

RPA process application - Instructions

The <u>RPA process application web form</u> is designed to simplify all our RPA projects and provide the data that the RPA team needs to evaluate the process.

The RPA team can only accept initial requests via the web form, please give as much information as possible.

Once the team receives a request, it will evaluate the process and make the decision on whether to start the project and the expected timeframe.

This decision will be taken based on factors like ROI, urgency and necessity. There might be cases where a request will have a low priority or will be rejected completely.

Once a decision is made, the team comes back to you with an approximate deadline and the next steps. Please make sure, you provide any resources or information requested by the RPA team.

Form fields		
FULL NAME	The complete name of the person requesting the process	
DEPARTMENT	The department where the requesting person works	
COMPANY EMAIL	The email of the requesting person	
PROCESS NAME	Find a meaningful name for the process. Avoid generic names like 'Delivery bot'	
PROCESS DESCRIPTION	Describe as detailed above the different steps of the process, which tools and data are to be used and which people will be involved. Also, think about what should happen if something goes wrong during the process (e.g., a field is not filled in correctly).	
SOFTWARE / PLATFORMS/ TOOLS USED DURING PROCESS	List all the components of the process. This could be a software like Excel or OneDrive, our CRM, a website or a web application.	
INCOMING DATA	Where does the data comes from – our CRM, an Excel, a websiteetc (<i>This field is not mandatory</i>).	
OUTGOING DATA	Where / how will the incoming date end up – in an Excel, a web form, our CRM(<i>This field is not mandatory</i>).	
N. PEOPLE INVOLVED	How many people are doing any kind of activity during the process or follow the process? E.g., a delivery process used by 3 PMs. Or a process that includes work from one Coach and one PM. A process that will be used by the whole Coaching Department.	

How to fill in



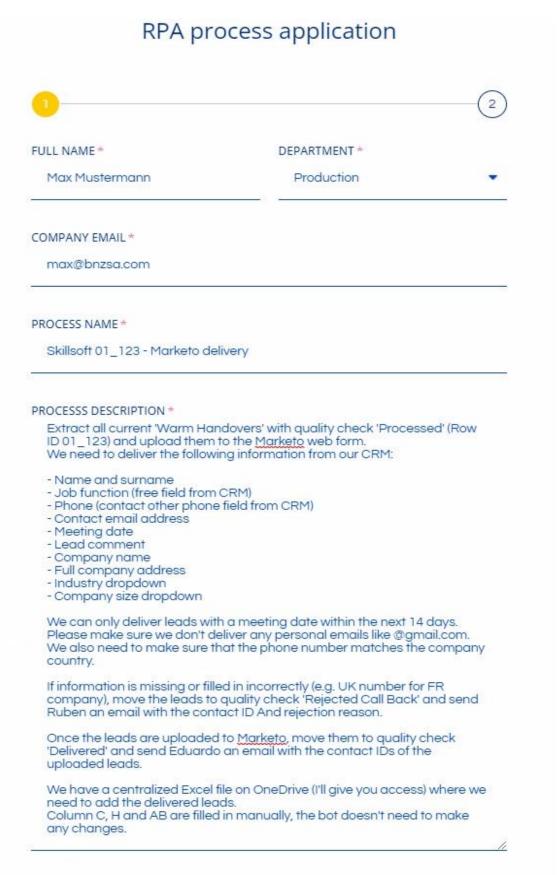
AVRG. TIME NEEDED PER PERSON	The average amount of time each of the involved person spends on the process in hours (0.25 equals 15 minutes, 0.5 equals 30 minutes and 0.75 equals 45 minutes).	
PROCESS EXECUTION CYCLE	How often is the process needed? Once per week, daily, several times a day or just once (Single Execution).	
WILL THERE BE CHANGES WITHIN THE FORESEEABLE FUTURE	Are you aware of any changes in the process, e.g., adding a new country, changing folder structures, adding or replacing tools, changing row IDs etc.	
EXECUTION MODE	What will trigger the process? Unattended – The process will be launched at a scheduled time. Attended – The process will be launched manually by a person Both: The process will be launched and a scheduled time with the option to launch it manually as well.	
DUE DATE	When would you like to start using process automatization? Please keep in mind that this date is just an orientational date. The final deadline will be defined by the RPA team according to urgency, workload and necessity.	
PROCESS OWNER	Who will be the person responsible for the process and the person of contact for the RPA team. Keep in mind, the Process Owner is responsible for reviewing the process, informing the RPA team about any changes and solving issues caused by human mistakes that lead to any errors during the automation.	
OTHER COMMENTS	Feel free to let the RPA team know anything that isn't covered by the prior field. Also, you can elaborate urgency, e.g., a campaign cannot start without the process.	
UPLOAD FILES (E.G. SPREADSHEETS, SCREENSHOTSETC.)	Upload anything that helps to better understand the process: Screenshots, Excel sheets etc.	

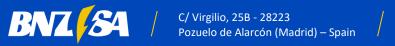
The more detailed and accurate the provided information is, the smoother and faster your automation project can be rolled out. If you're missing some of the information needed for the request, please investigate and get the answers *before* you send the request.

Also, the Process Owner must have availability for the RPA team during the development and should respond to any inquiries as soon as possible.



Example





	RPA process	application
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	FFORMS/ TOOLS USED DURING PI arketo (https://:marketo.com/bnz	ROCESS * <u>rsa/test_url</u>), OneDrive, Excel, Outlook/Email
		/
INCOMING DATA		OUTGOING DATA
BNZSA CRM		OneDrive Excel, BNZSA CRM, Email, Marketo
		a))
N. PEOPLE INVOLVED *	AVRG. TIME NEEDED PER PERSON *	PROCESS EXECUTION CYCLE *
1	2,5 👻	1 times per 🗸 Day 🔻
WILL THERE BE C	HANGES WITHIN THE FORESEEABLE	EXECUTION MODE *
FUTURE?		Unattended 🗸
DUE DATE *		PROCESS OWNER *
2021-11-29		Maike Mustermann
	TC	
OTHER COMMENT	15	UPLOAD FILES (E.G. SPREADSHEETS, SCREENSHOTSETC.)
OTHER COMMEN	ts.	Dateien auswählen Keine ausgewählt