



Accelerator Catalogue

Updated April 2024



Accelerators Catalogue

Overview

Pre-packaged service offerings to scale Customer's automation journey through Automation Success platform

Unique features of A+ accelerators



Created from real world customer experiences



Outcome-based with tangible results



Enable customer's scale journey and create value



Delivered by our Professional Services experts



Simplified procurement cycle



Accelerators Catalogue

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1. Process Discovery



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1.1 Manually Discover Automation Opportunities

Make progress on your automation journey by finding the right processes to automate. Automation Anywhere experts will help you assess your business processes and help you develop a list of the best candidates that can be automated to quickly impact your ROI.

Amount: 2 A+ Tokens

Outcomes

- List of automation opportunities with estimated impact and level of effort
- Understand core concepts to identify right candidates for automation
- Determine process complexity
- Estimate bot development effort
- Determine impact vs effort

Roles & Responsibilities

Automation Anywhere

- Technical feasibility from automation perspective for the processes identified - High level categorization of Simple, Medium, Complex

Customer

- Single point of contact (engagement manager) to coordinate with the SME and process owners for the process knowledge transfer and authorized to make process decisions
- Business users to provide relevant knowledge transfer and process flows and input for the initial phase

Duration: Up to 2 days over one week

Deliverables

- Process assessment of the shortlisted use cases
- Process complexity assigned into Simple, Medium and Complex designations post discovery sessions
- Provide estimated timelines

Key Activities

- Review of up to 5-7 processes to select automation opportunities
- Determine process complexity
- High level estimations of the efforts

Prerequisites

- Access to infrastructure, customer's technical team/s (key people) & implemented automation bot/s (if any)
- Identification of key people for future implementation/hand-offs
- Availability of all key stakeholders for workshop
- Ready access to workflows/documentation pertaining to process

Exclusions (out of scope)

- Standardization recommendations or process reengineering
- Any process documentation, e.g., BRD, TDD
- No tool included such as Process Discovery



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1.2 Discover Automation Opportunities using "Process Discovery"

Get your teams started with adoption of Process Discovery product. Leverage expert services to see the AI powered & data driven Process Discovery in action & learn the product capabilities. Automation Anywhere experts will help you with smooth product onboarding & 3 cycles of Process Discovery.

Amount: 100 A+ Tokens

Outcomes

- ~3-5 automation opportunities identified
- Accelerated onboarding & faster adoption cycle
- Process maps created & PDDs generated
- Technology enabled CoE team

Roles & Responsibilities

Automation Anywhere

- Guide customer through a step-by-step process to complete onboarding activities & listed discovery cycles

Customer

- COE Lead, technical architects, IT team/cloud experts, Infosec/compliance experts (if applicable)
- Ensure SME/user availability & active participation during workshops & various activities to support completion & technology enablement
- Drive actions internally in line with recommended plan

Prerequisites

- Onboarding & access provisioning for AAI experts in customer environment
- Readiness/alignment with business team to participate in the recording, analysis & discovery cycles in line with the suggested plan

Duration: Up to 100 offshore days spread over 30 weeks

Deliverables

- Onboarding, PEG installation & redaction tuning for 3 processes
- Training for up to 5 business analysts
- Identification of automation opportunities across 3 business processes
- PDDs of up to 3 business processes

Key Activities

- Product orientation - functionality, key features, components & applicability
- Technical architecture consulting & guidance around product adoption, certificate queries etc.
- Clearly layout dependencies and mutually build execution plan/approach w.r.t. customer context
- Infrastructure setup validation & product installation
- Enable completion of product setup cycle
- PEG VM image, Certificate & DNS entries, PEG Configuration, Proxy Configuration
- Configure initial redaction list & validate PEG functioning
- Enable customer to finalize target function & initial use cases
- Execution of up to 3 discovery cycles with initial users
- User onboarding, sensor installation and, task recording
- Create visualizations and derive insights
- Process prioritization for deep dive
- Execute process specific runs and create maps/butterfly charts
- Technology enablement for up to 5 business analysts
- Advise on optimal process flows to be captured and create readout



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Discover Automation Opportunities using "Process Discovery"

Assumptions

- Timely completion of various prerequisites such as infrastructure setup, approvals to support the execution of the scoped activities.
- Customer & AAI team to collaborate and mutually decide the processes & relevant user pool for discovery.
- Customer teams to perform sensor installation, recording activities in line with recommended approach and plan.

Exclusions (out of scope)

- More than One(1) onboarding/pre-onboarding activities
- More than One(1) PEG installation
- More than one function and beyond 3 process discovery cycles
- Creation of documents not listed as deliverables in this pack.
- Services other than those listed in this pack.



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2. Bot Build



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2.1 Guided Bot Building

Enhance your bot-building skills. Work with an Automation Anywhere Professional Services consultant to learn to build your first bot. Designed for up to 5 participants to learn the fundamentals of secure, scalable, reliable, and reusable bot building.

Amount: 5 A+ Tokens

Outcomes

- Learn to build simple process bots
- Best practice recommendations for standardizing bot framework
- Describe essential product features and automation terminology

Roles & Responsibilities

Automation Anywhere

- Best in class automation experts to coach about automation examples and best practices

Customer

- IT experts: All necessary application and infra access for Automation Anywhere team must be provisioned by IT expert
- Developer and/or business user: up to 5 designated attendees who will become proficient in bot-building

Duration: Up to 5 days over two weeks

Deliverables

- Bot-building guidance from an Automation Anywhere expert spread over 10 days
- In-depth product training and overview on Automation Anywhere product capabilities
- Thorough understanding of product features post the program
- Agile bot building guidance for users by Automation Anywhere team

Key Activities

- Automation Anywhere expert to guide and mentor users on Automation Anywhere product fundamentals and capabilities
- Extensive coaching to users to build proficiency in bot building

Prerequisites

- All attendees to complete "Automation 360 Bot Developer" trainings from Automation Anywhere University
- System and infra access for Automation Anywhere experts, such as credentials/bot id/digital worker, related to training
- Complete the Discover Automation Opportunity Accelerator (Recommended)

Exclusions (out of scope)

- No use case design, development, testing or deployment activities
- Support in UAT/Production
- Any process documentation, e.g., BRD, TDD
- No ownership of customer-developed solution by Automation Anywhere consultant



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2.2 Bot Building and Deployment - 1 Automation

Work with a team of Process Consultants, Architects and Automation Experts who will deliver a production-ready bot to fast track your organization's automation journey. Whether you are piloting, transforming, or scaling your digital workforce, this pack is a right fit for you. Use our services to identify a process for automation, build and deploy one bot.

Amount: Refer to the table in page 2

Outcomes

- One production-ready bot

Roles & Responsibilities

Automation Anywhere

- Discovery Workshop for a pre-identified function
- Process Selection Assistance
- Solution Design and Validation
- Bot Development
- Templated UAT and Production Deployment Assistance
- Handover and Knowledge Transfer session

Customer

- Provide infrastructure with security and setup for application development and test environment
- Provide guidance on the target function and the required team for Discovery Workshop
- Provide target process documentation and dedicated SMEs for process walkthroughs
- Provide requisite test data and application environment to be used during the bot build,
- Provide sign off on Solution Design within 2 days
- Carry out UAT, deployment & hyper care as per the timelines suggested by Automation Anywhere

Deliverables

- Discovery Workshop and finalized process for automation
- Solution Design Worksheet
- Production-ready Bot with executables and associated source code
- Bot Operation Manual

Key Activities

- Run discovery workshop for pre-identified function spanning up to 5-7 processes
- Prioritize and select one process for bot development in line with defined characteristics
- Design the solution, plan and develop the bot
- Perform unit testing, UAT support, deploy to production in line with standard Automation Anywhere execution timeline

Exclusions (out of scope)

- More than one function identified for discovery
- Processes other than the one identified for the bot build
- Processes not adhering to the attributes listed in this pack
- Efforts for process re-engineering and improvements to make them conducive to automation
- Processes involving use of Automation Co-Pilot/Process Discovery/Document Automation/Bot Insight
- Creation of documents not listed as a deliverable in this pack
- Enhancements and Change Requests to the bot after solution sign-off
- Services other than resources listed in this pack
- Navigation and governance with teams/stakeholders internal to the customer



