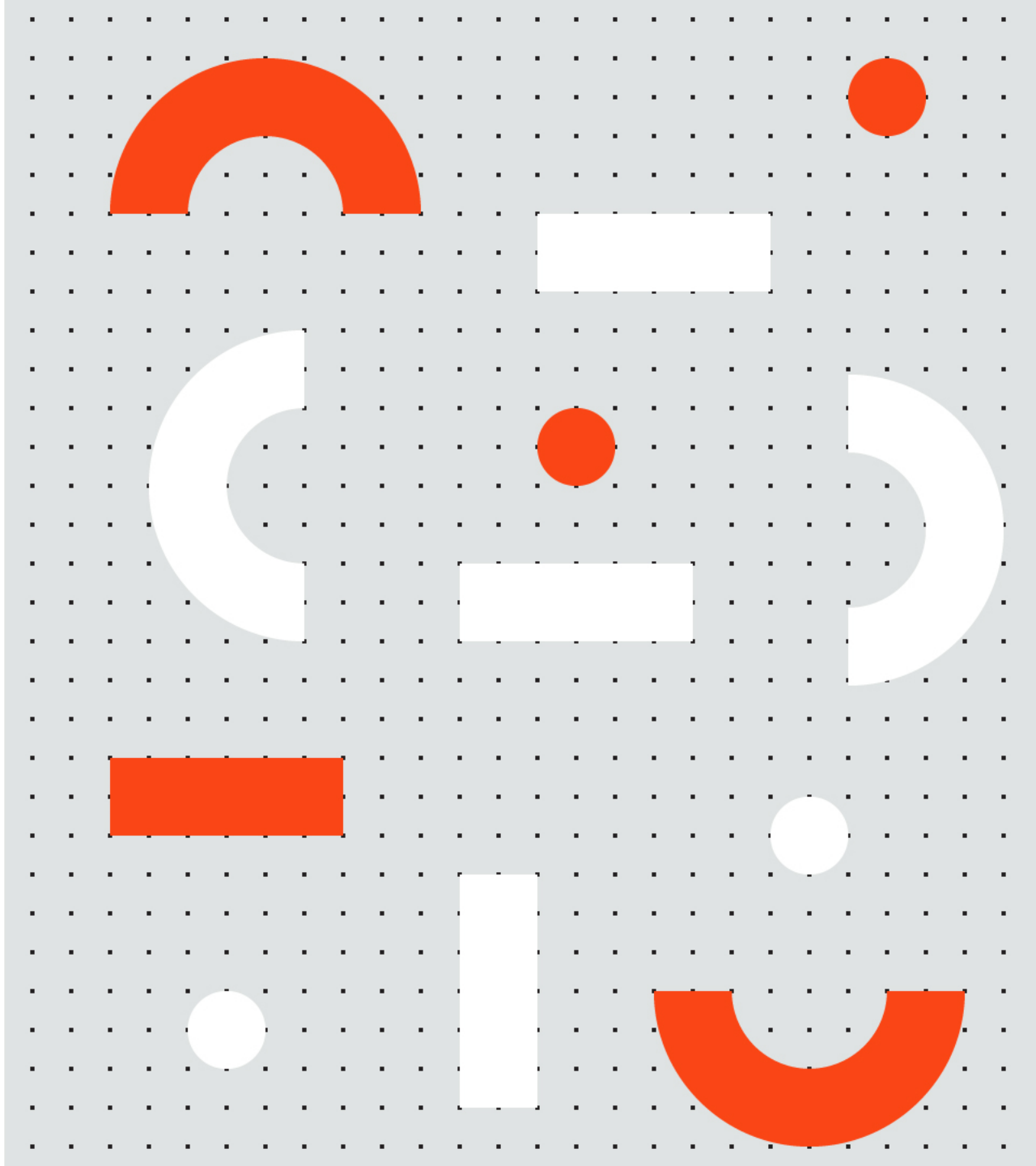
Business Analyst Training

What is a Process. The RPA Perspective



What is a Process

- **Definition**: A set of interrelated or interacting activities that transforms inputs into outputs
- **Components**: Inputs, Process Flows, Source Applications and Outputs
- **Things to remember**: The outputs of a process can serve as inputs for other processes

Planning and executing processes can help with:

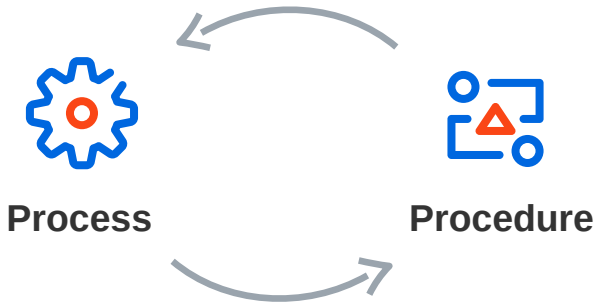
Compliance

Operational Needs

Managing Risks

Continuous Improvement

The relation between processes and procedures



A procedure explains:

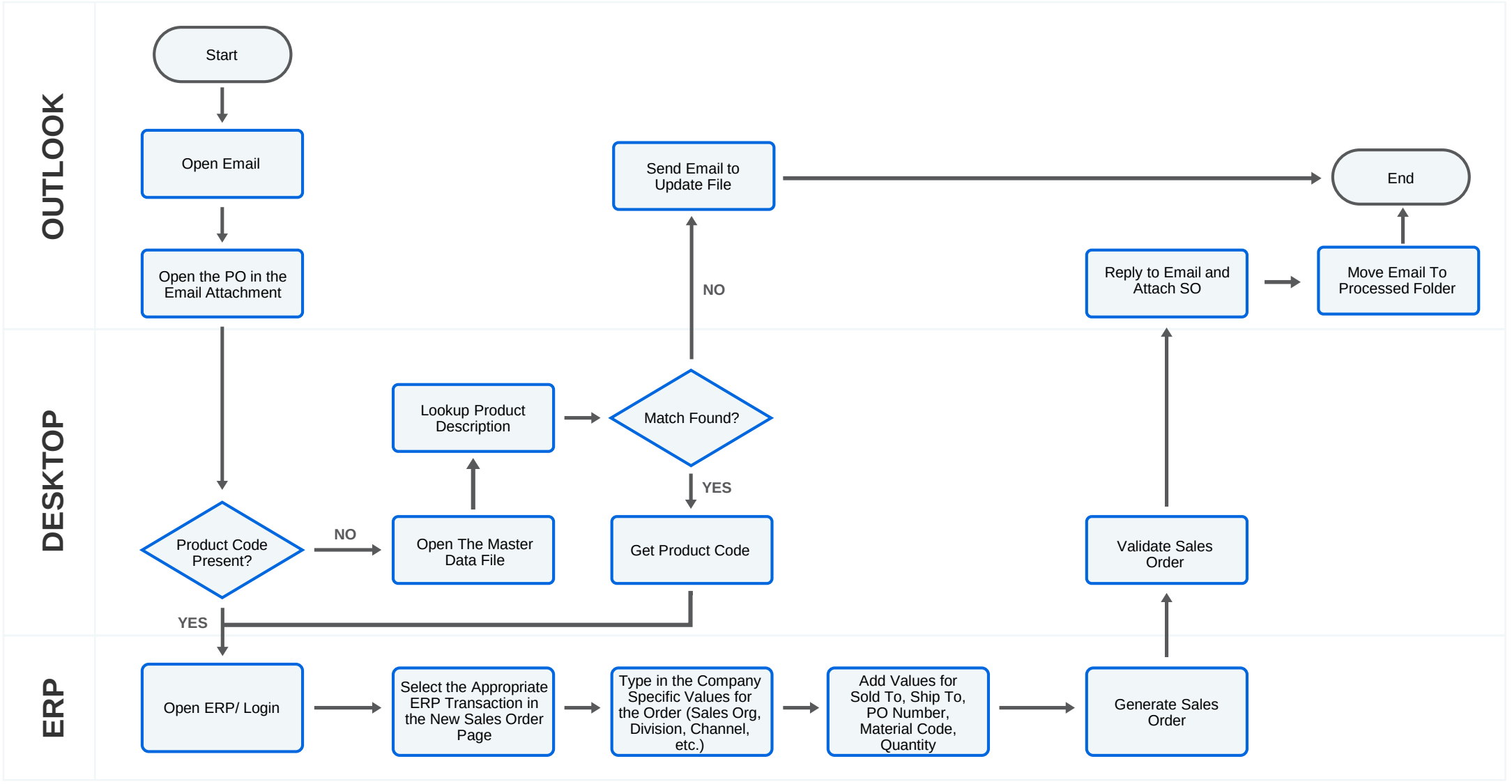
- who is responsible for each part of the process
- when each part of the process needs to occur
- how to handle exceptions
- the specifications applicable to each part of the process

Process Example

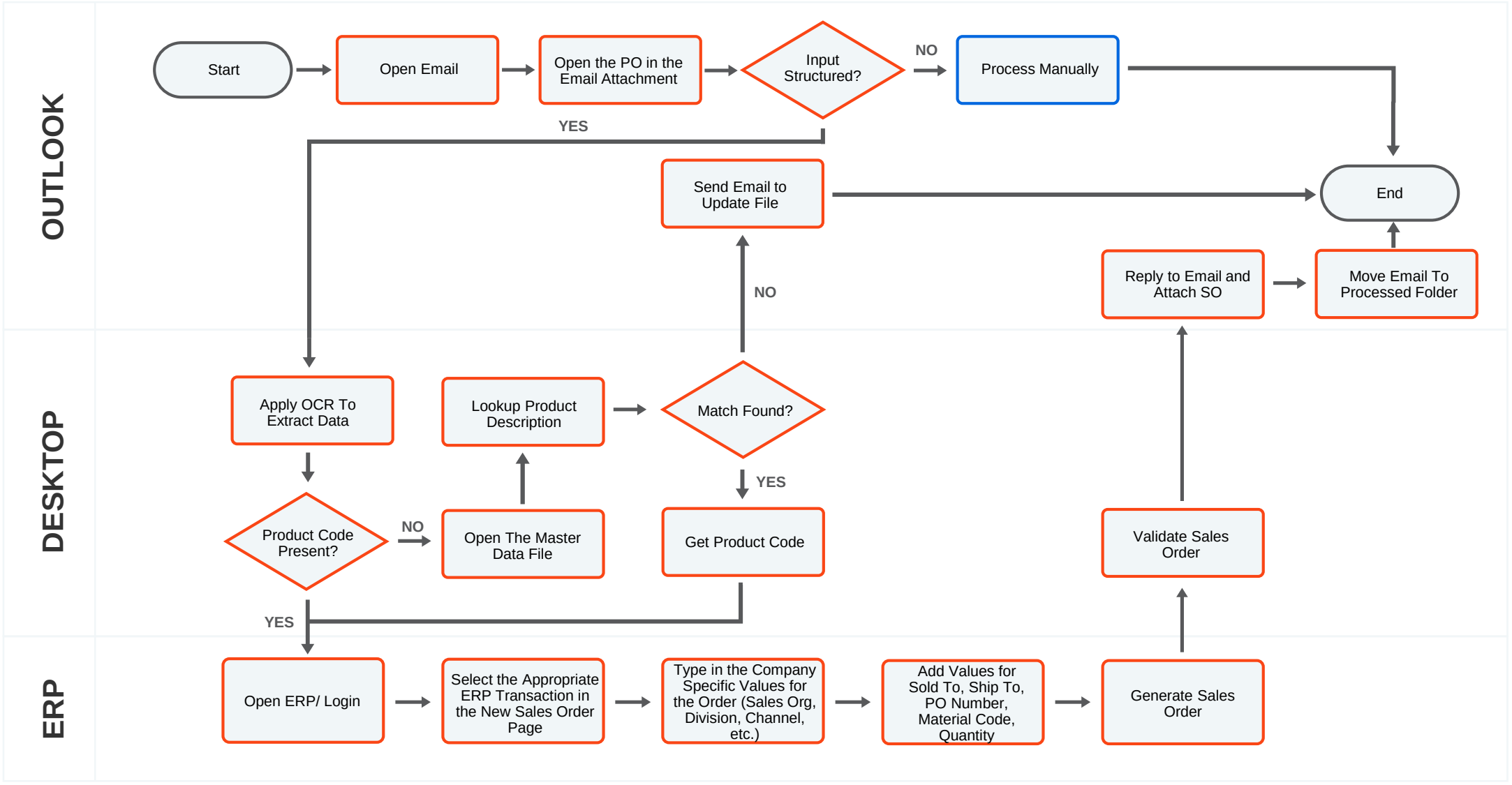
Order-to-Cash Process Description:

- A Purchase Order is received via email
- The agent opens the email attachment and checks that the product code is present in the PO
- If the product code is present in the PO, the agent opens the ERP system and runs a specific ERP transaction
- If the product code is not present in the PO, the agent looks it up in the master data file
- If the product code is present in the master data file, the agent opens the ERP system and runs a specific ERP transaction
- If the product code is not present in the master data file, the agent sends out an email to the Master Data Analyst to update the file
- Once the product code is provided, the agent populates the required fields in the ERP screen, as per the organization requirements and the PO
- Next, the agent generates and validates the Sales Order
- Finally, the agent replies to the initial email, adds the Sales Order in the attachment and moves the email to the processed folder

“As-Is” Process Flowchart



“To-Be” Process Flowchart



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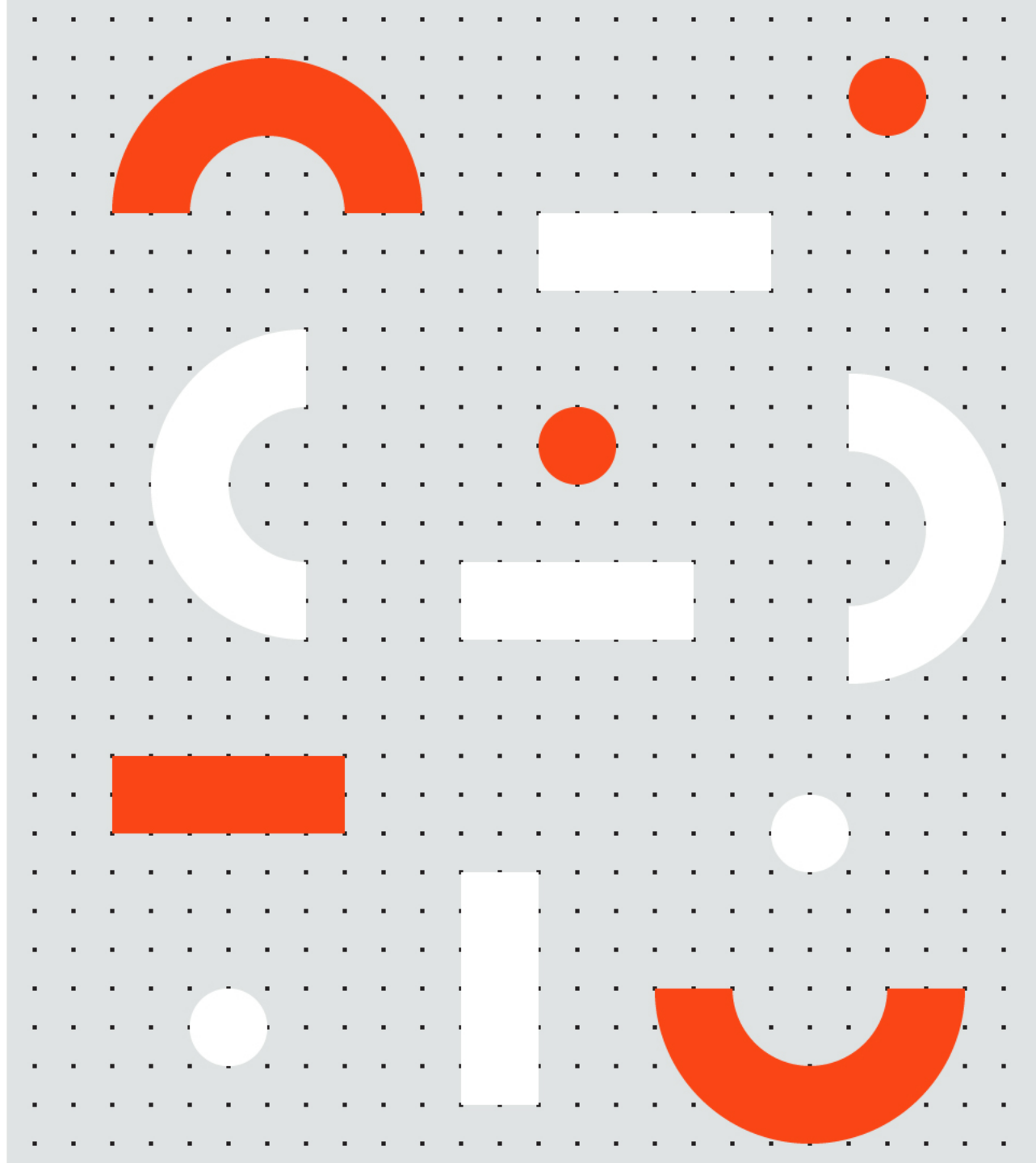

