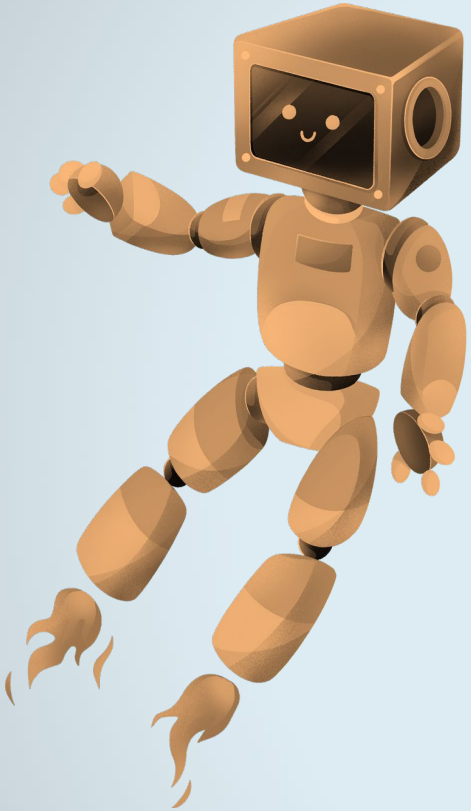

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The University of Texas System

THE UNIVERSITY OF TEXAS SYSTEM Alliance
Creating Value Through Collaboration & Automation

What is Robotic Process Automation (RPA)?

RPA: Robotic Process Automation Described

What is **RPA?**

RPA is the application of software “robots,” not physical robots, that mimics human action and connects multiple systems through automation without changing the existing IT landscape

RPA is integrated in an existing IT infrastructure

As a renewal of the existing IT landscape is not required, a high level of automation can be reached without major effort. RPA uses established control mechanisms and can communicate with all systems. Therefore, no interface has to be created.

RPA is a software

RPA is a computer software that runs repetitive, rule-based processes. The software is trained based on functional specifications and can be adjusted at any time.

RPA simulates an employee

The software robot has access to diverse applications with an ID or a password. The robot can gather information or change data. Consequently, business and administrative processes can be fully automated.

Capabilities

- Log into applications
- Enter data from excel
- Collect, move data and files
- Formulate data
- Fill in forms
- Open emails & attachments
- Extract structured and semi structured data from documents
- Scrape browsers
- Report generation
- Read databases
- Follow if/then decisions

USE CASE CHARACTERISTICS

- Tedious, repetitive tasks
- High-volume transactions
- Rules-based answers
- Manual work prone to errors
- Tasks performed outside office hours
- Existing work supported by algorithms or macros

Deterministic

(***Rule-Based***)

The process contains a **defined set of tasks** required for execution

Digitized

(***Electronic***)

The data required for the process can be **accessed electronically**

Documented

(***Well Defined***)

The process is transcribed with the **appropriate details**

RPA Use Case Examples

Finance & Accounting

- Billing / Invoicing
- Payments processing
- Cash application
- Reconciliations
- JE support
- Costing
- Fixed Assets
- Incentive claims
- Closing procedures
- A/R follow up & credit analysis
- Reporting
- Grant Closing procedures

HR Services

- Recruiting
- Onboarding
- Payroll processing
- Benefits administration
- Time & attendance management
- Education and training
- Off-boarding
- Compliance Reporting
- Position number reconciliations

IT Services

- Software Installations
- Data migrations
- Application testing
- Server application monitoring
- Identity & access management
- Security monitoring
- Help Desk management
- Policy distribution & compliance reporting

Higher Education

- Course registration
- Enrollment process
- Transcript Evaluation
- Shortlist candidates
- Attendance management
- Eligibility criteria check
- Schedule meetings
- Equipment reservations
- Student Withdrawal Expense
- Mailing
- State reporting
- Student closing reports

Risk & Controls

- Quality audits
- Compliance audits
- Internal audit enablement
- Security tracking & monitoring
- Technical threat & vulnerability management
- Access management

Supply Chain

- Spend categorization & reporting
- New vendor setup
- Contract creation & updates
- Contract compliance audits
- Contract reporting
- Quote & invoice management
- Returns processing
- Freight management
- Inventory management
- Capital equipment requests

Revenue Cycle

- Eligibility Checking
- New patient appointment requests
- Patient pre-arrival and arrival
- Claim denials
- Credit balances
- Medically Unlikely Edits
- Billing inquiries
- Code changes
- Identify payor and physician underpayments/overpayments

Customer Relationship Management

- Customer setup and master data mgmt.
- Password resets
- Appointment scheduling
- Downloading customer profile to Contact Center employee
- Automated Contact Center reporting
- Anticipate customer needs and follow up
- Pareto ranking of issues
- Automating internal reporting of customer inquiries and issues

Highlighted use cases are those that IASG have worked.

To Learn More About RPA

Please refer to the resources and webinars located at

https://www.utsystem.edu/offices/collaborative-business-services/intelligent-automation-services-group

Objective of UT System RPA Initiative

Background and Program Objectives

- Started in 2018, this initiative has a significant opportunity to help each UT System institution "**to do more with the same**." Automating manual, mundane, repetitive, rules-based tasks that can be done outside of normal business hours may be very advantageous in controlling administrative costs in the years ahead.

