Automation Implementation Methodology

Roles and Responsibilities: Business Team

This handout lists the roles and responsibilities associated with each role in the business team.

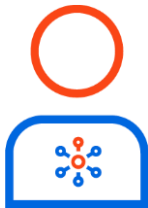| Role	Stages Involved	Key Task
Engagement Sponsor	• Kickoff • Project Closure	• Finances implementation projects • Approves Change Requests and billing packages • Signs off completed projects
Client Project Manager	• All implementation stages	• Manages the overall implementation from the client team side • Coordinates with the UiPath and client team for project success • Provides all necessary resources for project success • Works with IT provision robot hardware, developer and client Subject Matter Expert or SME software, and access • Approves the selection of deliverables and updates business cases • Collaborates with UiPath Project Managers to develop hardware, software, and access requirements plans • Works with UiPath Project Managers on project-level retrospective • Manages internal processes and escalations in projects
Process Owner	• All implementation stages	• Is familiar with the entire process • Is the point of contact for general information about the process • Approves the Process Definition Document (PDD) and User Acceptance Testing (UAT) • Works with the Support team and client Solution Architect to obtain Solution Design Document (SDD) approval after UAT

		• Approves the initial and updated business cases • Obtains the application owner's or owners' approvals of the as-is and to-be High-Level Designs • Creates a deployment plan with the Solution Architect • Creates a change ticket for production deployment

Process SME	• All implementation stages	• Collaborates with BA and supplies documents for knowledge transfer and evaluation of the process and existing Standard Operating Procedure (SOP)
		
		• Collaborates with BA and Automation Developers to provide the test data and carry out UAT
		
		• Performs the following to identify the cause and fix defects
		
		   – Detects and logs defects
		
		   – Notifies the developer
		
		   – Provides additional details
		
		• Retests the scenario to verify the bugs resolved
		
		• Upon completion of the UAT:
		
		   – Provides feedback to the Process Owner to facilitate sign-off
		
		   – Performs load and stress tests
		
		   – Monitors hypercare
		
		   – Coordinates with Process Owners for completion and signoff

	• All implementation stages	• Are knowledgeable about the organization's technical setup

Client IT Team		• Assists the UiPath Automation Implementation Team to:
		
		   – Integrate with the client's systems
		
		   – Access applications
		
		   – Provision robots
		
		   – Deploy automation
		
		• Supports technical setup details and deployment when consulted

Development Team	• All implementation stages	• Performs similar roles to their respective UiPath Automation Team counterparts • Supports the business development need • Informs the team about project development • Works with the UiPath Automation Implementation Team and supplies formal knowledge transfer to support resources

Support Team	• User Acceptance Testing	• Receives the documentation, and the knowledge transfer takes place from the development team during and after UAT
		
		• Handles long-term support of automation after project closure
		
		• Supports in three levels:
		
		   – At level 1, figures out the root cause and assists with simple issues, and escalates if needed
		
		   – At level 2, assists with more complex issues, makes small code changes to resolve issues, redeploys the automation, and escalates if needed
		
		   – At level 3, makes large edits and changes to resolve issues and redeploys the automation
		
		• Approves change requests and go-live

		• Sets up Production Orchestrator and robot machines
		
		• Deploys the automation to production
		
		• Collaborates with the UiPath or Client Solution Architect and Developers to:
		
		   – Review code
		
		   – Create, review, and approve the Runbook
		
		• Collaborates with the Solution Architect and Developers to define support and knowledge transfer requirements
		
		• Engages in knowledge transfer
		
		• Works with UiPath Product Support on issues unrelated to the specific process and deemed to be product issues