UiPath The Foundation of Innovation™

Important considerations

Important considerations when creating a hardware, software, and access requirements plan.

- As automation development expands to multiple processes, business units, and developers, having a standardized template becomes increasingly valuable.

- **Solution design:** grant access to ensure every user/machine can perform their designated tasks. Depending on the solution, creating multiple Windows users may be necessary. Accesses are typically user-specific, so create all application accesses per Windows user.

- **Consider access needs during the development lifecycle for your Application Access Tracker:**
  - **Development environment:** the developer's machine. It may encompass other elements, like Orchestrator, robots, and so on.
  - **Testing environment:** testing environment mirroring production for User Acceptance Testing. A service account: Windows users may need all required access for unattended solutions.
  - **Production environment:** for Windows users, a service account is needed for unattended solutions. Also, for attended processes, access must be granted to the users of the automation, such as accounts created in Orchestrator.

- **Note: It is important to consider involving the customer's IT Operations team in the discussion to jointly determine how access can be granted. This collaborative approach considers the unique setup of the organization and helps address potential limitations effectively. By engaging IT Operations, it helps to provide a tailored and well-informed decision-making process regarding access management.**

Important considerations while assisting the Business Analyst in technical feasibility analysis.

- **Exception handling**

Evaluate exception handling	Collaborate with the Business Analyst to conduct a thorough analysis of how the existing process handles exceptions.
Understand deviations from standard process flow	Collaborate with the Business Analyst to conduct a thorough analysis of how the existing process handles exceptions.
Determine automation solution capability	Collaborate with the Business Analyst to conduct a thorough analysis of how the existing process handles exceptions.

- **Human interaction and collaboration**

Determine human interaction levels	Collaborate with the Business Analyst to identify the extent of human interaction required in the process.
Integrate bots with human tasks	Work with the Business Analyst to identify tasks requiring human involvement and evaluate how bots can support or integrate with these interactions.

- **Data processing and validation**

Analyze data processing methods to determine human interaction levels	Collaborate with the Business Analyst to analyze how data is processed, validated, and verified in the existing process.
Handle business rules and transformations	Assist the Business Analyst in considering the business rules,

	calculations, and data transformations performed in the process.

- **Compliance and regulatory requirements**

Identify compliance requirements	Collaborate with the Business Analyst to identify compliance and regulatory requirements.
Support compliance through automation	Work with the Business Analyst to understand how compliance is currently met and assess automation's support for compliance.
Navigating Compliance Complexities	At times, collaboration with Subject Matter Experts (SMEs) or compliance specialists on the customer side may be necessary. When addressing highly specific topics, such as financial regulations or HIPAA, it is crucial to ensure active participation of the relevant stakeholders in the discussion.

- **Process Documentation**

Review and update process documentation (technical aspects)	Review and update process documentation (technical aspects