# Blue Prism Peer Review Board

Utilize the most appropriate technique for delivering automation

blueprism®
Robotic Process Automation Software

Delivering the **world's most successful digital workforce.**

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# Blue Prism

## Methodology Overview

***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 Process Delivery Methodology has been designed to provide the most appropriate technique for delivering Blue Prism processes to mitigate risk by providing earliest possible visibility to potential issues. By allowing multiple processes to be delivered in parallel, ensuring comprehensive control is maintained throughout the delivery to realise the process benefits at the earliest opportunity*

# During this session, we will cover:

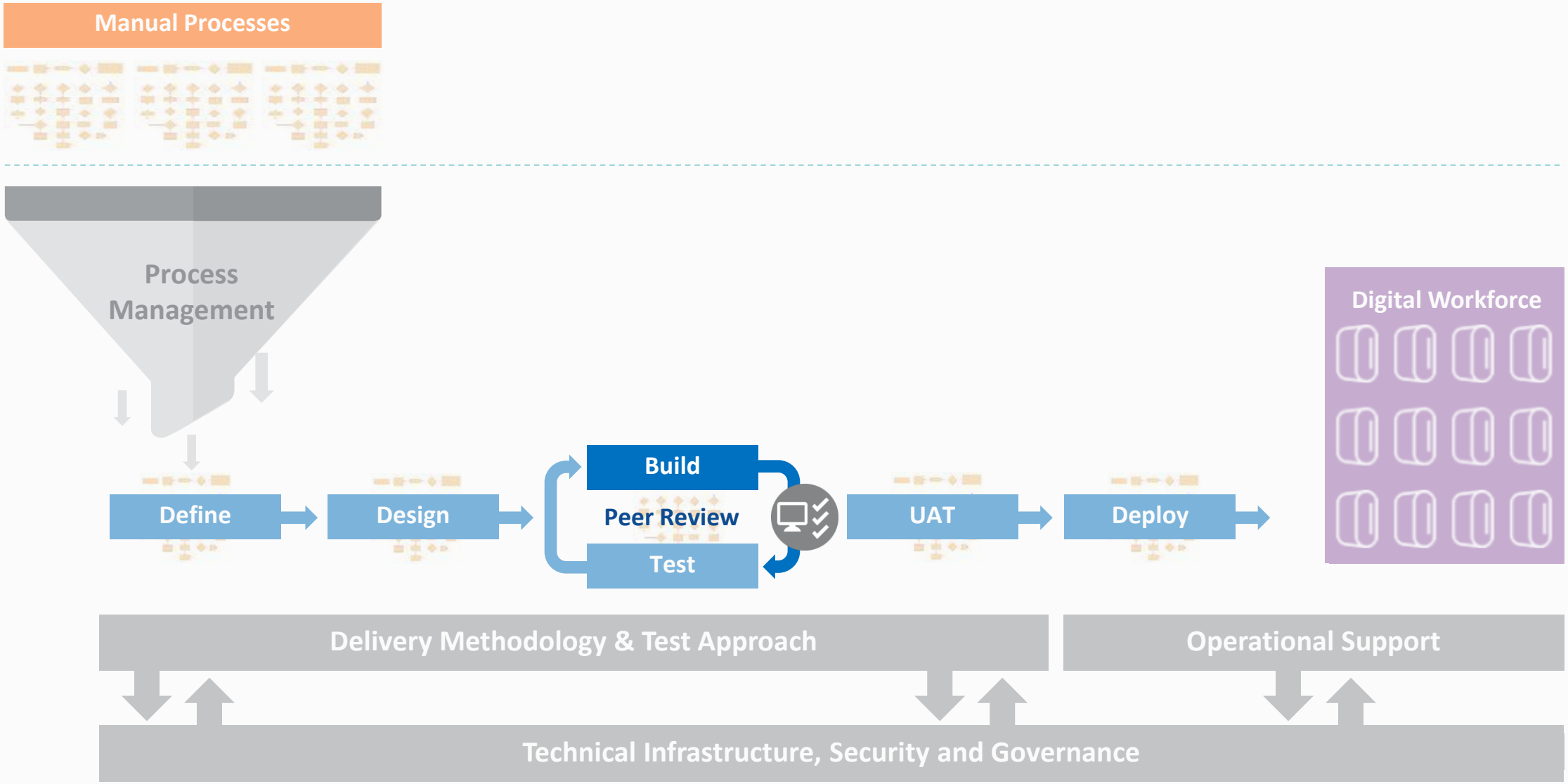
**Agenda**

- Blue Prism Methodology Overview
- Peer Review Board – Terms of Reference
- Peer Review – Tools
- Blue Prism Portal

