# Process Definition Document

*Process Name: Invoice Scraping*

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# Introduction

## Purpose of the Document

The Process Definition Document outlines the business process chosen for automation using UiPath Robotic Process Automation (RPA) technology.

The document describes the sequence of steps performed as part of the business process, the conditions and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them with the details required for applying robotic process automation to the selected business process.

## Objectives

The process has been selected for RPA as part of the project initiative conducted within Techno Computers Inc., the Finance department.

The objective of this process automation is linked to the project business case and is mainly intended to:

* Deliver faster processing
* Reduce redundant activities
* Improve overall performance and reliability

## Process Key Contact

The specifications document includes concise and complete requirements of the business process and it is built based on the inputs provided by the process Subject Matter Expert (SME)/ Process Owner.

The Process Owner is expected to review it and provide signoff for accuracy and completion of the steps, context, impact and a set of process exceptions. The details are to be included in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact Details (email & phone number) | Notes |
| Process Owner | Niyaz Ahmed | [niyaz.ahmed@uipath.com](mailto:niyaz.ahmed@uipath.com) +91-9870333008 |  |
| Business Analyst | Niyaz Ahmed | [niyaz.ahmed@uipath.com](mailto:niyaz.ahmed@uipath.com) +91-9870333008 |  |

## Minimum Prerequisites for Automation

|  |  |
| --- | --- |
| Met (Y/N) | Prerequisites |
|  | A filled in and completed Process Definition Document |
|  | Closure of any open process questions |
|  | Environment set up |
|  | Test Data to support development and testing |
|  | User access and creation of user accounts (licences, permissions, restriction to create accounts for robots) |

# As-Is Process Description

## Process Overview

General information about the process selected for RPA prior to automation.

|  |  |  |
| --- | --- | --- |
| # | Item | Description |
| 1 | Process Full Name | Invoice Scraping |
| 2 | Process Area | Personal |
| 3 | Department | Finance |
| 4 | Process Short Description  (operation, activity, outcome) | A process that will scrape relevant data from the invoices for further processing. The Robot will read through emails and download the invoices received in the form of an email attachment as a PDF. It will extract specific data and store those values in an Excel spreadsheet and a subset of values will be uploaded to the Orchestrator Queue. And finally, the robot will email the spreadsheet to yourself when finished. |
| 5 | Role(s) required for performing the process | Any |
| 6 | Process schedule and frequency | As needed (recommended End of Day [EOD]) |
| 7 | # of items processed /reference period | 100-150 invoices |
| 8 | Process execution time | 4-5 seconds/invoice |
| 9 | Peak period(s) | N/A |
| 10 | Transaction Volume During Peak period | N/A |
| 11 | Total # of FTEs supporting this activity | N/A |
| 12 | Expected increase of volume in the next reference period | N/A |
| 13 | Level of exception rate | N/A |
| 14 | Input data | Invoices as an attachment over email |
| 15 | Output data | Order details uploaded to Orchestrator Queue |

\*Add more rows to the table to include relevant data for the automation process. No fields should be left empty. Use “n/a” for the items that don't apply to the selected business process.

## Applications used in the Process

The table includes a comprehensive list of all the applications that are used as part of the process to be automated to perform the given steps in the flow.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Application Name & Version | System Language | Thin/Thick Client | Environment/ Access Method | Comments |
| 1 | Microsoft Outlook Version 2006 | English | Thin | PC |  |
| 2 | Microsoft Excel 2016 | English | Thin | PC |  |
| 3 | Adobe Reader PDF | English | Thin | PC |  |

\*Add more rows to the table to include the complete list of applications.

**-------------Complete the rest of the document and submit along with your final submission.-------------**

## As-Is Process Map

**High Level As-Is Process Map:** This chapter depicts the As-Is business process at a High Level to enable developers to have a high-level understanding of the current process.

