Business Analyst Training

Opportunity Assessment

Process Deep Dive

Pre-requisite

- Gather and understand process related documents – Standard Operating Procedures, process maps, Organizational Chart, user manuals etc.

Aim

- To have a deep understanding of the process
- To document and validate with the process owner As-Is process flows and all relevant data for RPA
- Design To-Be process flow – High level
- Handover a good documentation to the developer to build the RPA solution for that process

Approach

- Organize a discussion with the process owners & SME
- High level description of the process (walk through the process)
- Understand the complexity of the process & challenges (from SME point of view and RPA)
- Shadow the SME/ Workshop
- Capture process metrices (scope, applications involved, no of FTEs, volumes, AHTs, SLAs, Time dependencies, challenges, complexity, stakeholders involved and their role)
- Prepare process definition Document with the help of Key stroke level documentation or process recordings
- Mark what is in scope and out of scope for RPA from the beginning and continuously validate this classification during the documentation. Log the reasons behind

Actions & Deliverables

- Gather process information and data
- Prepare high level process map with straight through processing scenario and obtain sign-off from process owner
- Validate the process map with the process owner and update the document by including more scenarios and business rules
- Prepare the detailed L4 level process maps (including all scenarios) using process mapping tools like MS Visio/ Aris , validate them with the process owner and update the process steps
- Prepare PDD and include any support material that would detail the business rules, matrix role, the input & output, reports specifications
- Validate The PDD with the process owner and update the PDD with all feedbacks, organize sessions for clarifications - if needed
- Obtain the Sign-off

Requirement Gathering

High Level Process Maps & Documentation

Review

Include More Scenarios and Business Rules

Review

L4 Level Process Map & Process Description

To Be Process Map and Solution Description

PDD & Sign Off

Requirement Gathering

- **Process Metrices** can be captured with the help of existing workflow/ BPM tool, MI data & Time and Motion study (Provided by operations team)
  - Volume
  - AHTs
  - Total FTE effort involved in the process

- **Process Information**
  - Open and close times (Time dependencies) & SLA
  - Expected increase in volume
  - Stakeholders involved and their role
  - Inputs & Input Type (Structured/ Unstructured & Standard/ Non-standard)
  - Output & Output type

- **Infrastructure requirements**
  - Test environment availability
  - UiPath hardware/ Software requirements