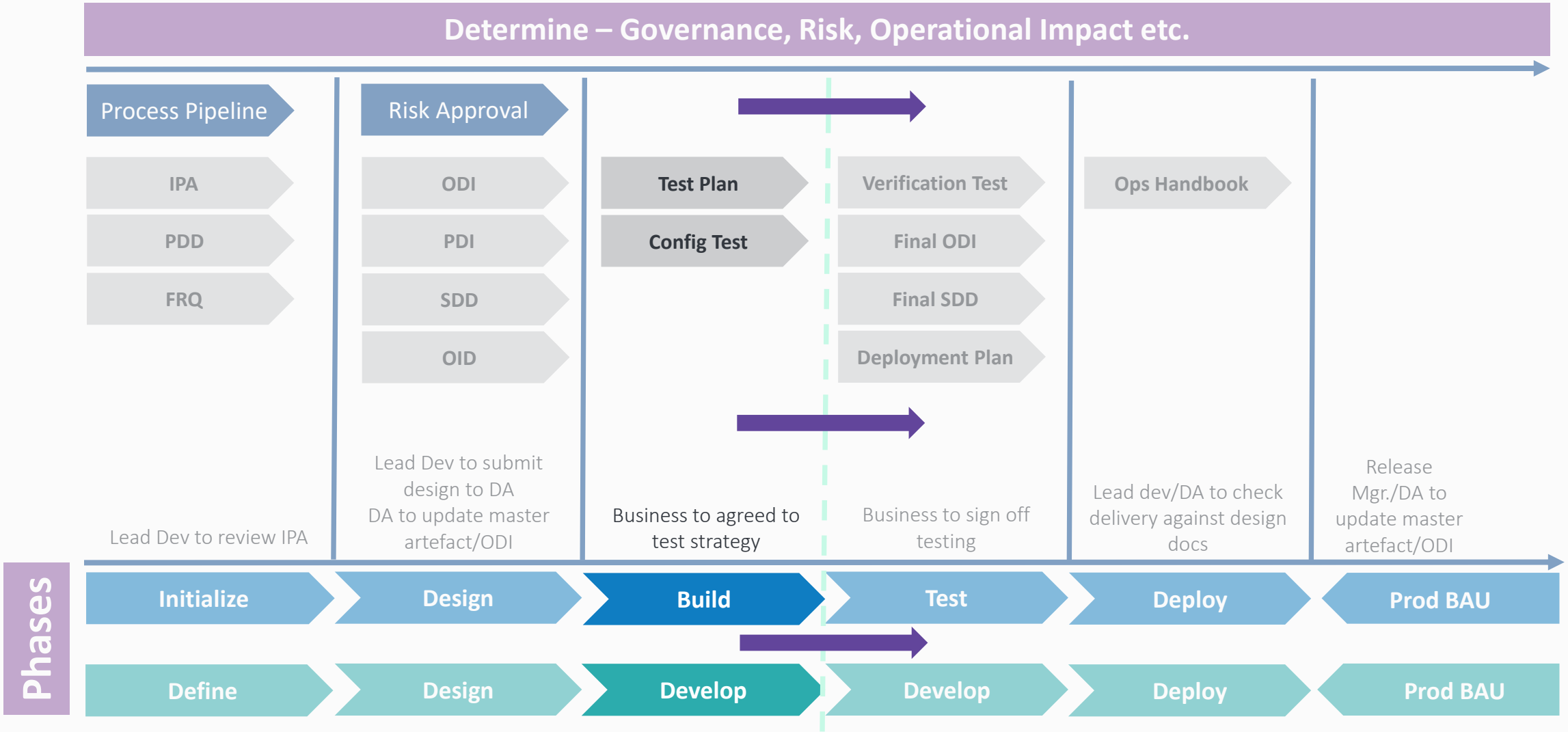
# Blue Prism Methodology

Ensuring those opportunities are implemented in the right way

# Blue Prism - Methodology



# Blue Prism – Peer Review Board



# Peer Review Board

Terms of Reference

*Basic best practices that should be adopted during process and object development*

# Peer Review Board

## Introduction

The Peer Review Board (PR) is responsible for

Maintaining the development integrity of the Blue Prism solution and its constituent processes and objects.

Ensuring Blue Prism solutions maintain and keep up to date with the latest best practices and comply with your organizations standards and governance.

**The Peer Review operates as both advisor and gatekeeper to the Blue Prism development team, supporting and validating all build elements during the deployment and testing phases.**

# Peer Review Board

## Composition

- ✓ The Peer Review Board does not necessarily refer to an individual. In initial stages of engagement, the PR should include an expert provided by the engagement partner or Blue Prism.
- ✓ To meet long-term needs, the PR can transition to a body within the client organization and integrate more closely with existing strategic processes and policies.

# Peer Review

## Role Responsibilities

Where listed below, the necessary qualifications can apply either to an individual filling the role or to the group/body acting in that capacity

- Regular Meetings
- Maintained a Centralized View
- Adherence to Standards & Best Practices
- Enforcing Best Practices

# Peer Review

## Regular Meetings

| Regular Meetings |
| --- |
| ▪ Meetings should regularly be occurring during the build phase with development and design staff to support implementation schedules.<br>▪ Provide availability to meet on an ad-hoc/exceptional basis as necessary to support exceptional circumstances<br>▪ Review all provided build work in a timely manner to avoid negative impact on timelines<br>▪ Engage with developers to review the Business Objects and Process currently in build. |

# Peer Review

## Adherence to Best Practices and Standards

| Adherence to Standards & Best Practices |
| --- |
