RPA Process Definition Document

Department: IT Department

Process Name: Monitor scheduler job & Job Queue job and create Daily report by Excel file.

RPA Tool: UiPath

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Revision History

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Document Version Control

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|  |  |  |  |

Contributors

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Document Sign-off Requirements

The following table contains the people required to sign-off and/or review this document and those that require the document for information only.

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Document Classification

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| Classification | **Company Confidential** |
| Definition | Information is Group confidential and needs to be protected |
| Context | Where loss of information confidentiality would result in significant harm to the interests of the organisation, financial loss, embarrassment or loss of information |

# Introduction

The Process Definition Document (PDD) captures the flow of a business process to be developed within UiPath.

The screenshots contained within the document captures the business process to be automated, the target systems used within the process and any assumptions that have been taken into account.

Once agreed as the basis for the automation of the target process, the process steps and assumptions will be used as the basis for RPA solution design.

Changes to this business process may constitute a request for change and will be subject to the agreed agility program change procedures.

**Note:** This document must be completed in the absence of existing process documentation that provides the level of detail required for a process to be automated. If existing process documentation is to be used instead of a new PDD the following steps should still be undertaken

* Existing process documentation reviewed to ensure it is still up to date and fully captures the current manual process.
* Existing process documentation provides the same level of detail that is required for automation.
* Agreed by the business as an accurate description of the manual process.

# Overview

## Manual Process Description

As part of Group IT, IT Department required to perform a monitoring log to record all the job queue Entries and Scheduler job list job status. To make sure all the jobs will successfully processed daily.

With the new RPA process, the source of data will also be extract.

Complete details of the As-Is Process are further described in Section 4: Process Details.

## Target Systems

|  |  |
| --- | --- |
| Name | Description |
| Microsoft Dynamic 365 Business Central | Microsoft Dynamics 365 Business Central is a cloud-based, all-in-one business management solution which enables to upgrade from entry-level accounting software or legacy ERP system to one single, comprehensive solution to manage finances, operations, sales, and customer service within the company. |
| Microsoft Office Excel | Excel is a spreadsheet program from Microsoft and a component of its office product group for business applications. Microsoft Excel enables users to format, organize and calculate data in a spreadsheet. By Organizing data using software like Excel, data analysts and other users can make information easier to view as data is added or changed. |

# Impacted Business Areas

There is no impact on current and other business areas as RPA is only automating current manual process thereby assisting businesses in reducing daily manual handling and effort in performing the process. Business can also redeploy the time saved on other key business areas.

While there is no downstream impact to the business process from RPA, there is dependency on respective systems which RPA works on. Hence, any enhancement or changes to the existing business process will cause a CR for RPA.

# Process Details

This section contains detailed description of the manual process.

## Flowchart

Scheduler job List monitoring

Save As  
TFP Daily Job Monitor Report – MMMYYYY.xlsx  
Or  
GFM Daily Job Monitor Report – MMMYYYY.xlsx

Goto Microsoft NAV

No

Yes

Update to Excel Log file File

Status = X

Status = ✓

Earliest Start Date /Time = Today Date or Tomorrow date  
&  
Run Status= Blank

Checking all the filtering job status follow the Criteria table

Goto Scheduler job list

Set Filter  
Description = C\*

Start

END

Save As  
TFP Daily Job Monitor Report – MMMYYYY.xlsx  
Or  
GFM Daily Job Monitor Report – MMMYYYY.xlsx

RPA auto reset the Error job back to Normal.

No

YES

Goto Job Queue Entries

Update status continue the last column data for above scheduler job at Excel file.

Status = X

Status = ✓

Earliest Start Date /Time = Today Date or Tomorrow date  
&  
Status= Blank

Checking all the filtering job status follow the Criteria table

Set Filter  
Description = C\*

Goto Microsoft NAV

## In Scope

Process Flow:

### 4.1.1 Summary of the process

**To auto create Excel log file to show the status of the Scheduler job and Job queue Entries to monitor the job was processing successful or not. Please refer to below point show:**

1. **Scheduler job for TFP**
2. **Job Queue Entries for TFP**
3. **Scheduler job for GFM**
4. **Job Queue Entries for GFM**

**Scheduler job for TFP Steps**

1. Go to Website : <https://erp.tfpmy.com/TFP/signin>

A screenshot of a login screen

Description automatically generated

1. Sign In User name and Password.
2. Press  and key in Scheduler and choose Scheduler Job List.

A screenshot of a computer

Description automatically generated

1. All the job wants to monitor was show in this page. A screenshot of a computer

   Description automatically generated
2. Filter range to easily monitored.

