

Process Definition Document

Process Name: Calculate Client Security Hash



Table of Contents

Introduction	1
Purpose of the Document	1
Objectives	1
Process Key Contact	1
Minimum Prerequisites for Automation	1
As-Is Process Description	2
Process Overview	2
Applications used in the Process	3
As-Is Process Map	3
To-Be Process Description	5
Detailed Process Map	5
Robot Type	6
Business Exceptions Handling	7
Known Exceptions	7
Unknown Exceptions	7
System Exceptions Handling	7
Other Observations	7
Additional sources of process documentation	8

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 +1 (800) 000 - 0000	Point of contact for questions
Business Analyst	Kristina Kaldon	example@uipath.com +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

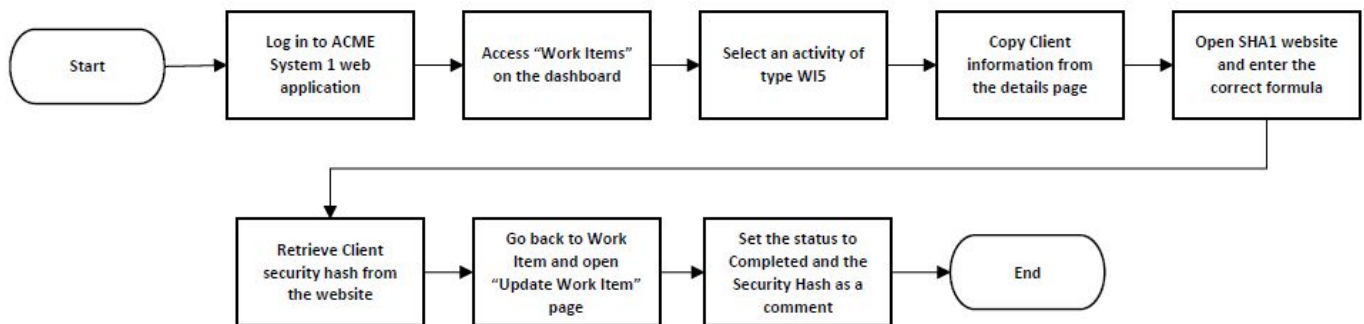
II. Applications used in the Process

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	

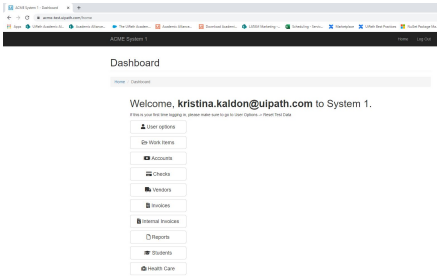
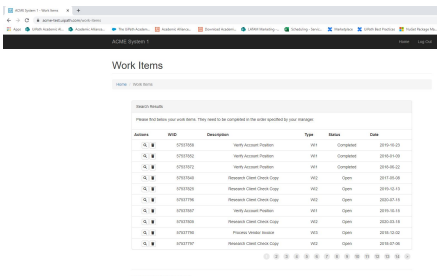
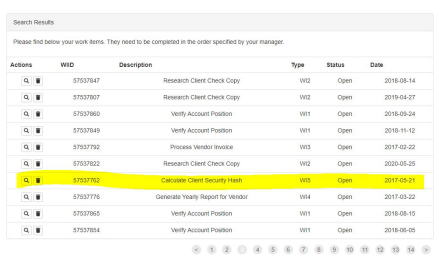
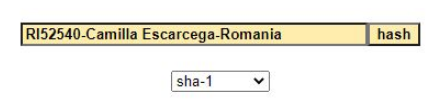
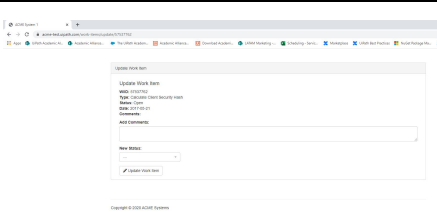
III. As-Is Process Map

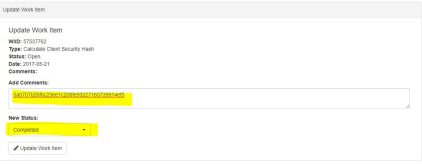
High Level As-Is Process Map: This chapter depicts the As-Is business process at a High Level to enable developers to have a high-level understanding of the current process.



