






Automation Implementation Methodology

Roles and Responsibilities: UiPath Team

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

Role	Stage Involved	Key Task
 <p data-bbox="197 1081 365 1111">Project Manager</p>	<ul data-bbox="488 448 756 506" style="list-style-type: none"> • All implementation stages 	<ul data-bbox="860 448 1426 1518" style="list-style-type: none"> • Manages the overall implementation • Coordinates the UiPath and client teams for successful project completion • Manages issues, risks, changes, and escalations in the project • Creates and maintains comprehensive project documentation • Ensures that the Statement of Work (SOW) is communicated and followed • Assesses client delivery readiness • Works with stakeholders to coordinate project personnel • Manages engagement setup, milestone tracking, status reporting, timesheet reviewing, and financial forecasting • Creates a project plan, staffing plan and communicate requirements • Sets up internal and client project meetings • Obtains approval for project documentation • Helps to coordinate and forecast the need for a Change Request • Performs project close actions
 <p data-bbox="197 1895 365 1924">Business Analyst</p>	<ul data-bbox="488 1608 767 1989" style="list-style-type: none"> • Business Case and Technical Validation • Process Analysis • User Acceptance Testing (UAT) • Solution Design • Project Closure 	<ul data-bbox="860 1608 1394 1955" style="list-style-type: none"> • Becomes knowledgeable of the business process to be automated based on the organization's goals • Is knowledgeable of general business process theory, techniques, frameworks, and automation capabilities • Gathers process requirements • Clarifies the inputs and expected outputs

		<ul style="list-style-type: none"> • Creates the required documentation • Documents the high-level requirements • Assesses business case potential • Creates a high-level work breakdown for the 'TO-BE' process state • Makes recommendations and runs the suitability and viability study • Creates and updates business cases • Creates a Process Definition Document (PDD) and documents the process at a keystroke level • Creates a User Acceptance Testing (UAT) plan • Defines success criteria such as understanding functional and non-functional requirements • Ensures the automation output is in line with the signed-off requirements • Validates any change requests • Starts the Change Request management cycle and updates the PDD after approval • Works on the engagement retrospective analysis
 <p>Solution Architect</p>	<ul style="list-style-type: none"> • All implementation stages 	<ul style="list-style-type: none"> • Acts as a lead and advisor of the development team • Defines the architecture of automation solutions • Oversees the design and implementation of the project • Recommends the appropriate set of tools and features • Creates an initial license estimate • Updates the license estimate

		<ul style="list-style-type: none"> • Performs code reviews • Ensures that the technical best practices are followed • Works with developers to create the Solution Design Document (SDD) and the Technical Testing Plan (TTP)
 <p>Automation Developer</p>	<ul style="list-style-type: none"> • Solution Design • Development and Testing • User Acceptance Testing (UAT) • Deployment and Hypercare • Project Closure 	<ul style="list-style-type: none"> • Builds automations following best practices and coding standards specific to business requirements • Makes changes to the automation during the development, testing, and hypercare phases • Communicates the changes to the Project Manager or Stakeholders • Conducts knowledge transfer sessions with the client's team • Assists in creating and reviewing the SDD • Reviews project documents, such as the PDD • Maintains code repositories • Builds solutions • Executes the TTP • Executes UAT including logging and fixing defects • Runs test cases
 <p>Infrastructure Engineer</p>	<ul style="list-style-type: none"> • Kickoff 	<ul style="list-style-type: none"> • Is well-versed in the UiPath Platform infrastructure • Assists in technical infrastructure-related issues • Works with the client's infrastructure and applications teams to integrate the UiPath Platform into their business • Reviews project requirements, hardware, and software requirements

		<ul style="list-style-type: none">• Analyzes the client's existing infrastructure• Designs and deploys infrastructure and applications• Assists in maintenance and upgrades
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