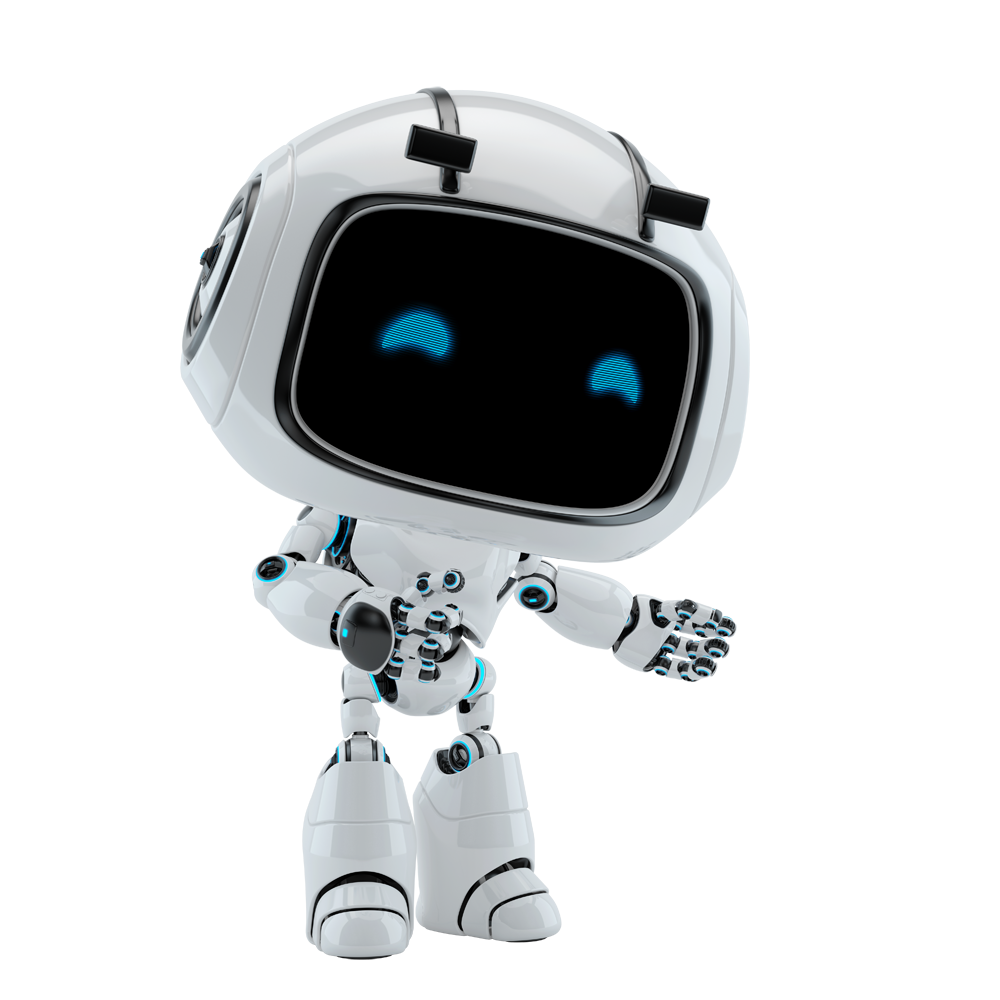


Robotic Process Automation

List USA Private Schools

Process Definition Document (PDD)



Document History

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Date | Version | Role | Name | Organization | Function | Comments |
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Contents

[1. Introduction 5](#_Toc487047734)

[1.1 Purpose of the document 5](#_Toc487047735)

[1.2 Objectives 5](#_Toc487047736)

[1.3 Process key contacts 5](#_Toc487047737)

[1.4 Minimum Pre-requisites for automation 6](#_Toc487047738)

[2. As IS process description 6](#_Toc487047739)

[2.1 Process Overview 6](#_Toc487047740)

[2.2 Applications used in the process 7](#_Toc487047741)

[2.3 As IS Detailed Process map 7](#_Toc487047742)

[2.4 Additional sources of process documentation 8](#_Toc487047743)

[3. To BE Process Description 9](#_Toc487047744)

[3.1 TO BE Detailed Process Map 9](#_Toc487047745)

[3.1.1 Change/Improvement details 9](#_Toc487047746)

[3.1.2 Areas already automated 10](#_Toc487047747)

[3.2 In Scope for RPA 10](#_Toc487047748)

[3.3 Out of Scope for RPA 10](#_Toc487047749)

[3.4 Business Exceptions Handling 10](#_Toc487047750)

[3.4.1 Known Exceptions 10](#_Toc487047751)

[3.4.2 Unknown Exceptions 11](#_Toc487047752)

[3.5 Application Error and Exception Handling 11](#_Toc487047753)

[3.5.1 Know Errors or Exceptions 12](#_Toc487047754)

[3.5.2 Unknow Errors and Exceptions 12](#_Toc487047755)

[4. Other Requirements and Observations 13](#_Toc487047756)

[5. Document Approval 13](#_Toc487047757)

## 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 the details required for applying robotic automation to the selected business process.

