

<<client/customer>> <object name>

OPERATIONAL IMPACT DOCUMENT

**Version: #.#**



Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Revision | Author | Description |
|  |  |  |  |

Reference Training

The following guidelines will help complete training for this delivery documentation.

|  |  |
| --- | --- |
| Title | Description |
| Lifecycle Orientation | This is a Blue Prism portal page, providing a brief explanation of the Blue Prism Lifecycle Orientation and related documents.  Blue Prism portal path: Home> University |
| Delivery Roadmap | This document describes the end-to-end steps in creating and delivering a Blue Prism process solution. The key process phases are outlined from Initial Process Assessment through to Testing.  Blue Prism portal path: Home> Documents |
| Lifecycle Orientation Sample Delivery Documents | All prescribed delivery documents are fully completed. These are referenced within the Delivery Roadmap and provide an example of the content and level of detail required.  Blue Prism portal path: Home> Documents |
| Process Delivery Methodology | The Blue Prism Process Delivery Methodology is a proven means of delivering ongoing business benefit through process automation using a controlled and structured Automation Framework.  Blue Prism portal path: Home> Documents |

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# Introduction

This document describes in detail the impact on the Operation from the delivery of this automated solution.

This document is intended for the client’s project delivery team to ensure that all components of the required operational architecture are in place.

# Process Overview

<*Describe the high level end to end process and how it interacts with all other impacted/dependent areas – basically a summary of the details that follow in this document.*

*This should take the form of a diagram, showing inputs/outputs and affected areas with a short narrative clarifying how the automated process fits in to the existing operational architecture*

*This should be understandable to the operational/project community>*

## Solution Diagram

*<Diagram to be inserted here>*

## Solution Description

<*Description to be inserted here>*

# Resource Requirements

*<It is likely that the implementation of the automated solution will change the Operational resource structure.*

*If the automated solution is classed as assisted automation, it is likely that there is a requirement to resource from the Operation a capability of data entry to create a digital trigger to the automated process.*

*Also to consider is the requirement to resource the working of any exceptions and referrals from the process.*

*There may be a requirement on IT with regard to supplying/receiving data feed.*

*The Blue Prism process controllers will be impacted. There may be a requirement for them to run processes at certain times etc.*

*Also there may be a requirement to obtain additional/amended Robot credentials to access the target systems>*

## Operational Resource Requirements

*<Detail the requirement/impact/expectation on Operational resource>*

## Blue Prism Process Controller Resource Requirements

<*Detail the requirement/impact/expectation on the Blue Prism process controllers>*

## IT Resource Requirements

<*Detail the requirement/impact/expectation on IT resource>*

# Data Storage Location

*<This section is to detail all the new or changed data storage locations (e.g. email, network folders etc.) which touch the Operation and/or owned by the Operation.*

*The Operation may be required to perform ‘housekeeping’ on these data storage locations in accordance with any records management policies.*

*It is recommended that the Operation have their own procedures on the management of those locations detailed in the process definition document that describes the operational process post-implementation of the automated solution.>*

## Email

*<Detail any new or changed email folders, email addresses, mail groups, mailboxes etc.>*

## Network drives/folders

*<Detail any new or changed network drives or folders >*

# Exceptions/Referrals

<*It is likely that the automated process will have exceptions/referrals designed by requirement.*

*In order for the Operation to understand all the exception/referral reasons/messages that they will receive, the list should be detailed here.*

*The client’s project delivery team can then take the details and document any necessary procedures to react to those exceptions/referrals, suggested in to the Process Definition Document reflecting the post- automation operational architecture>*

## Exception/Referral Messages

*<List the exception/referral messages>*

|  |  |  |
| --- | --- | --- |
| Exception/Referral Message | Description | Estimated Volume/Rate |
|  |  |  |

## Exception/Referral Protocol

<*list the communication method with Operation. I.e. which mailbox, network location, file name, file format etc.>*

### Method

<E.g. *email, Microsoft Excel spreadsheet etc.>*

### Locations

<*file/folder path, file name, mailbox name etc.>*

### Format

<*Document the email format, file format etc.>*

### Schedule

<*Document the timing of exception/referral reporting communication>*

# Assisted Automation Protocol

<*the automated process may fit an assisted automation pattern, which requires input/output triggers to be completed/received by the Operation in addition to any exception/referral reporting mechanisms>*

## Method

<E.g. *email, Microsoft Excel spreadsheet etc.>*

## Locations

<*file/folder path, file name, mailbox name etc.>*

## Format

<*Document the email format, file format etc.>*

## Schedule

<*Document the timing of receipt/output of any assisted automation contact>*

# Management Information

*<the automation may have included bespoke MI reporting. Detail here the expected communication method>*

## Method

<E.g. *email, Microsoft Excel spreadsheet etc.>*

## Locations

<*file/folder path, file name, mailbox name etc.>*

## Format

<*Document the email format, file format etc.>*

## Schedule

<*Document the timing of receipt/output of any MI reporting>*