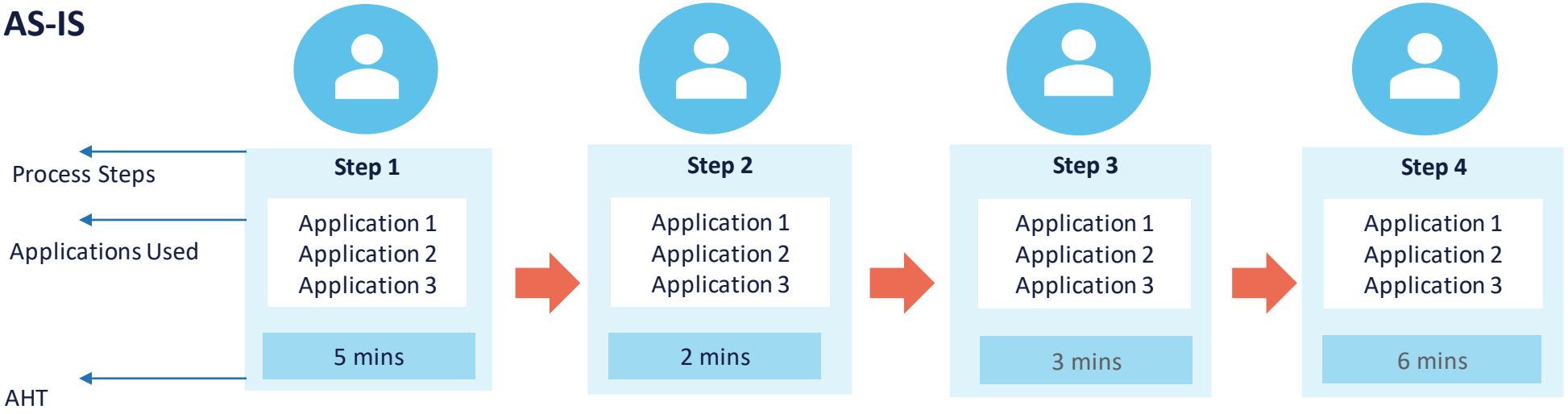
- **Applications used**

  - Understand and capture the underlying technology of each application
  - Capture all applications used in the process
  - Different instances of one application (Login module) – If applicable (e.g. SAP/ Mainframe)

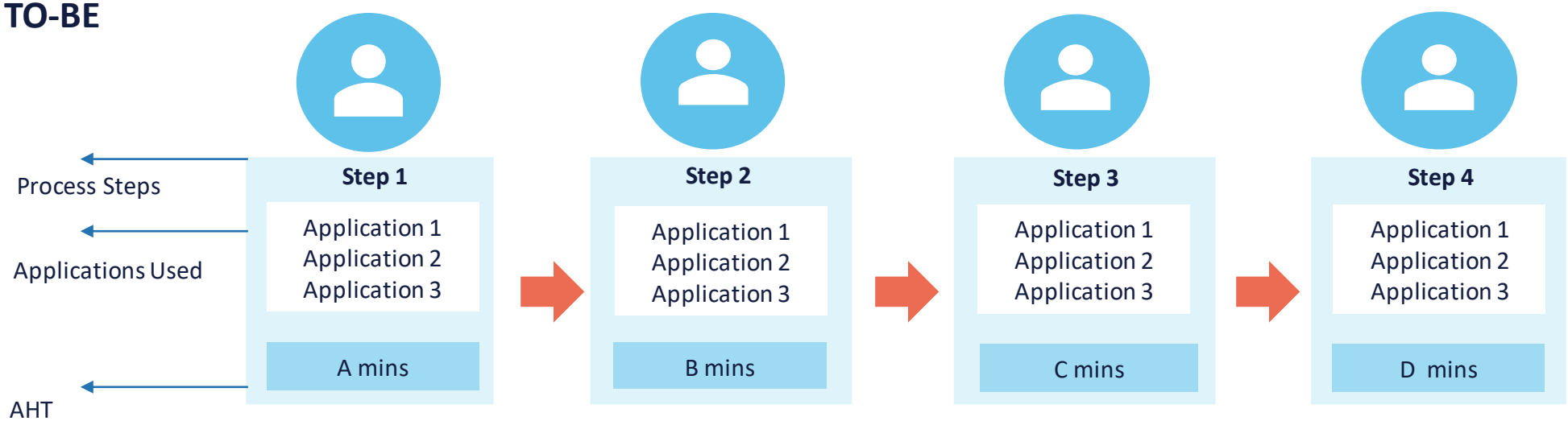
- **Thin 'or' Thick client ?**
  - Citrix/ VDI/ Remote desktops – Thin Client
  - Desktop applications – Thick Client