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Bot Building and Deployment - 1 Automation

Prerequisites

- Pre-identified functional area where further discovery is required.
- Discovery workshop spanning 2 days to identify the process for automation.
- Additionally, specific prerequisites will be communicated during solution design
- Process attribute should adhere to the following to be considered for the scope of delivery :

| Attributes | Simple | Medium | Complex |
|---|--|--|---|
| No. of steps | < 20 | 20-40 | 40-60 |
| No. of variations | < 3 | 4-6 | 6-8 |
| No. of validation rules | < 5 | 5-10 | 10-15 |
| No. of Target Applications and Environments | up to 3 Non-Citrix, Non-RDP | 2-4 | 4 to 5 |
| Application Types | Excel, Email, Webpages (or other simple applications adhering to above rules) | Excel, Email, Webpages, databases, logic check across applications | Excel, Email, Webpages, databases, APIs, Citrix Applications, logic check across applications |
| Input Characteristics | Structured, Rule bases, Repetitive No pdf/image/handwritten /scan/voice formats | Structured, Rule bases, Repetitive No pdf/image/handwritten /scan/voice formats | Structured, Rule bases, Repetitive No pdf/image/handwritten /scan/voice formats |
| Human judgement-based steps | Zero | Zero | Zero |
| Process and Input Language | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet |
| A+ Token Count | 33 | 44 | 57 |

Duration

- Not to exceed seven to twelve (7-12) offshore weeks for discovery, solution design, implementation, UAT and Production-readiness.
- Activity duration for individual stages (i.e., build, UAT etc..) to be communicated by Automation Anywhere team based on finalization of use case and capped at overall duration of this accelerator.
- Availability of required access to customer environment (including bot creator machine & applications) prior to starting of A+ delivery. Additionally, specific prerequisites will be communicated during the A+ execution.
- This accelerator is designed to be delivered by remote delivery team



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2.3 Bot Building using reusable automations - 1 Automation

Work with a team of Process Consultants, Architects and Automation Experts who will deliver a production-ready bot to fast track your organization's automation journey. Whether you are piloting, transforming, or scaling your digital workforce, this pack is a right fit for you. Use our services to assess the reusability of your existing automations and leverage reusable bots to accelerate your bot building.

Amount: Refer to the table in page 2

Outcomes

- One production-ready bot

Roles & Responsibilities

Automation Anywhere

- Automation complexity and similarity assessments
- Solution Design and Test cases adaptation
- Bot Refactoring adapted to a reusability framework
- UAT and Production Deployment Assistance

Customer

- Provide infrastructure with security and setup for application development and test environment
- Provide target process documentation and dedicated SMEs for process walkthroughs
- Provide requisite test data and application environment to be used during the bot build,
- Provide sign off on Solution Design within 2 days
- Carry out UAT, deployment & hyper care as per the timelines suggested by Automation Anywhere

Duration

- Not to exceed Four (4) to Eight (8) weeks for solution design, implementation, UAT and Production-readiness.
- Activity duration for individual stages (i.e., build, UAT etc..) to be communicated by Automation Anywhere team based on finalization of use case and capped at overall duration of this accelerator.

Deliverables

- Assessment Workshops and finalized process complexity & similarity analysis
- Solution Design Documents
- Production-ready Bots with executable and associated source code
- Bot Operation Manuals

Key Activities

- Run complexity and similarity assessment
- Build project plan for bot development
- Adapt the existing solution and refactor the bots
- Perform unit testing, UAT support, deploy to production

Exclusions (out of scope)

- Processes other than the one identified for the bot build
- Processes not adhering to the attributes listed in this pack
- Efforts for process re-engineering and improvements to make them conducive to automation
- Processes involving use of Automation Co-Pilot/Process Discovery/Document Automation/Bot Insight
- Creation of documents not listed as a deliverable in this pack
- Enhancements and Change Requests to the bot after solution sign-off
- Services other than resources listed in this pack
- Navigation and governance with teams/stakeholders internal to the customer



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Prerequisites / Assumptions

- Process Definition Documents of will be made available to conduct the complexity and similarity assessments
- Access to applications, systems and test data for bot building
- Additionally, specific prerequisites will be communicated during the A+ execution.
- Process attributes should adhere to the following Complexity and Similarity assessment to be considered for the scope of delivery:

Complexity Attributes

| Attributes | Simple | Medium | Complex |
|---|---|---|---|
| No. of steps | < 20 | 20-40 | 40-60 |
| No. of variations | < 3 | 4-6 | 6-8 |
| No. of validation rules | < 5 | 5-10 | 10-15 |
| No. of Target Applications and Environments | up to 3 Non-Citrix, Non-RDP | 2-4 | 4 to 5 |
| Application Types | Excel, Email, Webpages (or other simple applications adhering to above rules) | Excel, Email, Webpages, databases, logic check across applications | Excel, Email, Webpages, databases, APIs, Citrix Applications, logic check across applications |
| Input Characteristics | Structured, Rule bases, Repetitive, No pdf/image/handwritten/scan/voice formats | Structured, Rule bases, Repetitive, No pdf/image/handwritten/scan/voice formats | Structured, Rule bases, Repetitive, No pdf/image/handwritten/scan/voice formats |
| Human judgement-based steps | Zero | Zero | Zero |
| Process and Input Language | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet |

Similarity Attributes (n)

For n < 25%, Please refer to [Bot Building and Deployment - 1 Automation](#) from A+ Catalog

| Attributes | High Similarity | Medium Similarity | Low Similarity |
|----------------------|-----------------|-------------------|----------------|
| % Application match | n > 75% | 75% > n > 50% | 50% > n > 25% |
| % Process Flow match | n > 75% | 75% > n > 50% | 50% > n > 25% |
| % Exception match | n > 75% | 75% > n > 50% | 50% > n > 25% |

Bot reusability factor (R)

R = Average of Similarity Attributes (n)

| | High Similarity | Medium Similarity | Low Similarity |
|----------------------------|-----------------|-------------------|----------------|
| Bot Reusability Factor (R) | R > 75% | 75% > R > 50% | 50% > R > 25% |

Token Count

| Complexity | High Similarity (R) | Medium Similarity (R) | Low Similarity (R) |
|------------|---------------------|-----------------------|--------------------|
| Simple | 17 | 21 | 23 |
| Medium | 21 | 25 | 30 |
| High | 27 | 34 | 41 |



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3. Intelligent Document Processing (IDP)



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3.1 Learn About IDP using "Document Automation"

Accelerate return on your Intelligent Document Processing (IDP) automation investment with the Document automation platform. Get personalized guidance from an Automation Anywhere consultant on how to leverage pre-trained AI models and the platform to automatically classify, extract, and validate information from business documents in your organization.

Amount: 5 A+ Tokens

Outcomes

- Learning instance for processing one document type using supported pre-trained model.
- Deep dive into the document automation platform and best practices.
- Employ document automation tools, tips, and tricks

Roles & Responsibilities

Automation Anywhere

- Enablement session on usage of Document automation and implementation best practices

Customer (up to 8 participants)

- CoE Team: Sufficient sample documents for Document automation use case and access provisioning in control room
- Business users: Provide process walkthrough and share required domain knowledge to complete the activity
- Availability of users who will participate in the training workshop

Duration: Up to 5 days over two weeks

Deliverables

- Automation Anywhere guidance and knowledge building on Document Automation platform capabilities
- User proficiency and product knowledge of the Document automation features and functionality
- Intelligent data extraction using pre-trained models with guidance from Automation Anywhere team

Key Activities

- Automation Anywhere team to guide and mentor users on Document Automation learning instance creation, configure pre-trained models for extraction, and define data extraction and validation workflow.
- Extensive coaching to ensure users are self-sufficient in Intelligent document processing.