### Objectives

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

* *Reduce time needed to obtain list of schools by 95 %. The duration to manually combine such list exceeds 3 hours.*

## As IS process description

### Process Overview

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

|  |  |  |
| --- | --- | --- |
| # | Item | Description |
| 1 | **Process full name** | *List USA Private Schools* |
| 2 | **Process Area** | *n/a* |
| 3 | **Department** | *n/a* |
| 4 | **Process short description**  (operation, activity, outcome) | *Generate excel file with following data about each private school in USA: Name of the school, Address, State, Zip code, Phone number* |
| 5 | **Role(s) required for performing the process** | *n/a* |
| 6 | **Process schedule and frequency** | *n/a* |
| 7 | **# of items processes /month** | *n/a* |
| 8 | **Average handling time per item** | *n/a* |
| 9 | **Peak period (s)** | *n/a* |
| 10 | **Total # of FTEs supporting this activity** | *n/a* |
| 11 | **Level of exception rate** | *~0% exceptions (incomplete invoice details, unreadable data on the invoice etc)* |
| 12 | **Input data** | *none* |
| 13 | **Output data** | *Excel report containing information about each USA private school* |
| 14 | **Dependencies**  (upstream, downstream) | *n/a* |

### Applications used in the process

The table includes a comprehensive list all the applications that are used as part of the process automated, at various steps in the flow.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Application name & version | System  Language | Login Module | Interface | Environment/  Access method | Comments  (Include URLs) |
| *1* | *Excel* | *EN* | *n/a* | *Client* | *Local desktop* |  |
| *2* | *Edge* | *EN* | *n/a* | *Client* | *Local desktop* |  |

### As IS Detailed Process map

This chapter depicts the AS IS business process in detail to enable the developer to build the automated process.

Diagram

Description automatically generated

Figure . Manual process diagram

|  |  |  |
| --- | --- | --- |
| Step | **Short Description of Key Process Steps** | **AVG**  **TAT\*** |
| ***1*** | *Open* [*www.privateschoolreview.com*](http://www.privateschoolreview.com) *site* |  |
| ***2*** | *Choose state (repeat for each state)* |  |
| ***3*** | *Choose county (repeat for each county)* |  |
| ***4*** | *Copy every school information to excel file* |  |

## To BE Process Description

This chapter highlights the expected design of the business process after automation.

### TO BE Detailed Process Map

Diagram

Description automatically generated

Figure . Dispatcher Diagram

Diagram

Description automatically generated

Figure . Producer diagram

### In Scope for RPA

The activities **in scope of RPA**, are listed here:

1. Creating excel file with following data about each private school in USA: Name of the school, Address, State, Zip code, Phone number

### 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 | Unknown |
| Previously encountered. A scenario is defined with clear actions and workarounds for each case. | New situation never encountered before. It can be caused by external factors. Cannot be predicted with precision, however if it occurs, it must be communicated to an authorized person for evaluation. |

#### Known Exceptions

The table below reflects all the business process exceptions captured during the process evaluation and documentation. These are **known exceptions,** met in practice 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*** | *Missing attachment* | *Step # 2* | *If attachment is missing* | *send email by using* ***Reply email*** *function*  *“Hello,*  *The current email is missing the invoice in PDF/ XML format. Please resend the email with the correct file attached.*  *Thank you”* |
| *2* | *Invoice mandatory details are missing or incomplete (unidentifiable)* | *Step # 3* | *Fields missing or incomplete:*  *Company name*  *Invoice date*  *Invoice reference number*  *Description*  *Taxable amount*  *Tax Rate*  *Total amount*  *Contact information* | *send email for additional details:* ***Reply email***  *“Hello,*  *The product details mentioned in the invoice are incomplete or missing. Please check the invoice details and re-send the correct invoice.*  *Thank you”* |
| *3* | *Vendor does NOT exist in SAP* | *Step # 6* | *Vendor name not found* | *Send email to* [*vendormasterdata@sapvmd.domain.com*](mailto:vendormasterdata@sapvmd.domain.com)  *“Hello ,*  *The vendor presented in the attached invoice is missing from SAP. Please create one entry for it and confirm when it has been done. Thank you,”* |

*Insert more table rows if necessary to capture all the exceptions in a comprehensive list.*

#### Unknown Exceptions

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

*{Define a corresponding expected action that the robot should complete if it encounters unknown exception.}*

*Example:*

* *send an email notification at* [*XYZ@domain.com*](mailto:exceptions.invoiceprocessing@domain.com) *[insert full name, function and email address] with the original email and error message screenshot attached.*

### Application Error and Exception 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:

|  |  |  |
| --- | --- | --- |
| Area | Known | Unknown |
| **Technology/**  **Applications** | Experienced previously, action plan or workaround available for it. | New situation never encountered before, or may happened independent of the applications used in the process. |

#### Know Errors or Exceptions

The table below reflects all the errors identifiable in the process evaluation and documentation.

For each of these errors or exceptions, define a corresponding expected action that the robot should complete if it is encountered.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **AE #** | **Error name** | **Step** | **Parameters** | **Action to be taken** |
| ***1*** | *Email stops responding* | *Any step when working with outlook. Most frequent when opening attachments.* | *Error message* | *Wait for application to respond.*  *Retry.*  *Close application and run the sequence again.* |
| ***2*** | *SAP logon failure* | *Step 4* | *Account deactivated* | *Send email with screenshot to RPA supervisor.* |

*Insert more table rows if necessary to capture all the exceptions in a comprehensive list.*

#### Unknow Errors and Exceptions

For all the other **unanticipated or unknown application exceptions/errors**, the robot should:

*{Define a corresponding expected action that the robot should complete if it encounters an error or unknown exception.}*

*Example:*

* *send an email notification at* [*XYZ@domain.com*](mailto:exceptions.invoiceprocessing@domain.com) *[insert full name, function and email address] with the original email and error message screenshot attached.*