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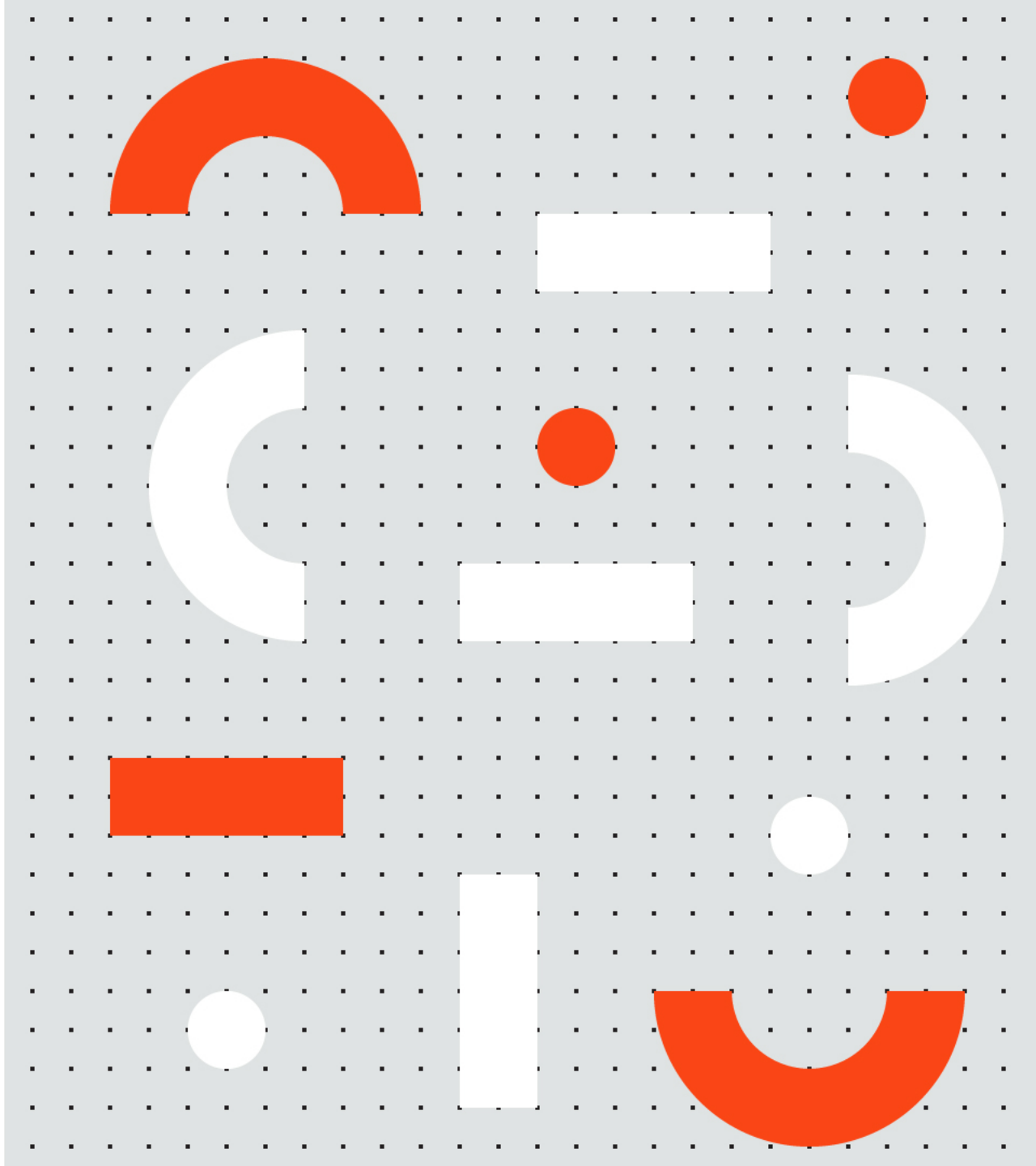
The RPA Business Analyst: Role, Skills and Challenges



The Role of a Business Analyst

A bridge between the stakeholders requesting a solution and the ones delivering the solution

BUSINESS / PROCESS OWNER		TECHNOLOGY TEAM
Understands the business requirements & problem	→	Translates the business problem into technology problem and provides a high-level solution
Validates that the solution does what was intended to do	←	Assists in solution design and confirms the solution

Skills Required

Curiosity

Wanting to identify all the pieces in the puzzle. Continuous learning

Patience

Delivering the final output may take time

Analytical Skills

Using clear & logical steps in analyzing a requirement from all angles

Communication Skills

Listening, observing and asking the right questions

Business & Industry Knowledge

Understanding your work environment

Vision

Zoom-in zoom out approach in identifying the best solution

The Challenges Ahead

Missing Documentation

Solution:

- Identify the right SMEs and decision makers in order to gather the necessary information
- Validate with the stakeholders that the gathered information is accurate

Low Quality Documentation

Solution:

- Agree with the development team on the level of detail needed by the developers
- Create a checklist to ensure the documentation is accurate and consistent
- Start documenting at a high level and then go into details
- Ask the development team to review the documentation during the early stage of the analysis period

Scope Creep

Solution:

- Make sure the scope of the project is clearly defined and documented and, if it's not, raise this issue in the first meetings with the stakeholders

Changes in the Initial Requirements

Solution:

- Analyze the reason for the request
- Look at every possible impact that might be generated by accepting the change
- Communicate the impact of the change clearly to the stakeholders and get their approval moving forward

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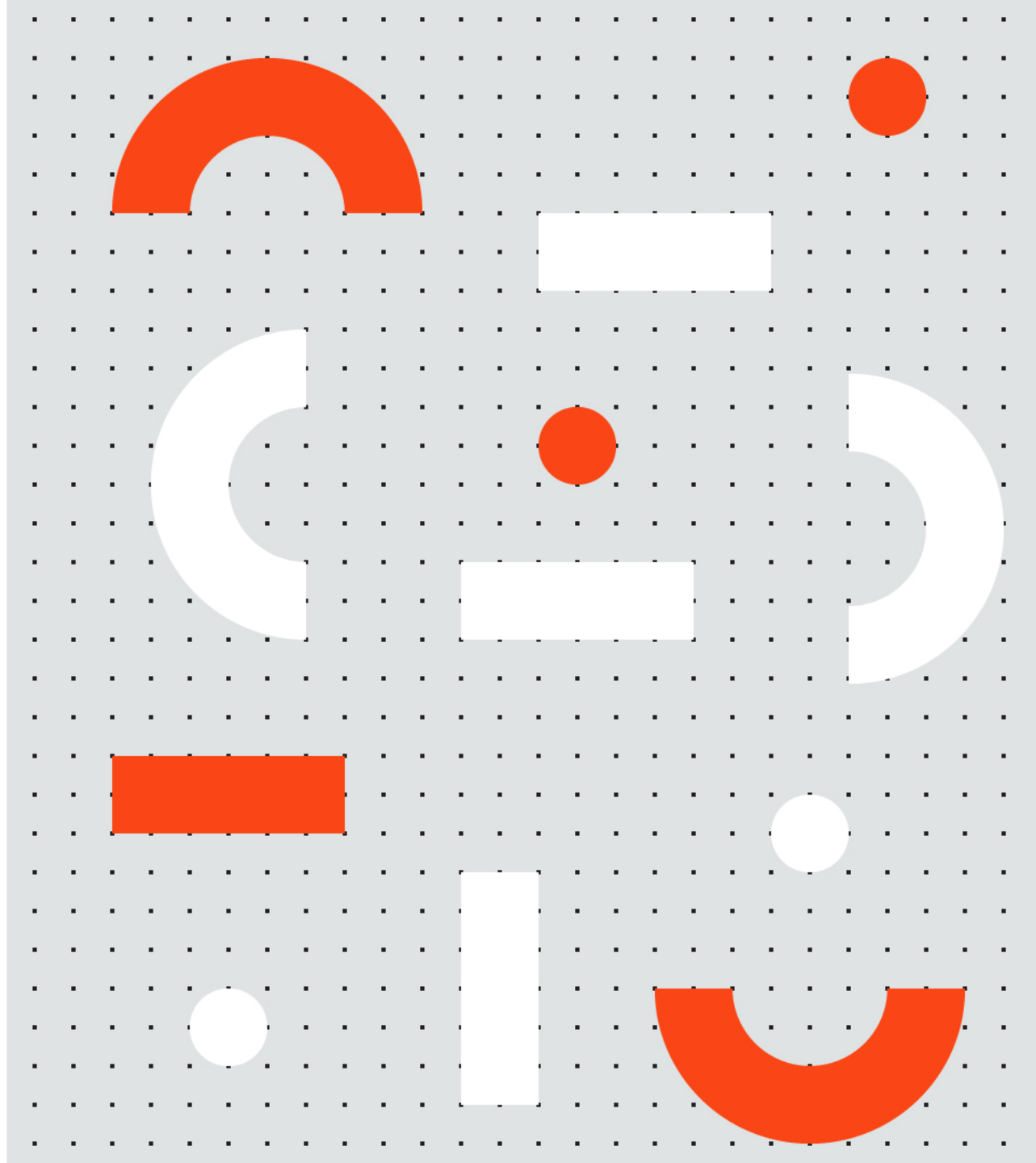