High Level Process Maps

AS-IS



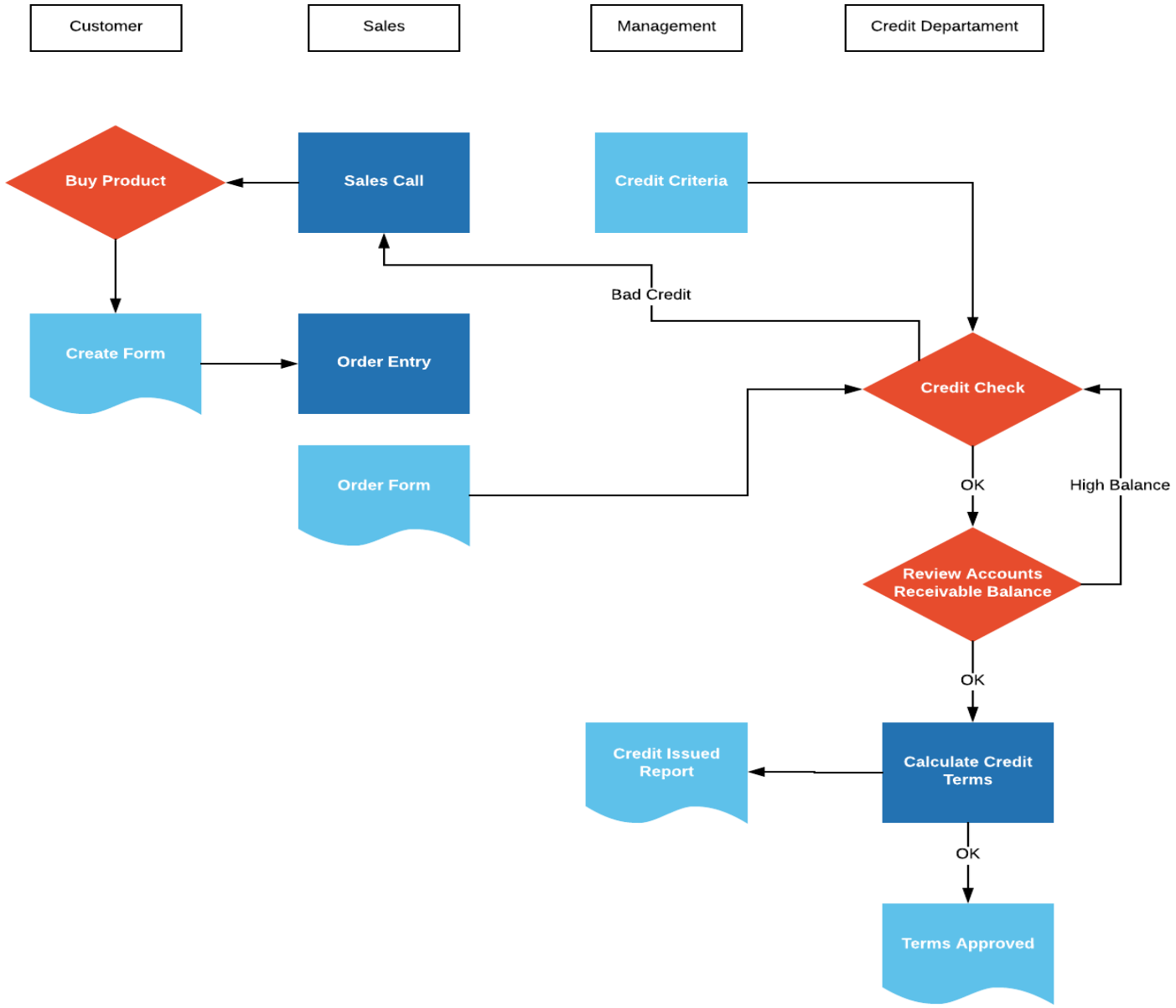
TO-BE



Process Mapping – SIPOC

Suppliers	Inputs	Process	Outputs	Customers	Requirements
➢ Raw materials ➢ Sources ➢ Manufacturers ➢ Suppliers	➢ Manpower ➢ Resources ➢ Equipment		➢ Product ➢ Timely delivery ➢ Increased quality	➢ Young people ➢ Students ➢ Service holders	➢ Customer satisfaction ➢ Expected quality ➢ Reduced backlog

Process Mapping – L4 Level



Inputs & Outputs

Inputs

Identify what are the inputs needed at process level and at granular level also and dependencies to other sub-processes

- Application type – From which inputs are accessed e.g.:- file, a screen, email, a scanned invoice etc.
- Input Structure – Input structure, Templates from which identified inputs needs to be captured
- Identify Fields – Unique identifiers to capture the required fields
- Input Location – Location from which the input file/ application can be accessed