Click + Filter 🡪 choose Description.

A screenshot of a computer

Description automatically generated

1. Key in C\* 🡪 Enter

A screenshot of a filter

Description automatically generated

1. All the Description start on C\* appear

A screenshot of a computer

Description automatically generated

1. Click Open in Excel

A screenshot of a computer

Description automatically generated

1. Excel file will prompt out after clicks.

A screenshot of a computer

Description automatically generated

1. Change Scheduler job List Tab name to Today date.

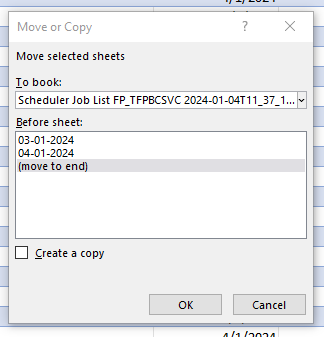
A screenshot of a computer

Description automatically generated

1. Save in specific folder and the file name follow below format:-

TFP Daily Scheduler Job Monitor Report – MMMYYYY.xlsx. e.g. JAN2024

1. Repeat all step start on next day (step 1 to step 10).
2. Open Excel file TFP Daily Scheduler Job Monitor Report – JAN2024 (represent as A)
3. Copy or Move the Today date sheet to “A”



1. Everyday report has new sheets like below.

A screenshot of a computer

Description automatically generated

**Job Queue Entries for TFP Steps**

1. Press  and key in Job Queue Entries and choose.

A screenshot of a computer

Description automatically generated

1. All the job wants to monitor was show in this page.

A screenshot of a computer

Description automatically generated

1. Filter range to easily monitored.

Click + Filter 🡪 choose Description.

A screenshot of a computer

Description automatically generated

1. Key in C\* 🡪 Enter

A screenshot of a filter

Description automatically generated

1. All the Description start on C\* appear

A screenshot of a computer

Description automatically generated

1. Click Open in Excel
2. Excel file will prompt out after clicks.

A screenshot of a computer

Description automatically generated

1. Change Job Queue Entrie sheets name to Today date.

A screenshot of a computer

Description automatically generated

1. Save in specific folder and the file name follow below format:-

TFP Daily Job Queue Entries Monitor Report – MMMYYYY.xlsx. e.g. JAN2024

1. Repeat all steps starting on next day (step 1 to step 10).
2. Open Excel file TFP Daily Job Queue Entries Monitor Report – MMMYYYY (represent as B)
3. Copy or Move the Today date sheet to “B”

A screenshot of a computer screen

Description automatically generated

1. Everyday reports have new sheets like below.

A screenshot of a computer

Description automatically generated

1. After completed log file, RPA will help to change all the job status “Error” to “Ready”
2. Process Step 1 to Step 4
3. Press + Filed

A screenshot of a computer

Description automatically generated

1. Choose “Status” and key in “Error”. Press Enter to show all the list.

A screenshot of a computer

Description automatically generated

1. All the Error Status will list out. Highlight the first Error status

\* Job show at below screenshot was just a example.

A screenshot of a computer

Description automatically generated

1. Clicks Process 🡪 Set Status to Ready.

A screenshot of a computer

Description automatically generated

1. Change all the Status “Error” to Ready for all Job that filter by C\*.

**Scheduler job for GFM Steps**

1. Go to Website : <https://erp.tfpmy.com/TFP/signin>

A screenshot of a login screen

Description automatically generated

1. Sign In User name and Password.
2. On Top right side click “” 🡪 My Settings

A screenshot of a computer

Description automatically generated

1. Click “” at Company Field 🡪 Highlight “Global Food Merchant Holding Sdn Bhd” 🡪click “ok” button.

A screenshot of a computer

Description automatically generated

A screenshot of a computer

Description automatically generated

1. Click “Ok” button to complete change company.
2. Press  and key in Scheduler and choose Scheduler Job List.

A screenshot of a computer

Description automatically generated

1. All the job want to monitor was shown in this page. Please follow the below filter to filter all the job that needs to monitor. A screenshot of a computer

   Description automatically generated
2. Filter which job need to monitor.

