

Process Definition Document



Process Name: Invoice Scraping

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Additional sources of process documentation	Error! Bookmark not defined.

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 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

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	Niyaz Ahmed	niyaz.ahmed@uipath.com +91-9870333008	
Business Analyst	Niyaz Ahmed	niyaz.ahmed@uipath.com +91-9870333008	

IV. 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

I. 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.

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.

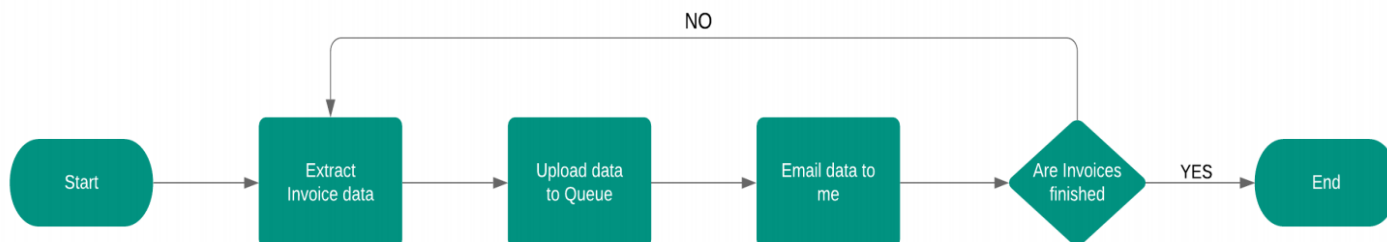
#	Application Name & Version	System Language	Thin/Thick Client	Environment/ Access Method	Comments
1	Microsoft Outlook Version 2006	English	Thin	PC	
2	Microsoft Excel 2016	English	Thin	PC	
3	Adobe Reader PDF	English	Thin	PC	

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

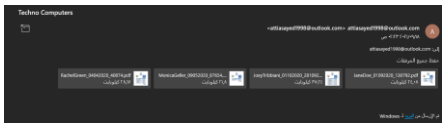
-----Complete the rest of the document and submit along with your final submission.-----

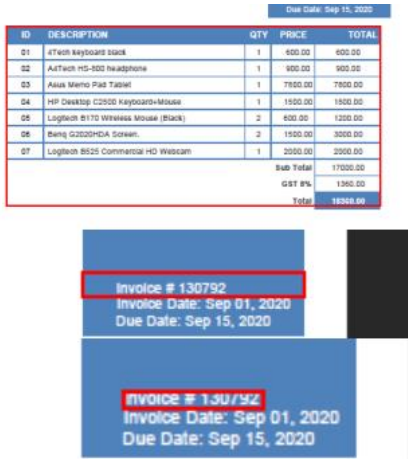
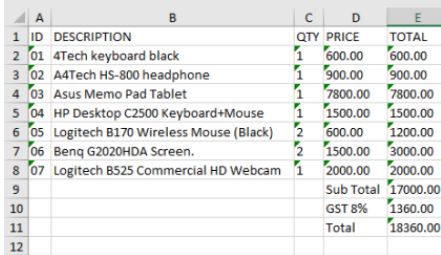
III. As-Is Process Map

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

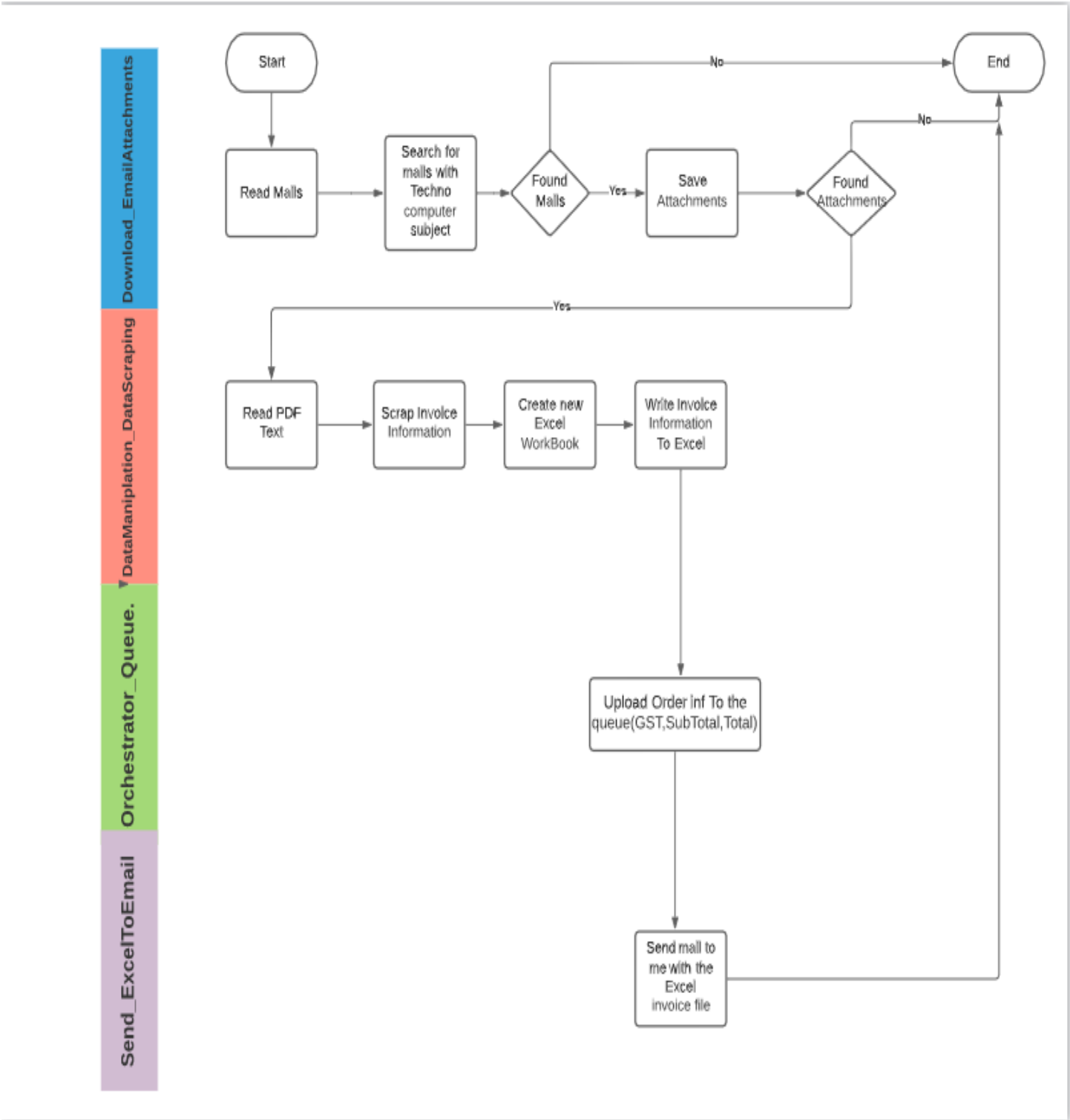
#	Step Action/Description	Screenshot	Remarks
1	Open Gmail		
2	Open Mails / Mails subject should be "Techno Computers"		
3	Save all attachments / Attachment name should be in this format (CustomerName_InvoiceDate_InvoiceNumber.pdf)		
4	Open attachments / Read the downloaded attachments one by one		

