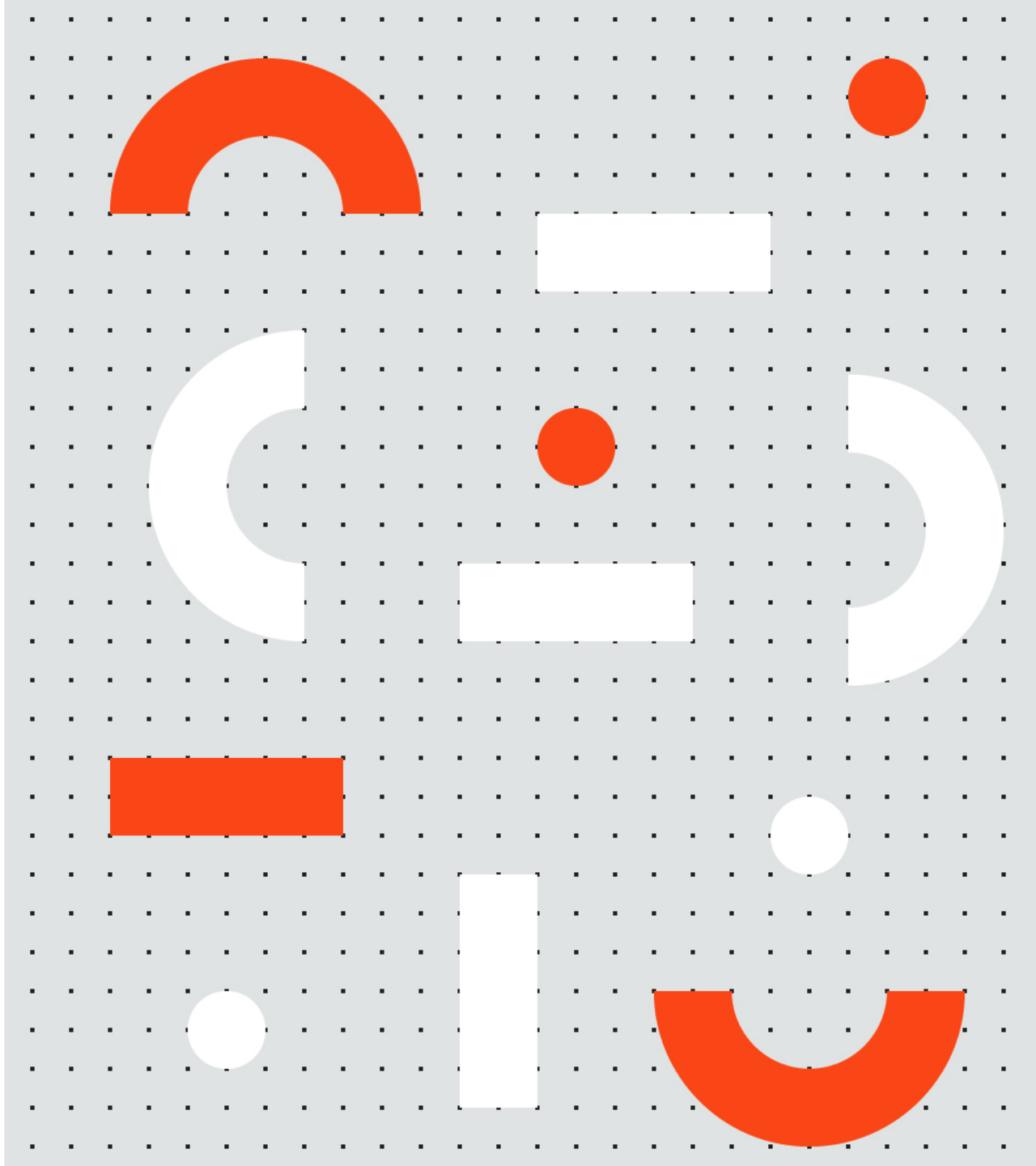


Business Analyst Training

Constant Improvement



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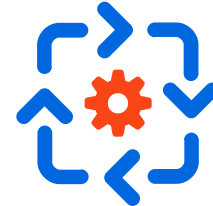
Constant Improvement



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)

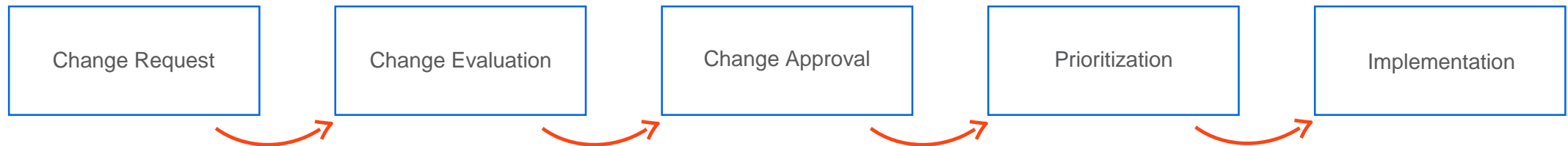
The RPA Change Control Process



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:

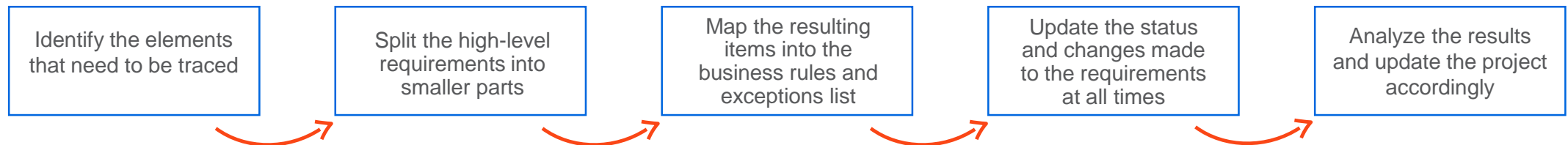
A spreadsheet that contains the end-to-end process and tracks the evolution of all the requirements, from the Business ones to the Test Cases and the Go-Live phase



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



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		
<input type="checkbox"/> In Review	<input type="checkbox"/> Approved	<input type="checkbox"/> 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

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