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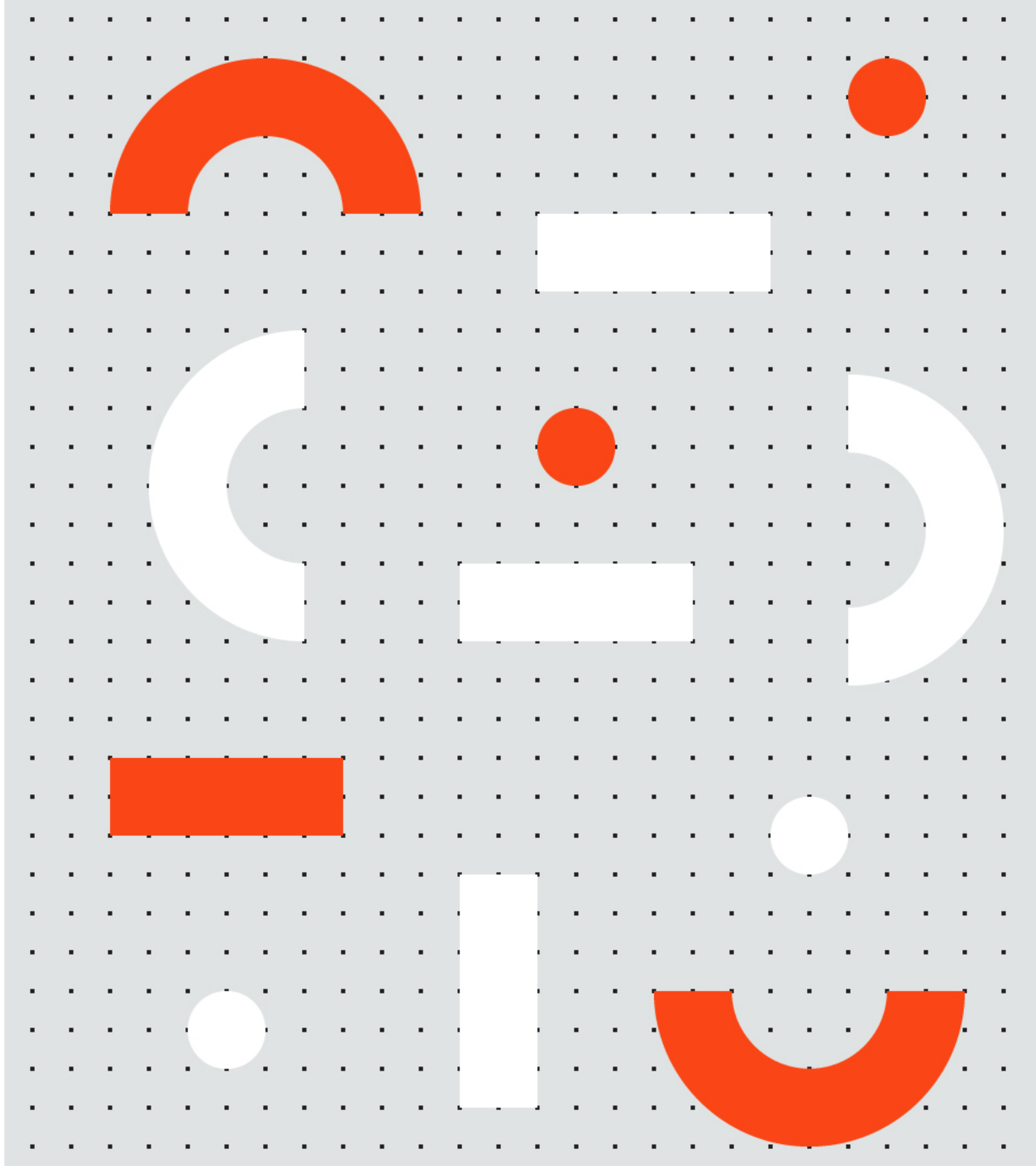
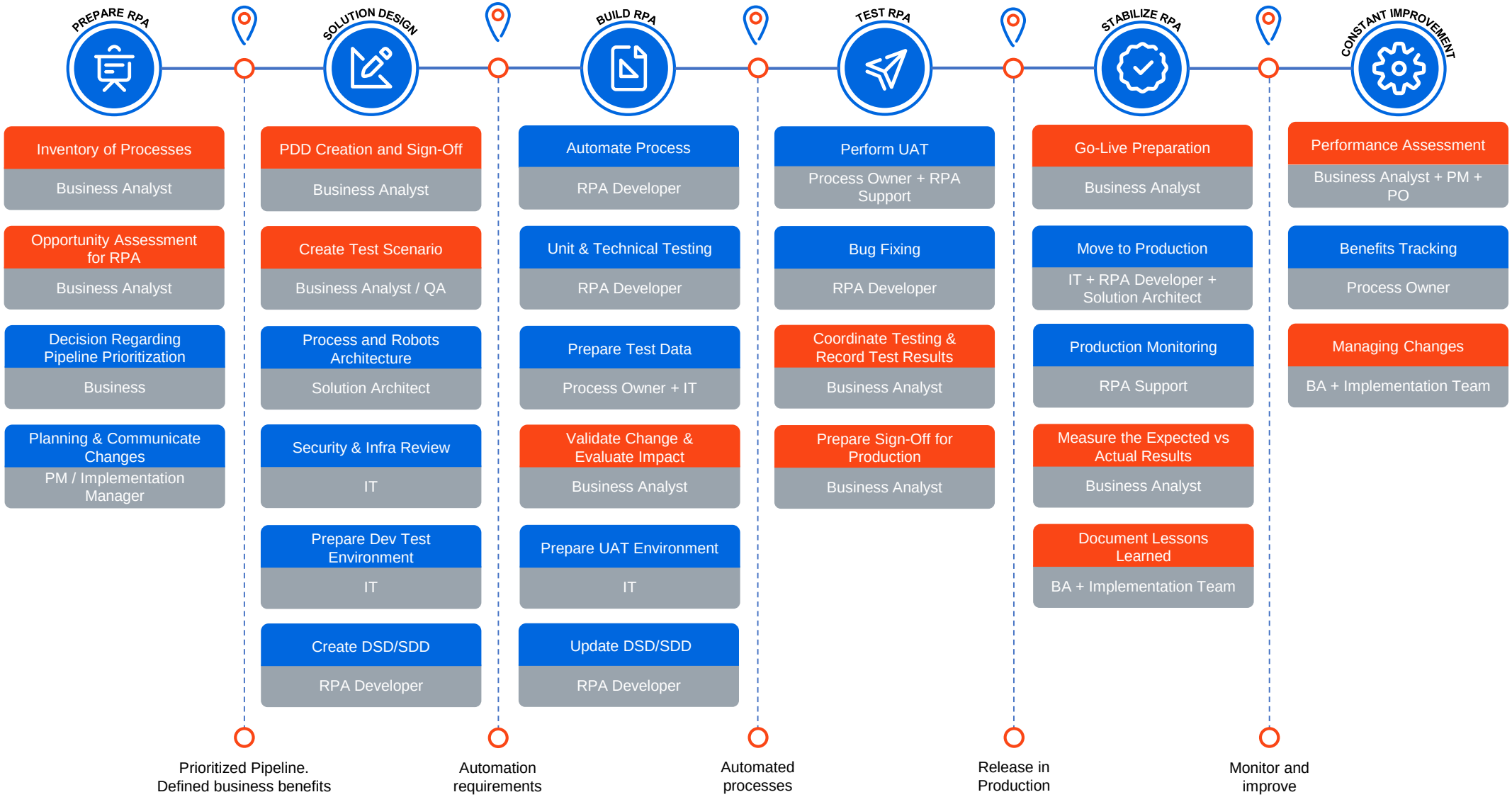
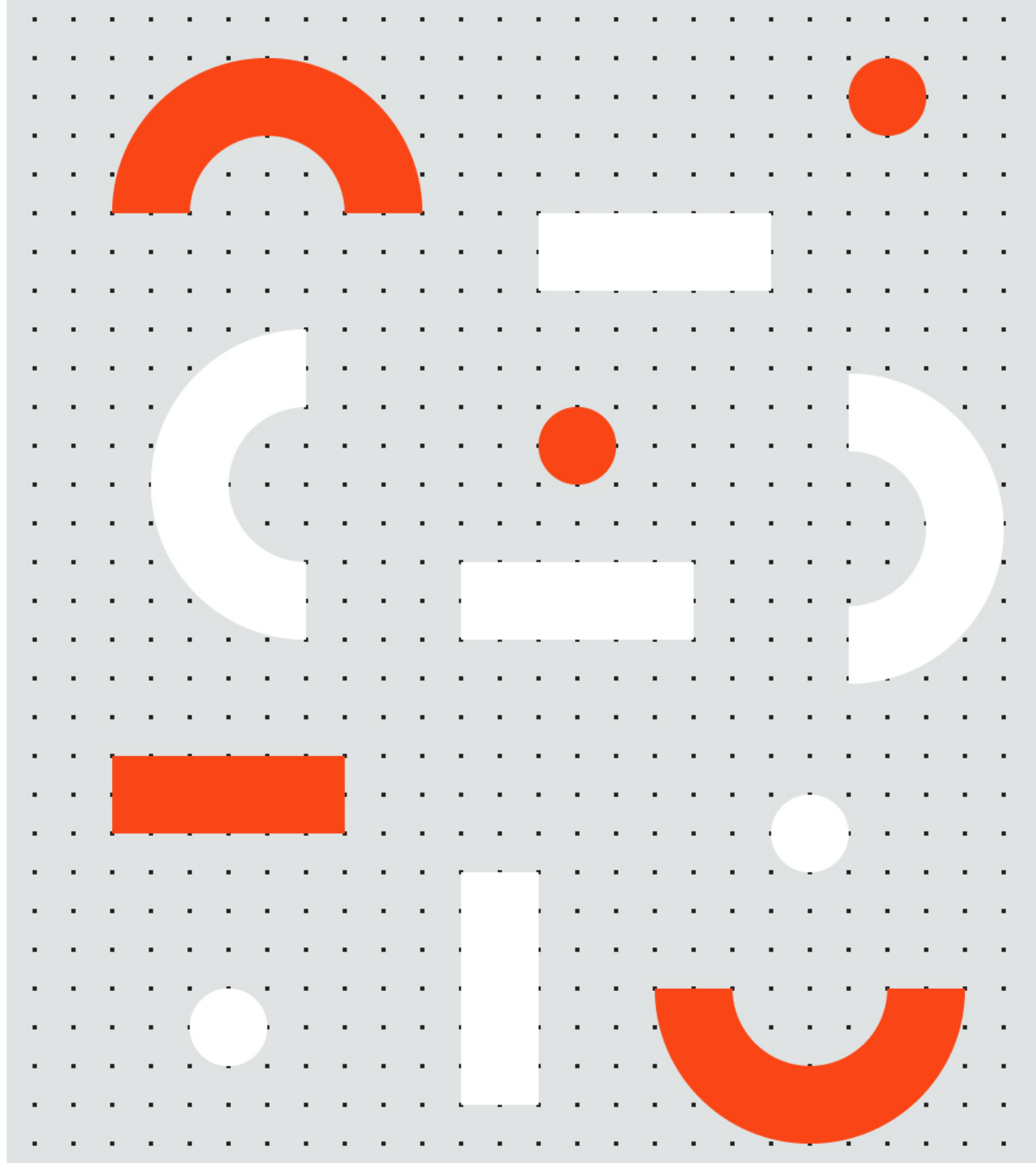
The RPA Journey and the BA's Role




PREPARE RPA
Inventory of Processes
Business Analyst
Opportunity Assessment for RPA
Business Analyst
Decision Regarding Pipeline Prioritization
Business
Planning & Communicate Changes
PM / Implementation Manager
SOLUTION DESIGN
PDD Creation and Sign-Off
Business Analyst
Create Test Scenario
Business Analyst / QA
Process and Robots Architecture
Solution Architect
Security & Infra Review
IT
Prepare Dev Test Environment
IT
Create DSD/SDD
RPA Developer
BUILD RPA
Automate Process
RPA Developer
Unit & Technical Testing
RPA Developer
Prepare Test Data
Process Owner + IT
Validate Change & Evaluate Impact
Business Analyst
Prepare UAT Environment
IT
Update DSD/SDD
RPA Developer
TEST RPA
Perform UAT
Process Owner + RPA Support
Bug Fixing
RPA Developer
Coordinate Testing & Record Test Results
Business Analyst
Prepare Sign-Off for Production
Business Analyst
STABILIZE RPA
Go-Live Preparation
Business Analyst
Move to Production
IT + RPA Developer + Solution Architect
Production Monitoring
RPA Support
Measure the Expected vs Actual Results
Business Analyst
Document Lessons Learned
BA + Implementation Team
CONSTANT IMPROVEMENT
Performance Assessment
Business Analyst + PM + PO
Benefits Tracking
Process Owner
Managing Changes
BA + Implementation Team
Prioritized Pipeline. Defined business benefits
Automation requirements
Automated processes
Release in Production
Monitor and improve
Checkpoint
Activity/ Deliverable Name
Owner
BA Deliverable
Business Analyst

Thank you



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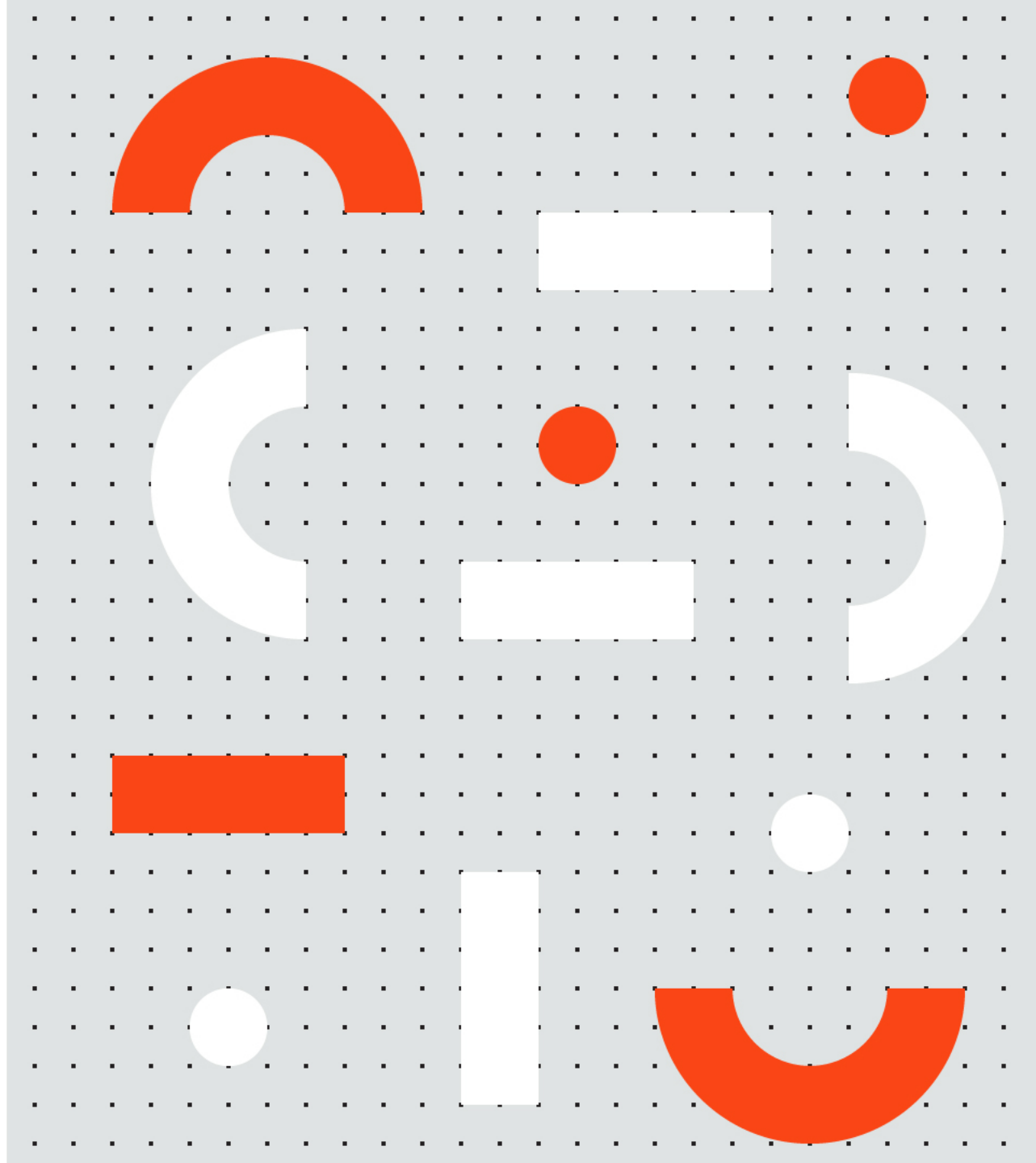
Prepare RPA



Aim & Approach

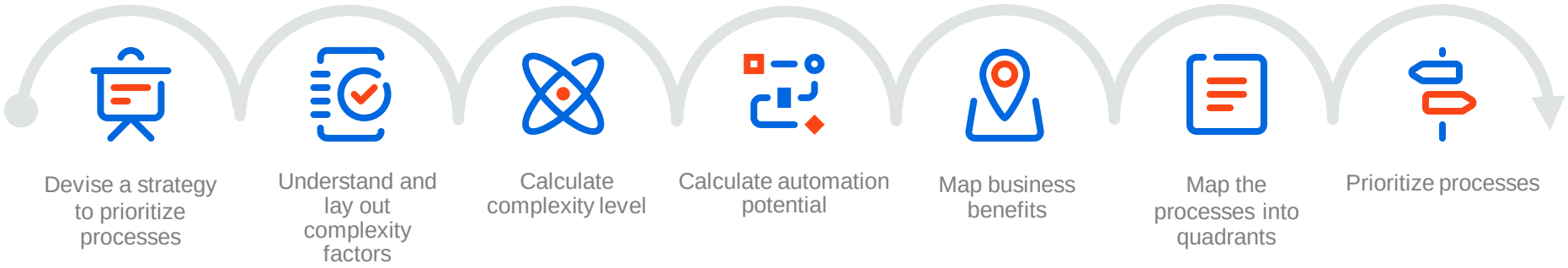
Prerequisite

- The senior management and the Business Unit leaders need to provide a process backlog, a high-level description of the processes at the organizational level (using organizational charts), as well as the list of stakeholders to interview for each process

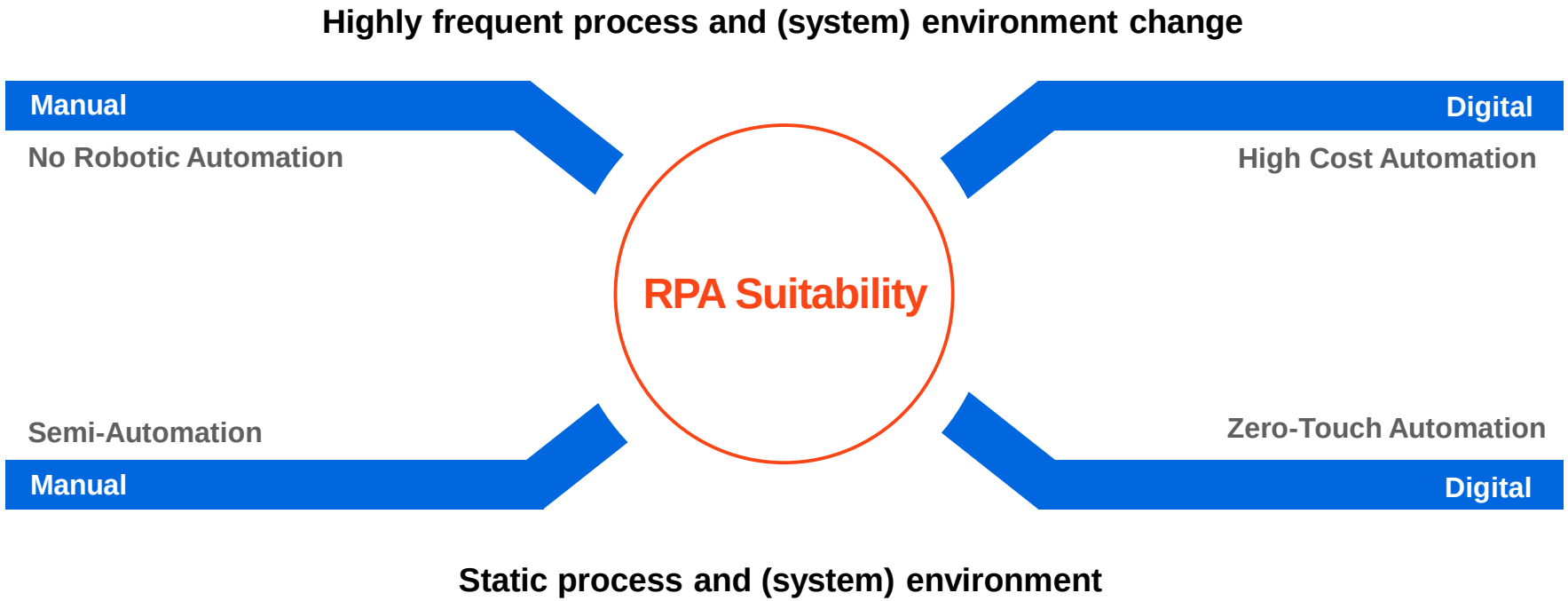
Aim

- Calculate and understand the automation complexity of the in-scope processes
- Calculate and understand the automation potential of in-scope processes
- Map the automation benefits (tangible & intangible benefits)
- Map the processes into automation quadrants in order to prioritize in-scope processes

