MARKET RESEARCH BOT

User Guide

Wednesday, June 2, 2021

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1. PURPOSE OF THIS USER GUIDE

This User Guide is designed for Contracting Officers, Contracting Specialists and other procurement professionals who will be using the Market Research bot. This document provides:

1) An abbreviated description of the technology that enables the bot to perform, known as Robotics Process Automation (RPA)
2) A brief overview of the business process with reference to more detailed process documents, policies or guidance
3) A step-by-step guide for how to interact with the bot
4) Troubleshooting support and contact information for technical support

2. INTRODUCTION TO ROBOTICS PROCESS AUTOMATION

Robotics Process Automation (RPA) is a process by which computer software, often called a "bot" or "automation," emulates and integrates the actions of a human interacting within digital systems to execute a business process. RPA automations utilize the user interface to capture data and manipulate applications just like humans do. This technology is best used to convert manual, rote, rule-based human processes into automated, software based processes.

3. ABOUT THE MARKET RESEARCH BOT

3.1. Business Process

Market research is needed for initiating new contracts and renewing existing ones. Procurement professionals currently provide research as a shared service, leading to a large volume of requests and increased amount of data required to produce market research reports.

The full business process including the Market Research Checklist can be found on Labornet.

3.2. Usage

This bot is an unattended bot, meaning it runs in the background and you will not see it doing the work. If you submit a request for the bot to run, it may take multiple hours to process your request.

When should I use this bot?

You should run this bot for each Market Research request assigned to you.

How do I use this bot?

This is outlined in detail in the Initiate section 5.1. At a high-level, you will use the Bot Center to submit the required fields for the bot to process your request. You will receive a confirmation message after clicking "Run" to submit the request. Once it has processed your request, you will receive an email with a link to a SharePoint folder where the market research results will be provided. Depending on your request, it may take the bot several hours to query all of the required sites. We recommend running the bot in the late afternoon so it has all day or all night to process your request.

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What do I need to know about this bot?

This bot collects information from various different government and public access websites. This automation is a simplified standard process used for conducting and documenting market to satisfy agency needs (FAR 2.101); commercial items or non-developmental items (FAR 10.002(b); other than full and open competitions with justification (FAR 6.303-2(a)(8); possible Socio-Economic and Small Business Set-asides (FAR 19.202) varying on the circumstances and complexity of procurements (FAR 10.002(b).   This automation DOES NOT provide any preference or recommendation of the offerors listed. The contracting officer shall issue solicitations to potential sources in accordance with the FAR and Departmental guidance, policies and procedures. Further review of these and all other offerors available within the criteria is required in order to determine appropriateness to meet Government requirements.

4.   USER ACCOUNT POLICIES

For security purposes, all users of this bot must be on the approved user list managed by OCIO.

4.1. Getting Started

Prerequisites

- Microsoft Edge or Google Chrome Web Browser
- DOL VPN Connection
- Bot user access: email EnterpriseServiceDesk@dol.gov to request DOL RPA access and ask for the ticket to be assigned to the "RPA support" Service Now group.

Instructions

User Login (via Windows)