- Key objectives
  - Reduce operating cost and/or increase revenue
  - Increase productivity, reduce errors and improve quality
  - Reduce exposure to risks and enhance compliance
  - Enhance customer service
  - Increase employee satisfaction
  - Improve information available for decision-making and planning

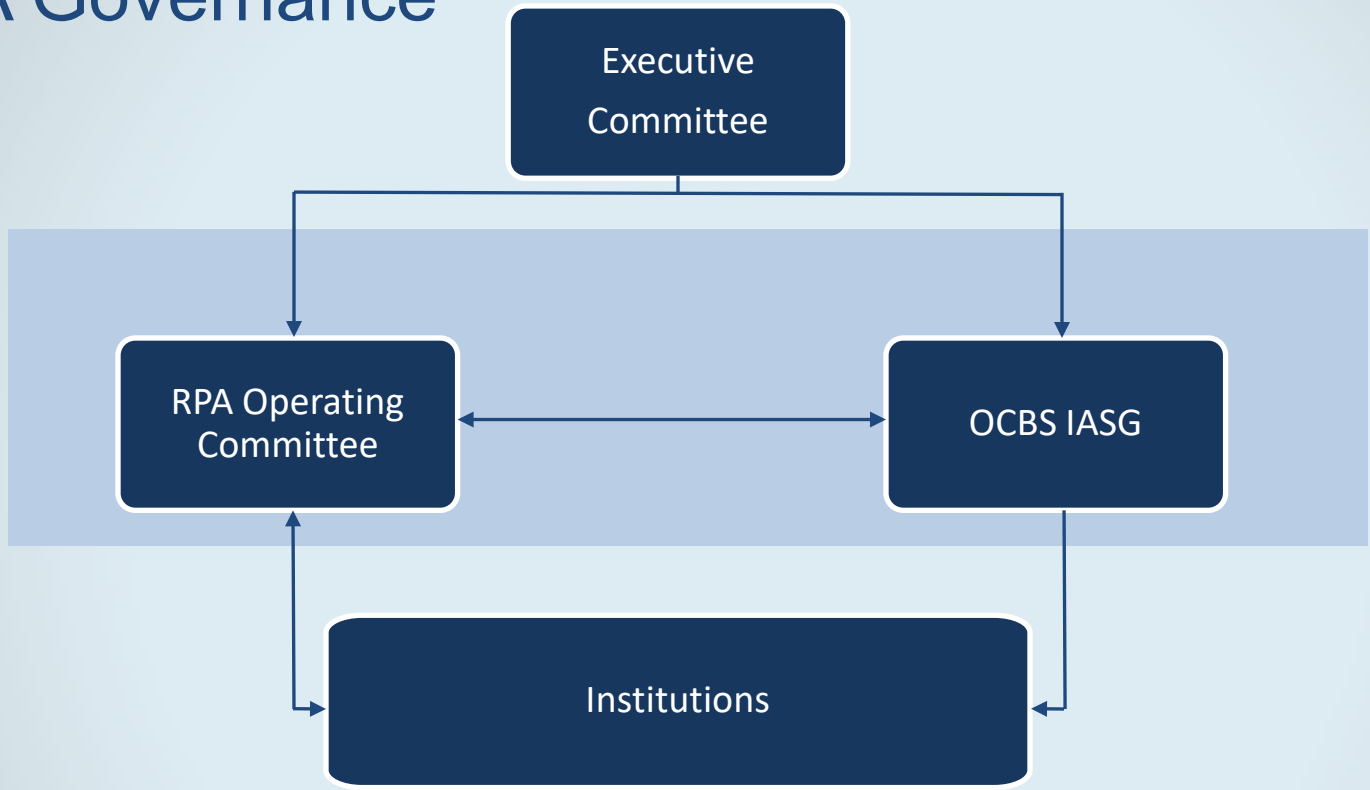
- Programed managed by UT System Office of Collaborative Business Services-Intelligent Automation Services Group

How is the program governed?

Governance Framework

The governance framework is established to focus on RPA development, financial planning, resource management, and control and risk management. The framework promotes cross campus collaboration, and tracks program scalability and value.

RPA Governance



RPA Governance Body

UT System OCBS Executive Committee

- Approves strategic direction, annual OCBS work plan and budget, projects and related budgets and monitors performance.
- Members comprised of Chief Business Officers from each UT System Institution.

UT System RPA Operating Committee

- Members comprised of representatives from institutions that are appointed by CBO
- Develops and recommends activities to the EC that achieve the RPA Strategy, operationalize lessons learned, and deploy new process automations.
- Develops RPA program expertise and shares knowledge
- Serve as Institution's communication conduit and RPA champion
- Recommends use cases and program improvements

IASG is a division of the UT System Office of Collaborative Business Services (OCBS) that provides the following services:

- Webinar & Education Programs
- Business Process analysis for automation
- Automation Design and Development
- Hosting and Monitoring Services
- Consulting Services

What is the Robotic Process Automation Operating Model (ROM)?

Purpose of Robotic Process Automation Operating Model (ROM)

The ROM is to be used as both a reference guide and tool to help guide IASG and Institutions through the RPA journey. It contains seven integrated pillars to ensure value realization. It demonstrates a formally structured, reusable framework and processes for a sustainable RPA Operating Model that will allow the program to consistently apply methodologies and deliverables. Elements include governance, roles & responsibilities, ideation, deployment, and support.