| ▪ Ensure development meets agreed-upon standards and best practices, both for the client organization and Blue Prism<br>▪ Provide feedback and recommendations to address any gaps or concerns found in the build review checklist<br>▪ Provide final approval on build work in readiness for testing<br>▪ Review all implementations before deployment to ensure that the end result is of the highest quality and matches planned and approved best practices |

# Peer Review

## Maintain a Centralised View

| Maintained a Centralized View |
| --- |
| ▪ Update and maintain the centralised view or library with all up-to-date information and documentation.<br>▪ Provide easy access and expert support for the centralised view or library contents and information to all development and design staff. |

# Peer Review

## Enforcing Best Practices

| Enforcing Best Practices |
| --- |
| ▪ Enforce Blue Prism best-practices on all aspects of development<br>▪ Offer feedback and advice to development team to ensure highest quality of submitted materials at all stages of the development process |

# Peer Review

## Necessary Qualifications

- ✓ Has Acted as a Lead Developer
  - Accredited Blue Prism Developer
  - Accredited Blue Prism Professional Developer
  - Experienced with Blue Best Practices
- ✓ Proven experience of successfully delivering high quality solutions in high pressure, structured environments using standard project management techniques and disciplines
- ✓ Ability to liaise with senior level external supplier and internal stakeholder representatives in a rational and measured manner to communicate project progress, issues, risks and solutions
- ✓ Ability to control meetings and ensure the attendees are focussed on achieving the predefined objectives
- ✓ The aptitude to adapt and evolve methodologies and procedures in a controlled manner to continually improve the delivery and support channels
- ✓ Background in software delivery with excellent client facing skills
- ✓ Experience of managing and motivating a cross discipline team

# Peer Review

Tools

# Peer Review

## Tools

In order to conduct a sustainable and maintainable Design Authority (DA), it is the responsibility of the Lead Developers to understand the tools that Blue Prism offer to be used during and in preparation for a session.

