# Process Definition Document

*Process Name: Calculate Client Security Hash*

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# Introduction

## I. 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.

## II. Objectives

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

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

## III. 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 | Kristina Kaldon | example@uipath.com<br>+1 (800) 000 - 0000 | Point of contact for questions |
| Business Analyst | Kristina Kaldon | example@uipath.com<br>+1 (800) 000 - 0000 | |

## IV. Minimum Prerequisites for Automation

| Met (Y/N) | Prerequisites |
|---|---|
| Y | A filled in and completed Process Definition Document |
| Y | Closure of any open process questions |

| | |
|---|---|
| Y | Environment set up |
| Y | Test Data to support development and testing |
| Y | User access and creation of user accounts (licences, permissions, restriction to create accounts for robots) |

# As-Is Process Description

## I. Process Overview

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

| # | Item | Description |
|---|---|---|
| 1 | Process Full Name | Calculate Client Security Hash |
| 2 | Process Area | Security |
| 3 | Department | Finance and Accounting |
| 4 | Process Short Description (operation, activity, outcome) | Generate the Security Hash for each Client based on their personal information |
| 5 | Role(s) required for performing the process | System 1 User (ACME) |
| 6 | Process schedule and frequency | Daily |
| 7 | # of items processed /reference period | 7-25 |
| 8 | Process execution time | 2 minutes / client |
| 9 | Peak period(s) | No peak period |
| 10 | Transaction Volume During Peak period | N/A |
| 11 | Total # of FTEs supporting this activity | 1 |
| 12 | Expected increase of volume in the next reference period | N/A |
| 13 | Level of exception rate | No expected exceptions |
| 14 | Input data | Client Data (Work Item Details) |
| 15 | Output data | Client Security Hash |

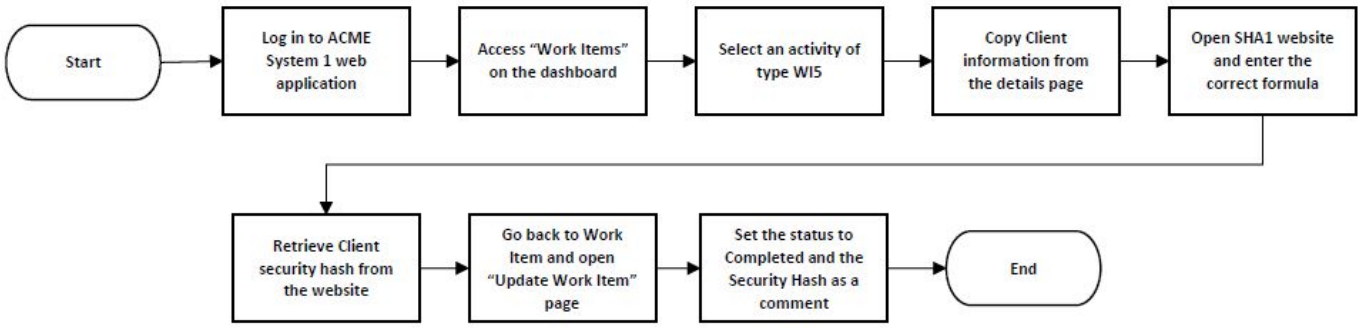
# II. Applications used in the Process

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.

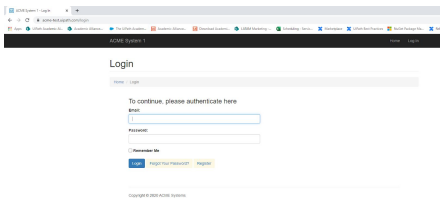
| # | Application Name & Version | System Language | Thin/Thick Client | Environment/ Access Method | Comments |
|---|---|---|---|---|---|
| 1 | Google Chrome 84.0.4147.125 | English | Thin | Direct | |

