

# Checklist Automation Reduces Time

RPA breezes through all health check routines at Start of Day



## Success Story

“Our workdays began as laborious checks resulting in many errors. Iris delivered an automated solution that was able to deliver far greater accuracy in a tenth of the time. – Operations Director, Capital Markets”



## CLIENT PROFILE

The client is a leading investment bank in capital markets with over 12 million customers.

The business case involved running through a daily checklist at start of day. Agents performed all health check tasks to ensure the trading operations management system was ready for traders to use. Every manual attempt consumed up to 2 hours with errors contributing to delays.

## CHALLENGE

If automating the checklist, the procedure had to be smart enough to cover all steps with an accuracy at least equaling the agents:

- ✓ Initiate SOD
- ✓ Initiate email review
- ✓ Verify the dashboard collectors and spoolers
- ✓ Check current inventory for FI, Money Market, Coupons
- ✓ Collate observations
- ✓ Send alert emails to groups accountable reviewing and correcting deviations

## SOLUTION

- Utilized BluePrism and Iris' Utilities to provide automation on several tasks thus reducing manual efforts by 90%
- Created RPA processes that were consistent, scalable and more accurate, with an automated alert mechanism
- Hosted the RPA processes on a virtual machine that required very little maintenance

## BENEFITS

Quality ↑

Consistently higher quality

90%

Cut manual daily checks by 90%

Accuracy ↑

Greater accuracy, higher volumes

“Iris BluePrism Utilities and Best Practices helped accelerate the implementation and switchover to the automated solution.”  
– Iris Automation Engineer

## ENVIRONMENT

- BluePrism

### About Iris Software

Iris ([www.irissoftware.com](http://www.irissoftware.com)) is a professional software services organization providing its customers with high-quality, cost-effective solutions and developing mutually beneficial relationships. Iris does this through comprehensive solution offerings with best-of-breed technologies, rapidly deployable solutions, flexible engagement models and proven methodologies. This allows customers to focus on their core competencies, and concentrate IT resources on projects that directly impact their bottom-line.

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