<Company> System, Inc.

Intelligent Automation

Automation Migration Planning Checklist

Confidential

Versioning

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 21 Nov 2018 | 1.0 | Discussion version – David, Srinivas, Robert | Mayank Patel & Shubhen Sarangi, Datamatics |
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# Automation Migration – Planning

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. At the time of preparing this checklist, <Company> had deployed automations using Kofax Kapow and Datamatics TruBot at other business units in Texas and Atlanta.

Integrating all automation deployment and management of all automation deployments will streamline oversight and ensure focus on business outcomes targeted by <Company>’s Intelligent Automation program, help standardize management & support processes and also leverage the competencies available through the Intelligent Automation COE for more efficient usage of automation skills and resources.

# Migration Decision-making

Business decision to migrate existing automations will be initiated by IA COE Director after consultations with respective business and IT stakeholders. COE Director will also coordinate the finalization of an integrated business, technical and transition plan to ensure smooth management of the migration process.

# Migration Considerations

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 |
| --- | --- | --- | --- |
| I | PLANNING: |  |  |
| 1. | Business Process Owner sign-off with plan & timeline for changeover | COE Director |  |
| 2. | Business expectations setting: Understand business related expectations for performance, availability, criticality, etc. | COE Director  Business Process Owner | Available planning documents per process or program |
| 3. | Administration of product, services vendor relationships: decide how this will be managed in future for continuity or closure | COE Director  Business Head | Contractual documents/agreements |
| II | PROCESS & SOLUTION UNDERSTANDING: |  |  |
| 4. | 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 |
| 5. | Technical Solution Understanding: Detailed walkthrough on technical solution design, code, considerations, etc. | COE Staff & Application Owner  Current Development & Support Team | Technical Solution Documentation |
| 6. | Automation Code & Artifacts: Current development & support team hands over code, scripts, artifacts, etc. to COE Scrum Team | Current Development & Support Team  COE Scrum Team | Automation Scripts, Code location & copies |
| 7. | Location & availability of process & transactional data | Current Development & Support Team  COE Scrum Team | Process transactional and reporting data |
| 8. | Bot IDs availability and management | COE Staff Business Process Owner Current Development & Support Team | Bot IDs and related documentation |
| 9. | Walkthrough of each automated process by current development & support team including environment, technology, etc. | COE Staff  Current dev & support team  COE Scrum Team | Listing of all processes  Documentation of each process & business expectations; Solution Design, Functional Design documents |
| 10. | Whether failover plan in place | Process SME  Current dev & support team | Failover plan, or manual process with contacts |
| 11. | 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 |
| 12. | Support incidents logs: handover of support incidents trails to Support & COE Team | Business Process Owner  Current Development & Support Team | Incident logs, communication trails |
| III | MIGRATION ACTION-PLAN: |  |  |
| 13. | Whether automated process will be migrated ‘As Is’ or is Re-development required? | COE Director  Business Process Owner Application Owner | To Be solution design: Functional & Technical with Gap/Work-items |
| 14. | 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 | To Be solution design: Functional & Technical with Gap/Work-items |
| 15. | Plan to complete any gaps in process or solution documentation, support, etc. | COE Staff  COE Scrum Team | Project Backlog – Azure DevOps; documented if required |
| 16. | ‘To Be Process’ 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 | Project plan |
| IV | SOLUTION MIGRATION: |  |  |
| 17. | Migrate (or Re-Develop) Process to Test Environment managed by IA COE | CoE Staff  COE Scrum Team | Project Backlog Tasks -Azure DevOpsAs part of Bot Development Process (Scrum) |
| 18. | Test & Validate with Process SME | COE Staff  Process SME  COE Scrum Team |  |
| 19. | Advise Business Process Owner for go-ahead to moving to Production | COE Director  Process SME |  |
| 20. | Conduct Q&A and Training session (if required) for Business Team, Support, other required teams | COE Staff  Process SME  Support  COE Scrum Team |  |
| 21. | Go-Live & Stabilization of Automated Process | COE Staff  Process SME  Scrum Team |  |