Approach



Determining RPA Suitability



Organization Wide Assessment

Complexity

- Defined as Low (<35%), Medium (35-65%) and High (>65%)
- Derived from 4 key parameters:
  - type of input method
  - percentage of free text
  - type and number of applications involved
  - number of screens involved

Potential FTE Savings

- Yields a high-level Potential FTE Benefits and automation percentage
- Derived from 4 key parameters:
  - percentage of rule-based steps
  - type of input method
  - free text requirement
  - process type

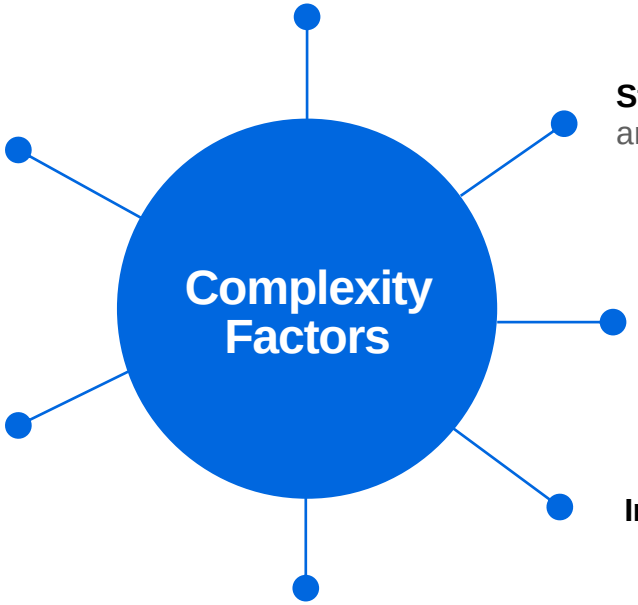
Automation Quadrant

- Derived as a matrix based on Process Complexity and Potential Benefit (High / Medium / Low)
- Establishes 4 categories:
  - Quick Wins
  - Low Hanging Fruits
  - Must-Do Improvements
  - Long-Term Improvements

Complexity Factors

Standard Inputs – Templated inputs, same format or type of inputs across cases

Number of screens involved in a process; can be taken as a proxy for number of steps



Structured Inputs – Machine readable and digital inputs; scanned PDF images

Unstructured Inputs – Flow of information as free text (unstructured informational flow) within the process

Type of Applications – Java applications, Mainframe applications, Web based applications, .NET applications, MS Office etc.

Image based automation – VDI / remote desktops

Variations / Scenarios within the process (number of *If Else* kind of rules)

Defining Automation Complexity

Low

- A **LOW** complexity automation project is, in general, one that can be easily created with the recorder and requires small customizations thereafter
- This includes desktop applications, as well as web applications. It can include scraping (web scraping, screen scraping)
- Development time: **1-2 weeks**

Medium

- A **MEDIUM** complexity automation project could be one that requires the transfer of data between applications
- Development time: **3-4 weeks**

High

- A **HIGH** complexity project is one that requires programming skills (.NET programmability) in terms of string manipulation functions, working with arrays, data tables, collections, data formatting, exception handling, terminal emulators
- Development time: **4-6 weeks**

Factors Driving Automation Potential

Rule Based

- Agent/user doesn't use their experience to make any decisions while processing a case. Decisions are made based on business rules and pre-defined logic

Process Type

- **Manual & Repetitive** - A process which is performed by users and most of the process steps are the same for all cases or transactions
- **Semi-Manual & Repetitive** - A process which is performed by users and also involves an automation mechanism like Macro, Outlook plug-ins, etc.
- **Automated** - A process which is already automated
- **Manual but Not Repetitive** - A process which is performed by users. Also, the process steps for each case will be different

Standard Input

- Inputs are **Standard** - Inputs are standard if the content is positioned in the same place even if the input types are different. E.g. in an invoice, the position of the details (invoice number, date, amount, name etc.) are always fixed, regardless of the input type (PDF, Word etc.)
- Inputs are **NOT Standard** - Inputs are considered as non-standard when the position of the content varies from one input type to another

Process Expected to Change

- Are processes or applications used to process a case going to change within 3 - 6 months? (E.g. major upgrade of ERP systems, process re-engineering etc.)

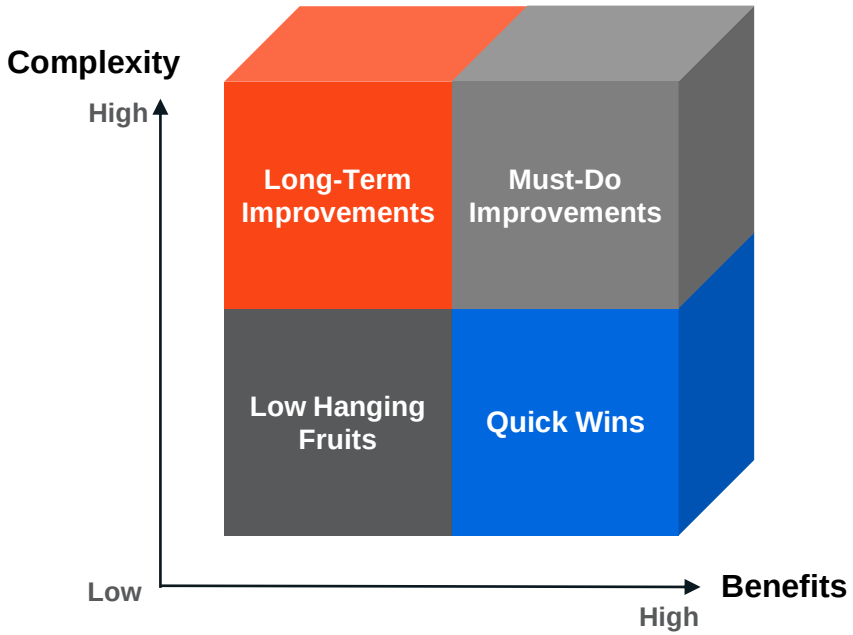
Unknown Exceptions %

- Percentage of the total volume received which cannot be processed without an external factor (query/approval)

Business Benefits

- **Cost savings –** RPA ensures cost savings through FTE reduction
- **Productivity Gain** – Increase in processed volumes within the defined unit time, coupled with a decrease in turnaround time and an improved AHT
- **Business Agility** – Enabling businesses to act at a faster pace than before
- **Quality improvements / Error reduction –** Robots run as configured with a 0% error rate
- **Compliance** – Ability to comply to regulatory requirements
- **Customer Satisfaction** – Automation leading to customer satisfaction (Example: contact center automation, resolving customer inquiries at a faster pace)
- **Flexibility** – If there is an unexpected spike in volume, robots enable you to scale up or down as required

Automation Quadrant Derivation



Complexity	Benefits	Automation Quadrant
Low	High	Quick Win
Low	Medium	Quick Win
Medium	High	Quick Win
Low	Low	Low Hanging Fruit
Medium	Medium	Low Hanging Fruit
High	High	Must-Do Improvement
High	Medium	Must-Do Improvement
Medium	Low	Long-Term Improvement
High	Low	Long-Term Improvement

Additional process prioritization factors like business reasons (e.g. foreseeing spikes in volume), regulatory & compliance reasons or parallel initiatives also need to be considered

Implementation Strategy

	Pilot M1-M3	1st Wave M4-M7	2nd Wave M7-M10	3rd Wave M10-M14	4th Wave M12-M17	Closure M16-M18
Activity	Choose use case from critical Quick Wins or important Low Hanging Fruits	Build showcase	Close Quick Wins	Close Quick Wins and Low Hanging Fruits	Close Must-Do Improvements	Close Quick Wins, Low Hanging Fruits and Must-Do Improvements
Activity	Create Value Proposition showcase	Increase confidence and buy-in	Ensure industrialized automation deployment			Hand over Long-Term Improvements
Activity	Highlight risks and org. change management impact	Prepare employee experience showcase "How did Robotic Process Automaton impact my work experience?"	Create role-based virtual worker libraries			
Activity	Obtain buy-in		Start re-assessment			

Opportunity Assessment – The Questionnaire

GENERAL

- Process Name
- Process location & region
- SME name

INPUT

- Are inputs standard?
- Data input type
- Does this process require reading of scanned images or handwritten documents?
- Does the process require reading of free text?

PROCESS METRICS

- Number of FTE's
- Number of Cases / Transactions
- Process Frequency
- AHT
- Number of steps

PROCESS DESCRIPTION

- Language
- High-level description
- Is there a quality check in place?
- Is the process manual & repetitive?
- Is the process rule based?
- Is the process or system expected to change within the next 3-6 months
- Percentage of unknown exceptions

IT ENVIRONMENT

- Technology / System Constraints
- Are there any steps in the process which are already automated?
- Is there a test environment available?
- Application access via VDI / Remote Desktop?
- Number of applications

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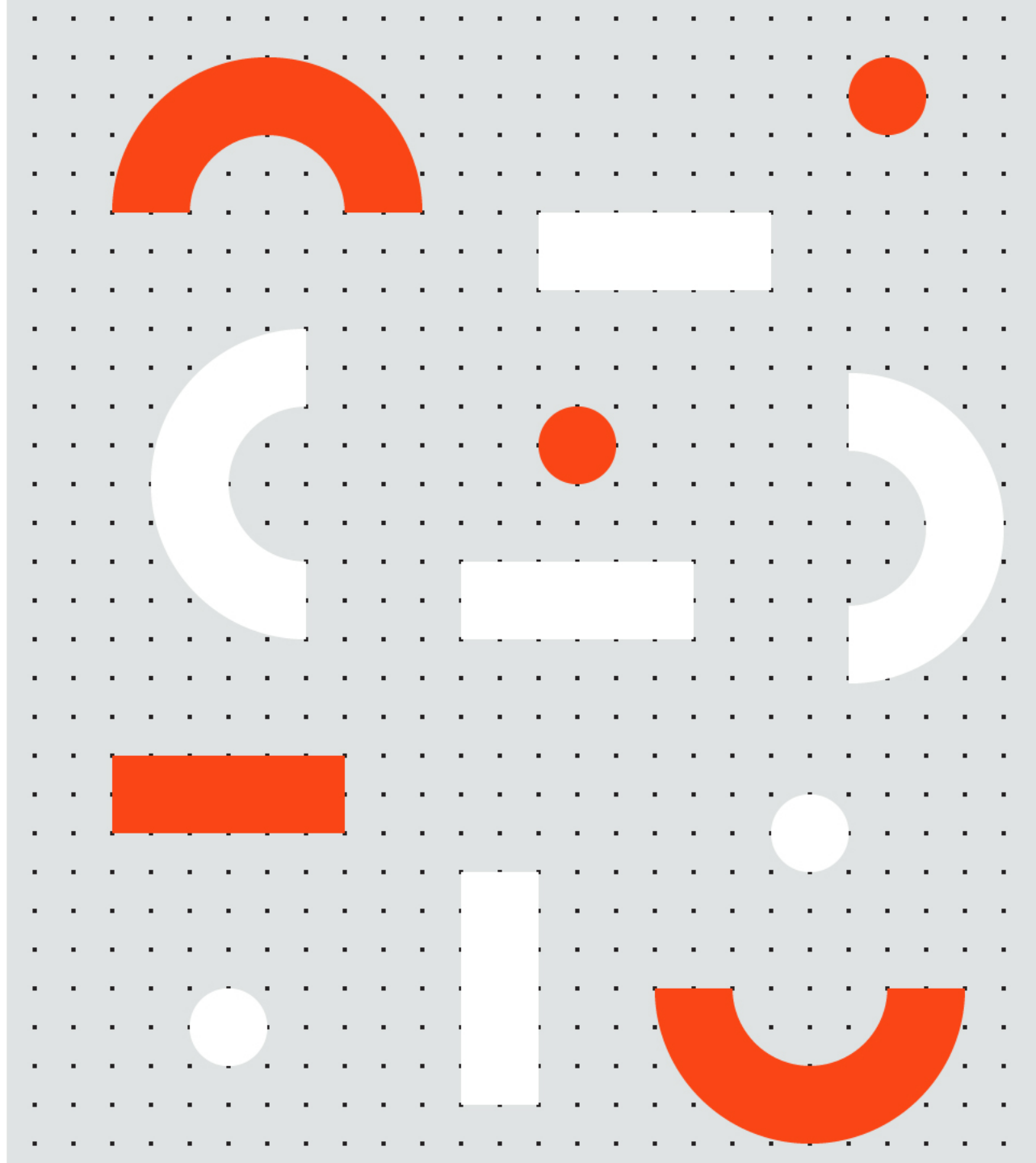

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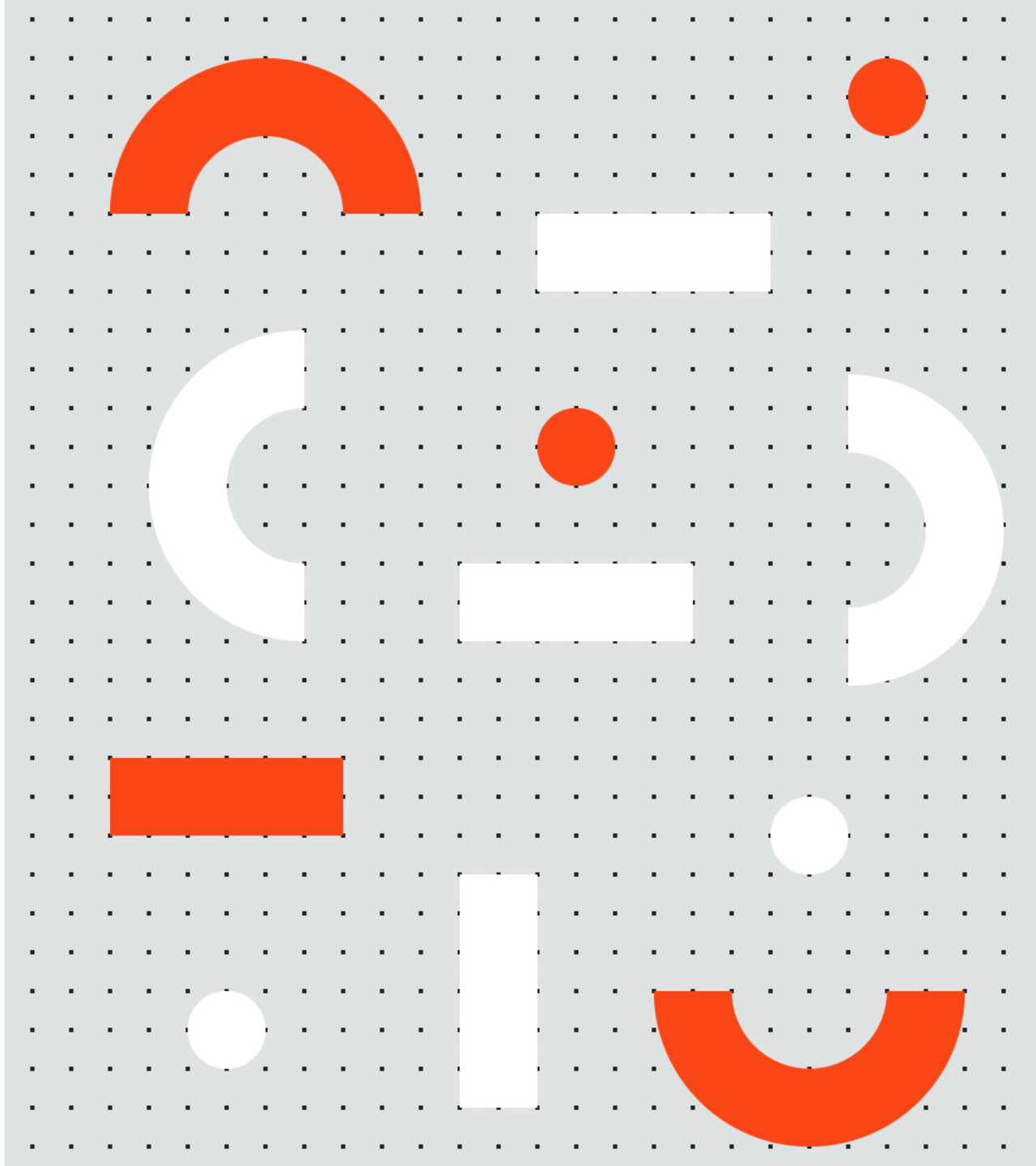
Solution Design