IASG has established templates that are available to each institution, such as functional and design documents, unit testing scripts. In addition, IASG can provide the expertise in best practices and standards related to topics in ROM.

RPA Operating Model (ROM)

Seven integrated Pillars to ensure value realization

Vision

- **1.1 Program Purpose**
  - Benefit definition
  - Executive sponsorship
  - Funding availability
- **1.2 High Level Business Case**
  - Program targets
  - Alignment w/ other improvement programs
- **1.3 Business & IT Readiness**
  - Business risk considerations
  - System strategy compliance
  - Vendor management
- **1.4 Value Measurement**
  - Performance Management
  - Benefits Realization

Organization

- **2.1 RPA Program Structure**
  - Model options
    - (Centralized vs Federated)
  - Maturity model
  - Roles & responsibilities
  - Skills assessment

Governance and Pipeline

- **3.1 Policies & Standards**
  - Program Governance
  - Process Prioritization
  - Development Protocols
  - RPA Risk & Controls
  - SLA Agreements
  - Asset Management
- **3.2 Readiness Assessment**
- **3.3 Opportunity ideation**
- **3.4 Opportunity assessment & Prioritization**

Delivery Methodology

- **4.1 Implementation methodology and design**
- **4.2 Develop User Stories & Test Cases**
- **4.3 Liaison with development teams**
- **4.4 Agile Approach**
- **4.5 User Acceptance Testing**
  - Define participants
  - Modifications
- **4.6 Performance testing**
  - Modifications & tuning
- **4.7 Migration to production**
  - Determine bot scheduling
  - Documentation sent to asset management
- **4.8 HyperCare**
  - Knowledge transfer
  - Transition to ongoing management model
- **4.9 Continuous operations**
  - Execute & monitor process change

Service Model

- **5.1 Daily**
  - Bot scheduling
  - Real time monitoring of RPA applications, IT infrastructure
  - Reporting framework
  - Incident Management and SLA adherence
- **5.2 Periodic**
  - Management of Change Control tickets
  - Communications with application owners
  - Communications with IT & Security
  - Institutional Integration
  - Infrastructure improvements

People

- **6.1 Stakeholder & Change**
- **Management**
  - RPA Toolkit
  - Change Champion Network
  - Coaching & Communications
  - Training
- **6.2 Talent Management**
  - Define Future State Roles
  - Assess Current Roles & needs
  - Define Learning Strategy
  - Create Learning Personas & Pathways
  - Implement & Monitor

Technology

- **7.1 Infrastructure**
- **7.2 Access Management**
- **7.3 Hosting Options**

Additional Resources

- The UT System RPA ROM can be found at the UT System OCBS Resources website.
- Foundation and principles of the Blue Prism ROM can be found at ROM Hub - SS&C Blue Prism Community
- Blue Prism ROM Certification Blue Prism University | Homepage

Are Digital Workers safe and secure?

Digital Workers are Safe Because…

Security Access and Privileges

- A digital worker is assigned access and privileges like a human worker. Their credentials are stored in a secured credential manager within the Blue Prism application.

Separation of Duties

- Roles of system admins, developers, and bot controllers are segregated within the application.

Security Audits

- Digital identity and access management is provisioned with an audit feature that allows tracking of all activity performed by the digital worker.
- Digital workers only follow prescribed rules.

End to End Encrypted Data

Information Security and the Digital Workforce Webinar

The Information Security and the Digital Workforce Webinar is a presentation shared by a Blue Prism Enterprise Architect that covers security governing principles. Topics include network security, credentialing, access restrictions, user profiles, authentication, authorization, encryption, and the architecture design.

A copy of the video and presentation can be found the at the UT System OCBS Webinar website.

What is the process and time commitment to automate a process?

Build a Digital Worker

2-4 weeks

8-12 weeks

Continuous

Process Selection	Design	Build	Deploy	Maintain

• Ideate
  • Characteristics
  • Business Case
  • Current Applications
• Opportunity Assessment
• Process Tool
	• Document Steps
	• Record Process
	• Develop Functional Design
	• Develop Solutions Design
		• Develop automation in Blue Prism
		• Unit Test
		• User Test
			• Move to Production
			• Schedule automation
			• HyperCare
				• Monitor
				• Make code changes

The University of Texas System

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Creating Value Through Collaboration & Automation

Roles & Responsibilities Per Process

DESIGN	BUILD	TEST	DEPLOY
Capture As-Is Process	Build Business Process in RPA Software	Test Automated Process & Perform UAT	Implement & Stabilize Processes in Production
2 weeks	~6 weeks	2 weeks	2 weeks

Roles and Time Commitments

DESIGN

IASG

Process Analysts
- Creates the functional design documents (FDD) with Business Units
- Establishes sprint activities
- Maintains repository for all documentation
- Support institutional project manager activities

Technical Architect
- Develops solution design, feasibility

Institution

Project Manager
- Provides project oversight, workshop coordination, communication, and obtains sign-off on FDD.