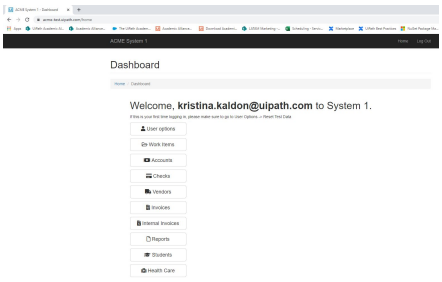
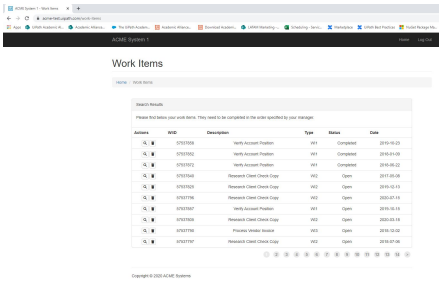
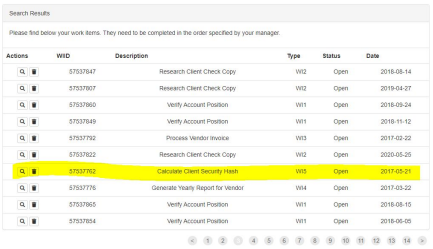
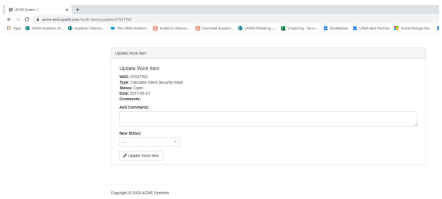
# III. As-Is Process Map

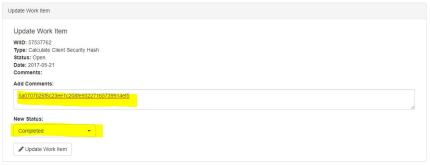
**High Level As-Is Process Map:** This chapter depicts the As-Is business process at a High Level to enable developers to have a high-level understanding of the current process.




**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 ACME System 1 Web Application | N/A | Chrome browser open to URL https://acme-test.uipath.com/ |
| 2 | Log in to System 1 |  | Required input for username and password. Must be registered and reset data.<br><br>Possible exception:<br>Handle exception if incorrect email or password |

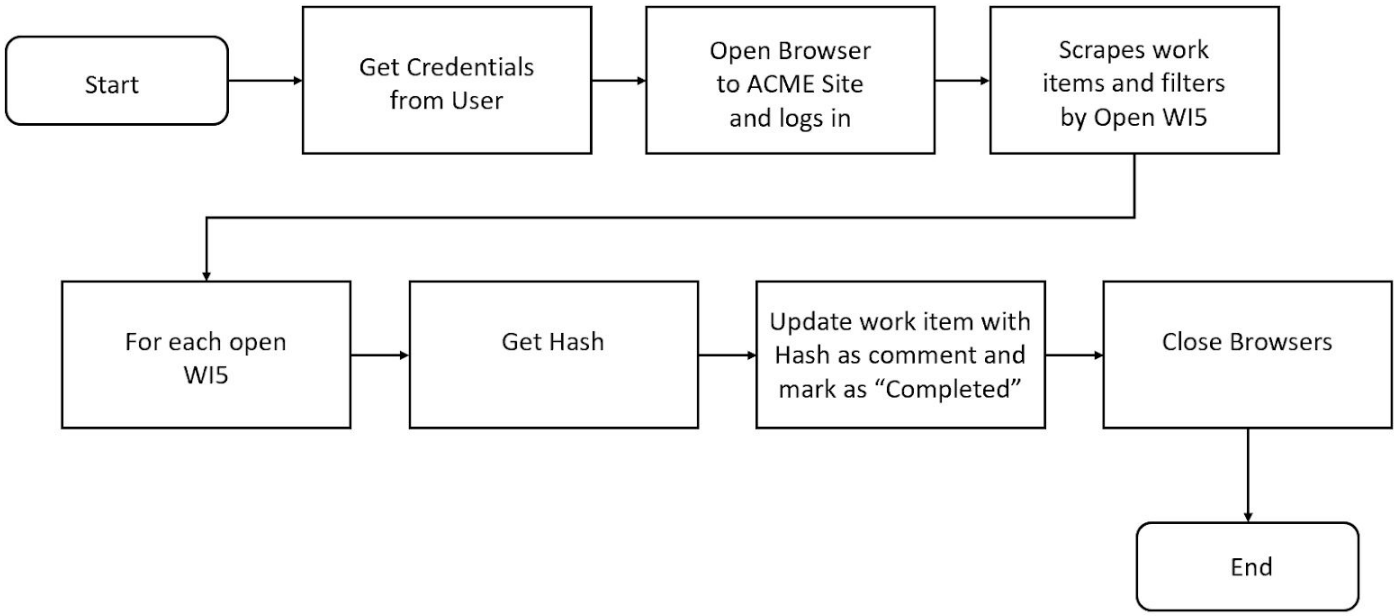
| | | | |
|---|---|---|---|
| 3 | Access the dashboard |  | |
| 4 | Access the list of Work Items by clicking on the work items button |  | |
| 5 | For each work item of type WI5, perform the following |  | Possible exception:<br>Handle exception if no work items of type WI5 exist |
| 5.A | Open the Details page of the WI5 to retrieve the Client Information Details |  | Do this by clicking on the search icon for the row or navigating to the URL “https://acme-test.uipath.com/work-items/ [work item ID]” |
| 5.B | Open the SHA1 webpage and provide the following input: [ClientID]-[ClientName]-[ClientCountry]. Replace all the variables with the corresponding values. Use dashes between items, as shown above |  | SHA1 URL:<br>http://www.sha1-online.com/<br>but you may use any SHA1 generator site<br><br>For example input:<br>RI52540-Camilla Escarcega-Romania |
| 5.C | Retrieve the Client Security Hash value from the webpage |  | |
| 5.D | Go back to Work Item Details and open Update Work Item |  | Do this by clicking the “Update Work Item” button or navigating to the URL “https://acme-test.uipath.com/work-items/update/ [work item ID]” |