Prerequisites

- Users should be trained on development of task bots & should understand Automation Co-Pilot
- 1 pre-identified process
- 5 Layouts, 10 samples each layouts (Total 50 documents), up to 15 fields
- System and infra access for Automation Anywhere experts, such as credentials /bot id/digital worker related to training

Exclusions (out of scope)

- No more than a single process with more than 5 layouts, each layout with less or equal to 10 sample size and 15 fields for extraction
- Support in UAT /Production
- Any process documentation, e.g., BRD. TDD
- No code development by Automation Anywhere SA
- No Automation Co-Pilot/task bot/Process Discovery/Bot Insight customization or development



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3.2 Build IDP solution using "Document Automation"

Accelerate return on your Intelligent Document Processing (IDP) investment with the Document automation platform. Get expert guidance from an Automation Anywhere consultant to leverage Generative AI capabilities and to automatically classify, extract, and validate information from business documents in your organization.

Amount: 17 A+ Tokens

Outcomes

- Document Automation setup and learning instance creation for processing two (2) document types.
- Enable up to Two (2) CoE team members to continue adoption of Document Automation Platform
- Recommendations on use case pipeline to scale IDP deployment

Deliverables

- Document Automation learning instance created in one environment
- Enablement of up to 2 users of the Document automation features and functionality

Roles & Responsibilities

Automation Anywhere

- Facilitate the key activities outlined

Customer

- Project Manager: Co-ordination with internal stakeholders
- CoE Team: Nominate 2 participants to actively participate in the enablement sessions to build required skills
- Ensure availability of SMEs for Business inputs

Duration: Up to 17 offshore days over Six (6) weeks

Key Activities

- Facilitate enablement sessions including learning instance creation, configuration of models for extraction, and defining data extraction and validation in line with product capabilities.
- Analyze a maximum of 5 use cases (document types) from the pipeline and select 2 use cases (document types) for solution fitment with relevant parser.
- Creation of one (1) training instance for Document extraction and shadow support customer team to create one (1) learning instance as part of enablement

Prerequisites

- CoE members should have completed e-learnings related to task bots, document automation and co-pilot
- Environment set up, roles and user creation, license validation and access provisioning in control room
- System , infra access and licenses for Automation Anywhere experts, such as credentials , bot id etc.
- 2 creators , 2 co-pilot and at least 1 bot runner licenses for the engagement
- Pipeline of IDP use cases with information on volume, variations & fields of interest
- Sample documents for selected document types

Exclusions (out of scope)

- Use cases beyond product capability and defined size
- Support in UAT /Production
- Any process documentation, e.g., BRD. TDD
- No Co-Pilot, Pre/post processing RPA, Process Discovery, Bot Insight customization or development
- Remediation of existing Document Automation extraction
- Handwritten documents and Low-quality documents
- Non-English documents



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Build IDP solution using "Document Automation"

Assumptions

- The below table specifies number of formats and number of fields for document types. The document type itself shown for illustration purposes. Recommendations on specific document type will be provided by AAI consultant after the actual documents review.

| Document Type (Examples) | No. of Formats | Maximum No. of Fields |
|--|----------------|-----------------------|
| Semi-structured documents- <ul style="list-style-type: none">InvoicesPurchase OrdersUtility BillsExpense ReceiptsBill of LadingWaybillArrival NoticePacking List | 20 | 15 |
| Structured Documents - forms with limited to no variation in format <ul style="list-style-type: none">Health Insurance formsKYC DocumentsTax Forms | 3 | 25 |
| Unstructured documents or Documents with high variations - <ul style="list-style-type: none">ContractsRequest letters and Emails | 2 | 15 |

- AAI consultant will help select two document types & relevant parser from the above list (or similar) during the engagement
- This accelerator is designed to be delivered by remote delivery team. Any request for onsite presence needs to be discussed separately.

Disclaimer

- While delivering services as outlined in this accelerator, the AA & Customer team need to work jointly to learn & follow the organization's policies that covers and not limited to confidentiality, intellectual property, accuracy, responsibility, copyright, trademark etc..
- With Generative AI solutions, one of the risks is that it can "hallucinate" an inaccurate output with high confidence. AAI recommends to assess impact of such exposures for relevant processes and follow "Human-in-the-loop" approach to implement necessary & possible mitigations.



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3.3 IQ Bot to Document Automation Transition

Get an Automation Anywhere expert for bridging an IQ Bot Learning Instance to latest A360 Document Automation Platform. With an expert help you can replicate functionality of existing IQ Bot to Document Automation environment and continue your Intelligent Document Processing (IDP) journey.

Amount: Refer to the table in page 2

Outcomes

- Transition of IQ Bot learning instance to Document Automation
- Enable customer on IQ Bot to Document Automation transition

Deliverables

- Transition of IQ Bot learning instance to Document Automation
- Up to 16 hours of enablement on IQ Bot to Document Automation transition

Key Activities

- IQ Bot Learning instance transition to Document Automation using command package utility
- Unit testing, UAT Support, Hypercare
- Enablement & Handover

Roles & Responsibilities

Automation Anywhere

- IQ Bot Learning Instance Review
- Post DA Review
- UAT & Go-Live

Customer

- Provide infrastructure support
- Business Documentation and dedicated SMEs (If any)
- Requisite test sample files for document processing and testing
- Resources (Business SMEs) for Document validation

Prerequisites

- All the IQ bot Learning Instance should be on latest IQ Bot A360 platform
- Automation Anywhere A360 CR should be upgraded to latest .32 version
- Environment set up, roles and user creation, license validation and access provisioning in control room
- System, infra access and licenses for Automation Anywhere experts, such as credentials , bot id etc.
- 2 creators , 2 co-pilot and at least 1 bot runner licenses for the engagement
- IQ Bot Learning Instance selection based on complexity
- Sufficient sample documents for each layout for testing
- Customer's team members are expected to complete recommended e-learnings related to document automation and co-pilot for effective enablement

Exclusions (out of scope)

- Use cases beyond product capability and defined size
- Nested tables extraction
- IQ Bot Standard Form Learning Instances
- Any new document layouts
- Classifier training / finetuning of any existing /new layouts
- Co-Pilot, Pre/post processing RPA bot building to plug the Document Automation with existing solution

Duration:

- Not to exceed 3 to 6 weeks for Transition, UAT & Hypercare
- Activity duration for individual stages (i.e., build, UAT etc..) to be communicated by Automation Anywhere team based on finalization of use case and capped at overall duration of this accelerator.



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IQ Bot to Document Automation Transition

Assumptions

- High level walkthrough of existing IQ Bot setup will be provided by customer team that includes special configuration and all other supporting files.
- All existing Learning Instances of v11 should be moved to Automation 360 (if applicable)
- Input files should be provided for parallel runs on IQ Bot and Document Automation for UAT.
- Customer will not be able to make changes in transitioned IQ Bot Learning Instances in Document Automation.
- Infrastructure dependencies (i.e., Port opening, whitelisting, share drive access) are handled before commencing the transition.
- Systems, applications and configurations are standard and same across Dev, UAT, Production environments of IQ Bot & Document Automation.

| Attributes | Simple | Medium | Complex |
|-----------------------------|--------------------------|---------------------------------|---------------------------------|
| No. of IQ Bot LI's in scope | 1 | 1 | 1 |
| Domain | Invoice, PO | Others | Custom Domain |
| No. of Layouts | Up to 30 | 31 to 50 | Up to 100 |
| No. of Fields | Up to 10 | 10 to 15 | 15 -25 |
| No. of Trained Groups | Up to 60 | 60 – 100 | > 100 |
| Custom Logic (Python) | Simple logic | Applied on Form Fields | Applied on Form & Table Fields |
| Language | English Script Languages | English + Non-English Languages | English + Non-English Languages |
| Tokens | 10 | 12 | 15 |



4. Co-Pilot & Gen AI



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4.1 Bot Building using "Automation Co-Pilot" solution

Get a head start in achieving human-bot collaboration through expert help from Automation Anywhere. Automation Anywhere experts will help you to identify, build and deploy one (1) process for Automation Co-Pilot.

