Sonata Software – RPA Overview
RPA Capabilities
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People & Culture
- 75+ RPA Certified Professionals
- Strong Knowledge Base
- Agile Resources
- End – End RPA Implementation experience
- Consultation and Discovery Phase
- Business engagement
- Pre and Post Deployment consultation
- Constant Learning & Development

Organization, Process & Implementation
- COE for Organization Structure
- RACI Matrix – Roles and Responsibilities
- Templates and checklists
- Defined Process for Build, Change Mgmt., Incident, Support
- Defined documents for each stage of RPA lifecycle, PDD, SDD,
- RPA Qualifiers, ROI Calculator

Tools & Technology
- Worked on UIPath, BluePrism, Abby Flexicapture AA, Workfusion, WinAutomation, PowerAutomate
- Gold Partnership with UIPath
- Leverage RPA tools into RPA engineering (Release, Deployment, Version Control, etc.)
- Research & Development Lab
- Reusable Assets
- Frameworks and Integrators

Governance & Best Practices
- RPA Standards and Checklists at each gates (PDD, Design, Engineering, Testing, Integration, Deployment, Support
- Centralized Administration & Management of Robots
- Dashboard and Reports
- Technology Governance
- NFR Governance
- Operational Governance

UiPath
blueprism
AutomationAnywhere
Abby Flexicapture
Power Automate
WorkFusion
RPA Engagement Approach

**Discovery Phase**
- SME Lead
- Process Owners
- Business Users
- Technology Group
- Product Owner
- Test & Support Team
- Developer
- Process Analyst & PM
- Architect
- Project Manager
- Engineering Team
- Acceptance team

**Process Definition**
- Approved
- Use Cases
- Process Discovery and Identification for Automation

**ROI Calculator**
- PR Assessment
- Integration touchpoints

**Business Rules**
- PR1
- PR2
- PR3

**RPA Factory Delivery Pipeline**
- RPA Road Map
- RPA Engineering
- Continuous Integration
- RPA Deployment & Support

**Sprint Backlog**
- Sprint 1
- Sprint 2
- Sprint 3

**Customer**
- Customer Manager
- Sonata Team

**Sonata Team**
- Architect
- Project Manager
- Product Analyst & PM
- Developer

**Process Owners**
- SME Lead
- Developer

**Customer Manager**
- Technology Group
- Product Owner
- Business Users
- Test & Support Team

**Intelligent Discovery Process**
- Process Definition - Approved Process Use Cases

**Building, Delivering & Supporting the Bot**
- Dashboard & Analytics - RPA Metrics
- RPA Releases

**Center of Excellence**
- COE
- RPA KM
- RPA SWAT Team
- RPA Accelerators
Services provided

01 Process Discovery & Consultation

02 RPA in a Day

03 Managed Services for Automation of business process through RPA (End-End)

04 RPA Engineering (Projects/Programs for approved use cases)

05 RPA Support Services for developed bots

06 Establishing RPA Center of Excellence
RPA in a Day
RPA in Day Approach

2 hours
- Discovery Phase
  - Process Analyst
  - Stakeholders from Customer
  - Process Discovery and Identification for Automation
  - RPA Engineering
  - Integration with Applications
  - Unit Testing with sample Data
- PR1: Process identification & Business Rules Assessment
- Identified process

5 hours
- Engineering of Bot
  - RPA Developer
  - Identified Process
  - RPA Engineering
  - Integration with Applications
  - Unit Testing with sample Data
- Automated Bot

1 hour
- Demo of Bot, Next Steps
  - Sonata Team
  - Automated Demo
  - Stakeholders from Customer
  - Brainstorming Next Steps
  - Next Steps for Automation
- 2 hours
- 5 hours
- 1 hour
Sonata’s RPA in Day approach is divided into three main steps

1. Discovery Step - Sonata would work with customer to identify the right process (use case) for RPA automation, ascertain the suitability for RPA and highlight the benefits RPA can provide

2. Engineering of Bot - Sonata would work with customer in demonstrating the engineering the bot. During this exercise customer would be made aware of basics of RPA and aspects pertaining to developing an end-end flow of identified use case using Power Automate. Depending on the use case the below aspects would be demonstrated

   1. Setting up basic workflow
   2. Demonstration of Integration using API Connectors
   3. Document Extraction using AI Builder (depending on the use case)
   4. Demonstration of Data Entry into a form using PowerAutomate Desktop
   5. Demonstration of Data Storage using Common Data Services

3. Demo of the Bot and Next Steps - This would involve demonstration of the RPA process and brain storm on the next steps for RPA automation journey for the organization
Assumptions / Pre-Requisites

- We would have initial discussions to present our Point of View and agree on the area where we need to spend time for ideating on the relevant use case (Customer Service, Finance, Support, HR, etc)

- Availability of key Business Process Owner / Sponsor from the relevant business unit to ideate the relevant use cases and to help prioritize during the workshop

- For the finalized / identified use case, we would need to scope the current As-is business process with corresponding business rule. Having relevant documents pertaining to the business process such as SOP or User Manual during the workshop would help in engineering the same

- Sample documents and Environments (Test/Dev) related to the use case need to be present for the identified use case

- User access to be provided to environment(s) and integrating applications related to the use case (can be temp account)

- Assume the required tools / licenses are made available (depending on the technology of preference)

- We would need test data (1-2 documents or test scenarios) to validate the working of bot after the engineering
Thank You