1. Navigate to the following URL: https://botcenter.dol.gov/
   - *You will be redirected to the UiPath login screen.*

2. To login using your DOL account, click on the Windows icon as shown below:
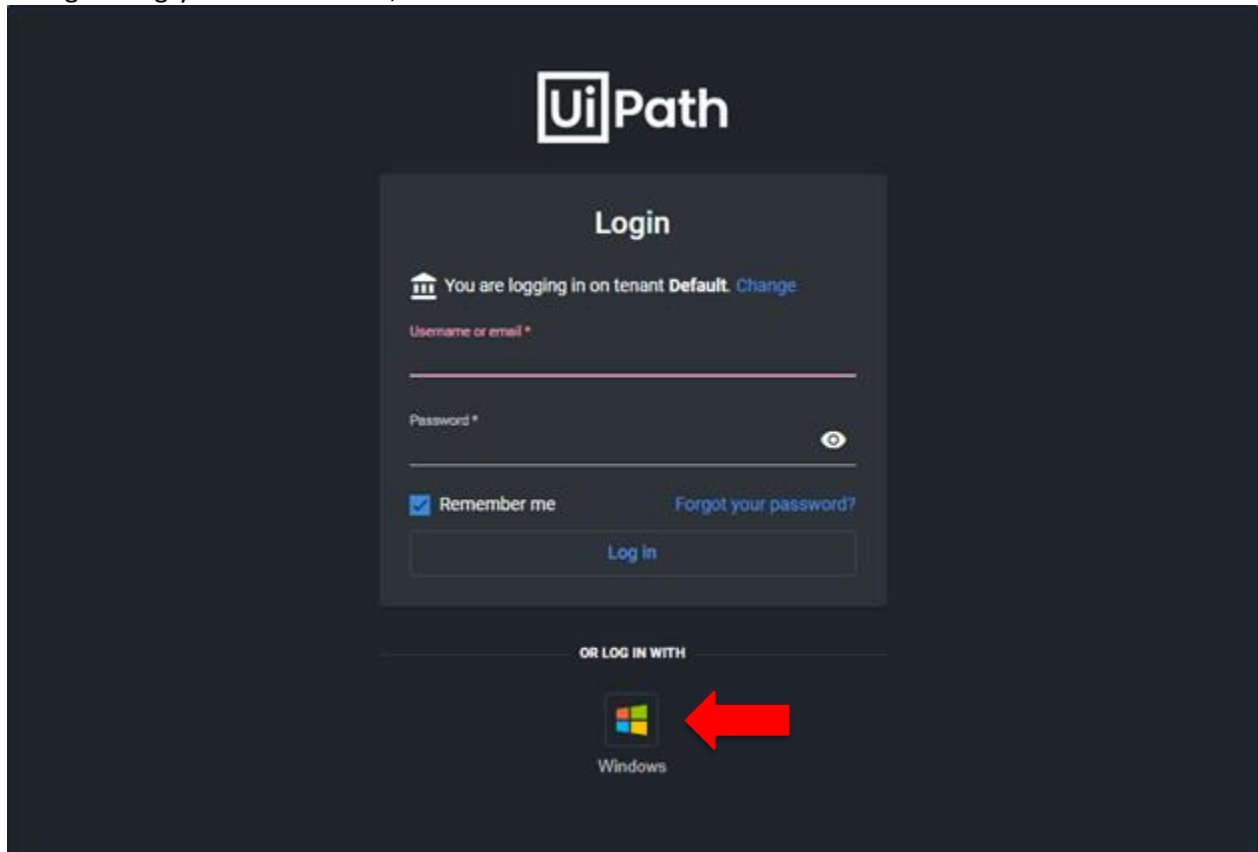
- *If login is successful, will be redirected back to the bot center.*

4.2. Login Error

If you get a login error (usually error #214), please open a ticket with RPA Support. This link will open an Outlook email. ***Do not*** change the email recipient, subject line or prefilled body. Please add a description of your issue and send a screenshot of the error message.

5. USING THE MARKET RESEARCH BOT

5.1. Initiate

Navigate to the Bot Center, and under Market Research, click "Run Bot":

Market Research

🏛 OCIO   ⏰ Every Day at 8:00pm

Market Research is performed by contract professionals. It involves due diligence on the pool of contractor candidates for addressing the needs of a purchase request (PR) requested by the program office for new contract or exercise of options scenarios. This process involves capturing several vendors from the GSA eLibrary website and collecting data from other websites for each of the vendors selected and returning a checklist with supporting documentation.