Prerequisites and Objectives

Prerequisite

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

Aim

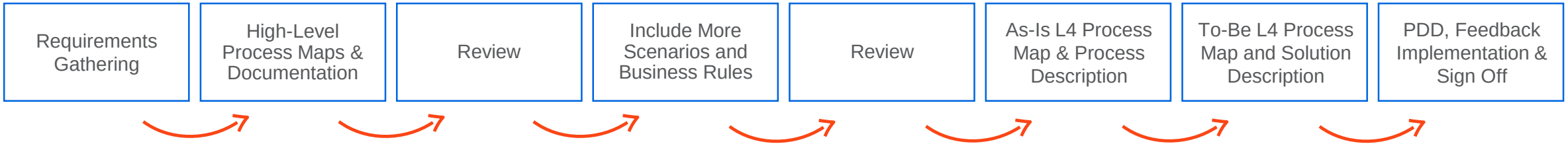
- Gain a deep understanding of the process
- Document and validate with the Process Owner the As-Is process flow and all relevant data for RPA
- Design the To-Be process flow
- Handover a good documentation to the Developer to build the RPA solution for that process

Recommended Approach

- Organize a discussion with the Process Owner & SMEs
- Obtain a high-level description of the process (walk through the process)
- Understand the complexity of the process & the challenges (from SME and RPA point of view)
- Capture process metrics (scope, applications involved, no of FTEs, volumes, AHTs, SLAs, time dependencies, challenges, complexity, stakeholders involved and their role)
- Prepare the Process Design 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 process
- Log the reasons which determine whether an action can be automated or not

Stages of Process Documentation

- Gather all the process information and data
- Prepare a high-level process map with process description
- Validate the high-level process map with the Process Owner
- Update the document by including more scenarios and business rules and validate it with the Process Owner
- Prepare the detailed Level 4 process map (including all scenarios) for the As-Is process
- Define the To-Be Level 4 process map together with the solution description and validate these with the Process Owner
- Prepare the PDD and include any support material that would detail the business rules, roles matrix, the input & output etc.
- Validate the PDD with the Process Owner and update the PDD with all the received feedback; if needed, organize sessions for clarifications
- Obtain Sign-Off



Requirements Gathering

Process Metrics

- Volume
- AHTs
- Total FTE effort involved in the process

Process Information

- Open and close times, time dependencies & SLAs
- Expected increase in transaction 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

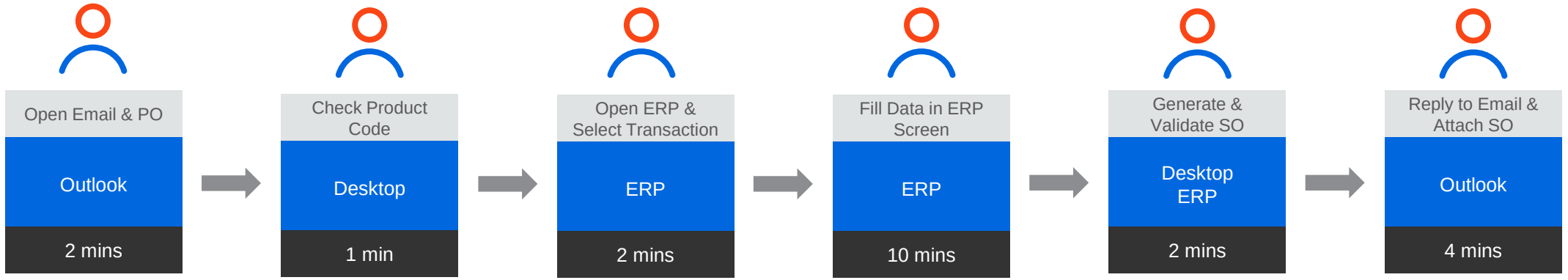
- Capture all applications used in the process
- Understand and capture the underlying technology of each application
- Different instances of one application – if applicable (e.g. Mainframe)

“Thin” or “Thick” Client ?

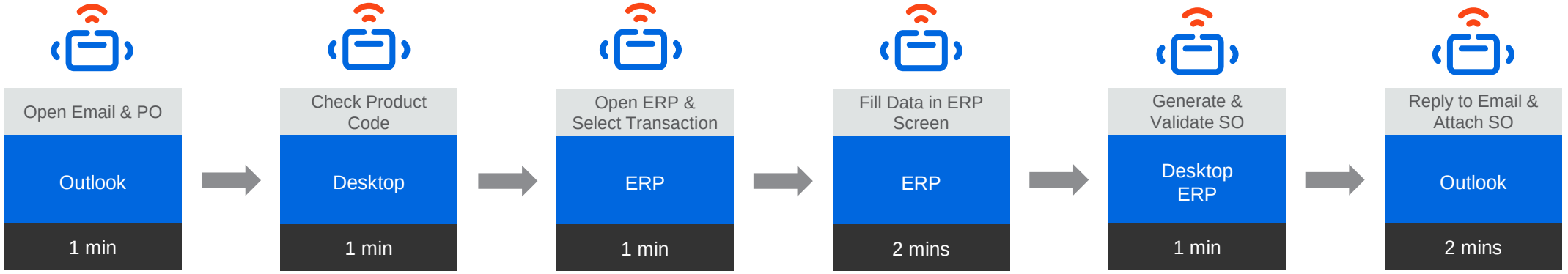
- VDI / Remote desktops – Thin Client
- Desktop applications – Thick Client

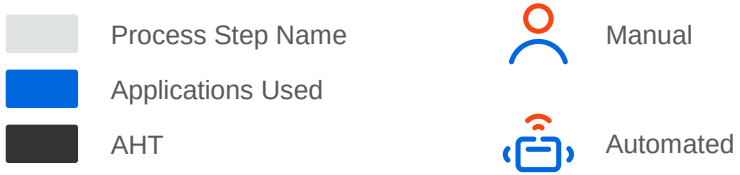
High Level Process Maps

As-Is

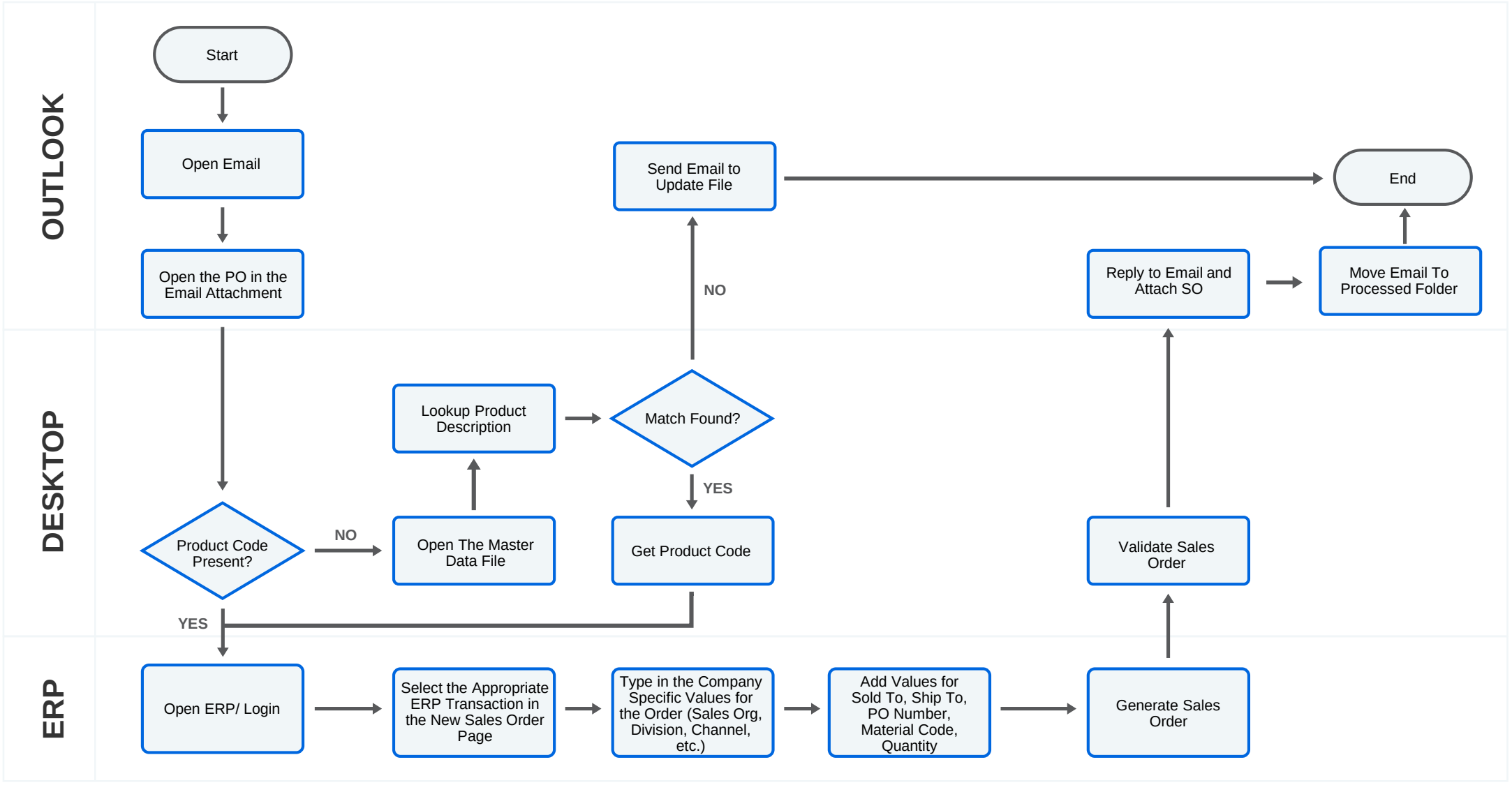


To-Be

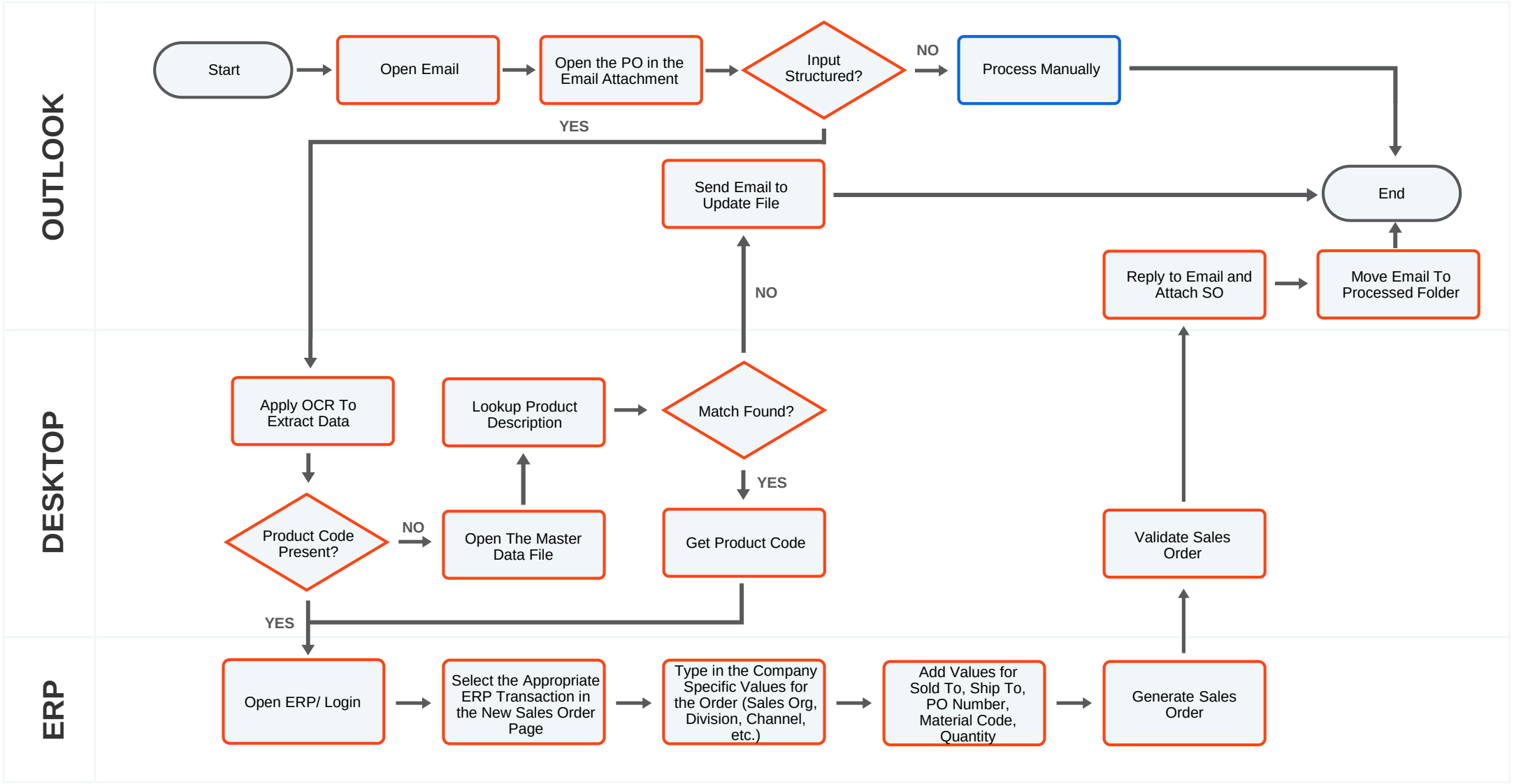




As-Is L4 Process Map



To-Be L4 Process Map



Inputs & Outputs

Inputs

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

- Input Source – from which inputs are accessed (e.g. file, a screen, email, a scanned invoice etc.)
- Input Structure – templates from which identified inputs need to be captured
- Fields containing the input – unique identifiers to capture the required fields
- Input Location – location from which the input file / application can be accessed

Aim: For the To-Be process documentation, analyze in detail every input and how it can be obtained and standardized where possible

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

Outputs

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

- Output type: a new record in an app, a report, a file etc.
- Destination
- Structure
- Content
- Trigger

Process Documentation Methods and Tools

Key Stroke Document

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

Process Video Recordings

- Video recordings of process activities
- Recommended for complex business rules within a process
- Short video recordings (activities as modules) with appropriate voiceovers are recommended
- Index the videos and use them as reference in the As-Is process description

Business Logic Translation Table

- Either use the existing business rules table or document the business rules in a separate file
- The robots can use business rules directly from the table
- In case of future rule changes, the table will be updated directly, with low / zero impact on the code
- Index the business rules and use them as reference in the As-Is process description

Out of Scope Activities

Out of Scope Activities

- Compliance requests - must remain under the human control of team members
- Activities / source apps liable to change in the next 3- 6 months (e.g. a source app release is announced)
- Templates / inputs not standardized or involving free text / poor quality scanned images
- Activities that need human input, due to the complexity and human expertise involved
- Effort to automate a specific activity exceeds the gains

Impact of Out of Scope Activities

The impact of the activities that cannot be automated has to be analyzed according to certain criteria:

- Will it change the order of the steps performed?
- Will the robot need to be restarted?
- Will the robot need to wait for that activity to be processed first?
- Does the robot need to use the output of that manual activity?