### Peer Review Checklist

- This provides the ability to maintain a library of objects and processes with their associated checklists of how the process and object have been built

### Object Build Tracker (OBT)

- Tracking mechanism to keep the development up to date on how many objects have been built, still outstanding and that are causing issues

### Process Build Tracker (PBT)

- Tracks the main process title and if split up into individual processes as per best practices these can be tracked

### Build Review Checklist

- This is a simple checklist that can be performed on any object or process or both at any time

### Release Analyser Tool

- The Release Analyser process and the Object Inventory object work by consuming data in a release file and writing it into Excel.

# Design Authority

Object Build Tracker (OBT)

# Design Authority - Tools

## Object Build Tracker (OBT)

- A tracking tool that can be used during the design phase to either compliment or replace the Object Design Instructions (ODI) dependant on whether the designer / developer feels this document is better suited to the organizations methodology
- A mechanism to keep track of the current development on how many objects have been built, still outstanding and that are causing issues
- Allows the Lead Developers to assign which developers can build which Business Objects
- Tracker takes more of an agile approach applying more developers to the build reducing effort and increasing efficiency of the development team

# Design Authority - Tools

## Object Build Tracker (OBT)

- Tracker is spreadsheet based, with similarities to the ODI, but in this particular tool, all Business Objects remain on the same tab

**OBJECT BUILD TRACKER**

| | | | | |
|---|---|---|---|---|
| Total objects required | | | 7 | |
| Total Actions to Build | | | 21 | |
| Built | | | 6 | 29% |
| Not Started | | | 6 | 29% |
| Developing | | | 8 | 38% |
| Reusable Actions | | | 20 | |

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| Application Type | Spy Modes | Business Object Name | Actions | Inputs | Outputs | ReUse | Candidate | Status | Notes |
|---|---|---|---|---|---|---|---|---|---|
| Application Type 1 | | APP 1 VBO 1 | Launch | | | Yes | Delegate 1 | Built | |
| | | | Attach | | Attached | Yes | Delegate 2 | Built | |
| | | | Exit | | | Yes | Delegate 1 | Built | |
| | | APP 1 VBO 2 | Attach | | Attached | Yes | Delegate 2 | Developing | |
| | | | Login | Username | | Yes | Delegate 1 | Developing | |
| | | | | Password | | | | | |
| | | | Log out | | | Yes | Delegate 2 | Developing | |
| | | | Get Logged in Status | | Logged In Status | Yes | Delegate 1 | Developing | |
| Application Type 2 | | APP 2 VBO 1 | Attach | | Attached | Yes | Delegate 2 | Not Started | |
| | | | Select Menu | | | Yes | Delegate 1 | Not Started | |
| | | | Select Option | Option Name | | Yes | Delegate 2 | Not Started | |
| Application Type 3 | | APP 3 VBO 1 | Launch | | | Yes | Delegate 1 | Built | |
| | | | Attach | | Attached | Yes | Delegate 2 | Built | |
| | | | Exit | | | Yes | Delegate 1 | Built | |
| | | APP 3 VBO 2 | Attach | | Attached | Yes | Delegate 2 | Developing | |
| | | | Login | Username | | Yes | Delegate 1 | Developing | |
| | | | | Password | | | | | |
| | | | Log out | | | Yes | Delegate 2 | Developing | |
| | | | Get Logged in Status | | Logged In Status | Yes | Delegate 1 | Developing | |
| Application Type 4 | | APP 4 VBO 1 | Attach | | Attached | Yes | Delegate 2 | Not Started | |
| | | | Select Menu | | | Yes | Delegate 1 | Not Started | |
| | | | Select Option | Option Name | | Yes | Delegate 2 | Not Started | |

