



Automation Implementation Methodology

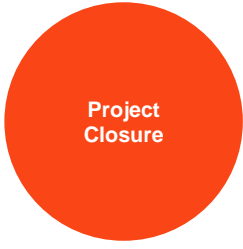
The Implementation Methodology Model

This handout lists the key people and tasks involved in each phase of the implementation model.

Stage	Role Involved	Key Task	Output
 Kickoff	<ul style="list-style-type: none"> • Solution Architect • Project Manager • Infrastructure Engineer 	<ul style="list-style-type: none"> • Set up the overall expectations of the project • Early RPA readiness discussions about: <ul style="list-style-type: none"> – Client's environment and infrastructure – Test and dev environments – Test data/test cases 	<ul style="list-style-type: none"> • Reviewing the SOW • Setting up communication cadence • Completing the customer readiness checklist • Initiating the Issue Tracker
 Business Case and Technical Validation	<ul style="list-style-type: none"> • Solution Architect • Project Manager • Business Analyst 	<ul style="list-style-type: none"> • Assess potential automations for their complexity and feasibility • Validate the estimated timelines and efforts required for successful delivery • Validate the Business Case for the selected use cases and the Cost Benefit part of it • Identify the key complexity, technical dependencies, and access to key applications 	<ul style="list-style-type: none"> • Verifying the automation use case • Confirming use case alignment with contract expectations
 Process Analysis	<ul style="list-style-type: none"> • Solution Architect • Project Manager • Business Analyst 	<ul style="list-style-type: none"> • Analyze the chosen process in its as-is state and start the PDD • Identify the degree of automation • Streamline the business flow to the 'to-be' process • Fill the PDD with the as-is and to-be processes 	<ul style="list-style-type: none"> • Defining and finalizing the "to-be" process • Completing and approving the PDD • Creating and approving the UAT plan

 <p>Solution Design</p>	<ul style="list-style-type: none"> • Business Analyst • Solution Architect • Project Manager • Automation Developers 	<ul style="list-style-type: none"> • Design a future state flow and maps out modules for automation development • Use Application Tracker to record access required by the developer to build and run automation UAT and Production • Prepare the Technical Testing plan encompassing UAT scenarios, functional testing, and system integration testing 	<ul style="list-style-type: none"> • Completing the SDD document • Completing the Application Tracker • Completing the Technical Testing Plan
 <p>Development and Testing</p>	<ul style="list-style-type: none"> • Solution Architect • Project Manager • Automation Developers 	<ul style="list-style-type: none"> • Create the modules outlined in the design whiteboard using the PDD and SDD • Review and make necessary changes to the code • Test and run the modules individually in controlled settings • Execute the Technical Testing plan after Development and Unit Testing • Create automated tests for functional testing to confirm large functions work independently • Complete end-to-end test for system integration testing • Run all UAT test scenarios 	<ul style="list-style-type: none"> • Building automation • Completing Unit and Integration Testing • Completing code review • Executing Technical Testing plan

 <p>User Acceptance Testing (UAT)</p>	<ul style="list-style-type: none"> • Solution Architect • Business Analyst • Project Manager • Automation Developers 	<ul style="list-style-type: none"> • Conduct UAT in coordination with the implementation team • Run all the potential happy-path and business exception scenarios • Ensure all agreed-upon scenarios are tested • Log any deviations and fix that with the help of the Automation Team • Create a Runbook document template with the following details: <ul style="list-style-type: none"> – System architecture – Production environments – Operating instructions for automation – Instructions to the operations, IT, and automation implementation team • Document the Runbook template for every automation 	<ul style="list-style-type: none"> • Executing UAT Test Cases • Signing off client business team test execution • Completing the Runbook document
 <p>Deployment and Hypercare</p>	<ul style="list-style-type: none"> • Solution Architect • Project Manager • Automation Developers 	<ul style="list-style-type: none"> • Migrate the final process packages, libraries, and assets to the production Orchestrator • Identify and address issues quickly using hypercare • Run and review production cases using hypercare • Fix issues promptly and re-push to production 	<ul style="list-style-type: none"> • Revising the Runbook document • Completing production bug fixes

		<ul style="list-style-type: none"> Initiate knowledge transfer during hypercare 	
 Project Closure	<ul style="list-style-type: none"> Solution Architect Project Manager Business Analyst Automation Developers Business Team 	<ul style="list-style-type: none"> Confirm conformance of all services are made as per the contract Carry out the handover process for long-term support of the developed automations Check and close financial loops 	<ul style="list-style-type: none"> Checking and signing off contract completion by the client Initiating knowledge transfer and document handover