Amount: 42 A+ Tokens

Outcomes

- One production-ready Automation Co-Pilot integrated bot developed and tested by Automation Anywhere experts

Roles & Responsibilities

Automation Anywhere

- Perform key activities outlined in Key Activities

Customer

- Provide target process documentation and access to dedicated SMEs for walkthroughs
- Carry out UAT and provide timely feedback as per the test plan
- Timely Sign off on solution design and UAT
- Assign an engagement SPOC to drive internal activities including and not limited
 - To obtain required approvals from compliance, risk, and security teams
 - To ensure that required data points & test cases are made available for unit testing & UAT
 - To perform production deployment & hyper care runs as per suggested plan

Duration: Up to Six (6) weeks offshore delivery

Deliverables

- Production-ready bots with executables and associated source code
- Solution design document
- User guide/operation manual

Key Activities

- Select process, design solution, and develop the bot
- Perform unit testing, UAT support, and assist production deployment of up to 5 users
- Provide hyper care support
- Activity duration for individual stages (i.e., build, UAT etc..) to be communicated by Automation Anywhere team based on finalization of use case and capped at overall duration of this accelerator.

Exclusions (out of scope)

- Processes not adhering to the attributes listed for this pack
- Scaling the bot beyond 5 users
- Embedded Automation/Document Automation/Process Discovery/Bot Insight development
- Efforts for process re-engineering and improvements to make them conducive to automation
- Enhancements or changes after solution sign-off
- Any activities on the existing bots in the customer environment



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Bot Building using "Automation Co-Pilot" solution

Prerequisites

- Availability of 5 pre-identified processes along with related documentation
 - Provision infrastructure & availability of internal application development and test environment
 - System and infra access for Automation Anywhere experts such as credentials /bot id/digital worker/Licenses related to processes being automated.
 - Test data covering all scenarios for Unit testing in non-production environment and UAT environment
 - Availability of required access to customer environment (including bot creator machine & applications) prior to starting A+ delivery. Additionally, specific prerequisites will be communicated during the A+ execution.
-
- Process attributes should adhere to those defined below to be selected for delivery

| Attributes | Values |
|---|--|
| No. of process steps | < =25 |
| No. of process variations(scenarios) | <= 5 |
| No. of validation rules | <= 10 |
| No. of Automation Co-Pilot Processes | 1 |
| No. of Automation Co-Pilot Forms | 2 |
| No. of Target Applications & Environments | up to 3 (Non-Citrix, Non-RDP) |
| Input Types | Excel, Email, Webpages |
| Input Characteristics | Structured, Fixed Format & Digitized (No paper, scanned images, handwritten, or voice) |
| Process and Input Language | English |
| Process Frequency | Daily |



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4.2 Discover and Deploy Generative AI use case

Discover automation opportunities best suited for Generative AI & Automation Success Platform (ASP). Work with a team of Automation + AI experts identify automation possibilities with Generative AI & Automation Success Platform (ASP) and help to design, develop and deploy the Automation solution powered by Generative AI.

Amount: Refer to the table in page 2

Outcome(s) :

- Create Pipeline of 5 Generative AI and ASP use cases.
- Provide recommendations on LLM Models (Vertex.AI, AWS Bedrock, Azure OpenAI)
- Customer enabled with knowledge to apply Generative AI capabilities using ASP
- 1 production ready intelligent automation use case developed and enabled with Generative AI capabilities

Roles & Responsibilities

Automation Anywhere

- Generative AI Use case selection
- Provide LLM Model Recommendations
- Solution design and development
- UAT assistance
- Enablement

Customer

- Provide target process documentation/SOP, recordings and dedicated SMEs for process walkthroughs
- Provide Volumetric data such as request volumes, average handling time, etc.
- Ensure availability of Subject Matter Experts and Info Sec teams to provide context and assistance with technology/model onboardings.
- Provide sign off on Solution design within 2 days
- Carry out functionality testing with sufficient test data/cases within timelines

Duration

- Not to exceed total Four (4) weeks for discovery and Eleven (11) weeks for Implementation.
- Activity duration for individual stages to be communicated by Automation Anywhere team based on opportunities identified and capped at overall duration of this accelerator.

Deliverables

- Discovery workshops and identify use-cases for Generative AI automation,
- Provide model recommendations
- Functioning automation built on customer's A360 environment
- Up to 8 hours of enablement to the customer to conduct discovery of Generative AI use-cases

Key Activities

- Run discovery sessions for customers business processes using the AAI GenAI Discovery Framework.
- Identify 5 Generative AI use-cases for automation
- Provide Model Suggestions based on performance and operability.
- Estimate Automation Success Platform license view for the opportunities identified.
- Select Generative AI candidate for development using ASP Stack (A360, Document Automation, and Co-Pilot) in line with defined characteristics for ASP.
- Design and develop solution.
- Perform testing and provide UAT assistance to create one production ready intelligent automation solution
- Enable the customer on guardrails / best practices to use Generative AI

Exclusions (out of scope)

- Standardization recommendations, improvements or process re-engineering,
- Videos & Voice formats
- Fine tuning of LLMs / Model Trainings,
- Cloud services and LLMs currently not supported with A360 platform,
- Use of tools such as Process Discovery,
- Processes that involve CITRIX and/or similar remote applications
- Production deployment and Hypercare



Accelerators Catalogue

Prerequisites

- Bring Your Own Licenses (BYOL) - Customer to bring their own licenses for various AI Services within 5 days of providing LLM recommendations and share the integration APIs,
- Availability of required access to customer environment (including bot creator machine & applications) prior to starting of A+ delivery. Additionally, specific prerequisites will be communicated during solution design
- Process attribute should adhere to the following to be considered for the scope of delivery:

| Discovery of Generative AI use cases | |
|--------------------------------------|-----------|
| Attributes | Count |
| Discover use cases | < =5 |
| A+ Token count | 20 |

| Deployment of 1 Generative AI use case | | | |
|---|--|--|--|
| Attributes | Simple | Medium | Complex |
| No. of Target Applications and Environments | up to 3 Non-Citrix, Non-RDP | 2-4 Non-Citrix, Non-RDP | 4 to 5 Non-Citrix, Non-RDP |
| No. of steps | < 20 | 20-40 | 40-60 |
| No. of variations | < 3 | 4-6 | 6-8 |
| No. of validation rules | < 5 | 5-10 | 10-15 |
| No. of forms | <3 | < 5 | <10 |
| Number of Formats | Up to 5 | Up to 10 | Up to 20 |
| Number of Fields of Interest | Up to 10 | Up to 15 | More than 15 |
| Application Types | All applications supported through ASP | All applications supported through ASP | All applications supported through ASP |
| Input Characteristics | No handwritten/audio/video formats | No handwritten/audio/video formats | No handwritten/audio/video formats |
| Data Privacy | In line with customer's policies | In line with customer's policies | In line with customer's policies |
| Process and Input Language | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet |
| A+ Token Count | 40 | 55 | 70 |



Accelerators Catalogue

Disclaimer

- While delivering services as outlined in this accelerator, the AAI & Customer team need to work jointly to learn & follow the organization's policies that covers and not limited to confidentiality, intellectual property, accuracy, responsibility, copyright, trademark etc.
- It is expected that customer has vetted the Generative AI solution in line with the prevalent governing laws of the location where the solution is being developed, deployed and adopted.
- With Generative AI solutions, one of the risks is that it can "hallucinate" an inaccurate output with high confidence. AAI recommends to assess impact of such exposures for relevant processes and follow "Human-in-the-loop" approach to implement necessary & possible mitigations.



Accelerators Catalogue

4.3 Discover Generative AI Use cases

Discover automation opportunities best suited for Generative AI & Automation Success Platform (ASP). Work with a team of Automation + AI experts to jumpstart your Generative AI enabled automation journey. AAI experts will help you identify automation possibilities with Generative AI & Automation Success Platform (ASP)

Amount: 25 A+ Tokens

Outcome(s) :

- Create Pipeline of 10 Generative AI and ASP use cases.
- Provide recommendations on LLM Models (Vertex.AI, AWS Bedrock, Azure OpenAI)
- Customer enabled with knowledge to apply Generative AI capabilities using ASP (Enterprise Architecture, Human in the Loop, Context Awareness, Handling Unstructured Data)

Roles & Responsibilities

Automation Anywhere

- Generative AI Use case feasibility analysis
- Generative AI Use case complexity analysis
- Provide LLM Model Recommendations
- Solution design
- Enablement

Customer

- Provide target process documentation/SOP, recordings and dedicated SMEs for process walkthroughs
- Provide Volumetric data such as request volumes, average handling time, etc.
- Ensure availability of Subject Matter Experts and Info Sec teams to provide context and assistance with technology/model onboardings.
- Provide sign off on Solution design within 2 days
- Carry out functionality testing with sufficient test data/cases within timelines

Duration

- Not to exceed total 10 weeks for discovery.
- Activity duration for individual stages to be communicated by Automation Anywhere team based on opportunities identified and capped at overall duration of this accelerator.