Business Process Owner
- 3-4 sessions (2 hours each to understand processes)
- 4-6 hours for review of proposed solution (FDD) and sign-off
- **ACCEPTANCE:** Sign off on Functional Design Document

IT
- 6-8 hours to sit in process workshops and assist with to-be updates to systems, if needed
- 2-4 hours to set up access needs to systems such as PeopleSoft, networks, etc.

BUILD

IASG

Process Analysts
- Supports Build process
- Support institutional project manager activities

Technical Architect
- Oversees developers, sets coding standards

Automation Developer
- Codes in selected software.

Institution

Project Manager
- Manages sprint activities

Business Process Owner
- 4 hours per week to review progress and provide clarifications
- Time to prepare test data & scenarios
- Validate demos of bots working

IT
- 2-4 hours for access updates, technical troubleshooting

TEST

IASG

Process Analysts
- Creates the testing template with business unit
- Support institutional project manager activities

Technical Architect
- Oversees testing requirements

Automation Developer
- Tests in selected software.

Institution

Project Manager
- Manages sprint activities
- Coordinates UAT scripts, and obtains signoff.

Business Process Owner
- 6-8 hours per week for User Acceptance Testing and feedback on results
- **ACCEPTANCE:** Sign off on successful test scenarios

IT
- 4-6 hours per week for User Acceptance Testing review; access updates

DEPLOY

IASG

Process Analysts
- Supports transition
- Support institutional project manager activities

Technical Architect
- Guides the migration to production

Automation Developer
- Provides stabilization support

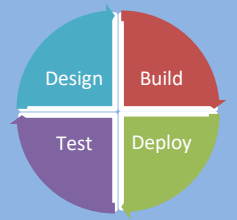
Institution

Project Manager
- Manages sprint activities
- Reconciles deliverables; ie. (FDD,SDD, Invoices)

Business Process Owner
- 2-4 hours to review of production results (dependent on frequency of process)
- **ACCEPTANCE:** Sign off on stabilization in production (# of successful runs)

IT
- 2-4 hours to assist with any technology issues

Total Hours over 12 weeks



IASG

PM Process Analysts
- 115 hours per process

Technical Architect
- 30 hours per process

Automation Developer
- 280 hours per process

Institution

Project Manager
- 50 hours per process

Business Process Owner
- 48-60 hours per process

Information Technology
- 20-30 hours per process

How do I determine what to automate?

Automation “Use Case” Characteristics

- Tedious, repetitive tasks
- High-volume transactions
- Rules-based answers
- Manual work prone to errors
- Tasks can be performed outside normal office hours
- Existing work supported by algorithms or macros

Opportunity ideation

Use Case Characteristics for RPA

Business Unit Support will identify and submit processes as potential RPA opportunities. All submissions **must** include and meet the following minimum conditions[1] to be recognized as a suitable candidate:

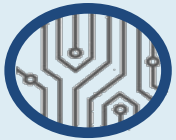
Deterministic

(*Rule-Based*)

The process contains a **defined set of tasks** required for execution

A process is deterministic if:

- There is a sequential series of tasks with fixed start and end conditions
- There is no randomness or judgement (i.e., the process is rule based) in outcomes



Digitized

(*Electronic*)

The data required for the process can be **accessed electronically**

Examples of digitized storage include:

- Local PC drive
- Shared network drive
- IT Application / database

Documented

(*Well Defined*)

The process is transcribed with the **appropriate details**[2]

Critical details include:

- All business process owners
- Instructions for executing each process task
- Key business/ system exceptions and corresponding workarounds

[1] Additional criteria may be introduced at various stages of the RPA program to reflect the goals and scope
[2] Keystroke documentation will not be required at the identification phase

High-level business case

Analytics helps validate overall goals, allocate goals to specific areas and prioritize further assessment and implementation activity play a role?

Coverage – *Creating the funnel*

Pipeline size: Typically ratio equals 3x opportunities identified to realized savings target

Functional breadth: In order to generate sufficient opportunities program scope should consider multiple functional areas

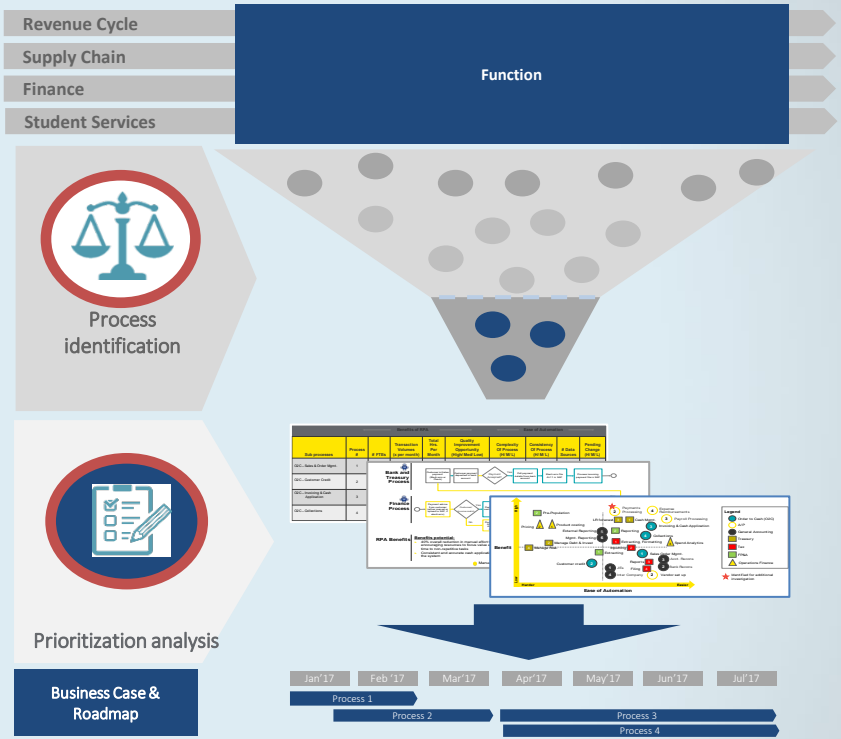
Actual benefit realization: Full benefits are usually realized 2-3 months after deployment therefore it is important to identify quick wins