Exception Handling

Things to remember:

- Exceptions appear in a business process when something unexpected happens during the process execution
- A process documentation that describes only “the happy path” is considered incomplete, so it is important to keep track of both business exceptions and technical exceptions
- Make sure you cover all possible scenarios when something might not go as planned

Business Exceptions

- Mandatory details are missing or are incomplete / unidentifiable
- Email attachment is not available

Known Exceptions

- Previously encountered
- A scenario is defined with clear actions / workarounds for each case

App / System Exceptions

- Application stops responding
- System login failure

Unknown Exceptions

- New situation never encountered before
- Can be caused by external factors and cannot be predicted with precision
- It must be communicated to an authorized person for evaluation

PDD Creation, Sign-Off & Maintenance

01

Create PDD

Gather all the necessary information and put together a document describing the process

02

Sign-Off PDD

Validate the document with both with the Business Owner and the development team

03

Maintain PDD

Keep the document up to date during development. Unexpected things regarding the process might come to the surface

PDD – Document History and Approval Flow

Document History

- Version number of the document
- Date when the version of the document was created
- Name, role, function and organization of the person doing the updates
- Comments that summarize the changes for a specific version

Document Approval Flow

- Version number of the document submitted for approval
- Name, role, organization and signature of each person in the approval flow

PDD – Table of Contents

Test Scenarios and Test Cases

Test Scenario

Necessary for:

- ensuring better organization
- a thorough testing of the end-to-end functionality of the workflow

Not required when:

- applications are very complicated
- the project is on a tight schedule
- using Agile methodology
- performing regression testing

Guidelines:

- A solid understanding of the RPA workflow and of the possible user actions during the process is required
- Avoid writing scenarios that cover multiple components
- Update the Traceability Matrix to ensure there is a scenario for each component

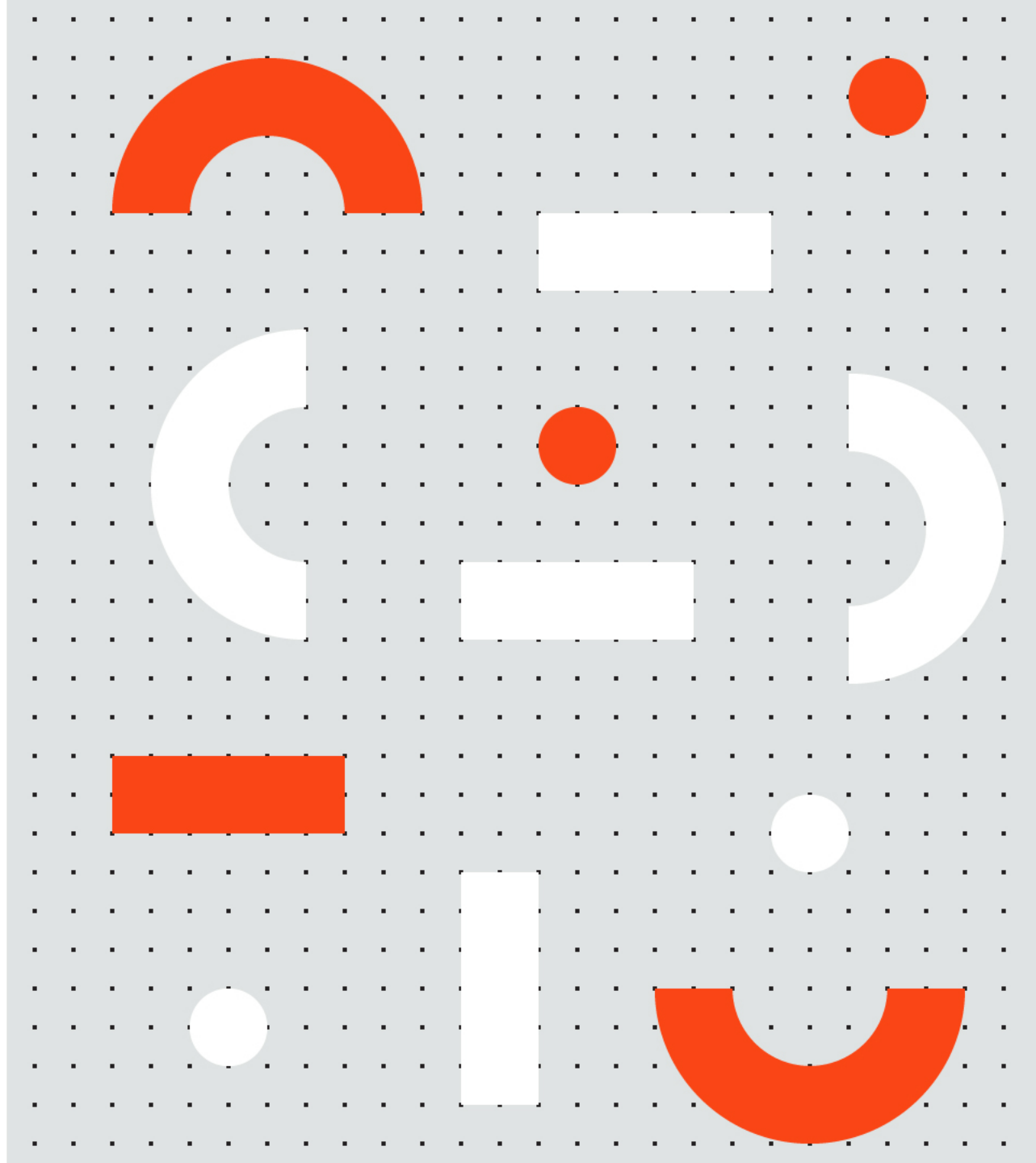
Test Case

Required fields:

- Test case ID – unique value for each test case
  Best practice: use a naming convention to indicate what's being tested
- Test Author – name of the BA / Tester
- Test Executed By – name of the tester who executed the test
- Execution Date – date when the test execution was performed
- Test Title – test case title
- Test Steps – all the execution steps in the order they are to be executed
- Expected result – what the result of the test should be
- Actual result – the actual result of the test case
- Status – Pass or Fail
- Defect ID – if the status is Fail, then the defect ID needs to be added
- Comments

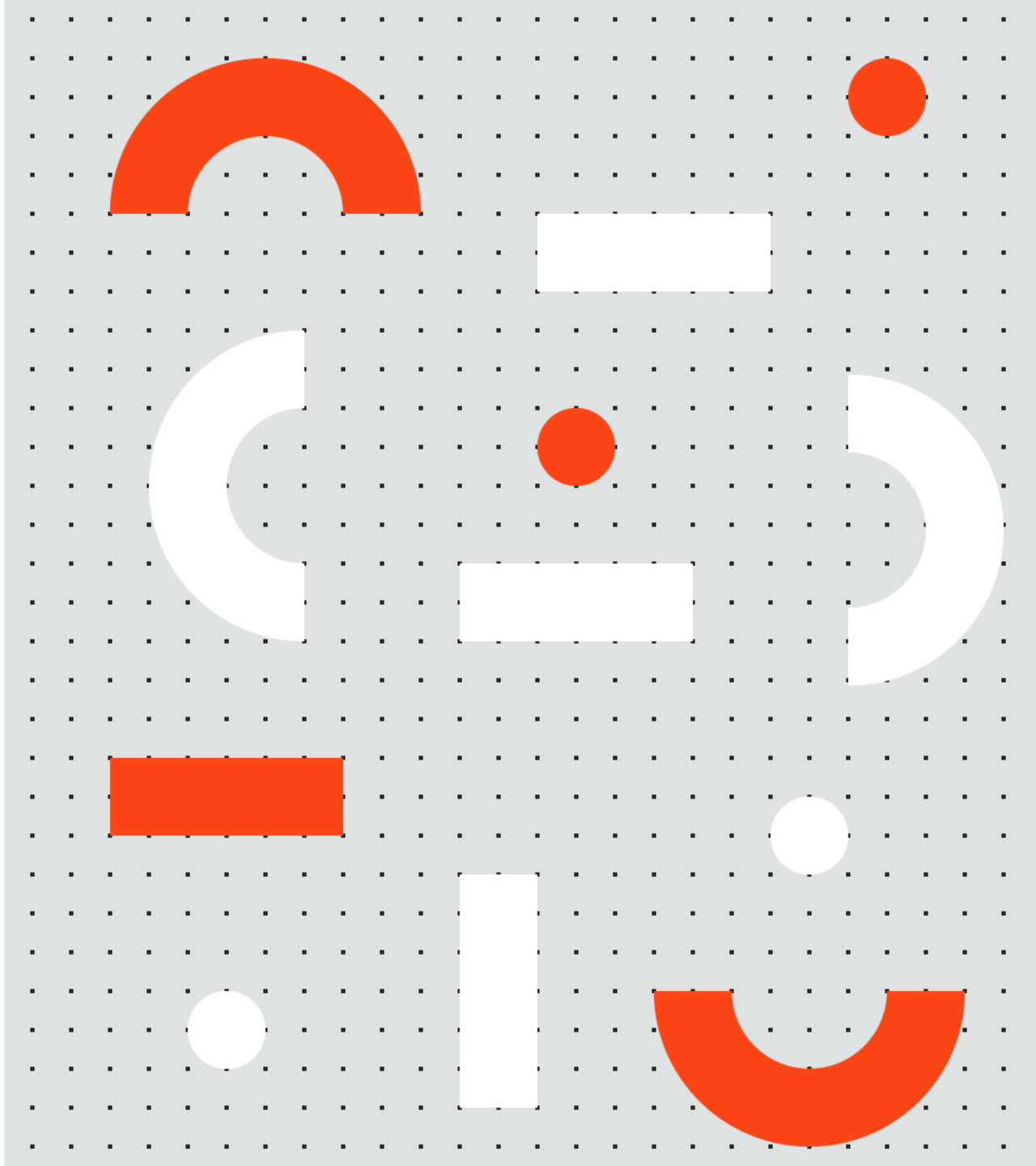
Test Scenario to Test Case relation: 1 : 1 or 1 : many

Thank you



Business Analyst Training

Build RPA



Managing Changes

- **Definition of change**: any modification in the initial process requirements, as documented and agreed in the signed-off PDD and that is not a bug or defect
- **When can changes occur:** throughout the entire implementation process
- **What can trigger change**: new input types, gaps in the PDD identified after sign-off, internal or external factors, an increase in the percentage of automation, etc.

BA responsibilities during the Build phase:

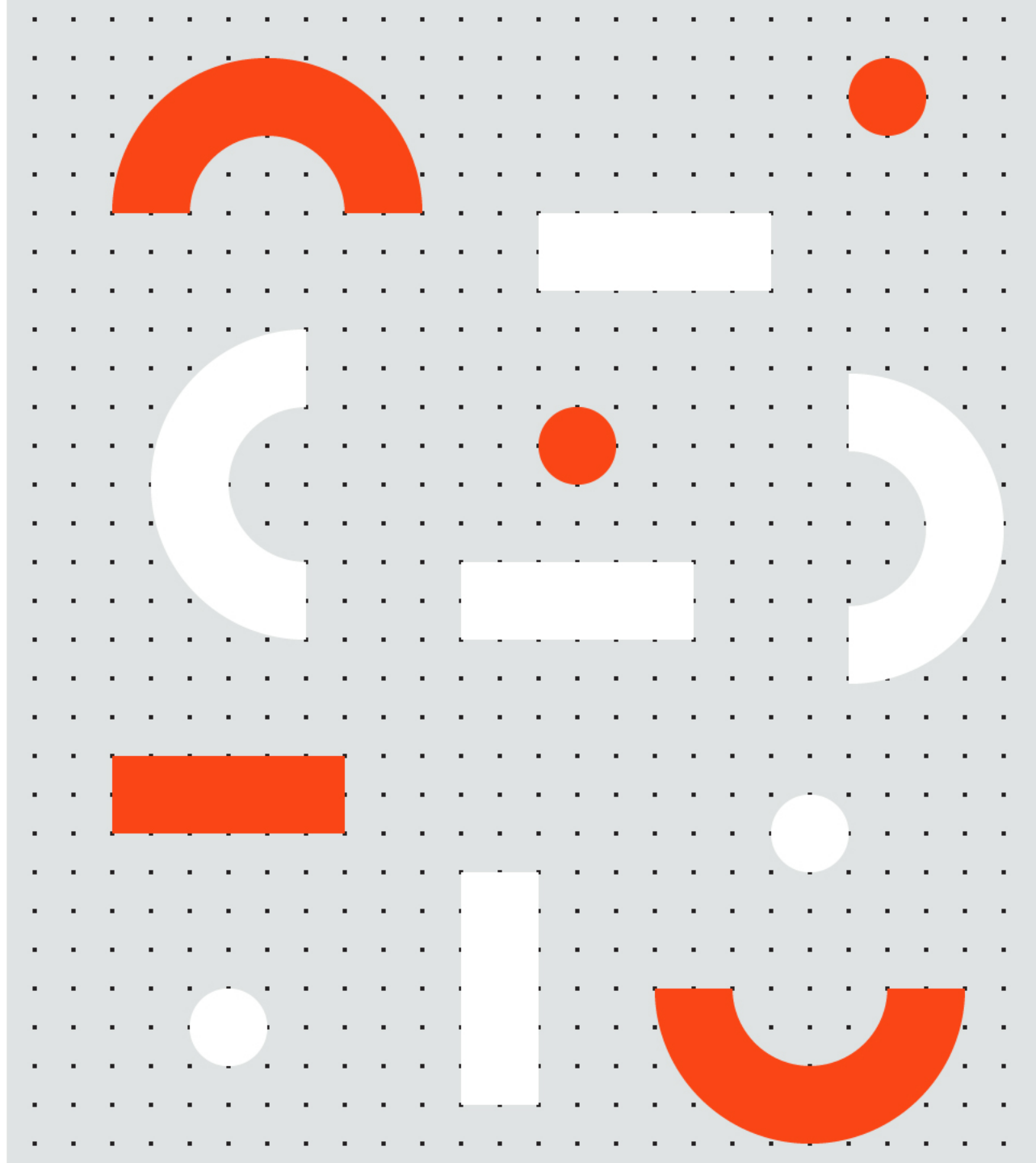
Analyze the proposed changes and apply the KRAC (keep / remove / add / change) approach

Identify impact: duration, risks, etc.

