Automation Migration – Checklist

Automation Migration refers to automations that may have been developed in other technologies, using intelligent automation products other than <company>’s Intelligent Automation COE Standard either by <company>’s IA COE or by other business units or vendors.

Migration plan will be initiated by IA COE Director after consultations with respective business and IT stakeholders.

Migration will be coordinated by COE Director or COE Staff (manager, analyst) designated by COE Director. Following checklist is a tool for the reference of COE Director or COE Staff in managing the migration:

| Nbr. | Step | Responsible | Artifacts |
| --- | --- | --- | --- |
|  | PLANNING: |  |  |
|  | Business Process Owner sign-off with plan & timeline for changeover | COE Director |  |
|  | Business expectations setting: Understand business related expectations for performance, availability, criticality, etc. | COE Director  Business Process Owner |  |
|  | Administration of product, services vendor relationships: decide how this will be managed in future for continuity or closure | COE Director  Business Head |  |
|  | PROCESS & SOLUTION UNDERSTANDING: |  |  |
|  | Process Understanding & Automation Objectives: Detailed description and mapping of process (if unavailable), Performance of current solution with data and outcomes, Any challenges and future plans. | COE Staff | As Is Process Documentation;  Process Business Results, Business Case documentation |
|  | Technical Solution Understanding: Detailed walkthrough on technical solution design, code, considerations, etc. | COE Staff & Application Owner  Current Development & Support Team | Technical Solution Documentation |
|  | Automation Code & Artifacts: Current development & support team hands over code, scripts, artifacts, etc. to COE Scrum Team | Current Development & Support Team  COE Scrum Team |  |
|  | Walkthrough of each automated process by current development & support team including environment, technology, etc. | COE Staff  Current dev & support team  COE Scrum Team |  |
|  | Whether failover plan in place | Process SME  Current dev & support team |  |
|  | Handover &/or Preparation of Process Knowledge Base for L1-L3 Support Teams | COE Staff  Current Development & Support Team | In standard support format as per <company> Support standards and procedures |
|  | Support incidents logs: handover of support incidents trails to Support & COE Team | Business Process Owner  Current Development & Support Team | Incident logs, communication trails |
|  | MIGRATION ACTION-PLAN: |  |  |
|  | Whether automated process will be migrated ‘As Is’ or is Re-development required? | COE Director  Business Process Owner Application Owner |  |
|  | Whether solution to be hosted in existing technology & environment or to be re-developed in COE standard technology | COE Director  Business Process Owner Application Owner |  |
|  | Plan to complete any gaps in process or solution documentation, support, etc. | COE Staff  COE Scrum Team |  |
|  | To Be Plan:  Prepare and communicate migration plan with business impact, cut-over dates, rollback plan, technical solution & data migration, support process, etc .. Clarify approach and production process to Business Process Owner, Process SME, other relevant stakeholders | COE Staff  COE Scrum Team |  |
|  | SOLUTION MIGRATION: |  |  |
|  | Migrate (or Re-Develop) Process to Test Environment managed by IA COE | CoE Staff  COE Scrum Team | As part of Bot Development Process (Scrum) |
|  | Test & Validate with Process SME | COE Staff  Process SME  COE Scrum Team |  |
|  | Advise Business Process Owner for go-ahead to moving to Production | COE Director  Process SME |  |
|  | Conduct Q&A and Training session (if required) for Business Team, Support, other required teams | COE Staff  Process SME  Support  COE Scrum Team |  |
|  | Go-Live & Stabilization of Automated Process | COE Staff  Process SME  Scrum Team |  |