**Process for Automation of Data Collection**

**Steps for automating processes:**

1. What is the current process?
2. Is automating part or the complete process required? Conduct a feasibility study. What process can be automated and what should be left manual?
3. Decide which technology/software to be used for automation.
4. Design a database structure first, if a database will be used
5. Develop the database/software.
6. Implementation and testing by end client.
7. **What is the current process:**
* Understanding the current process of the NGO
* Identifying the important processes and how they are currently monitored
* Identifying the changes that can be made for the improvement of the processes (manual or automated)
* Check the processes that are already automated and if they need any modification
* Prepare a process flow document at the end of the process.
1. **Will automating part or complete process required? Conduct a feasibility study. What process can be automated and what should be left manual?**
* Based on step 1 identify the processes that should be automated, that can be automated, that should be kept manual but modified, that should be kept in the existing format.
* Prepare a list of processes that will be automated/modified and get it approved by the partner NGO
* Identify the timelines for the development.
1. **Deciding which technology/software are to be used for automation:**
* Understanding the needs of the end user is a must before deciding on the technology to be used
* Identify the following - ease of use, NGO’s computer expertise, availability of computers, use of free software, simple to code (keeping in mind that complicated code is difficult to modify for the future volunteers), easy to maintain, no dependency on internet, support for the software, ease of installation.
1. **Designing database structure if using a database:**
* Step 3 would help you decide the technology to be used.
* Start with designing the database/table structure. Set the relationship between the tables.
* Identify the fields for every table and take out the redundant/duplicate data.
1. **Developing the database/software:**
* Set the timelines and start developing the software/database.
* Get it reviewed and approved by the partner on weekly basis.
* Ask for feedback. In case of any change request, assess the feasibility before committing.
1. **Implementation and testing by end client:**
* Most crucial step of the entire process is final installation and testing by end user.
* Test the software/database at the local machine before attempting installation on the end user machines.
* Install the application at the end user’s machine.
* Testing of the software by the end user is important and we should allocate 2-3 weeks for the procedure.
* Prepare a simple installation and user guide for reference.
* Monitor the testing and accommodate the changes if possible.
* Get an approval from the partner NGO for the final version of the software.