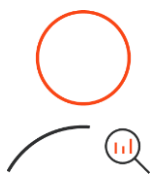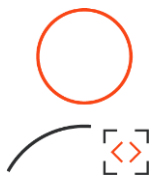![UiPath - The Foundation of Innovation™]

UiPath Automation Implementation Methodology Fundamentals

Roles and responsibilities: Implementation Team

This handout lists the roles and responsibilities associated with each role in the Implementation Team.

Role	Stage Involved	Key Task
Project Manager	• All implementation stages	• Manages the overall implementation • Coordinates the Implementation and Client teams for successful project completion • Manages roadblocks, risks, changes, and escalations in the project • Creates and maintains comprehensive project documentation • Ensures that the Statement of Work (SOW) is communicated and followed • Assesses client delivery readiness • Works with stakeholders to coordinate project personnel • Manages engagement setup, milestone tracking, status reporting, timesheet reviewing, and financial forecasting • Creates a project plan and staffing plan and communicates requirements • Schedules, facilitates, and documents meetings with the Client Team and the Implementation Team • Obtains approval for project documentation • Helps to coordinate and forecast the need for a Change Request • Performs project closure actions
Business Analyst	• Business Case and Technical Validation • Process Analysis • User Acceptance Testing (UAT) • Solution Design	• Becomes knowledgeable of the business process to be automated based on the organization's goals • Is knowledgeable of general business process theory, techniques, frameworks, and automation capabilities • Gathers process requirements

	• Project Closure	• Clarifies the inputs and expected outputs
		• Creates the required documentation
		• Documents the high-level requirements
		• Assesses business case potential
		• Creates a high-level work breakdown for the 'to-be' process state
		• Makes recommendations and runs the suitability and viability study
		• Creates and updates business cases
		• Creates a Process Definition Document (PDD) and documents the process at a keystroke level
		• Creates a User Acceptance Testing (UAT) plan
		• Defines success criteria such as understanding functional and non-functional requirements
		• Ensures the automation output is in line with the signed-off requirements
		• Validates any change requests
		• Starts the Change Request management cycle
		• Works on the engagement retrospective analysis
Solution Architect	• All implementation stages	• Acts as a lead and advisor of the development team
		• Defines the architecture of automation solutions
		• Oversees the design and implementation of project components
		• Recommends the appropriate set of tools and features
		• Creates an initial license estimate

		• Updates the license estimate • Performs code reviews • Ensures that the technical best practices are followed • Works with developers to create the Solution Design Document (SDD) and the Technical Testing Plan (TTP)
Automation Developer	• Development and Testing • User Acceptance Testing (UAT) • Deployment and Hypercare • Project Closure	• Builds automations following best practices and coding standards • Makes changes to the automation during the Development, Testing, and Hypercare phases • Communicates the changes to the project manager and stakeholders • Conducts knowledge transfer sessions with the client's team • Assists in creating and reviewing the SDD • Reviews project documents, such as the PDD • Maintains code repositories • Builds solutions • Executes the TTP • Creates the Runbook and supports clients during UAT
Infrastructure Engineer	• Kickoff	• Is well-versed in the UiPath Platform infrastructure • Assists in technical infrastructure-related issues • Works with the client's infrastructure and applications teams to integrate the UiPath Platform into their business • Reviews project requirements, hardware, and software requirements

		• Analyzes the client's existing infrastructure
		• Designs and deploys infrastructure and applications
		• Assists in maintenance and upgrades