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. Possible exception: Handle exception if incorrect email or password

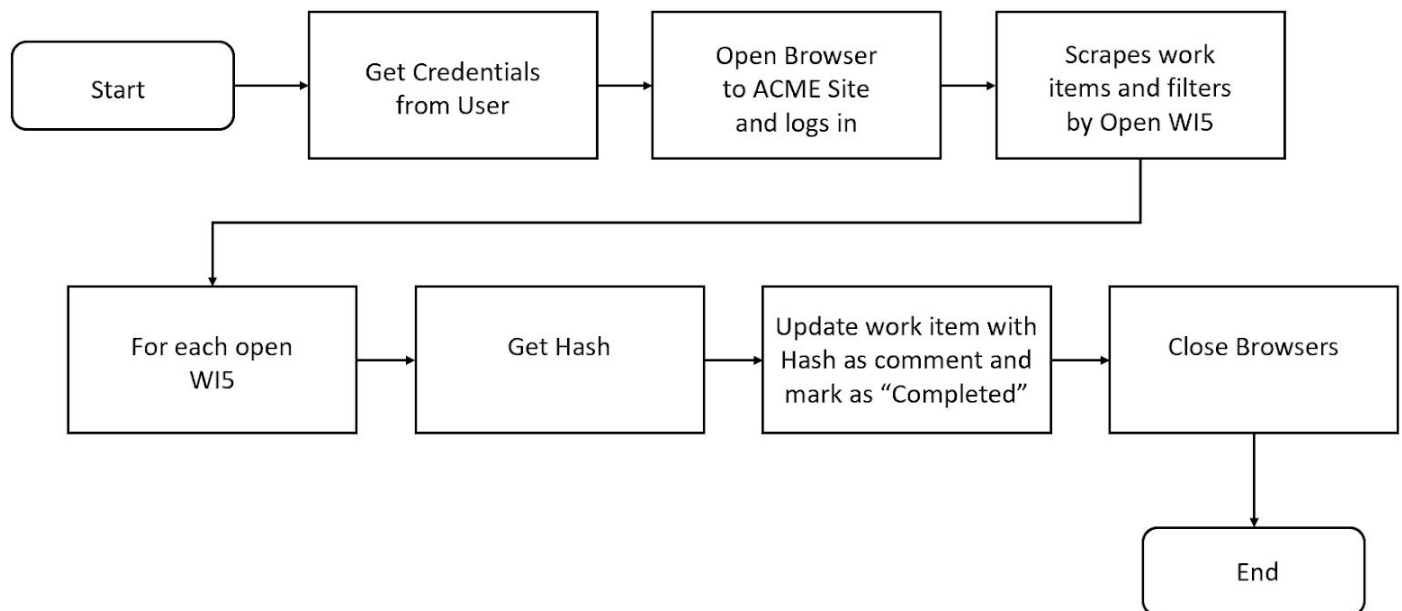
3	Access the dashboard		
4	Access the list of Work Items by clicking on the work items button		
5	For each work item of type WI5, perform the following		Possible exception: Handle exception if no work items of type WI5 exist
5.A	Open the Details page of the WI5 to retrieve the Client Information Details	<p>Client Information Details</p> <p>Client ID: CX76110</p> <p>Client Name: Mirian Derosier</p> <p>Client Country: Germany</p>	Do this by clicking on the search icon for the row or navigating to the URL https://acme-test.uiopath.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: http://www.sha1-online.com/ but you may use any SHA1 generator site
5.C	Retrieve the Client Security Hash value from the webpage	<p>Result for sha1: 5a0707b26f6c23ee1c208fe93227165739914ef5</p>	For example input: RI52540-Camilla Escarcega-Romania
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.uiopath.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
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Name					
PromptForCredentials	Prompts the user to enter their username and password for the ACME test site.	N/A	N/A	out_Password - string 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 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 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 in_WIID - string	Hash entered must be all lowercase

II. Robot Type

#	Attended	Unattended	Trigger	Comments
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1	Attended	N/A	Kicked off by user as needed	Will use user's email and password for login
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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