When should I use this bot?	+

What do I do with the results?	+

Run Bot   **Report a Problem**   **User Guide**

Populate the pop-up window with the following information in the corresponding fields:

1) Project Name – Give this request a name that corresponds to the request
2) UserID – first initial last name. Example: sstewart for Sam Stewart
3) GSA Term – Enter the search term to be used for GSA research. This will be one of the 7 IT categories available: Electronic Commerce, IT Hardware, IT services, IT software, IT solutions, IT training, Telecommunications.
4) GSA Source Value – Enter the category or any other vehicle source. Examples include: MAS, HCATS, OASIS
5) GSA Category Sources Value – Enter the NAICS code(s) found at https://www.naics.com/search/
6) Product Service Code (PSC) Search Term (optional) – Enter the description of the product or service. Examples include: Software, Hardware, License, IT, etc.

To submit multiple requests at one time, click "Add another line" near the bottom of the pop-up window for each additional request:

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Once all necessary input has been entered, click the "Run" button to submit the request.

This bot reaches out to a number of different sites to collect information. Depending on the number of requests you make in your template, it may take the bot a while to process. As such, the bot is scheduled to run at night to optimize its ability to handle all of the requests. The bot runs each night starting at 8pm. This means a request sent at 9 am will not be processed until 8pm the same day and the results will be returned the next morning.

5.2. Accessing the bot's output

After clicking "Run" to submit your request, the pop-up window will show a confirmation message:

1. If you are not approved, you will receive a rejection email stating so. See section 4 regarding User Account Policies.
2. Upon completion, you will receive a confirmation email stating your Market Research Process has completed successfully with results as an attachment and including a file path to stored documents:
   a. If the bot fails to process your submission for any reason, you will receive an email. Contact DOL Enterprise Service Desk (see section 6) to determine why the bot failed.

Reply   Reply All   Forward   IM

MarketResearch@dol.gov   ■ Haase, Lara L - OASAM OCIO INTERN

Bot Process Transaction Failure

The bot has failed to process your transaction. Please try and resubmit. If you receive this message again, please contact your Orchestrator Admin or Bot Support to resolve the issue. Project Name: Appian Licenses

   b. The confirmation email will include an attachment (in the format of **Market Research-Project Name-Date Stamp**) which provides vendor information and locations for associated documents

MarketResearch@dol.gov   ■ Haase, Lara L - OASAM OCIO INTERN

Market Research Process Completed Successfully

ServiceNow Services_haase.lara.l_20292021_122917.csv
9 KB

Please see attached documentation for final result. Please find all files in
\\SILENTFS01.ent.dir.labor.gov\OCIO-APPS-RPA_Prod\Market_Research

All files from GSA, SBA, Size Standards, Cesus and PSC are stored in :
V:\Market_Research\

   c. All documents will be stored in the Market Research SharePoint Drive folder: /SILENTFS01.ent.dir.labor.gov/OCIO-APPS-RPA_Prod/Market_Research
   d. Copy the results to your local drive and delete from the SharePoint drive. This step is at your discretion based on what results are relevant or needed for your report.
3. The results will be stored in this folder for **24 hours**. *It is your responsibility to keep track of all bot results and provide a record of all Market Research Report documentation. Using this bot does not replace the decision making and record keeping requirements.*

6. TROUBLESHOOTING AND TECHNICAL SUPPORT

6.1. Troubleshooting FAQ

Why didn't the bot process my request?

1) Input issues:
    a. Do not use special characters (Examples include: *&_) or spaces when populating the template
2) Data Source issues:
    a. If one of the websites the bot uses to collect data from is down, the bot will not be able to process your request.

6.2. Technical Support

If you are able to login to the Bot Center but do not see any bots, you may not be in a user group authorized to run a bot process. See Section 4.

If you experience other issues, click on "Report a Problem" at the bottom of the Contractor Responsibility Determination bot dashboard (next to the "Run Bot" button, see screenshot below). This will generate an Outlook email, with the appropriate Subject line and addressee. Do not removed the pre-populated text in the body, and add your issue description. Include a screenshot of the error you received in the email body. If the problem is that the bot never emailed you with the attachments, explain that in the email. The service desk may ask you a few questions before sending you to the OCIO RPA team.

For consideration: This bot is dependent on external sites. If any required sites are down, please submit a ticket explaining this as this will cause problems with the bot.