Deliverables

- Discovery workshops and identify use-cases for Generative AI automation,
- Provide model recommendations with solution approach
- Up to 8 hours of enablement to the customer to conduct discovery of Generative AI use-cases

Key Activities

- Run discovery sessions for customers business processes using the AAI GenAI Discovery Framework.
- Identify 10 Generative AI use-cases for automation
- Provide Model Suggestions based on performance and operability.
- Estimate Automation Success Platform license view for the opportunities identified.
- Select Generative AI candidate for development using ASP Stack (A360, Document Automation, and Co-Pilot) in line with defined characteristics for ASP.
- Enable the customer on guardrails / best practices to use Generative AI

Exclusions (out of scope)

- Standardization recommendations, improvements or process re-engineering,
- Videos & Voice formats
- Fine tuning of LLMs / Model Trainings,
- Cloud services and LLMs currently not supported with A360 platform,
- Use of tools such as Process Discovery,
- Processes that involve CITRIX and/or similar remote applications.



Accelerators Catalogue

Disclaimer

- Customer to provide a list of automation opportunities to pursue for discovery and GenAI use-case identification
- While delivering services as outlined in this accelerator, the AAI & Customer team need to work jointly to learn & follow the organization's policies that covers and not limited to confidentiality, intellectual property, accuracy, responsibility, copyright, trademark etc.
- It is expected that customer has vetted the Generative AI solution in line with the prevalent governing laws of the location where the solution is being developed, deployed and adopted.
- With Generative AI solutions, one of the risks is that it can "hallucinate" an inaccurate output with high confidence. AAI recommends to assess impact of such exposures for relevant processes and follow "Human-in-the-loop" approach to implement necessary & possible mitigations.



Accelerators Catalogue

5. CoE & Governance



Accelerators Catalogue

5.1 Get Hands-On with CoE Manager

Maximize the value of your automation program with a simple, out-of-the-box tool that enables to manage the end-to-end program lifecycle. This accelerator will help you to get hands-on on CoE Manager. Empower your team to gain actionable insights and control over your automation lifecycle by tracking program data, targets, and progress from ideation to value realization. With CoE Manager Plus, get additional configurations and customizations done with the help of AAI experts

Amount: 5 A+ Tokens (CoE Manager), 17 A+ Tokens (CoE Manager Plus)

Outcomes

- Created at least 5 opportunities
- Establish automation lifecycle framework for standardized ideation to value tracking cycle
- Enforce automation program governance through advanced configuration, approval flows & centralized controls.
- Establish multi-level hierarchical structure & capability to crowdsource automation ideas across the business units to build strong pipeline
- Enable your team to capture key value metrics related to automation or value generated
- Additional configurations and customizations for *CoE Manager Plus*

Deliverables

- Configure the CoE Manager instance
- Demonstration and walkthrough of CoE manager capabilities including administration activities
- Track at least 5 automation opportunities through the different lifecycle stages
- Implementation of requested customizations (*For CoE Manager Plus*)

Roles & Responsibilities

Automation Anywhere

- Perform key activities outlined

Customer

- Nominate key COE personnel to participate in the setup and configuration activities
- Customer team to setup SSO configuration and dependency closure for Integrations (*CoE Manager Plus*)

Duration: Not to exceed total Five (5) weeks for CoE Manager and Six (6) weeks for CoE Manager Plus.

Key Activities

- Demonstration and walkthrough of CoE manager capabilities
- Configure up to 3 control rooms
- Initial product configuration to establish ideation to deployment lifecycle using available data
- Setup organization hierarchy in line with version capability
- Demand management - best practices overview
- Up to 5 CoE members enabled on CoE Manager
- Set-up multi level organization hierarchy as needed
- Implementation of configurations & customizations in line with pre-defined guardrails to support customer use case

Prerequisites

- License and admin access to the CoE Manager web application
- Identification of key people for demo and hand-offs
- Identify 5 use case or candidates and relevant data to establish CoE manager opportunities
- Whitelisting of util.Shibumi.com* domain
- Any authentication or configuration for integrations . Example – Client secret keys, Client IDs etc. (*CoE Manager Plus*)

Exclusions (out of scope)

- Ongoing Support
- Product installation/upgrades or customization
- Activities beyond the feature capability of CoE manager base version (*Only for CoE Manager base version*)
- Product installation /upgrades and customization beyond pre-defined guardrails
- Customizations with efforts of more than 3 weeks
- Involvement in any customer roadshows, demos or customer internal initiatives
- CoE setup or advisory consultation
- Actual use case ROI value realization



Accelerators Catalogue

5.2 Automation Program Health Check

Assess your automation implementation strategy and get benefitted with relevant and wider experience. Work with an Automation Anywhere consultant to review your automation program, identify gaps and get recommendations to optimize/improve automation throughput.

Amount: 10 A+ Tokens

Outcomes

- Assessment of existing automation implementation
- Prioritized list of actions for performance improvement and risk mitigation
- Recommendations to follow in various aspects i.e., execution, governance, demand management etc..

Roles & Responsibilities

Automation Anywhere

- Certified Professional Services consultant: Perform key activities outlined

Customer

- Program Manager: Knowledgeable about customer automation program and authorized to make project decisions
- Technical Architect: Provide relevant domain & technical expertise
- Implementation Team: Provide inputs to existing automation development

Duration: Up to 10 days over three weeks

Deliverables

- As-Is assessment of Automation Anywhere platform, governance, delivery (bot framework, etc.), support & maintenance.
- Gap Analysis report to optimize/improve
- Best practices and future recommendations for scalability

Key Activities

- Kick-off and information gathering from respective stakeholders.
- Identify the problem areas by means of assessment questions and conduct gap analysis
- Submit a final report having necessary recommendations

Prerequisites

- Provide necessary documents required to perform assessment
- Availability of relevant key stakeholders for all workshops
- Identification of 1 sample process for conducting RDLC assessment

Exclusions (out of scope)

- Remediation of infrastructure based on the Business Process Analysis
- Remediation of bot framework
- Creation of Bot and/or migration into production
- Implementation of recommendations provided
- Any activities involving tools or technologies beyond Automation Anywhere product suite
- Individual process assessment



Accelerators Catalogue

5.3 Building Intelligent Dashboard Reports

Become the data hero of your organization by showing measurable impact of automation program. Work with our experienced consultants to optimize your bot data collection and reporting to accelerate automation adoption across the organization.

Amount: 3 A+ Tokens

Outcomes

- Assessment of existing reporting
- ROI measurement tracking and reporting recommendations
- Measure bot performance
- Develop and apply a reusable framework that will enable bot tracking for 1 process
- Recommended best practices to standardize framework adoption

Roles & Responsibilities

Automation Anywhere

- Perform key activities outlined to help customer with Bot Insight reporting

Customer

- Program Manager: Knowledgeable about customer automation program
- Technical Architect: Relevant technical expertise, diagrams and inputs
- Business User/s: Success factors, automation shortcomings, improvements
- Implementation Team: Perform hands-on with the guidance of an Automation Anywhere Consultant to ensure knowledge readiness for future deliveries

Duration: Up to 3 days over two weeks

Deliverables

- Reporting data identification
- Reporting best practices around data insights
- Bot Insights dashboard implementation for one automation process

Key Activities

- Kick-off/Introduction to Automation Anywhere reporting capabilities
- Reporting best practices
- Reporting data identification techniques (using an implemented bot as sample)
- Assist in implementation of Bot Insight dashboard

Prerequisites

- Access to infrastructure
- Access to customer's technical & business team/s (Key people)
- Access to the implemented automation bot (s)
- Identification of key people for future implementation/hand-offs

Exclusions (out of scope)

- Remediation of automation bot as per business user feedback
- Automation bot creation and/or migration into production
- Any additional reporting frameworks like API integration, emails, triggers, custom reporting bot etc.