Implementation pipeline: Opportunity pipeline should include functional and technical diversify to allow for parallel workstreams

Benefit realization - *Maximizing the funnel throughput*

1. **Materiality -** Identify largest dollars and FTE's including areas of high growth (potential cost avoidance)
2. **Most variable labor -** Focus on contingent labor, outsourced tasks, Global Business Services (GBS) and OT for retained FTEs
3. **Easiest path to realization**
   - Executive sponsorship
   - Discreet activities (HC 100% dedicated to activity)
   - Maximum concentration (transactions and FTE) per tower
   - Non-customer facing or critical process
   - Limited impact to existing systems
   - Existing skills for RPA technology
4. **Complexity/ feasibility**
   - Data quality/ integrity
   - Process and/or system stability
   - Compliance sensitivity

Opportunity identification and roadmap creation



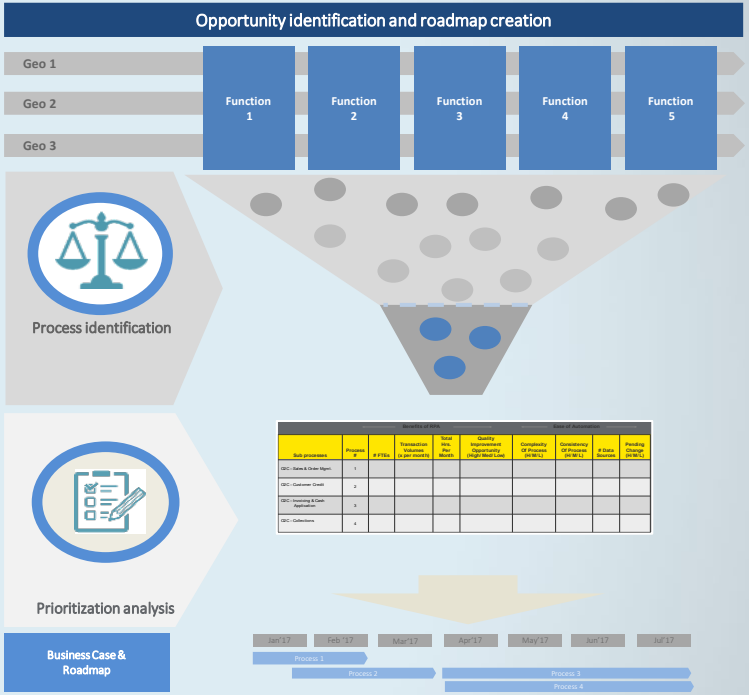
Opportunity/Process Assessment Success Factors

Approach

- Identify process automation opportunities by function / institution (pre-work by institution to gather needed information on process, sub-process, task, etc.)
- Process owners participate in workshops over a three-week timeframe for two to four hours to review a selected Function (Finance, Budgeting, Rev Cycle, Supply Chain, or HR) for automation potential and value

Success Factors

- Inventory of processes by functions
- Process documentation available
- Headcount and effort tied to processes available
- Availability of Process Owners during Opportunity/Process Assessment workshops
- Minimal competing initiatives during workshops



What process can be automated? What processes has UTS automated?

UT System Institutions' Projects in Production
Value Achieved From Feb 2019 thru FY25- Q2 (Feb 2025)

UTA	UTEP	UTPB	UTSA	UTT
Grant Close Feb 2019 $196,954	Grant Close May 2023 $182,161	Grant Close Apr 2023 $61,589	Grant Close May 2023 $117,865	Review & Validate Mar 2019 $308,908
Sahara UTS142 Notifications Close Announcement Nov 2023, Reminder Notice Dec 2023, 30 Day Past Due Jan 2024 60 Day Past Due Feb 2024, 90 Day Past Due Mar 2024 120 Past Due to Leadership Apr 2024 $175,526			TRS Recon TRS to HCM - $4,487 Aug 2023 TRS HCM to GL - $4,812 Feb 2024	TMHP Medicaid Jan 2023 $16,263
			Missing Receipts Aug 2024 $20,452	Grant Close Jan 2024 TBD
				TRS Reconciliation May 2024 TBD
				Fixed Assets Reconciliation Aug 2024 TBD