# Design Authority - Tools

## Object Build Tracker (OBT)

- Tracker contains fields that can be updated as the “build” commences. At this particular stage for the DA, this document can be completed for purposes of highlighted what needs to be built
- These fields are pertaining to the “integration” methods of the application. If known before hand via an Application Assessment they can be fed into this tracker to provide the Lead Developer more information about the technologies of the application.
- Knowing this information beforehand is extremely powerful as it can drive the selected delegates to build those objects once the design is signed off in the Design Authority

**OBJECT BUILD TRACKER**

| Application Type | Spy Modes |
|---|---|
| Application Type 1 | |
| | |
| Application Type 2 | |
| Application Type 3 | |
| | |
| Application Type 4 | |

# Design Authority - Tools

## Object Build Tracker (OBT)

- The following parts of the OBT are very similar to what are in the ODI
- It depends on your selected methodology that the designers / developers use regarding the ODI or OBT.
- For the initial designs we recommend an ODI and then once approved in the DA to then copy the detail into an OBT in readiness for the build. This is your decision to make.
- The OBT then allows for tracking of the build.

| Business Object Name | Actions | Inputs | Outputs |
|---|---|---|---|
| APP 1 VBO 1 | Launch | | |
| | Attach | | Attached |
| | Exit | | |
| APP 1 VBO 2 | Attach | | Attached |
| | Login | Username | |
| | | Password | |
| | Log out | | |
| | Get Logged in Status | | Logged In Status |
| APP 2 VBO 1 | Attach | | Attached |
| | Select Menu | | |
| | Select Option | Option Name | |
| APP 3 VBO 1 | Launch | | |
| | Attach | | Attached |
| | Exit | | |
| APP 3 VBO 2 | Attach | | Attached |
| | Login | Username | |
| | | Password | |
| | Log out | | |
| | Get Logged in Status | | Logged In Status |
| APP 4 VBO 1 | Attach | | Attached |
| | Select Menu | | |
| | Select Option | Option Name | |

# Design Authority - Tools

## Object Build Tracker (OBT)

- These elements of the OBT are extremely powerful, especially within a DA session for the Lead Developers
- The Leads can then assign the required delegates to build certain elements in the OBT or allow a single developer to build all
- The powerfulness of the tool is regarding the “Status” column, in which, when used allows for status tracking of the objects for project managers and lead developers to track how the work is progressing
- Help show progress, but also if a developer is struggling on actions or Business Objects in entirety.

| ReUse | Candidate | Status | Notes |
|---|---|---|---|
| Yes | Delegate 1 | Built | |
| Yes | Delegate 2 | Built | |
| Yes | Delegate 1 | Built | |
| Yes | Delegate 2 | Developing | |
| Yes | Delegate 1 | Developing | |
| Yes | Delegate 2 | Developing | |
| Yes | Delegate 1 | Developing | |
| Yes | Delegate 2 | Not Started | |
| Yes | Delegate 1 | Not Started | |
| Yes | Delegate 2 | Not Started | |
| Yes | Delegate 1 | Built | |
| Yes | Delegate 2 | Built | |
| Yes | Delegate 1 | Built | |
| Yes | Delegate 2 | Developing | |
| Yes | Delegate 1 | Developing | |
| Yes | Delegate 2 | Developing | |
| Yes | Delegate 1 | Developing | |
| Yes | Delegate 2 | Not Started | |
| Yes | Delegate 1 | Not Started | |
| Yes | Delegate 2 | Not Started | |

# Design Authority - Tools

## Object Build Tracker (OBT)

- Tracking is contained within the tool, which allows for a table if required to be issued in an email at the end of the day.
- It provides that level detail for the leads and project managers to understand how the build for the required business objects on the OBT are progressing.
- From experience, clients who have used the OBT very much have an easier handle of the management of the build work and can quickly gauge those bottle necks.
- So many projects that seem to be doomed for failure because a certain action can't be built as quickly as envisaged, when in actual fact, other actions around it can still be progressed.