Accelerators Catalogue

5.4 Control Room Administration

Explore and identify the key components and responsibilities of an Automation Anywhere Control Room Administrator. Learn the anatomy of the Automation Anywhere Control Room and its features that help to address requests from business users, developers, and executive stakeholders in day-to-day activities pertaining to RDLC.

Amount: 3 A+ Tokens

Outcomes

- Effectively manage user, roles, bots, folders and devices access and Control Room licenses and allocations
- Improve usage of bot runners
- Help create and manage schedules and deployments for bots in production
- Create and manage bot IDs/Accounts and secure passwords
- Setup one process in customer environment that employs the above-mentioned best practices

Roles & Responsibilities

Automation Anywhere

- Perform key activities outlined

Customer

- To assign a qualified administrator who has completed the Automation Anywhere University Control Room Administrator learning trail to run this program
- Document the best practices and suggestions, review with internal teams, take initiatives to bring in changes for effective administration of the CR

Duration: Up to 3 days over 1 week

Deliverables

- Overview of the Automation Anywhere Control Room and its components
- Assessment of existing practices on managing your control room
- Best practices and future recommendations for high availability of control room

Key Activities

- Understanding the needs of Control Room administrator and building solutions
- Review the Control Room set up and recommend best practices
- Bot operations management through leveraging a sample use case

Prerequisites

- Admin access to all components of automation infrastructure like application servers, repository path, databases, bot runners, etc.
- Admin access to the Control Room web application
- Identification of key people for future implementation/ hand-offs
- 1 process already in production

Exclusions (out of scope)

- Remediation of infrastructure-based issues and business specific issues
- Remediation of bots failing in production or any environment
- Creation of task bots/Process Discovery/Automation Co-Pilot/Bot Insight/ Document Automation and/or migration related activities
- Bot building activities



Accelerators Catalogue

5.5 Design Your Automation Operating Model

Learn the guidelines & fundamentals to create an automation operating model, define roles and aligned responsibilities. Get enabled to identify the best suited automation CoE model, based on the assessment of requirement and maturity, and assist in realizing the business benefits with better technology adoption.

Amount: 5 A+ Tokens

Outcomes

- Learn about creation and optimization of a Center of Excellence structure based on recommendations and best practices
- Augmentation recommendation required in operating model
- Selection of Operating Model and best practices
- Communication and information flow in operating model and BU

Roles & Responsibilities

Automation Anywhere

- Drive all workshops & meetings
- Recommend the To-be operating model

Customer

- Liaison for any engagement related data
- Information related to functional areas
- Review the recommendations made by Automation Anywhere

Duration: Up to 5 days over two weeks

Deliverables

- Recommendations to design automation operating model
- Enable understanding about roles and responsibilities
- Selection criteria for picking the correct model
- Interaction Model with Business Units
- Progression Model based on organizational maturity
- Success Criteria of operating Model

Key Activities

- Automation Anywhere team to analyze the current automation structure and model
- Automation Anywhere team to recommend To-Be operating model for automation
- Automation Anywhere team to provide recommendations on automation CoE Model

Prerequisites

- Calendarization with key stakeholder for AS-IS understanding
- Documents related to existing Automation Operating model
- Information flow diagram/model from existing setup

Exclusions (out of scope)

- Operationalization of Operating Model
- Setting up of CoE Model



Accelerators Catalogue

5.6 Technical Rapid Response

Accelerate your automation journey by resolving your specific automation roadblocks. Get eight hours of dedicated expert guidance from an Automation Anywhere technical consultant to deep dive into core problem areas to resolve potential technical barriers and get bots into production.

Amount: 1 A+ Token

Outcomes

- Root cause analysis from Automation Anywhere experts on specific automation barriers
- Solution recommendations based on automation best practices
- Implementation of the quick fix recommendations
- Applying workarounds

Roles & Responsibilities

Automation Anywhere

- Automation Anywhere expert: Specialized Automation Anywhere resources dedicated for handling deadlock situations by getting into root cause analysis of the pain points
- Technical Consultants: Our experienced go-to team for any technical glitch and problems

Customer

- IT experts: All necessary application and infra access to Automation Anywhere team must be provisioned by IT expert
- Business users/Process Owners: Provide the issue details to Automation Anywhere expert
- Automation Team: Provide architecture, workflow solution code details

Duration: Not to exceed 1 day

Deliverables

- Potential solution/recommendation of the problem (Infra/Technical/Process)
- Root cause analysis
- Standardize the solution to resolve issue and avoid repetition

Key Activities

- In-depth investigation & comprehension of the potential problem
- Root Cause Analysis
- Bring in best in industry expertise for resolution of the problem

Prerequisites

- All process-related infrastructure readiness such as applications/tools/data
- Ready access for Automation Anywhere experts, such as credentials/bot id/digital worker related to process infra
- Details of core problem (Technical/Process/Infrastructure)

Exclusions (out of scope)

- End to End Process Automation/Bot Building
- Any training on Automation Anywhere product functionalities
- End to End health check of the infrastructure / processes
- Fix related to product issues
- Fix related to logic/framework issue



Accelerators Catalogue

5.7 Assistance on Project Governance

Get specialized assistance from Automation Anywhere expert consultants during an automation engagement to address specific challenges. Leverage the expert services to help your team through technical supervision or project governance. You can engage Automation Anywhere consultants based on mutually pre-agreed time span & frequency.

Amount: 5 A+ Tokens

Outcomes

- Detailed feedback & Guidance about activities reviewed
- Learn to build bots based on Automation Anywhere's proven standards and practices
- Trained and enabled technical team on Automation Anywhere's Technical Delivery Framework

Roles & Responsibilities

Automation Anywhere

- Fixed duration availability (minimum – 2 hours/day, maximum - 6 hours/day as per mutually pre-agreed schedule i.e., daily/alternate days/weekly)
- Execute activities that are pre-selected by customer from the key activities section

Customer

- Ensure availability of artefacts and documents ahead of the engagement
- Nominate a single point of contact for the entire duration of the Accelerator
- Provide information as requested during the engagement
- Apply recommendations from Automation Anywhere for the engagement

Duration: Up to 5 days of engagement across 4 weeks for any 1 role.

Deliverables

- Summary of reviewed project aspects and identified gaps along with improvement recommendations

Prerequisites

- Automation Anywhere Certified team members
- Share governance & delivery artefacts for the engagement (SOW, proposal/business Case, project kick off document, project plan, risk and action log, governance & review structure, project status reports and technical documentation such as PDD/SDD)
- Availability of required access for Automation Anywhere members to perform their activities

Key Activities

- Assess the current project delivery methodology, project plan, RACI, governance, cadence requirements
- Review existing technical delivery approach and bot development framework
- Review technical documentation (PDD/BRD/TDD/SDD) & bot code.
- Providing guidance on code modularization, code scalability

Exclusions (out of scope)

- Training on project management tools & methodologies, Automation Anywhere Platform or any skill development
- Performing activities related to actual engagement, project management & delivery
- Activities involving discovery to deployment cycle of bots & hyper care support
- Raising A-People support tickets
- Structured workshops/hands-on sessions that requires preparation
- Ownership of solution & outcome delivered



6. Citizen Development Program



Accelerators Catalogue

6.1 Citizen Development Program Advisory

Create structured implementation and governance framework that provides a foundation to execute citizen development-led automation program successfully. Establish structures, guardrails, best practices and guidelines to scale your automation program and accelerate digital transformation in your organization.

Amount: 8 A+ Tokens

Outcomes

- Established automation lifecycle for citizen developers to follow post completion of trainings
- Defined operating model to adopt as part of citizen development program (CDP)
- Governance framework that covers all elements of lifecycle and ownership
- Understand license management and bot reusability

Roles & Responsibilities

Automation Anywhere

- Describe citizen development program construct & importance of governance
- Enable customer with required information about citizen development automation lifecycle, best practices, guard rails etc..