UTSWMC	UTHSCH	UTHSCSA	UTMDACC	UT System Admin
TMHP Medicaid Apr 2021 $13,071,156	Review & Validate Feb 2019 $1,633,752	TMHP Medicaid Mar 2020 $22,050,762	Payor Under/Over Payment Apr 2022 $1,662,994	LBB Reporting Nov 2021 $131,333
MR Records/Denials BCBS $262,900		Clinical Trials Invoice Creation Aug 2024 $6,946	TMHP Medicaid Jul 2022 $1,880,087	
			Agency Nursing Timekeeping Dec 2023 $4,576	

Automations in Development
Academic Institutions

Submitted Institution	New / replicate	Process Area	Process Name	Description	Target Completion – FY25	Status
UTSA	New	Student Services	Loan Refund	Parent Plus Loan refund processing utilizing Banner report AR_F404 Loans_Holds_Rpt (student info) and the TSARREV (refund amt), and generate voucher in PeopleSoft.	Q4	Build
UTSA	New	Payroll	Pre-Distribution Audit	Replicate finding source of funding discrepancy when paysheets are open This particular process would need more details but could be used at other UTShare institutions.	Q4	Build
UT System Admin	New	Supply Chain	HUB Reporting	Monthly HUB reporting that pulls a report of expenditures, removes exceptions, reconciles that data against the TPASS report, and delivers the output report to a shared network folder.	Q3	Production
UTT	New	Student Services	Patriot Promise Management	Run five queries from PS CMS production, clean up such as deleting rows, merging cell data, calculations. Produce a single output file of students eligible to receive the Patriot Promise distribution. If permitted to allow digital worker to batch upload.	Q3	UAT
UTT	New	Student Services	Federal Reconciliation	Reporting spend by running several queries such as UT Share Balance, Awards, Disbursements, and COD reports. Compile data and identify discrepancies.	Q4	Build
UTT	New	HR	eForms CiProcess	The eForms Ci Process is employed to execute approved changes from eForms to PeopleSoft related to job changes, encompassing activities like hiring, termination, job attributes, and assignment transfers.	Q4	Design/ Hold

Automations in Development
Health Institutions

Submitted Institution	New / replicate	Process Area	Process Name	Description	Target Completion – FY25	Status
UTHSCSA	New	Clinical Research	CTO Create Invoice and PDF	Phase 2 which creates the CTO invoice was completed in March 2025. Phase 3 generates PDFs is expected by Q3.	Q3	Build
UTMDACC	New	Supply Chain	Tecsys Automated Fill/Kill Process (TAFKP)	Making cancellation changes to the supply order in Tecsys, the Inventory Management System, when orders from the distributor, Medline, can not be fulfilled.	Q3	Build

Automations in Proof of Concept

Submitted Institution	New / replicate	Process Area	Process Name	Description and Activity Update
UTPB	New	Student Services	Transcript Evaluation*	Collect course and testing from undergraduate transfer transcripts. Conducted testing on Microsoft Ai Builder training model, and modified approach to combine IDP and GenAi models for retro verification and correction method. A scheduled demo to the UTPB team is scheduled for 5/5.
UTMDACC	New	Accounts Payable	Invoice Processing IDP Solution*	Create PeopleSoft vouchers from invoices. Evaluated Microsoft's out-of-the-box Invoice and Document Automation solutions, including customization for Life Technologies, and compared them with GPT-4o prompt-based extraction in Power Platform. Developed a quick POC, shared it in a technical collaboration session. A demo to be scheduled with the MDA AP team.

- Currently testing Learning Language Models (LLM) and Generative AI capabilities alongside IDP technology and developing an implementation framework. The goal is to enhance output quality while minimizing the need for human intervention, model training, and ongoing maintenance.

Automations in Evaluation or Pre-Design

Institution	Name	Proposed	Evaluation Completion Target
UTA	Car Rental Voucher Processing	Q1	Q3
UTSA	HUB PAR Documentation	Q1	Q3
UTRGV	PS Encumbrance's to PO	Q1	Q3
UTHSCSA	HUB Par + B2G Payment Interface from PS + HUB “EC” Reports	Q1	Q3
UTHSCSA	HUB PAR Payment Processing	Q1	Q3
UTHSCSA	B2G Payment Interface	Q1	Q3
UTMDACC	Tecsys Automated Fill/Kill Process (TAFKP)	Q1	Complete. Moved to Development Q2

Automations in Ideation

A complete list of automations in ideation can be found on the IASG website:

https://www.utsystem.edu/offices/collaborative-business-services/intelligent-automation-services-group

Who is IASG? What services does IASG provide?