5	Read required data / invoice number, invoice date and all the order information	 <p>The screenshot shows an invoice table with columns: ID, DESCRIPTION, QTY, PRICE, and TOTAL. It lists items like 4Tech keyboard black, A4Tech HS-800 headphone, Asus Memo Pad Tablet, HP Desktop C2500 Keyboard+Mouse, Logitech B170 Wireless Mouse (Black), Benq G2020HDA Screen, and Logitech B525 Commercial HD Webcam. Below the table are two blue cards with white text: 'Invoice # 130792, Invoice Date: Sep 01, 2020, Due Date: Sep 15, 2020' and 'INVOICE # 130792, Invoice Date: Sep 01, 2020, Due Date: Sep 15, 2020'.</p>	
6	Save order info / create a new excel file and save all the order information to it	 <p>The screenshot shows an Excel spreadsheet with columns A through E. Row 1 contains headers: ID, DESCRIPTION, QTY, PRICE, TOTAL. Rows 2-8 contain the same data as the invoice table in step 5. Row 9 shows 'Sub Total' with a value of 17000.00. Row 10 shows 'GST 8%' with a value of 1360.00. Row 11 shows 'Total' with a value of 18360.00.</p>	
7	Upload customer details in a queue / upload Sub-Total, GST and Total to a queue.		
8	Mail the excel file / mail the excel file to attiasayed1997@gmail.com with this subject: "Course 2 Automation: CustomerName_InvoiceNumber details uploaded to queue"		
9	Repeat for all invoices / repeat steps 4-8 for all the downloaded invoices.		

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 Name	Description	Pre-conditions	Post-actions	Arguments	Notes
Download_Email Attachments	Read the last unread emails. Download all the attachments with the subject line Techno Computers. Save the attachment files in the data folder in the Project directory.	-login user name and password of gmail account.	-Attachments are downloaded successfully.	<ul style="list-style-type: none"> in_PdfFolder Path 	
DataManiplation_DataScraping	<ul style="list-style-type: none"> - Automate the reading of the pdf file. - Scrap_PDF_Data Automate the entering of the order information into an excel sheet 	- PDF invoices extracted from email and saved to "Invoice" folder	<ul style="list-style-type: none"> - PDF_Data scrapped successfully - Data from Data Table exports successfully to Excel file 	<ul style="list-style-type: none"> in_PdfFolder Path in_ExcelFolder Path out_Total out_GST out_SubTotal 	
Orchestrator_Queue	This workflow helps in uploading the Order Information to the Orchestrator Queue	- Successful extraction of (SubTotal, GST, Total)	- Order Information successfully uploads to queue	<ul style="list-style-type: none"> in_Total in_GST in_SubTotal 	
Send_Excel ToEmail	This workflow mails the generated excel file to my Gmail account which subject line:	- Successful export of Excel files.	- Email delivered successfully with excel attachment	<ul style="list-style-type: none"> in_ExcelFolder Path 	

	"CustomerName_ InvoiceNumber details uploaded to queue"				
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II. Robot Type

#	Attended	Unattended	Trigger	Comments
1		Yes		

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	Found no mail to process	Read mail		Throw an exception and end the process
2	Found no mail with the provided subject	Read Mail		Throw an exception and end the process
3	Found no Attachments to process	Read Mail		Throw an exception and end the process

Unknown Exceptions

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

- Throw an exception and end the process

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	Excel File folder does not exist	Data scraping		Throw an exception
2	Information to be uploaded to the queue are not valid	Upload to orchestrator queue		Throw an exception
3	The information are not successfully uploaded to the queue or the queue is empty	Upload to orchestrator queue		Throw an exception
4	Generated Excel files do not exist	Send excel files to email		Throw an exception

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