(IF ON GOOGLE DOCS GO TO INSERT DRAWING TO PUT YOUR DRAWING HERE)

**Detailed Process Map:** This chapter depicts the As-Is business process at a detailed view to enable process owners to document their process

|  |  |  |  |
| --- | --- | --- | --- |
| # | Step Action/Description | Screenshot | Remarks |
| 1 | Open the email and open all mails with subject “Techno Computers” and download all the attachments with name CustomerName\_InvoiceDate\_InvoiceNumber.pdf  And save them in folder named “attachments” in the desktop in path  C:\Users\dell\+Environment.Username\invoices project\Invoices Project | A screenshot of a computer  Description automatically generatedA screenshot of a computer  Description automatically generated |  |
| 2 | Open the pdf file and extract   * InvoiceNo * InvoiceDate * Order Information   + ItemNo   + Description   + Quantity   + Price   + SubTotal   + GST   + Total   data and put them in the excel file. | Graphical user interface, text, application  Description automatically generated  Graphical user interface, application, table, Excel  Description automatically generated |  |
| 3 | Repeat the previous step with all the files in the attachments folder save the excel files with name CustomerName\_InvoiceNumber.xlsx  Email the files to its destination with subject  ” **Course 2 Automation: CustomerName\_InvoiceNumber details uploaded to queue**” | Graphical user interface, text, application, email  Description automatically generated |  |

# To-Be Process Description

## Detailed Process Map

**High Level To-Be Process Map:** This chapter depicts the To-Be automation process at a High Level to enable developers/COE to have a high-level understanding of the to be developed process.

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**Detailed Process Map:** This chapter depicts the To-Be automation process at a detailed view to enable developers/COE to see the workflows involved in the RPA solution

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Workflow Name** | **Description** | **Pre-conditions** | **Post-actions** | **Arguments** | **Notes** |
| The main workflow | The first it check if there is a folder named as “attachments” and also check if this folder contain at least on file with name CustomerName\_InvoiceDate\_InvoiceNumber.pdf  Using the output of those two activities in if condition to decide to start the “download attachment workflow” after the downloading has finished using for each loop to start our process for each file individually so first get the name of each pdf file and then by using string manipulation get the ownername and the invoice number and joining them together to make the sheetname argument Then using pdf count pages activity to know the number of pages for each pdf to how many pages we need to make data scraping for | File in the desktop named as invoices project inside another one with the same name |  | Sheetname(string) |  |
| Downloading the attachments | This workflow for downloading the attachments. it starts by getting the password and email from orchestator server and use them to access my mail and view the last 7 unreaden mails and download the attachment with name CustomerName\_InvoiceDate\_InvoiceNumber.pdf | File in the desktop named as invoices project inside another one with the same name |  |  |  |
| If the invoice is one page | using data scraping to get out the data from the pdf and then write it to the excel with the desired name and make the sheet also with the desired name using get text to know the invoice number and invoice date to write them in empty cells becaus they aren't included in the table then by calculating the row count making dynamic variable intger number to decide the position of the sub-total,GST 8% and total then upload them to the orchestator as queue items then delete the TOTAL range as it is not required.  then using outlook to send the attachments individually with special subject for each | File in the desktop named as invoices project inside another one with the same name |  | ExtractDatatable  Extracteddatatable1  sheetname |  |
| If the invoices pages are 2 | using data scraping twice to get the table in the second page also and then write it to the excel with the desired name and make the sheet also with the desired name using get text to know the invoice number and invoice date to write them in empty cells becaus they aren't included in the table then by calculating the row count making dynamic variable intger number to decide the position of the sub-total,GST 8% and total then upload them to the orchestator as queue items then delete the TOTAL range as it is not required.  then using outlook to send the attachments individually with special subject for each |  |  | ExtractDatatable  Extracteddatatable1  sheetname |  |

## Robot Type

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Attended | Unattended | Trigger | Comments |
| 1 |  |  |  |  |

## Business Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. These can be classified as:

### Known Exceptions

The table below reflects all the business process exceptions encountered during the process evaluation and documentation. These are known exceptions that occurred before. For each of these exceptions, define a corresponding expected action that the robot should complete if it encounters the exception.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| BE # | Exception Name | Step | Parameters | Action to be Taken |
| 1 | Email error | Some emails may be not sent |  | Log message with the name of the sheet that hasn’t been sent |
|  |  |  |  |  |
|  |  |  |  |  |

### Unknown Exceptions

For all other unanticipated or unknown business (process) exceptions, the robot should:

## System Exceptions Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here with the description and action to be taken, for each, by the robot.

Errors identified in the automation process can be classified as:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| SE # | Exception Name | Step | Parameters | Action to be Taken |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

For all the other unanticipated or unknown system exceptions, send an email to **<placeholder>** and attach a screenshot of the error message.

# Other Observations

Include below any other relevant observations you consider needed to be documented here.

# Additional sources of process documentation