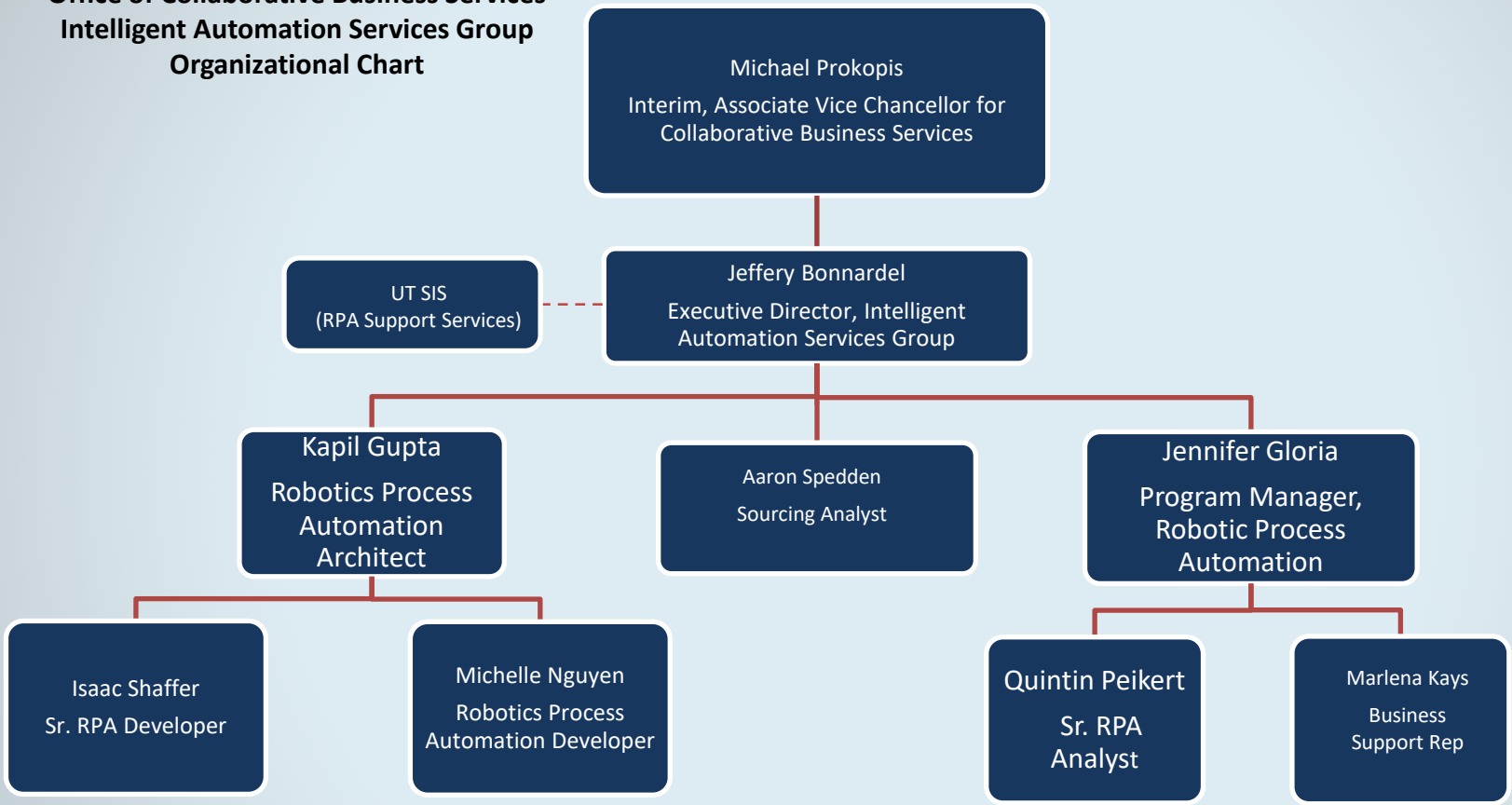
Who is IASG

Intelligent Automation Services Group (IASG) is an internal support group that serves all UT System Institutions for business process automation utilizing RPA and Intelligent Automation tools.

Intelligent Automation Services Group Offers

- Webinar & Education Programs
- Business Process analysis for automation
- Automation Design and Development
- Hosting and Monitoring Services
- Consulting Services

Office of Collaborative Business Services
Intelligent Automation Services Group
Organizational Chart



Intelligent Automation Services Group (IASG)

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Has RPA delivered value to UTS?

Value Creation through FY25 Q2

Institution	Process	FY19	FY20	FY21	FY22	FY23	FY24	FY25	Totals
UTHSCH	Review & Validate	$133,236	$266,472	$266,472	$266,472	$279,702	$280,932	$140,466	$1,633,752
UTT	Review & Validate	$20,466	$40,932	$40,932	$46,840	$51,995	$68,851	$38,893	$308,908
UTHSCSA	TMHP Medicaid Eligibility		$532,982	$2,637,042	$5,929,976	$4,571,921	$4,455,033	$3,923,808	$22,050,762
UTSWMC	TMHP Medicaid Eligibility			$2,143,455	$3,208,658	$3,515,718	$2,629,749	$1,573,575	$13,071,156
UT System	LBB System Adm				$17,658	$36,700	$53,892	$23,083	$131,333
UTMDACC	Payer Under/Over payment				$282,046	$395,894	$657,934	$327,121	$1,662,994
UTA	Grant Close				$14,464	$70,716	$56,825	$54,949	$196,954
UTMDACC	TMHP					$826,046	$880,126	$173,915	$1,880,087
UTPB	Grant Close					$17,356	$32,121	$12,113	$61,589
UTSA	Grant Close					$6,826	$53,478	$57,561	$117,865
UTEP	Grant Close					$39,896	$123,594	$18,671	$182,161
UTT	TMHP					$489	$15,774		$16,263
UTA	Sahara UTS 142 Notifications						$148,750	$26,776	$175,526
UTSA	Missing Receipts						$4,078	$16,375	$20,452
UTSA	TRS to HCM Reconciliation						$2,112	$2,375	$4,487
UTSA	HCM to GL Reconciliation						$2,406	$2,406	$4,812
UTHSCSA	Clinical Trials Invoice Creation							$6,946	$6,946
UTMDACC	Agency Nursing Timekeeping							$4,576	$4,576
Totals		**$181,124**	**$895,230**	**$5,142,745**	**$9,779,826**	**$10,036,759**	**$9,515,553**	**$6,403,608**	**$41,954,845**