Use the Traceability Matrix for logging the approved changes

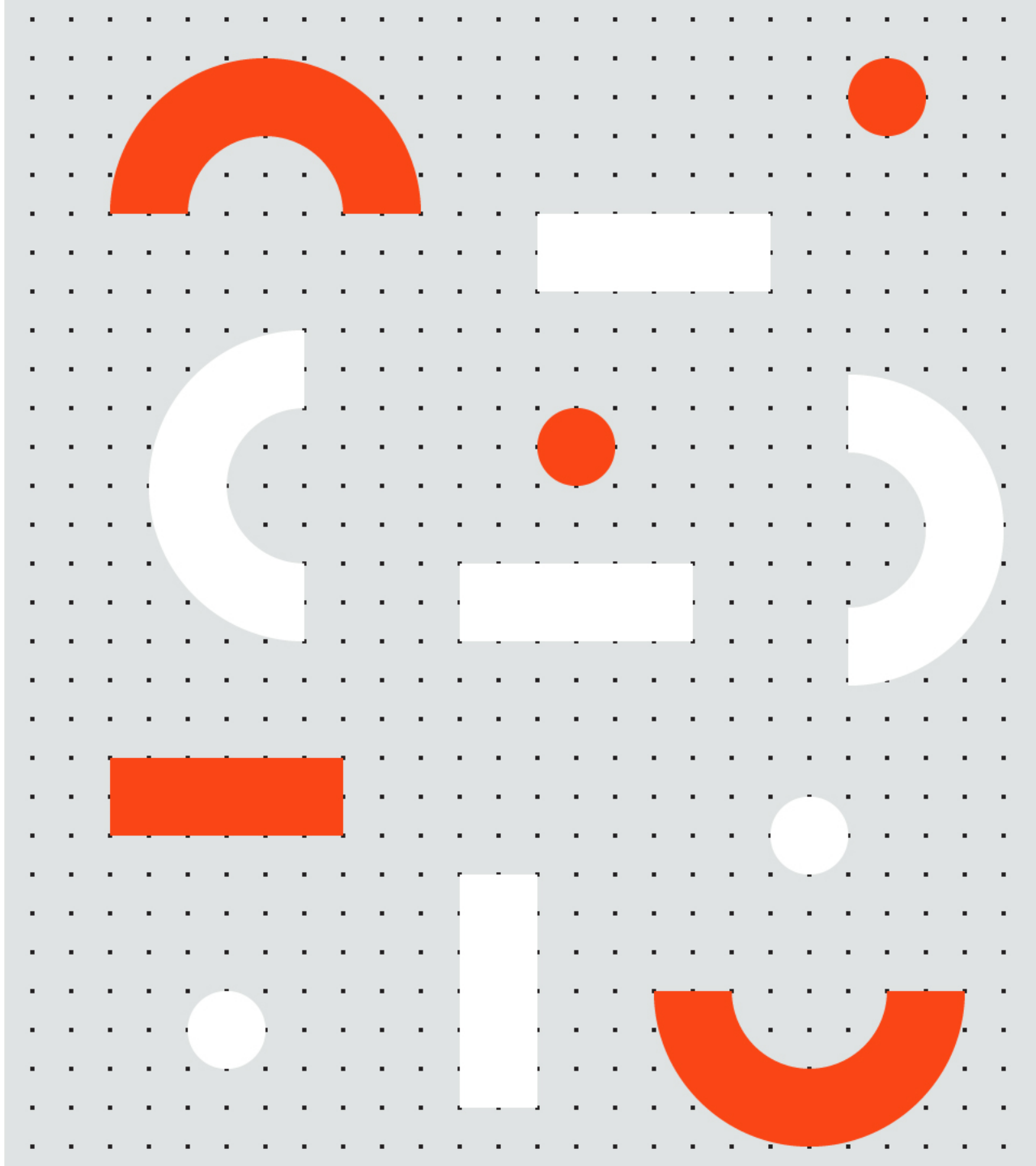
Update the PDD to include the requested changes, as well as the detailed step by step description for each change implementation

Thank you

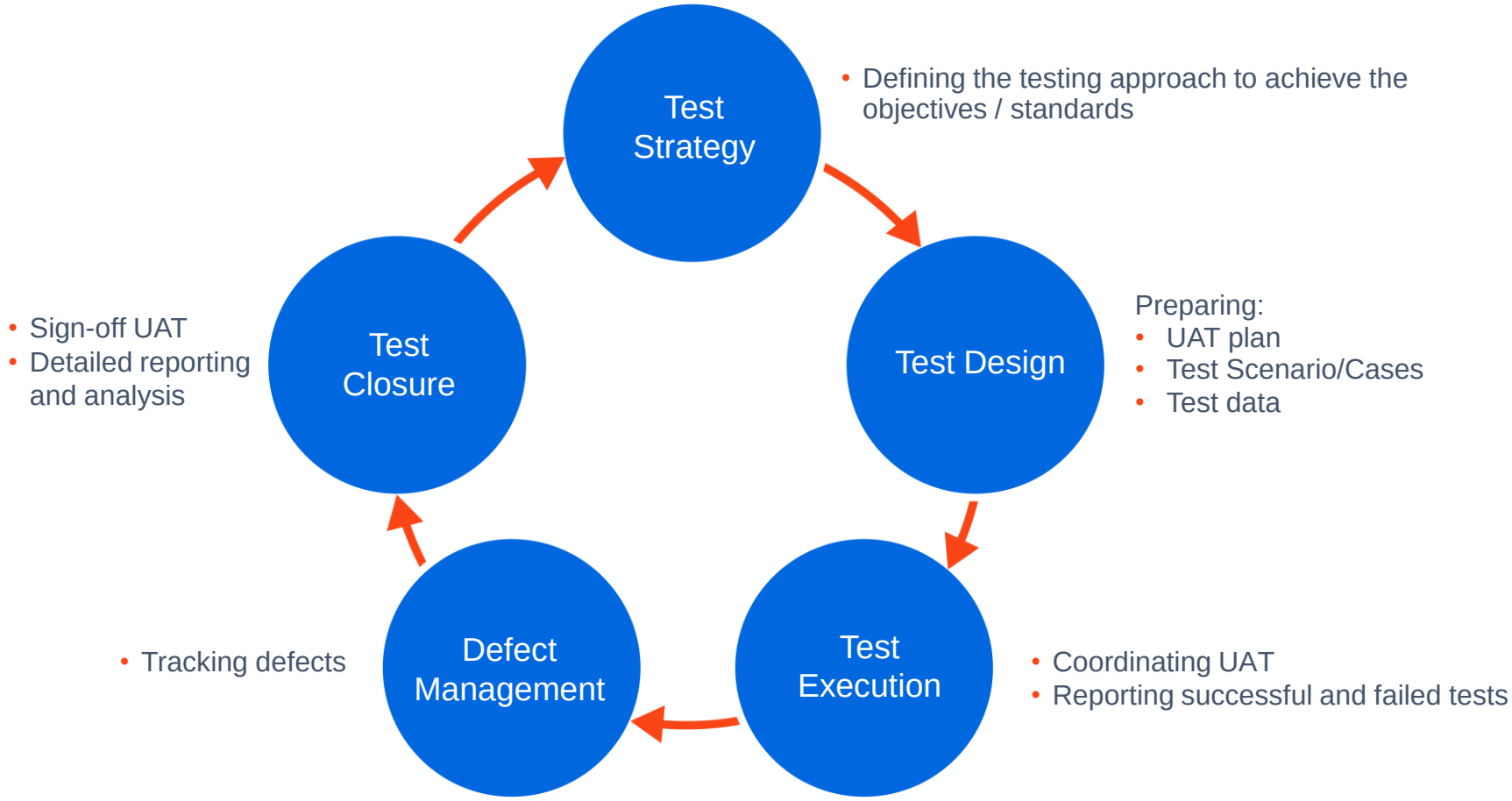


Business Analyst Training

Test RPA



UAT – Lifecycle & BA Role



…most of the times:

Testing the robot's output = simulating the human's operational activity

UAT Prerequisites

- **Test scenarios** to cover all the business use-cases, rules and exceptions
- **Test data** - input for the process (list of transactions, emails, documents to be processed etc.)
- **Test environments**:
  - Robot + Orchestrator test environment
  - Applications test environment
- **Process frequency** (daily / bi-weekly / monthly / quarterly)
  - Check if the environment date needs to be updated
  - Check if EOD/EOM needs to be run
- **Data restoration** - understand the number of times the data can be restored, if needed
- **Dependencies** with other projects on the same environment
- **Test duration** - estimate the test duration in one run (how long it would take the robot to perform the expected action)
- **Intermediary output** - clarify with the developer how an intermediary output can be verified

UAT Plan - Structure

What?

- Test if the robot performs same actions & output as the user does
- Test new outputs as described in the PDD

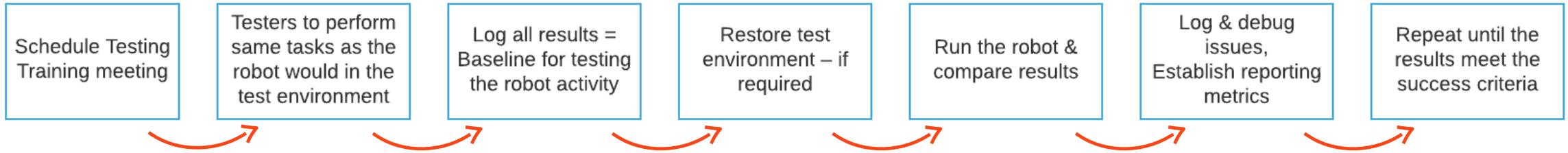
Who?

- Process Owner – SMEs
- RPA Developer
- BA
- Support team

When and Where?

- Define the total time duration, start date & end date
- Schedule the tests according to test duration & testers availability
- Ideally bring all the testers in the same room

How? The testing process



Handling Issues – Creating an Issue Log

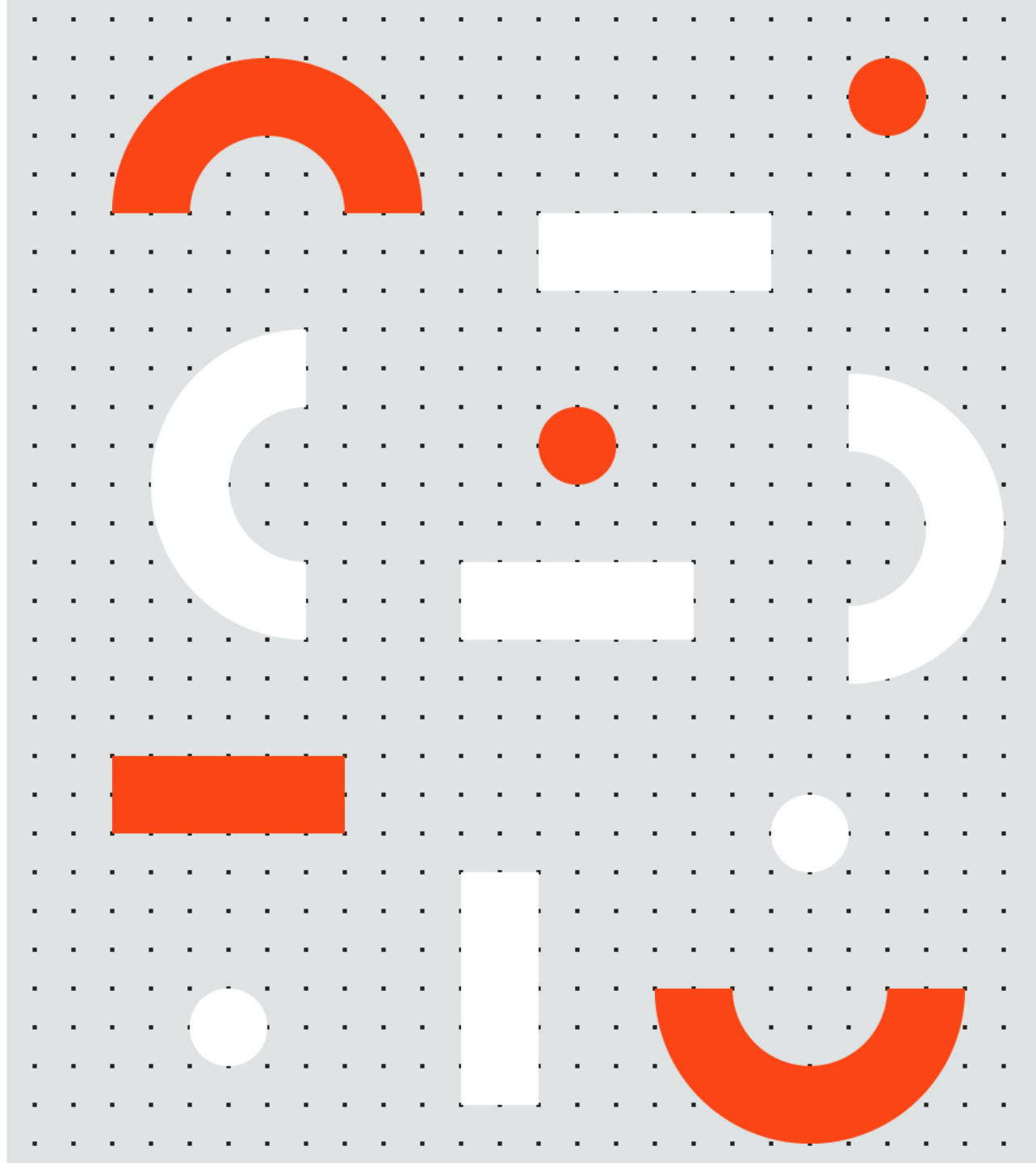
Necessary for:

- demonstrating a development issue
- helping the development or engineering team reproduce the issue before attempting to fix it

Required fields:

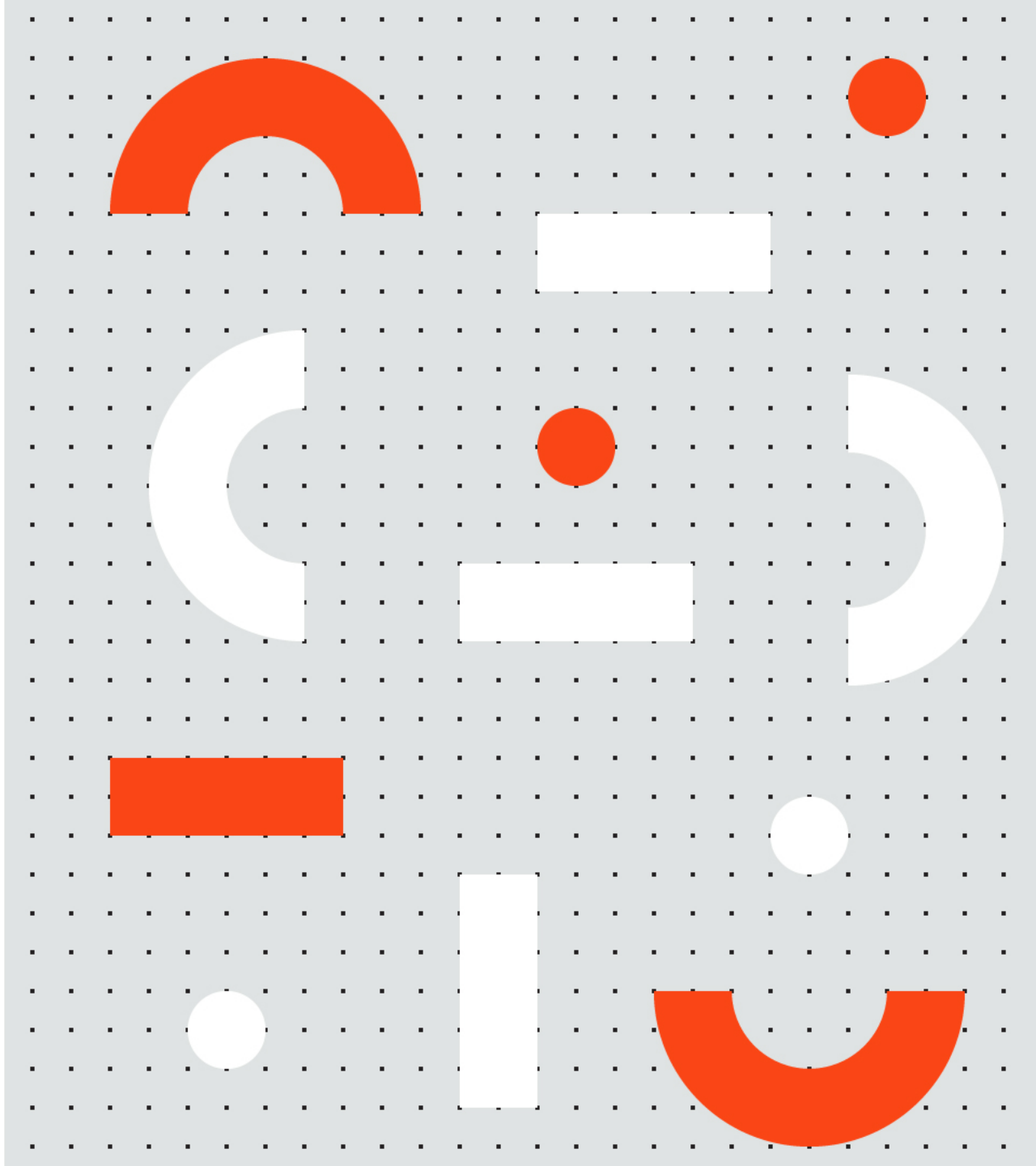
- **Title** – summary of what the issue is
  Best practice: use a naming convention, like having the name of the tested module between brackets at the beginning of the title.
  Example: *[Login] Unable to confirm the pop-up screen after trying to login with an incorrect / expired password*
- **Environment** – DEV, TEST, PROD environment and application version
- **Steps to reproduce** – sequence of steps (from start to end) which will result in the issue to occur
- **Expected result** – what the result of the performed action should be
- **Actual result** – what the result of the performed action is
- **Visual proof** – is optional and can be represented by a screenshot or a short recording