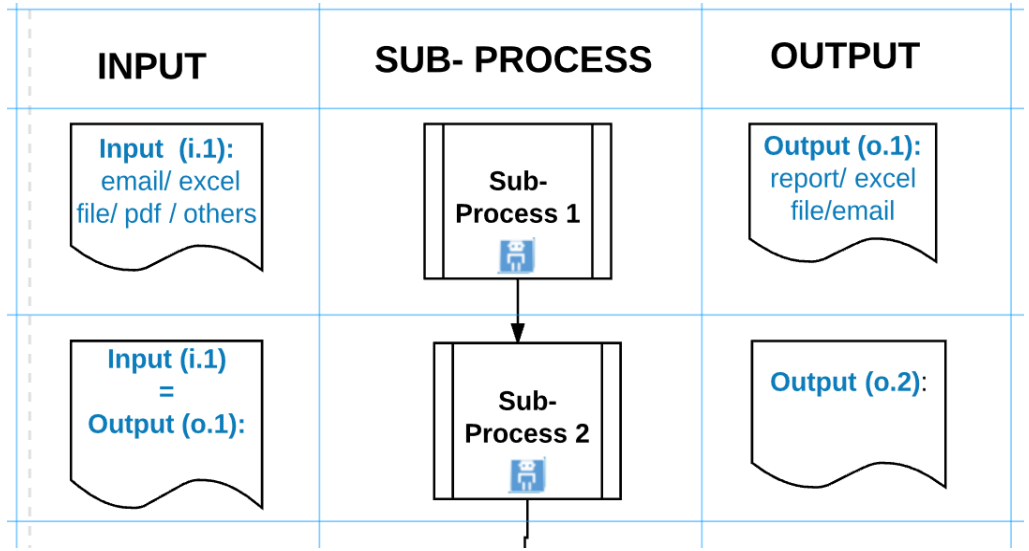
For TO BE, analyze in detail every input and how it is obtain and standardize where possible

- Already existing at activity level: i.e. a report that triggers some actions
- Specifically created for RPA: i.e. data posted to be used by the robot

Outputs

Identify if the output already exists or it needs to be generated by the robot:

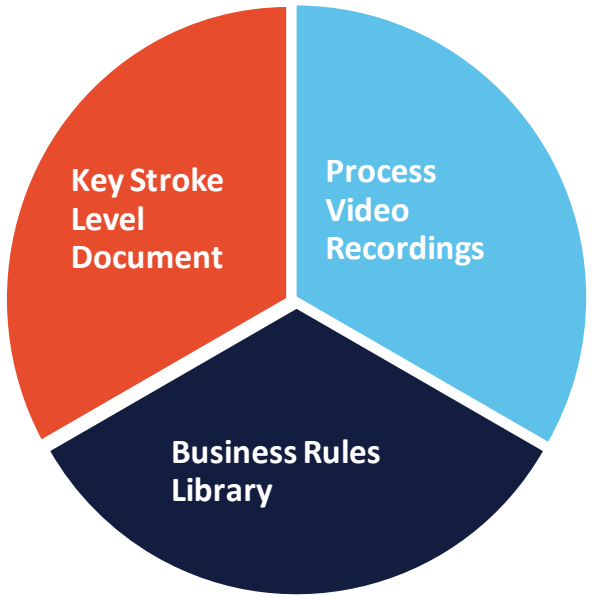
- Output type: a new record in an app, a report, a file etc.
- Output type – file/ folder/ report. Attributes to capture: destination, structure, content, trigger



Process Description

Key Stroke Document

- Process activities detailed at key stroke level with respective screen shots captured
- Capture each and every action by SME on the application layer
- Screen shot tools :- Microsoft Screen recorder/ Epiplex to capture screen shots



Process Video Recordings

- Video recordings of process activities
- Best used to capture for complex business rules within a process
- Short video recordings (Activities as Modules) with appropriate voice overs are recommended
- Index the videos and refer to them as reference in the As-Is process description

Business Rules Library

Either use the existing business rules library or Document the business rules in a separate file, to ease the PDD Documentation & Development :

- Robot can use business rules directly from the library
- In case of future rule changes, Library will be updated directly, with low/ Zero impact on the code
- Index the Business rules and refer to them as reference in the As-Is process description

