

**WebApplicationSmartInvoice**

**Robotic Process Automation**

<Process name>

WebApplicationSmartInvoice – (PDD)

<ARTIKEYS>

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Version Control

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Date | Version | Role | Name | Organization  Department | Function | Comments |
|  | 1.0 | Author | Hasan habbosh |  |  |  |

## Document Overview

The **Process Design Document (PDD)** is created for every business process that is designed to be automated using RPA technology. This document is updated and reviewed whenever any changes or update requests are made to the process design. The purpose of this document is to provide a comprehensive overview of the business process as analyzed and designed, including the key points and detailed stages for implementing automation.

The naming convention for the document follows the same approach as naming automated processes, reflecting the business process name and version. Alternatively, a different naming convention can be defined based on project requirements.

This document is prepared by the **Business Analyst** and the **Solution Architect**, and it is reviewed and approved by the Solution Architect to ensure accuracy and clarity before moving to the implementation phase.

The objective of this document is to record a comprehensive analysis of the business process, including the main requirements, key objectives, gap analysis, and detailed workflows. It serves as a clear reference for the development team and stakeholders. Additionally, it supports the automation team and support teams in fully understanding the process before and during implementation to ensure that the solutions align with the defined goals of the process.

## Automated Master Project details

Details filled in by the developer reflect the actual information for the master project released for production.

|  |  |  |
| --- | --- | --- |
| # | Item | Details  (Fill in with free text. If not applicable, mark the field as “n/a. No empty fields.) |
| **1** | **Master project name and version** | WebApplicationSmart Invoice |
| **3** | **Is Orchestrator used?** (Yes/ No) | YES |
| **4** | **Scalable?** (Yes/ No)  (can the process be run by multiple robots in parallel) | YES |

## Runtime Guide

### Runtime diagram [Architectural structure of the Master Project]

Display the interaction between components (package / robots, Orchestrator queues, and running

order).

*Add diagram below:*

### Master Project Process OverView

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

|  |  |  |
| --- | --- | --- |
| # | Item | Details  (Fill in with free text. If the section does not apply to your automation, mark the field as “n/a”. No empty fields. ) |
| **1** | Process full name | WebApplicationSmartInvoice |
| **2** | Function | Invoicr |
| **3** | Department | Finance and Accounting |
| **4** | Process short description (operation, activity, outcome) | شرح عن العملية |
| **5** | **How to start the automated process?** |  |
| **6** | Process schedule | 25/1/2025 |
| **7** | # of items processes /month | 50 |
| **8** | Average handling time per item | 7 Min |
| **9** | Peak period (s) | ALL MONTH |
| # of FTEs supporting this activity | 1 |
| Level of exception rate | 1000 invoices have missing details |

## Project details

In this section describe all the projects that compose the automated process.

For each project, describe the workflow(s) in the logical order that they are called in.

If the workflow is a flowchart, also include the exported image from Studio.

**If the automated process is composed of multiple projects, copy paste and fill in the table below for each project with its specific details *(Sections 4.1 ; Section 4.2 etc)***

### Project Name: {Fill in Project name here}

*Add to the title of this section the actual project name of the automated process.*

#### Workflow(s) specific to {Project name}

*Add to the title of this section the actual project name to which the workflows are specific to. The name should normally coincide with the Project name mentioned at Section 4.1*

Define below all the workflow files ( xaml files) used in the project, with the Input and Output data.

|  |  |  |
| --- | --- | --- |
| # | Workflow Step name | Short Description |
| 1 | 1.1 | Open Web Application |
| 2 | 1.2 | Log in to System 1 (input data: email and password) |
| 3 | 1.3 | Access the Invoice |
| 4 | 1.4 | Access the invoice Details |
| 5 | 1.5 | Download invoice pdf |
| 6 | 1.6 | For Etch invoice pdf |
| 7 | 1.7 | Send invoice to customer |

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## OtherDetails

|  |  |  |
| --- | --- | --- |
| # | Item name Step action description | Details Screenshot (Fill in with free text. If not applicable, mark the field as “n/a. No empty fields.) |
| **1** | Open Web Application |  |
| **2** | Log in to System 1 (input data: email and password) |  |
| **3** | Access the Invoice |  |
| **4** | Access the invoice Details |  |
| **5** | Download invoice pdf |  |
| **6** | For Etch invoice pdf |  |
| **7** | Send invoice to customer |  |

## Glossary

1. **Master Project**  
   The overall output of the development, encompassing all components and modules required for the Smart Invoice system. It includes multiple projects working together to automate the invoice generation, management, and reporting processes.
2. **Project**  
   A specific module developed using UiPath Studio, consisting of one or more workflows that handle distinct functionalities within the Smart Invoice system. Examples include customer management, invoice generation, and inventory comparison. Each project can be packaged and executed independently, contributing to the larger scope of the master project.
3. **Package**  
   The compiled output of a project. A package can be deployed to the robot machine and executed by the robot service. For the Smart Invoice system, packages may include invoice generation, inventory reconciliation, or profit calculation processes. Each robot can execute only one package at a time.
4. **Workflow**  
   A component of a package that encapsulates a specific part of the system's logic. For example, workflows can handle invoice validation, customer data retrieval, or inventory analysis. Workflows are saved as .xaml files in the project folder and can be invoked from other workflows. By default, an initial workflow runs when executing the package.
5. **Activity**  
   A specific action or task that the robot performs as part of a workflow, such as extracting data from an Excel file, sending an email, or generating a PDF invoice.
6. **Sequence**  
   A workflow structure where activities are executed sequentially. For example, generating an invoice could follow steps like retrieving customer details, calculating total amounts, and saving the invoice as a PDF.
7. **Flowchart**  
   A workflow structure where activities are connected visually with arrows, allowing for easier representation of decision-based logic. For instance, a flowchart might handle conditional tasks like checking whether an invoice exceeds a set limit before proceeding to approval.
8. **State Machine**  
   An advanced workflow organization method, similar to a flowchart but designed to handle more complex scenarios. For the Smart Invoice project, a state machine could be used to manage multi-step processes like customer verification or invoice approval workflows.
9. **BOR (Back Office Robot)**  
   A robot operating in unattended mode, executing processes without human intervention. In the Smart Invoice system, this robot could handle nightly tasks like reconciling invoices with inventory and calculating daily profits.
10. **FOR (Front Office Robot)**  
    A robot operating in attended mode, triggered by user input. This robot could be used by employees to generate invoices or update customer information on demand.
11. **Orchestrator**  
    An enterprise-level server platform for managing the Smart Invoice automation system. It supports centralized deployment, logging, reporting, auditing, monitoring, remote control, scheduling, workload management, and asset management. In the Smart Invoice system, the Orchestrator ensures efficient execution and monitoring of tasks like inventory comparisons, invoice generation, and daily profit reporting.
12. This glossary ensures that all stakeholders and developers have a clear understanding of the key terms used in the Smart Invoice project and its automation processes.