**OBJECT BUILD TRACKER**

| | | | | |
|---|---|---|---|---|
| Total objects required | | | 7 | |
| Total Actions to Build | | | 21 | |
| Built | | | 6 | 29% |
| Not Started | | | 6 | 29% |
| Developing | | | 8 | 38% |
| Reusable Actions | | | 20 | |

# Design Authority

Process Build Tracker (PBT)

# Design Authority - Tools

## Process Build Tracker (PBT)

- Very similar to the OBT, but this is for tracking the processes that need building.
- Tracks the main process and if split up into individual processes (Sub Processes) as per best practices, these can be tracked
- Allows the lead developers to have multiple developers working on the process
- Delegates can be assigned and a tracking status can be provided on how much of the build work has been built for the processes

# Design Authority - Tools

## Process Build Tracker (PBT)

- Tracker allows for Process only build work to be tracked.
- Regardless if only one process, it still allows for visibility of how the process is progressing

### PROCESS BUILD TRACKER

| | | |
|---|---|---|
| Total Processes required | 5 | |
| Total Sub Processes required | 25 | |
| Built | 8 | 32% |
| Not Started | 9 | 36% |
| Developing | 8 | 32% |

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| Process | Sub Process | Description | Inputs | Outputs | Candidate | Status | Scheduled | Notes |
|---|---|---|---|---|---|---|---|---|
| Example Process 1 | Sub Process 1 | | | | | Not Started | | |
| | Sub Process 2 | | | | | Developing | | |
| | Sub Process 3 | | | | | Built | | |
| | Sub Process 4 | | | | | Not Started | | |
| | Sub Process 5 | | | | | Developing | | |
| Example Process 2 | Sub Process 1 | | | | | Built | | |
| | Sub Process 2 | | | | | Not Started | | |
| | Sub Process 3 | | | | | Developing | | |
| | Sub Process 4 | | | | | Built | | |
| | Sub Process 5 | | | | | Not Started | | |
| Example Process 3 | Sub Process 1 | | | | | Developing | | |
| | Sub Process 2 | | | | | Built | | |
| | Sub Process 3 | | | | | Not Started | | |
| | Sub Process 4 | | | | | Developing | | |
| | Sub Process 5 | | | | | Built | | |
| Example Process 4 | Sub Process 1 | | | | | Not Started | | |
| | Sub Process 2 | | | | | Developing | | |
| | Sub Process 3 | | | | | Built | | |
| | Sub Process 4 | | | | | Not Started | | |
| | Sub Process 5 | | | | | Developing | | |
| Example Process 5 | Sub Process 1 | | | | | Built | | |
| | Sub Process 2 | | | | | Not Started | | |
| | Sub Process 3 | | | | | Developing | | |
| | Sub Process 4 | | | | | Built | | |
| | Sub Process 5 | | | | | Not Started | | |

# Design Authority - Tools

## Process Build Tracker (PBT)

- Tracker contains fields pertaining to the processes that need to be built or that have been built
- In time this could be used as collateral to track the process library
- As per best practices, if the process is broken up into sub processes, then this can be tracked and documented here

**PROCESS BUILD TRACKER**

| Process | Sub Process | Description |
|---|---|---|
| Example Process 1 | Sub Process 1 | |
| | Sub Process 2 | |
| | Sub Process 3 | |
| | Sub Process 4 | |
| | Sub Process 5 | |
| Example Process 2 | Sub Process 1 | |
| | Sub Process 2 | |
| | Sub Process 3 | |
| | Sub Process 4 | |
| | Sub Process 5 | |
| Example Process 3 | Sub Process 1 | |
| | Sub Process 2 | |
| | Sub Process 3 | |
| | Sub Process 4 | |
| | Sub Process 5 | |
| Example Process 4 | Sub Process 1 | |
| | Sub Process 2 | |
| | Sub Process 3 | |
| | Sub Process 4 | |
| | Sub Process 5 | |
| Example Process 5 | Sub Process 1 | |
| | Sub Process 2 | |
| | Sub Process 3 | |
| | Sub Process 4 | |
| | Sub Process 5 | |

