

Workload Automation and Job Scheduling Software Checklist

Installation and Usability

- Is it easy and fast to install? On-premise? SaaS? Cloud-based?
- Is the user interface intuitive and easy for users at all levels of IT proficiency?
- Does it use a centralized dashboard for tracking all agents, applications, schedules, and workflows?
- Is there a fully functional mobile app?
- Can you customize notifications and user lists to send automatic email and text alerts about malfunctions and exceptions?
- Does it offer self service capabilities to reduce IT workloads?

Scheduling and Functionality

- Can it schedule jobs and workflows across assorted operating systems and platforms?
- Does the solution offer both server-based agents and agentless capabilities to offer levels of flexibility and efficiency? In workload automation, agents enable coordination between the automation application or scheduler and other business process management applications and diverse operating systems.
- Can you configure and manage the solution through a web-based portal or does it require a desktop client?
- Does the product offer native workload and workflow version control?
- Does it provide integration with major business server applications?
- How granular and specialized is integration with applications?
- Does it offer file transfer through standard secure protocols?

Administration

- What are the reporting and analytics capabilities? What about prediction analysis capabilities?
- How does the product design workflows? What are the options for triggers? How do you connect steps in a workflow? How much custom scripting is required for special cases?
- How does the product allow you to test or preview your workflow?
- What affordances does the product offer for governance and compliance?
- What about one-time cost, maintenance cost, training?
- Does it offer conversion capability to move from existing products?
- How scalable is it to accommodate small or large organizations, and changes within an organization?
- How does the program maintain secure access?