

RPA Governance

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# Introduction

When introducing new software to an organization, we use Software Governance to manage the successful introduction of that software in its various states and stages. As RPA grows in its uses within an organisation, governance will be instrumental in ensuring the correct mechanisms are used to manage and control the activities involved when implementing the automated processes we design with IBM RPA

# Audience

The intended audience for this document will be the RPA Architects, RPA Developers and Business Stakeholders

# RPA Governance Requirement

Getting up and running with our first IBM RPA Robot can be very quick given the intuitive nature of the product, but this can lead to inefficiencies and a harder to maintain code base. Governance will help us to manage the complexities of our RPA landscape resulting in one that is efficient and easy to maintain.

## RPA Center of Excellence (CoE)

A common way to manage such governance is through a Centre of Excellence. Developing Robots to automate tasks that are already inefficient is prone to problems and may not be the best way forward, and so in certain instances, these tasks may be re designed before considering developing a bot to perform them. The Centre of Excellence will have certain responsibilities that will align with other models used within the organization, but will be tailored to suit Robotic Process Automation

Some activities for the CoE may include reporting on development cycles, monitoring and quality control.

# Development Stages

## Is RPA a good fit

Before embarking on a development effort, a process should be in place to ensure that the right decisions are made when identifying processes that would benefit from IBM RPA. This could be achieved by answering some core questions , for example

* Is the task to automate expensive?
* Does the task contain repetitive elements?
* Is data structured?
* Will the task be easy to implement?

Such a list of questions could be hardened into a flow chart that could be used to determine if a task is a suitable RPA candidate.

The processes to be automated should be well identified, organized and structured.

## Requirement Gathering

Once an understanding of the use cases and requirements are agreed, estimates can be made as to the effort required. Any risks should be determined and understood.

# Architecture

Typically, any software architecture will have at least 2 environments. This allows a separation of processes so that developers can develop and test software solutions and move them into production use in a controlled manner.

## IBM RPA Tenant

The IBM RPA Tenant is represented by the services that form the RPA service stack. The tenant can either be installed on premises or as an IBM SaaS offering. All users, groups, computers, schedules and scripts are stored within the tenant.

It is the Tenant that provides the separation required when we consider the different environments required to satisfy the dev test prod cycle.

# Environments

## Multi Tenant

Each environment can be contained within its own Tenant. This would provide complete isolation between environments. Depending on requirements it may be possible to contain non production environments within the same tenant.

## Development and Test

If multiple environments are to be contained within the same tenant, then the separation of environments will have to be managed by the naming of entities such as groups and scripts within the tenant.

There are many ways that Dev and Test can be separated when sharing a tenant. Let’s consider an example.

### Multiple Environment Script Management Example

Let us consider a script we have that allow several users to manipulate spreadsheet data. The script is called ‘MergeSheets.wal’

Developers will want to modify this script during the development stage, and they will want to promote the change to Testers.

We could achieve this by having 2 copies of the script, MergeSheets\_Dev and MergeSheets\_Test, but users will typically launch scripts with the launcher. When promoting a new copy of the MergeSheets script it would be helpful to be able to make as few changes as possible. A stub script could be used for the launcher, removing the need to re apply the script to the launcher when we promote new code.

### External Scripts

Special consideration should be made when calling external scripts when thinking about naming. If a naming convention with environment detail is used then it would make sense to carry this convention through to external scripts and parameters inside the tenant.

## Production

The production environment will typically be a separate tenant. Developers and Test users will not be part of that tenant and scripts will not need separation by naming although similar naming conventions can still be used.

# Conclusion

As in any technology driven process, governance will drive us towards software that is better designed and understood. This will result in robots that can help reduce costs and improve productivity.