# Design Authority - Tools

## Process Build Tracker (PBT)

- The following parts of the PBT allow for the Lead Developers to assign candidates to the sub processes which provides that element of speed to delivery
- The status allows a tracking of how the processes are being built and allows the projects to handled more effectively
- The scheduled column is for those processes that are on a schedule, because if it is used as a library moving forwards, knowing if the process is scheduled is good knowledge to have

| Candidate | Status | Scheduled |
|---|---|---|
| | Not Started | |
| | Developing | |
| | Built | |
| | Not Started | |
| | Developing | |
| | Built | |
| | Not Started | |
| | Developing | |
| | Built | |
| | Not Started | |
| | Developing | |
| | Built | |
| | Not Started | |
| | Developing | |
| | Built | |
| | Not Started | |
| | Developing | |
| | Built | |
| | Not Started | |
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# Design Authority - Tools

## Process Build Tracker (PBT)

- Tracking is contained within the tool, which allows for a table if required to be issued in an email at the end of the day.
- It provides that level detail for the leads and project managers to understand how the build for the required processes on the PBT are progressing.
- From experience, clients who have used the PBT very much have an easier handle of the management of the build work and can quickly gauge those bottle necks.

| | | |
|---|---|---|
| Total Processes required | 5 | |
| Total Sub Processes required | 25 | |
| Built | 8 | 32% |
| Not Started | 9 | 36% |
| Developing | 8 | 32% |

# Design Authority

Release Analyser Tool

# Design Authority - Tools

## Release Analyser

- The Release Analyser process and the Object Inventory object work by consuming data in a release file and writing it into Excel.
- The Release Map report shows you how processes and objects relate to each other, and the Object Inventory report provides a list of all the objects and their pages

# Blue Prism Portal

Blue Prism Self Learning

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# Blue Prism Learning

**Objectives**

## Why Blue Prism LMS?

- **Sales Training**
- **Developer training**
- **Blue Prism basic awareness**
- **Assessment for all areas**
- **Curriculums (learning plans)**

**Blue Prism Learning Management System (LMS) is an online learning platform that enables partners to equip their salesforce with key Blue Prism sales skills. This includes both commercial and technical skills.**

**Benefits**

## What are the benefits of the LMS?

- **Customizable training request** – Select what you want to learn based on what you need to learn (i.e. commercial or technical or both)
- **Transparent learning progress** – Monitor team's learning progress
- **Flexible online learning** – Accessible anytime, anywhere

**How it works**

## Why Blue Prism LMS?

- **Register** – Communicate training needs and register team to the learning program
- **Enroll** – Decide on learning plans (i.e. courses) for the team
- **Monitor** – Monitor team's learning progress by using reporting and auto-notification features in the LMS

# Blue Prism User Portal

The Blue Prism Portal facilitates access to the latest software releases, framework and methodology templates, sales support materials and supporting technical documentation.

## Learning

- **Blue Prism Learning provides a range of educational products and services to support the key roles in a robotic automation program**
- **It enables Developers to quickly acquire the necessary skills and experience to deliver professional Blue Prism solutions**
- **Complimented by additional materials and learning pathways for analysts, project managers and process controllers. The Blue Prism Developer Accreditation exam provides a formal recognition of a developer's ability**

### Forums

- **The forum provides an interactive, collaborative environment within which Blue Prism users can share ideas, problems, solutions and suggestions for future product functionality**

### Product

- **The Releases area contains the Blue Prism releases (historical and present) subject to your site profile**
- **Includes technical, functional and operational descriptions of how the product works and how it is designed and deployed across an organization's technical infrastructure using the sections below**

### Resources

- **Blue Prism Templates provide a base for starting new process solutions and process examples provide sample solutions for a variety of common processing**
- **The methodology and framework has been designed to integrate fully with our customer's incumbent change management systems thereby removing the need for additional procedural and governance obligations**

### Customer Services

- **Includes information on product support hours and methods for contacting Customer Service.**
- **The User Group provides a platform to support the growing number of regular users in the Blue Prism community**
- **My Account enables you to change your password or email address and set up Subscriptions within the Portal**

# Any Questions?

For further information following this session, please review the Blue Prism Portal that contains a wealth of information about the Blue Prism Technology

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