Initial Process Analysis - Create Quotes

Contact Details

AN Other, a.n.other@bptravel.com, 01234 567 890, 07123 456 789.

Process Requirement

The BP Travel create quotes process is triggered by an Excel spreadsheet of customer quote requests from the travel portal. These files are currently created at 9am, 12pm, and 3pm. The requests are allocated to the advisors who key them into the quote system and then either email the quote details to the customer or contact the customer when a quote can't be generated e.g. invalid dates, invalid routes etc.

Proposed UiPath Solution

A UiPath process solution will be created to continually poll for new quote files before loading the cases to a UiPath work queue. The cases will be then be worked in turn and an email quote response forwarded to the customer. For exception cases where a quote can't be generated an exception file will be created for manual review. This file will be created at the end of the process.

Prerequisites

- Detailed process documentation outlining each of the step-by-step procedures is required.
- A suitable IT development environment as defined in the project initiation phase and access to the in scope systems (test environments) is required.
- Sample quote request file

Assumptions

- Suitably skilled Subject Matter Experts (SMEs) will be available to support the delivery of this process automation
- The quote request file is of a consistent structure and format.

Estimates

Delivery

Analysis, design, documentation, configuration, test and go-live support: 5 days.

Production

Controller – it is estimated that this process can be absorbed into the existing process controller resource workload.

Maintenance – As the underlying systems and business rules are static, it is estimated that the business as usual maintenance activity on this process will equate to 0 – 2 days per year.

Case Volumes and Process Metrics

Approximately 600 Create Quote requests arrive on reports throughout the day. Volumes are projected to double over the next 12 months.

Currently 2.8 Full Time Equivalents (FTE) work this process.

Business Benefit Categories

- Assuming 10% exceptions an FTE saving of approximately 2.5 FTE

- Assuming 10% exceptions a cost avoidance of 2.5 FTE within 12 months as volumes are expected to double.

- Increased accuracy

- Improved customer journey as quote will be returned to customer more quickly.

- Elimination of backlogs during busy periods.

Exceptions and Referrals

It is expected that the initial Business Referral level (i.e. process actions that are to be referred by the UiPath process to the Operational Department for manual input and therefore not expected to be automatically processed end to end) is estimated to be approximately 10 %.

The level of Host System Exceptions (i.e. cases where unexpected host system events are encountered) is expected to be in the range of 0 – 5 % when the process is initially made operational. This range estimate will be reviewed and refined during the project design and delivery phase.

Environment Considerations

The number of virtual desktops required for this process will be one.

Initial Process Analysis Summary

Key Factor Assessment

The following factors were analysed as part of the data gathering exercise for this Initial Process Analysis. Each item is rated on the following scale:

1. Reduce the exception levels, size or estimate range

2. Average exception level (5-15%), size (20-30 days) or estimate range (10 days)

3. Increase the exception levels or estimate range

Factor	Rating	Comment	Impact Area
Business Process Definition	**1**	**Detailed, documented process descriptions exist and have been witnessed.**	**Exception levels**
Subject Matter Expert	1	The SME has good knowledge of the documented process and will be made available to support the project	Exception levels
Process Complexity	**1**	**The business process is very simple and uses simple proven interfaces,**	**Estimate size**
Host Application Technology	1	HTML	Host Application Technology
Re-use of existing components	**2**	**Excel objects already exists and only small amount of functionality to be supported in new objects.**	**Estimate size**
Test Data Availability	1	The test environment is an exact replica of live	Estimate range
Hardware Availability and Security Approval	**2**	**Hardware and security strategy unclear at this time**	**Estimate range**

NOTES:

A score of 3 in any in any of the categories highlighted in Bold should trigger the activities required to produce a Refined Process Assessment (RPA).

RATINGS AND SAMPLE WORDING

Business Process Definition Rating:

- 1 – Detailed, documented process descriptions exist and have been witnessed. The quality of the documentation will be assessed during the next phases of the project

- 2 – High level process descriptions exist and have been witnessed. The quality of the overviews will be assessed during the net phases of the project

- 3 – No material process documentation exists. A Business Process Walkthrough is required in order that a Refined Process Assessment can be produced.

Subject Matter Expert: -

- 1 – The SME has good knowledge of the documented process and will be made available to support the project

- 2 – The SME has limited knowledge of the documented process OR the SME has reasonable knowledge of the process but will have only limited availability to support the project

- 3– No SME identified with sufficient knowledge of the detailed process

Process Complexity:

- 1 – The business process access has an small Average Unit Time and/or process involves single queue transaction and/or process does not update business critical data and/or no changes required to end to end business process.

- 2 – The business process access has an reasonable Average Unit Time and/or process involves a couple of queue transactions and/or process updates some business critical data late in the process and/or minor changes required to end to end business process.

- 3 – The business process access has an high Average Unit Time and/or process involves multiple queue transactions and/or process updates business critical data throughout the cycle and/or significant changes required to end to end business process. A Business Process Walkthrough is required in order that a Refined Process Assessment can be produced.

Host Application Technology:

- 1 – HTML, Windows or Mainframe

- 2 – Java

- 3 – Citrix etc, (An Application Assessment is required in order that a Refined Process Assessment can be produced.

Re-use of Existing Components

- 1 – The majority of the components required already exist in production

- 2 – Some of the components required already exist in production

- 3 – None of the components already exist

Test data availability

- 1 – Test cases are available in the live environment and/or client approves use of production cases for controlled testing.

- 2 – A test environment exists that is an exact mirror of the live environment and the environment is readily available for BP use.

- 3 – The client has no appropriate test environment and cases in the live environment cannot be used for controlled testing or the test approach has not yet been defined.

Hardware Availability and Security Approval

- 1 – The IT team have been engaged and are able to provide the required hardware infrastructure with minimal UiPath team involvement. The security team have provisionally approved the approach subject to confirmation during the delivery project.

- 2 – Initial conversations have taken place with IT but the path to creating the required hardware infrastructure is not defined.

- 3 – The hardware infrastructure will be difficult to source and/or the security team have raised concerns over the approach. OR – the IT and/or Security teams have not yet been engaged.

NOTES:

Business Process Walkthrough

A Business Process Walkthrough requires a UiPath consultant sitting with a SME to see the process being walked through manually. All available Process Documentation should be provided in advance of this face to face meeting.

Application Assessment

Where the IPA has identified new or complex technology in the host systems, an Application Assessment will be undertaken – this requires that the UiPath product is installed on a client desktop with access to the appropriate host system(s)/

Client Site

A Client Site Investigation will be undertaken for all new and prospective UiPath clients – the ClientSite Investigation incorporates a Business Process Walkthrough and an Application Assessment.