Thank you



Business Analyst Training

Stabilize RPA



Preparing GO-Live

Aim

- Make the transit easier for others to accept the change and its benefits

Responsibilities

- Deliver trainings (along with the SMEs already involved in testing)
- Support in updating the existing procedures
- Create User Manuals for the RPA process
- Handover all the documents produced (and updated) during the project

To whom

- Stakeholders
- Implementation Team
- Operations and Technical Support Team

Preparing GO-Live – The User Manual

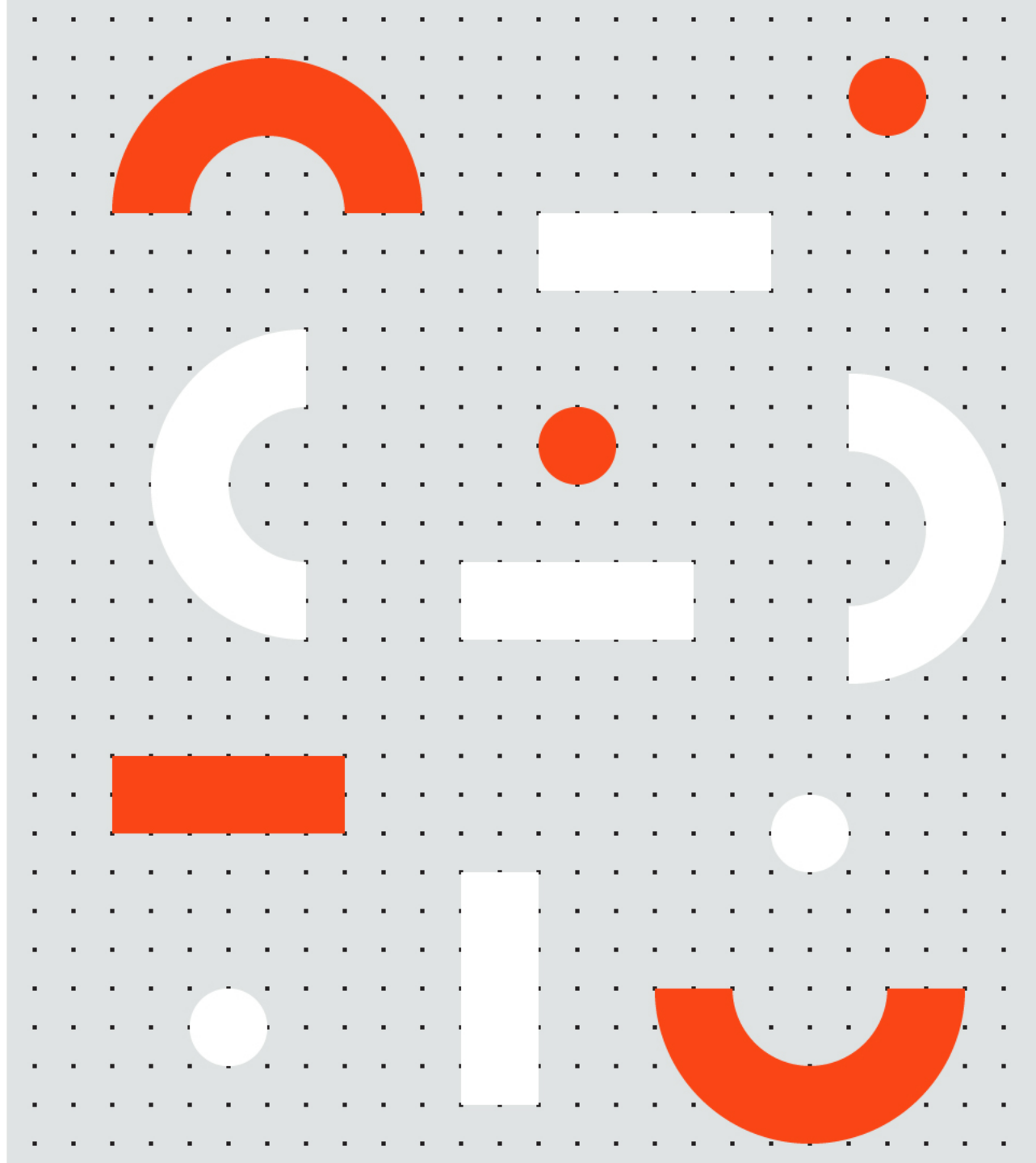
What it needs to cover

- Description of the new process
- Description of the final inputs & outputs
- Description of the process schedule
- Procedures for resetting and restarting the process
- Instructions on how to create reporting dashboards
- Instructions on error handling

Things to remember

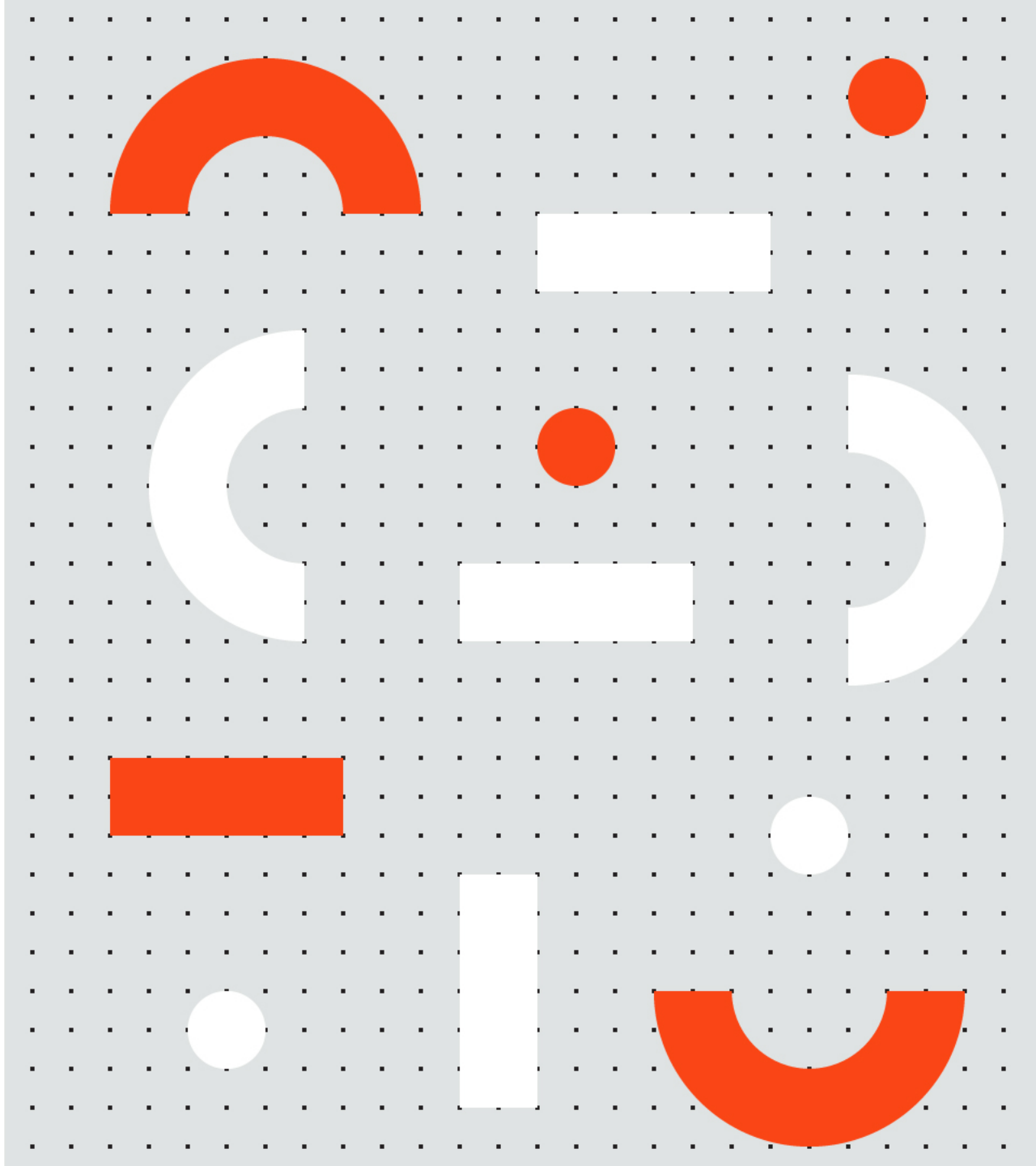
- The User Manual must be updated throughout all the implementation phases
- Each team member should provide input based on their activity
- Any issue that comes up needs to be documented by mentioning what triggered it and how to identify it more easily in the future
- The documentation should describe events and outcomes, not the people involved in the project
- It’s important to mention which of the teams were affected by the changes brought by the implementation of RPA

Thank you



Business Analyst Training

Constant Improvement



Constant Improvement

During the post-production phase of an RPA implementation, the Business Analyst will focus on:

Performance Assessment

Managing Changes

Performance Assessment

Aim

Monitor the performance of the process and measure it against the baseline which was established at the beginning of the project

Things to Consider

- the number of transactions executed
- the average handling time
- the average robot uptime
- custom reports that were requested and developed for the project

Action Points

- Schedule adjustments
- Updates to the process workflow
- Change implementation

Change Control & Change Management

Change

Definition: Any modification or revision of the requirements in the PDD

Change Control

Definition: The process used to ensure that changes to a product or system are introduced in a controlled and coordinated manner

Change Management

Definition: A structured approach to transitioning individuals, teams and organizations from a current state to a desired future state

Types of Changes

Based on when a change appears

- **Proposed for future automation** (e.g. new initiatives; future changes on the process that have already been approved for automation)
- **Occurring during automation development** (e.g. requests that result from increasing the percentage of automation, gaps in the documentation (PDD) after it was validated and signed-off or a CR that is generated by an internal / external factor)
- **Occurring post implementation** (e.g. requests that result from increasing the percentage of automation, improvements to the existing automation, bug fixing or gaps in the documentation discovered after Go-Live

From a process component perspective

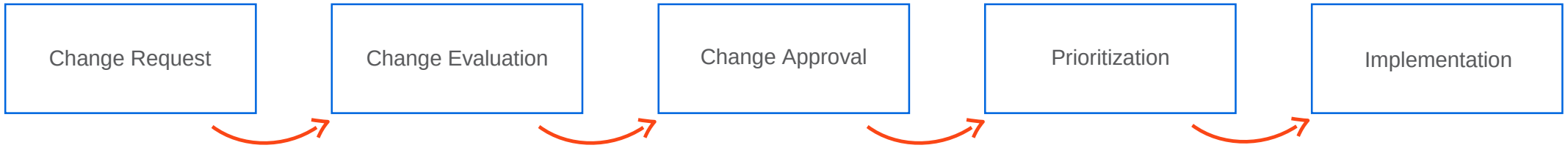
- **Input changes** (e.g. a new input; the same input but in a different format; the same input with a change in content and/or structure)
- **Process changes** (e.g. new steps that need to be added; existing steps that have to be removed; changes to the existing steps; changes in the order of executing the existing steps)
- **System changes** (e.g. upgrades; new functionalities or modules; changes on existing functions; the decommissioning of an existing system or module)
- **Output changes** (e.g. new reports or dashboards; changes to existing reports and new logs)

The RPA Change Control Process

What it is:

The process of requesting, determining attainability, planning, implementing and evaluating the changes to an automation process throughout the project lifecycle

Stages of the RPA Change Control Process



Things to remember:

- Every change request needs to be documented and every modification in the status of a change request needs to be updated in the Traceability Matrix

The Traceability Matrix

What it is:

A spreadsheet that contains the end-to-end process and tracks the evolution of all the requirements, from the Business ones to the Test Cases and the Go-Live phase

Necessary for:

- Tracking the advancement of the requirements by examining the output of each deliverable
- Tracing back the business requirements of a certain product feature
- Business requirements versioning
- Project scope monitoring

Guidelines for creating the Matrix

1. Identify the elements that need to be traced
2. Split the high-level requirements into smaller parts
3. Map the resulting items into the business rules and exceptions list
4. Update the status and changes made to the requirements at all times
5. Analyze the results and update the project accordingly

Change Request

Project Name		Date	

Request Information			
Requested By		Request No	
Name of Request			

Change Description	
Change Description	
Change Reason	
Impact of Change	
Proposed Action	

Status		
☐ In Review	☐ Approved	☐ Rejected

Approval	
Approval Date	
Approved By	

Change Evaluation – Questions to Ask

Questions that should be asked during this phase:

- Are there any existing requirements in conflict with the change?
- Are other processes affected?
- What is the impact of implementing the change?
- What are the consequences of not making the change?
- What are the risks that come from implementing the change?
- What is the effort to implement the change?
- What is the impact on the pipeline?

Who is Responsible:

- Implementation Manager / Project Manager, Process Owner, Business Analyst, Solution Architect, RPA Developer

Change Evaluation – Categorizing Changes

Standard

Definition: Any new request that is different from the original requirements
E.g. changing the frequency of when the robot is running; rescheduling the robot etc.

Emergency

Definition: Any change that is a show stopper for Go-Live or endangers the production environment
E.g. interface changes that have an impact in the execution of the workflow; a change in the design of the process

Normal

Definition: Any change that goes through a normal change approval process flow, requiring formal assessment
E.g. Windows updates; Outlook changes; automatically pushed patches

Change Evaluation – Approval

Possible decisions based on evaluation:

- Keep the existing functionality
- Remove the existing functionality
- Add a new functionality
- Change an existing functionality

Who is Responsible:

- Implementation Manager / Project Manager, Process Owner, Business Analyst, Solution Architect, RPA Developer

Thank you