

# **Best Practices Document for SDD Creation**

## **1. Introduction**

- Provide an overview of the automation solution.
- Define the purpose, scope, and objectives of the document.

## **2. Project Overview:**

- Include information on stakeholders, roles, and expectations.

## **3. Functional Requirements:**

- Clearly outline the functional requirements of the solution.
- Specify the processes to be automated, along with their inputs and outputs.
- Specify response times, throughput, and any scalability considerations.

## **4. Technical Architecture:**

- Provide information on the RPA tool, versions, additional software, and infrastructure.
- Address performance considerations and optimizations for the RPA solutions.
- List and detail any external dependencies.
- Ensure all necessary software, APIs, and connections are documented.
- Prioritize access:
  - Developer access: Include anything needed for a developer to begin automating the process.
  - Test access: Include anything needed for the developer/UAT testers to test the automation.
  - Production access: Include anything needed for the automation to run in production.
- Building a Robot architecture requires exploration in the following areas to make the design future-proof and enhance performance:
  - Seek data volume peaks and lows for optimal design.
  - Understand different execution shift timings to determine scheduling.
  - Consider customers' Business Continuity Plan (BCP) strategies that align with the solution.
  - Gather data on operations team size(s) to determine the number of robots needed.
  - Evaluate underlying applications and decide on a technical approach that best suits the automation.
  - Research the applications for alternate/optimal approaches to enhance performance and/or handling time.

## **5. Process Flow Diagrams and Data Flow Diagrams:**

- Use flowcharts to illustrate the step-by-step process of each automated task.
- Highlight decision points, errors, and exception handling.
- Create diagrams to represent the flow of data.
- Identify data sources, transformations, and destinations.

## **6. Error Handling and Recovery:**

- Define how the automation solution handles errors and exceptions.

- Outline recovery mechanisms and processes for resuming interrupted tasks.

## **7. Security:**

- Address security concerns and specify measures taken for sensitive data.
- Identify and comply with relevant industry regulations and standards.
- Ensure the RPA solution adheres to data protection and privacy regulations.
- Consider existing client data security definitions.
- Set up user and access management according to customer protocols and/or UiPath best practices.
- Establish application credentials and access management guidelines for underlying sub-systems.
- Define checks and balances to safeguard Personal Identifiable Information (PII) and Personally Identifiable Information (PII) information.
- Safeguard transient information flow during robot transactions (e.g., encrypt specific data in queue items, storage buckets).
- Consider protection of PII data used for RPA transactions and storage of specific data elements.
- Define required client-specific data audit certifications and ensure compliance.
- Address client-specific geographic data store requirements (e.g., data security around European Union data centers).
- Understand and enforce client-specific data access.
- Enforce business-level data segregation (e.g., segregate Client 1 payroll transactional data from Client 2 payroll transactional data).

## **8. Logging and Monitoring:**

- Specify how the RPA solution logs events and activities.
- Define monitoring mechanisms to track the performance of automated processes.
- Consider reporting as part of the design to mitigate design and code changes, even if not initially requested.

## **9. Deployment Plan:**

- Provide a detailed plan for deploying the RPA solution into the production environment.
- Include considerations for rollback procedures in case of failures.

## **10. Maintenance and Support:**

- Detail ongoing maintenance and support requirements.
- Include information on updates, patches, and version control.
- Outline a plan for training and knowledge transfer.
- Establish a change management process to handle updates and modifications.

## **11. Documentation Standards:**

- Ensure consistency in terminology and formatting throughout the document.
- Develop user-friendly documentation.
- Include FAQs and troubleshooting information.

## **12. Collaboration and Communication:**

- Specify how collaboration and communication will be facilitated among team members.
- Include contact information for key stakeholders and the team.