Out of Scope

Out of scope

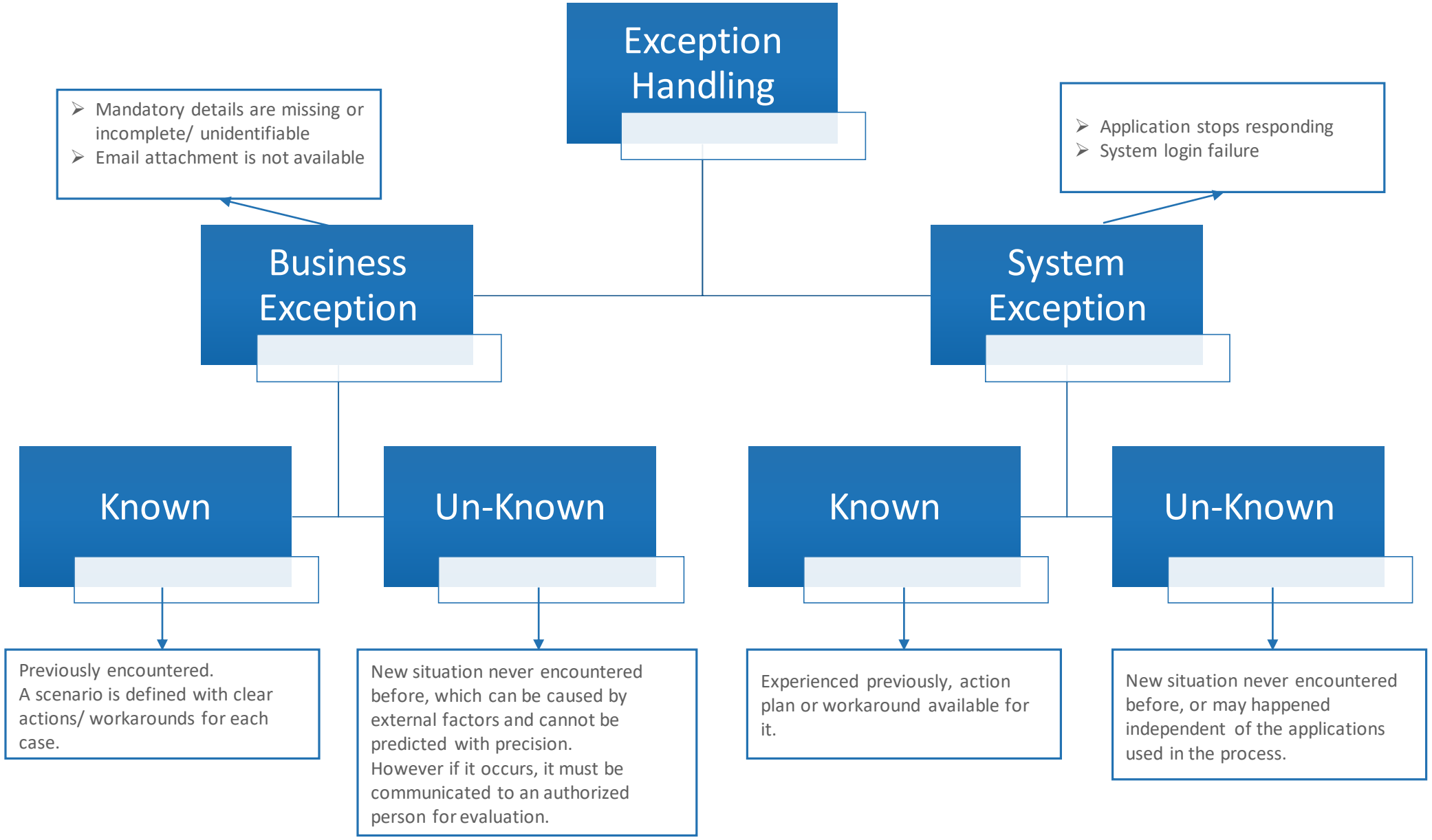
- Compliance requests (Must remain in the human control of team members)
- Activities/ source apps under change in the next 3- 6 months (i.e a source app release announced/)
- Templates/ inputs not standardized or involving free text/ poor quality scanned images
- Activities that need human input, due to the complexity and human knowledge involved
- There is another automation in place
- Effort to automate a specific activity bigger than the gain

