

Case Studies for **Change and Release Self-Assessment Process**



One of the largest bank in India Leverages AutomationEdge RPA to Automate **Change and Release self-assessment process**

Reduction from
3 days to
5 minutes 



Problem Statement

Preparing **monthly compliance report** was a mundane and **time consuming activity** as it involved referring data from 11 different files, a week's time and 4 human working on it.



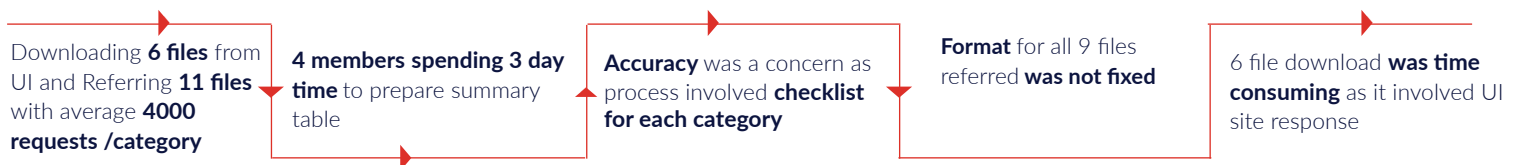
Use Case

Sending compliance status report with attachment of Post assessment report with proper excel file name and summary table to Change Managers, Change Champions and Spocs of IT and BTG teams through auto-mailer.

Previous month data of change and release IDs, change categories is downloaded from UI Original Report (.xls file). Category wise attachments existency flag is updated in result by using Intermediate report (.xls file). **For each change and release request ID details are taken from both the .xls files, and on the basis of check list final compliance status report is generated in Post assessment report file** for categories- Open Change, Closed Change, Closed Release, NSI(New Solution Identification)and Data patch. This report with Summary table is shared to Change Managers, Change Champions and Spocs of IT and BTG teams through auto-mailer.



Challenges



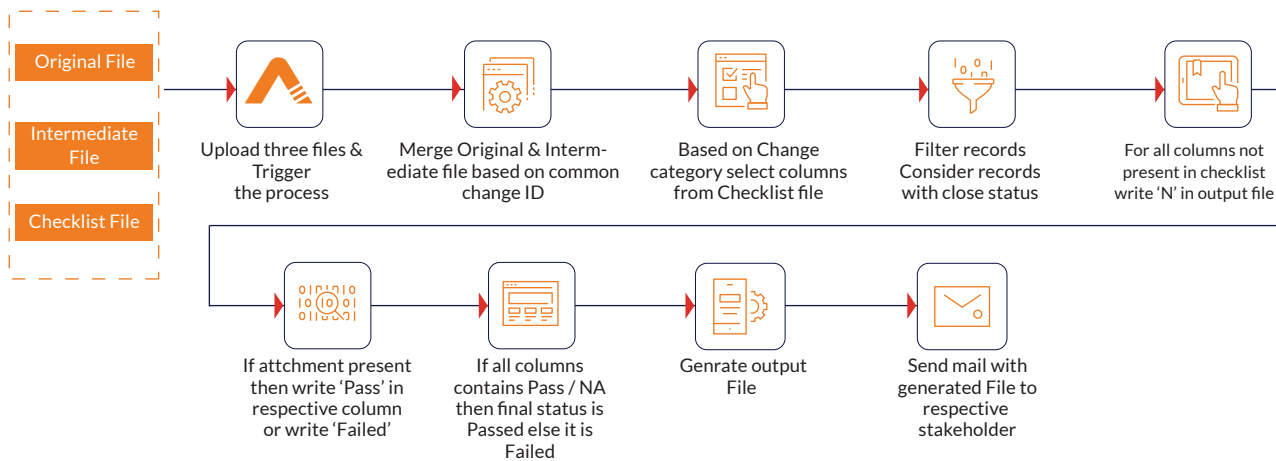


Solution Offered

- Robot will download Open, Intermediate files for each change category from UI
- Robot will upload Open, Intermediate files and Checklist on AutomationEdge and will trigger the process
- Robot will merge open and intermediate file, refer checklist based on change category and will filter closed records.
- Robot will generate final output file for each change category, will summarize report in a table and will email it to all the respective stakeholders
- For columns not present in checklist it will mark "N" and if required attachment is present then it will update "Pass" or else "Failed" in the respective status column. If the final status is Pass/NA then the final status is passed or else Failed



Change & Release Management



GUI Automation Benefits



TAT

Reduction from 3 days to 5 minutes



Productivity

Optimized utilization of 4 man hours/day efforts saved



Accuracy

No scope of manual error