How to Get an RPA Program Started

Key activities to get started include…

- ☑ Defining Organizational Objectives (Vision & Strategy)
- ☑ Establishing RPA Governance
- ☑ Determining Technical Environment & Support Model (e.g., IASG, In-house, 3rd Party)
- ☑ Selecting Delivery Team (e.g., IASG, In-house, 3rd Party)
- ☑ Ensuring stakeholders on-board
  - Information Security
  - IT
  - Compliance
  - Internal Audit
  - Employees

The IASG Team is available to assist you with any of these activities.
IASG@mdanderson.org

How Do I Build a Process Automation?

How to Build a Process Automation

- Select Process
- Document-Map Process
- Establish Team
- Key Decisions
- Design
- Build
- Test
- Deploy

Select a Process

- Identify potential processes for automation that meet use case characteristics
- Consider processes which can not be improved through existing application.
- Perform a process assessment to determine automation potential of processes selected (e.g., potentials savings, complexity of build, risks, and limits).
- Ensure it meets RPA requirements
  - Digitized
  - Deterministic
  - Documented

Document Process

- Create detail step by step procedures of the process (SME & Business/Process Analyst)
- Create the Functional Design Document -Flow chart current and new process (Business/Process Analyst)
- Create the Solution Design Document (Technical Architects)

RPA Team

- Capture Current Process – Subject Matter Expert (SME) and RPA Analyst
- Establish Scope – Process Owner, SME, and RPA Analyst
- Document To Be State – RPA Analyst
- Configure Automation – Blue Prism Developer
- Test Automation – Unit Testing Blue Prism Developer and SME
- UAT Testing – SME, Developer, and RPA Analyst
- Finalize Process Documentation – RPA Analyst
- Deploy and Stabilize – Technical Architect and Monitor Team

Key Decisions

- What, if all, of the process will be automated?
- How often will the digital worker run, i.e. frequency, hours, days of the week?
- Do you need a SQL server to capture large data sets?
- How many licenses will you need?
- Will the environment reside at your institution or UT SIS?
- Who will support and maintain the automation?

Design

- Functional Design Document - a document that details the business process that is to be automated. Once agreed as the basis for the automation of the target process, will be used as a platform from which the automated solution will be designed.

- Solution Design Document - a comprehensive document containing, not only high-level details of how the developer will deliver the solution in the RPA platform, but also includes details of other deliverables that are required for the solution (i.e. web services, database tables, web forms etc.) and on other details such as security, scheduling, alerting, management information, and exception handling.

Build

Once the solution design document has been developed, then the solution must be reviewed and agreed upon by the process owner, IT, implementation team, and delivery team to ensure successful delivery.

An RPA Developer is then tasked to build out the solution using business objects in the Blue Prism application studio.

The developer will need requirements during this phase such as the input and output files, and test data to prove the object logic.

Blue Prism Tutorial Video

Blue Prism Video Tutorial | 010 | Introduction to process studio and creating a simple process - YouTube

Test

The aim of testing is to deliver solutions that meet business requirements and contain the minimum possible number of faults.

- Unit testing is testing the performance of the automation, environment, and stability.
- User Acceptance testing is validating the output, and meeting expectations.

Deploy

Move to Production

- HyperCare
  - Move to Production HyperCare where automation is in production but is closely being monitored by the delivery team. Once stability is achieved, knowledge transfer occurs between developers and the monitoring team.
- Business as Usual (BAU)
  - Routine operations

Things to Remember – Lessons Learned

- Get Information Security approval before you start the process
- Make sure all interested Parties are involved, (ISO, Audit, Compliance, Process Owners SME, etc.)
- Involve a Technical Architect at design to advise, and create solution design
- Get credentials for the DW to the appropriate applications
- Determine when the automation can run and how long
- Try and determine number of DW needed
- Unit Testing done by developer and with Process SME, and should run end to end to simulate production
- UAT should run end to end to simulate production
- Don’t develop in a vacuum, engage the process SME

RPA Video

- https://www.youtube.com/watch?v=5JJCZIclC1Q&list=PL4SEtvjUqihFh-iFvb_s0VAhPCX1tzg2A&index=3
- Please visit the UT System OCBS Webinar website for the How to Build a Digital Worker Webinar

How do I get started?

Identify Process

- Select a process that meets the use case characteristics
- Ensure it meets RPA requirements
  - Digitized
  - Deterministic
  - Documents
- Conduct a process assessment to determine potentials savings, complexity of build, risks, and limits.
- Consider processes which can not be improved through existing application.

The IASG Team is available to guide you on these requirements. IASG@mdanderson.org

Have a good internal team

Include key stakeholders to ensure proper RPA development workflow, financial planning, resource management, control and risk management, and to prevent potential delays.

- Information Security
- IT
- Compliance
- Internal Audit
- Employees