Impact of Out of scope activities

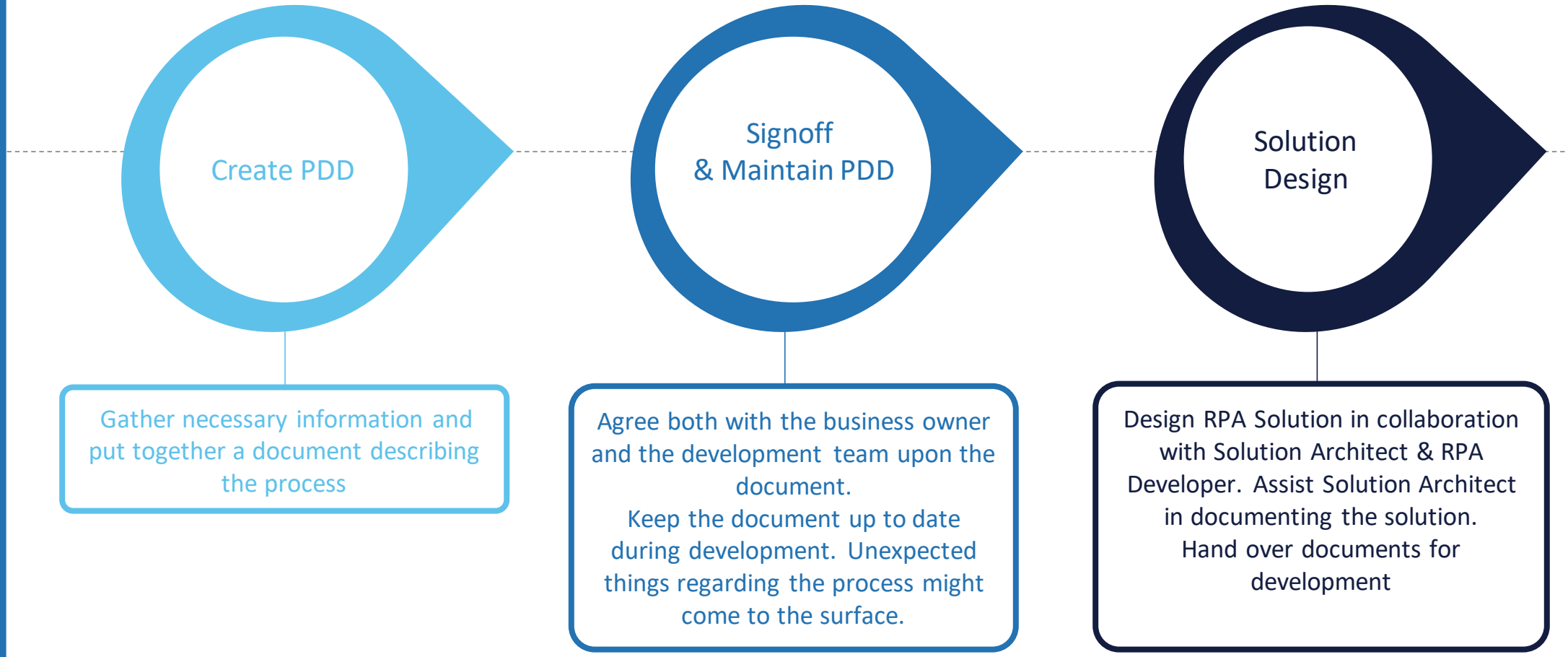
For **out of scope** activities, that mean that either human intervention is still needed, identify dependencies at process level –

- will it change the order of performing the steps?
- will the robot need to be restarted?
- will the robot need to wait for that activity to be processed first?
- do the robot need to use the output of that manual activity

Exception Handling



Define & Design RPA Solution




UiPath
Thank you!
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