Customer

- SPOC (engagement manager) for managing the CDP
- Facilitate workshops with identified stakeholders
- Liaison between Automation Anywhere and Customer for any engagement related data
- Pre-fill questionnaire before scheduled workshop
- Ensure availability of relevant stakeholders from Business, CoE and IT

Duration: Up to 8 days over 3 weeks for a program size of up to 50 users

Deliverables

- Enable customer to define operating model, automation lifecycle and best practices
- Share governance framework that identifies the governance domains, coverage
- Recommended practices and guardrails to be followed
- Suggest practices around license management and bot reusability

Key Activities

- Conduct workshops to indoctrinate importance of governance, best practices and guardrails
- Provide information about the various activities involved in the automation lifecycle i.e., ideation to deployment
- Share multi layer operating model and explain the distribution of roles and responsibilities

Prerequisites

- Share existing automation lifecycle, governance model/framework
- Should have completed "Learn the fundamentals of Citizen development & design your first program" accelerator

Exclusions (out of scope)

- Any actions related to CoE assessment or solution
- Any activities related to automation lifecycle
- Execution/operationalization of citizen development program activities
- Private Bot Store setup
- Customization or curation of content and any additional workshops



Accelerators Catalogue

6.2 Guided Bot building for Citizen Developers

Exclusive accelerator designed for Citizen Developers looking to get help from Automation Anywhere experts to improve their bot building skills. Learn about the most common & relevant command packages, their application on use cases through hands-on sessions. Use this opportunity to clarify your queries around best practices to be followed by citizen developers during bot development.

Amount: 5 A+ Tokens

Outcomes

- Establish understanding to identify use cases for Citizen Development led automation
- Build basic functional task bots with commonly used Automation 360 packages and actions
- Learn bot development best practices

Roles & Responsibilities

Automation Anywhere

- Ensure execution of activities in-line with the construct of this accelerator
- Mentor participants and clarify questions / queries raised during hands-on sessions

Customer / Partner:

- Appoint a batch coordinator/SPOC to plan sessions
- Conduct feedbacks for retrospective corrections for future hands-on sessions
- Coordinate with internal IT and ensure hands-on sessions are delivered as planned

Duration: Up to 5 Days over 2 weeks for a batch of maximum 20 Citizen Developers

Deliverables

- Share participant guide and best practices guide
- Execute up to 10 hands-on sessions to help citizen developers understand following common packages - Application, Boolean, Browser, Clipboard, Comment, CSV/TXT, Data table, Database, Datetime, Delay, Dictionary, Email, Error Handler, Excel Advanced, File, Folder, If, List, Log to File, Loop, Message box, Number, Recorder, String, System, Task bot, Wait, Window

Key Activities

- Provide overview of control room, bot agent, workbench, variables and variable packages
- Technical hands-on sessions for bot building (up to 5 use cases from Automation Anywhere catalogue)
- Walkthrough of best practices guide with examples

Prerequisites

- Completion of citizen developer learning trail (eLearning & VILT) Automation Anywhere University (AAU)
- Provisioning of all device and control room access for participants

Exclusions (out of scope)

- Any action or package not covered in deliverables
- Private bot store setup or any related activities
- Use cases from customer / partner during hands on training sessions
- Bot development activities
- Any other documentation not covered in deliverables.
- Any features/packages restricted in the T&C



7. Migration



Accelerators Catalogue

7.1 Migration Services – Switch to Automation Success Platform

Leverage Automation Anywhere’s professional services to move (Lift & Shift) your existing live & stable automated process from any source automation platform to Automation Success Platform (ASP). Work with a team of experts to fast track your organization’s migration journey from your existing automation platform to ASP.

Amount: Refer to the table in page 2.

Outcomes

- Production-ready bots for 1 process.

Roles & Responsibilities

Automation Anywhere

- Joint program planning & management with customer
- Implementation of AAI bot framework & process onboarding on ASP
- Enable customer CoE in ASP Control Room administration

Customer

- Designate a program manager for the entire duration of the engagement
- Required infrastructure provisioning with relevant access to AAI team members
- Relevant SME & documentation availability during the entire program
- UAT readiness – Environment, data, access, test cases
- UAT sign-off and deployment to UAT / production environments
- CoE team availability to take handover post migration to ASP

Deliverables

- Revised solution design document (if required) to capture any modifications due to platform differences.
- Bot code in compliance with AAI standard framework
- Bots ready for Production deployment
- Handover document and bot operations manual

Key Activities

- Review existing process documentation, production code & process recordings to learn about existing automation solution
- Validate process complexity as per defined matrix and normalize in line with complexity factors
- Develop the bots as per AAI standards
- Perform unit testing / integration testing and UAT support
- Deployment & hyper care assistance
- SOPs for bot operations

Exclusions (out of scope)

- Solution redesigning
- Processes other than scoped for migration
- Process enhancements, bug fixes, STP improvement, process standardization or re-engineering, addressing performance issues or KPI improvements, developing custom technology solution or cognitive automation
- Processes involving use of Automation Co-Pilot/Process Discovery/Document Automation/Bot Insight or any similar technology
- Creation of documents not listed as a deliverable in this pack
- Navigation and governance with teams/stakeholders internal to the customer
- ASP training



Accelerators Catalogue

Migration Services – Switch to Automation Success Platform

Prerequisites

- Up to date BRD/PDD, process recordings, existing Bot Solution design document and existing bot scripts with its supporting files
- Code freeze before migration
- Completion of AAU trainings by CoE teams
- Environment provided for Dev and UAT activities should be replica of production environment
- Availability of adequate number of licenses (ASP & Non-ASP platform) to support this migration
- Additionally, specific prerequisites will be communicated during solution design

| Attributes | Simple | Medium | Complex |
|---|--|---|--|
| No. of bot files | < 5 | >= 5 and < 15 | >= 15 |
| No. of variations | < 5 | >= 5 and < 15 | >= 15 |
| No. of validation rules | < 5 | >= 5 and < 15 | >= 15 |
| No. of Target Applications and environments | up to 3, Non-Citrix, Non-RDP | 2-4 | 4 to 5 |
| Application Types | Excel, Email, Webpages (Or other simple applications adhering to above rules) | Excel, Email, Webpages, databases, logic check across applications | Excel, Email, Webpages, databases, APIs, Citrix Applications, logic check across applications |
| Input Characteristics | Structured, Rule based, & Repetitive No pdf/image/handwritten/scan/voice formats, Queue based trigger | Structured, Rule based & Repetitive No pdf/image/handwritten/scan/voice formats, Queue based trigger | Structured, Rule based, & Repetitive No pdf/image/handwritten/scan/voice formats, Queue based trigger |
| Human judgement-based steps | Zero | Zero | Zero |
| Process and Input Language | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet | English and languages using ISO basic Latin alphabet |
| Parallel processing | No | No | Yes |
| Invoke External Code/Script | No | No | Yes |
| No of Tokens | 30 | 37 | 48 |

Duration

- Not to exceed four to eight (4-8) offshore weeks for solution design, implementation, UAT and Production-readiness.
- Activity duration for individual stages (i.e., build, UAT etc..) to be communicated by Automation Anywhere team based on use case complexity and overall program plan.
- Availability of required access to customer environment (including bot creator machine & applications) prior to starting of A+ delivery. Additionally, specific prerequisites will be communicated during the A+ execution.
- Remote offshore delivery team



Accelerators Catalogue

7.2 Migrate from v11 to Automation 360 - 1 Automation

Get an Automation Anywhere expert for accelerated conversion of your bots from V11.x version to latest Automation 360 enterprise version. With expert help you can replicate functionality of existing V11.x bot to 1 non-production Automation 360 environment and make it ready for UAT cycle.

Amount: Please refer to the token count in page 2

Outcomes

- Quick conversion & UAT readiness of 1 legacy V11.x process to Automation 360 environment.
- Quick assessment of upgrade readiness for additional bots in the control room.