| | | | |
|---|---|---|---|
| 5.E | Set the status to “Completed”. Add a comment with the obtained [SecurityHash] from step 5.C |  | |
| 6 | Continue to the next WI5 until all are completed | N/A | |
| 7 | Close browsers opened during process | N/A | Close ACME and SHA1 browsers. If they are unresponsive, you can kill Chrome, but otherwise, do not kill Chrome. |

# To-Be Process Description

## I. 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.




**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 | Description | Pre-conditions | Post-actions | Arguments | Notes |
|---|---|---|---|---|---|

| **Name** | | | | | |
|---|---|---|---|---|---|
| PromptForCredentials | Prompts the user to enter their username and password for the ACME test site. | N/A | N/A | out_Password - string<br>out_Username - string | |
| OpenBrowser | Opens a browser to the input URL | N/A | Chrome browser open to URL | in_URL - string | |
| LogInACME | Logs into the ACME test site and ensures the login was successful | Chrome browser open to the ACME login page | Logged into ACME - on homepage | in_Password - string<br>in_Username - string | Throw BRE if the page didn't load or the login credentials didn't work. |
| IterateWorkItems | Scrapes the work items from ACME and filters by open WI5 types. If there are open WI5s, it will invoke updating each work item with the hash | Logged into ACME | Logged into ACME | in_URL_AcmeWI - string<br>in_URL_SHA1Generator - string | Throw BRE if no open WI5 |
| ProcessWorkItem | Process a work item 5 by scraping the data from its page, calculating the hash and updating the page | Any ACME page (logged in) | Update Work Item ACME page | in_URL_AcmeWI - string<br>in_WIID - string | Hash entered must be all lowercase |

# II. Robot Type

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

| | | | | |
|---|---|---|---|---|
| 1 | Attended | N/A | Kicked off by user as needed | Will use user's email and password for login |

# III. 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 | Incorrect Email or Password/ACME site down | 2 | Check for Log Out button | Log with Error level and Throw BRE |
| 2 | No open work items of type WI5 exist | 5 | | Log with Warn level and Throw BRE |

## Unknown Exceptions

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

- Log with Error level and Kill any open applications (Chrome)

# IV. 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 |
|---|---|---|---|---|
| 1 | Application unresponsive | Any | No response/blank page | Log with error level and kill any open applications |

# Other Observations

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

- Future additions to use Orchestrator to store the ACME credentials, making the automation unattended
- Future additions to retry when unexpected exception occurs

# Additional sources of process documentation

- N/A