Click + Filter 🡪 choose Description.

A screenshot of a computer

Description automatically generated

1. Key in C\* 🡪 Enter.

A screenshot of a computer screen

Description automatically generated

1. All the Description start on C\* appear

A screenshot of a computer

Description automatically generated

1. Click Open in Excel
2. Excel file will prompt out after clicks.

A screenshot of a computer

Description automatically generated

1. Change Scheduler Job List sheets name to Today date.

A screenshot of a computer

Description automatically generated

1. Save in specific folder and the file name follow below format:-

GFM Daily Scheduler job Monitor Report – MMMYYYY.xlsx. e.g. JAN2024

1. Repeat all steps starting on the next day (step 1 to step 10).
2. Open Excel file GFM Daily Scheduler job Monitor Report – MMMYYYY (represent as C)
3. Copy or Move the Today date sheet to “C”

A screenshot of a computer screen

Description automatically generated

1. Everyday reports have new sheets like below.

A screenshot of a computer

Description automatically generated

**Job Queue Entries for GFM Steps**

1. Press  and key in Scheduler and choose Scheduler Job List.

A screenshot of a computer

Description automatically generated

1. All the job want to monitor was shown in this page. Please follow the below filter to filter all the job that needs to monitor.

A screenshot of a computer

Description automatically generated

1. Filter which job need to monitor.

Click + Filter 🡪 choose Description.

A screenshot of a computer

Description automatically generated

1. Key in C\* 🡪 Enter.

A screenshot of a computer screen

Description automatically generated

1. All the Description start on C\* appear

A screenshot of a computer

Description automatically generated

1. Click Open in Excel
2. Excel file will prompt out after clicks.

A screenshot of a computer

Description automatically generated

1. Change Scheduler Job List sheets name to Today date.

A screenshot of a computer

Description automatically generated

1. Save in specific folder and the file name follow below format:-

GFM Daily Job Queue Entries Monitor Report – MMMYYYY.xlsx. e.g. JAN2024

1. Repeat all steps starting on the next day (step 1 to step 10).
2. Open Excel file GFM Daily Job Queue Entries Monitor Report – MMMYYYY (represent as D)
3. Copy or Move the Today date sheet to “D”

A screenshot of a computer screen

Description automatically generated

1. Everyday reports have new sheets like below.

A screenshot of a graph

Description automatically generated

1. After completed log file, RPA will help to change all the job status “Error” to “Ready”
2. Process Step 1 to Step 4
3. Press + Filed

A screenshot of a computer

Description automatically generated

1. Choose “Status” and key in “Error”. Press Enter to show all the list.

A screenshot of a computer

Description automatically generated

1. All the Error Status will list out. Highlight the first Error status.

\* Job show at below screenshot was just a example.

A screenshot of a computer

Description automatically generated

1. Clicks Process 🡪 Set Status to Ready.

A screenshot of a computer

Description automatically generated

1. Change all the Status “Error” to Ready for all Job that filter by C\*.

## Problems or Issues

|  |  |  |
| --- | --- | --- |
| Possible problems and exceptions might happen during the processes | Example | Current Solutions (How does the user handle those?) |
|  |  |  |
|  |  |  |
|  |  |  |

## Out of Scope

**SIGNOFF MATRIX PDD Signoff Statement**

We hereby agree and confirm the business process described above, for and on behalf of \*\*\*\*department. By signing below, we hereby agree to commence the preparation of the RPA Solution Design for the process of IAM ID Management – DCP Back Office ID De-Provisioning

|  |  |  |
| --- | --- | --- |
| Has |  | N |
| Specialist, System & Admin Support |  | IT Security Executive |
|  |  | Dept.1 |
| Dept.1 |  |  |
| Date: |  | Date: |
|  |  |  |
| Q |  | T |
| CL, System & Admin Support |  | SH, User Access Management |
|  |  | Dept.2 |
| Dept.2 |  |  |
| Date: |  | Date: |
|  |  |  |
| O |  | B |
| Head, Strategy & Business Mgmt CoE |  | Head, System Security |
|  |  |  |
|  |  |  |
| Date: |  | Date: |
|  |  |  |
| K  Snr Solution Specialist, |  | N  Head, Software Devt and R&D |
| Date: |  | Date: |