Roles & Responsibilities

Automation Anywhere:

- Expert consultants to complete code conversion & UAT readiness for identified processes

Customer:

- Assign an engagement SPOC and ensure availability to drive internal activities including and not limited to
 - Obtain required approvals from compliance, risk, security teams
 - Availability of all necessary application and infra access for Automation Anywhere team
 - Ensure that required data points & test cases are made available for unit testing & UAT
 - Verify the results of Automation360 bots against the legacy bot outputs

Deliverables

- 1 process migrated to Automation 360 non-prod environment and ready for UAT

Prerequisites

- Readiness of Automation 360 non-production environment with latest released version (A360.[n-1] or above)
- Latest bot scanner report (A360.[n-1] or above) with raw data files
- System, Application and infra access for Automation Anywhere experts such as credentials /bot id/digital worker/Licenses related to processes being upgraded.
- Availability of pre-identified processes along with related documentation i.e., PDD, SDD, Prod. Config
- Test data covering all scenarios for Unit Testing in non -production environment

Key Activities :

- Automation Anywhere team to convert the code, unit test, stabilize in 1 Automation 360 non-production environment and provide a UAT ready bot to customer team.
- Replicate v11 bot functionality to Automation 360 process bot.

Exclusions (out of scope)

- Upgrade from v10.x, Process Discovery or Bot Insight
- Enhancements, fix existing defects, performance improvement, design changes, 3rd part integrations, custom scripts & bug fixes
- UAT /Production testing & deployment activities, Product fixes
- Any process Documentation e.g., BRD, SDD/TDD
- Infrastructure setup and decommissioning systems / licenses
- Process Automation undergoing changes



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Migrate from v11 to Automation 360 - 1 Automation

Assumptions

- High level process & code level walkthrough will be provided by customer team that includes configuration and all other supporting files for seamless bot execution.
- Any processes that uses Citrix or RDP is considered a complex process.
- It is assumed that current bots are developed as per Automation Anywhere best practices and do not have any logical gap and will not need any retrofitting as part of upgrade.
- All existing control room data in v11 should be made available in Automation 360. New roles, credentials etc. creation is not in scope.
- Infrastructure dependencies (i.e., Port opening, whitelisting) are handled before starting migration activities.
- Any other parallel migration or upgrade to Applications or v11 Bot should be avoided if it can impact the Automation 360 upgrade activity.
- Automation anywhere environments are upgraded to suggested versions before starting migration.
- Systems, applications and configurations are standard and same across Dev, UAT, Production environments of Automation 360 & V11.
- Data during production validation should be exclusive as there might be parallel processing happening on v11 Bot as BAU.
- Desktops or VDIs given to automation experts will not have any lag that might impact upgrade project.
- ODBC drivers will be installed in the machine for accessing excel as database where required.
- Customer to provide access to v11 client, production logs & bot run outputs during the migration.
- Process attribute should adhere to the following to be considered for the scope of delivery :

| Attributes | Simple | Medium | Complex |
|---|------------------|------------------|------------------|
| No. of task Bots | 1-4 | 5-8 | 9-15 |
| # of Code Lines | Up to 1000 | 1000 to 2500 | 2500 to 4000 |
| No. of Target Applications and Environments | 1 to 2 | 2 to 4 | 4 to 5 |
| Average Handling Time | Up to 20 minutes | Up to 40 minutes | Up to 75 minutes |
| Token Count | 3 | 4 | 5 |

Duration: Migration engagement duration to be finalized based on the complexity and total number of the processes in scope and includes remote offshore delivery.



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To enable Automation Anywhere to perform the Services effectively, customer will complete any dependencies or tasks as per agreed timelines. In case of any delays, Automation Anywhere will evaluate the need for any additional efforts & tokens to deliver the services and communicate them to Customer.

- Automation Anywhere team will require minimum 2 weeks of lead time to mobilize and onboard delivery team.
- Before initiating the engagement, customer team needs to complete required prerequisites such as infrastructure setup, product installation, team onboarding, access provisioning etc...
- Customer will share Process Document (BRD/PDD) and any supporting files with Automation Anywhere team before beginning of the program.
- If the engagement team will be or needs to be working onsite, Customer will provide a physical location in which the joint project team, including Automation Anywhere team members will be located, and will provide Automation Anywhere team members with reasonable access to their relevant Customer Systems, IT tools and shared knowledge databases for implementation and testing purpose. If the engagement team requires a Customer issued laptop or VPN connectivity, Customer is responsible for providing laptops (shipping out to team member's location) and network access needed to perform the Services, including initial set-up, connectivity, and ongoing availability, as well as access to required Customer Systems for in-scope process. Customer will be responsible for the maintenance of Laptops provided to the resources.
- Customer should ensure that environment security setup, access requirements such as service account or bot id access, bot creator access in dev/UAT environment, and any necessary file, email, system, or data access, software and application versions etc. requirements are completed for successful bot deployment and execution. Customer would ensure that no access is provided to Automation Anywhere to any of its private/confidential/ personal/sensitive personal data/ information including access to any login credentials.
- Customer team to ensure availability of separate environments of applications in Dev/UAT & production with data availability & required infrastructure (VM/runners) etc... to ensure completion of required build and testing activities as applicable. Environment provided for Dev and UAT activities should be replica of production environment. Use of production environments for dev or test is strongly discouraged.



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- Customer will ensure that suggested solution designs by AAI SMEs are reviewed, approved or an alternate requested solution is made available. Automation Anywhere team will be able to provide these inputs during solution design phase as these are specific to the individual processes. It is expected that Customer provides necessary support to complete the requested actions such as signoff, approval etc... within < 2 days' time to initiate implementation of specific solution.
- Customer to ensure that required integration capabilities are provided (such as APIs, service accounts with privileges) to establish connectivity with various applications (for ex. Service Now, JIRA etc...)
- Customer is responsible to ensure availability of appropriate number of skilled staff with right mix of automation experience and Automation Anywhere certification to complete the handover.
- Customer to ensure data availability (for ex. Input files, mails, mapping files etc.) during the solution design phase.
- Customer will ensure completion of below mentioned pre-requisites before initiating UAT (if applicable as part of the construct of accelerator)
 - UAT environment – Availability of separate UAT environments, laptops and VMs (Developer machines should not be used for UAT purpose).
 - UAT Data which covers all variations, scenarios/Test cases, UAT team availability
 - Test plan – All test scenarios should be provided in advance. These test scenarios (assuming this is available based on historical process run) refer to various test cases that need to be validated during unit testing and UAT. Each process may have unique cases and should be made available by Customer before the respective stage.
- Customer should communicate about any scheduled downtime for systems or people unavailability will be communicated as early as possible to enable the development team to plan their activities effectively. Based on the impact, it may also require changes to the deployment timeline for specific use case.
- Customer will provide dedicated process SMEs of target processes & IT experts until the project is concluded.
- Automation Anywhere automation delivery framework considers 2-3 days of standard timeline for a UAT cycle with 2-3 runs within the same duration. The idea of UAT is that Customer team drives UAT cycle, executes all possible scenarios and identifies bugs/ code issues. Any environment, infrastructure, application, 3rd party dependency etc...are not considered as UAT defect.



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- It is expected that Customer team performs enough executions for daily activities during the hyper care period (if applicable as part of the construct of accelerator). For the activities with lower frequencies (such as weekly, monthly, quarterly, yearly or any other), the hyper care should be executed using UAT/pre-prod with historical data and in UAT/pre-prod environment in absence of actual activity, environment during hyper care.
- In absence of any OCR or IQ Bot implementation for any process, it is expected that input for automation will be provided in a manner (i.e., structured data) that can be consumed by RPA bots such as excel, db etc... without a need of any data modification/transformation.
- Customer to ensure scope of processes is not subject to changes during automation program.
- It is expected that Customer will provide adequate number of creator license for the duration of project to ensure smooth functioning of the project. Separate creator licenses to be made available in each environment to conduct respective build activities. License sharing/rotation won't be feasible given the stringent timelines to complete the activities.
- It is expected that based on the transaction volume, frequency, execution time, documents pages and bot operations time; Customer will arrange adequate number of runner license & Process Discovery pages.