

Process Definition Document



Process Name: Invoice Scraping

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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 2019	English	Thin	PC	
2	Microsoft Excel 2019	English	Thin	PC	
3	Foxit Reader	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.**-----

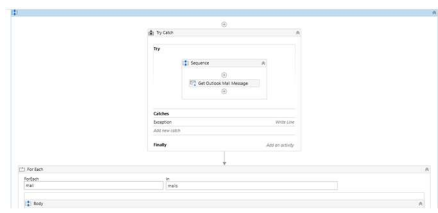
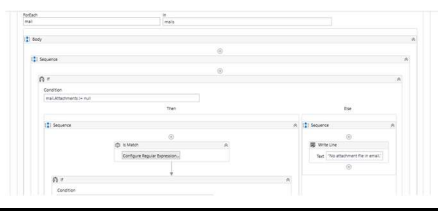
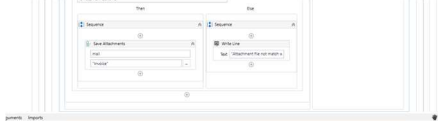
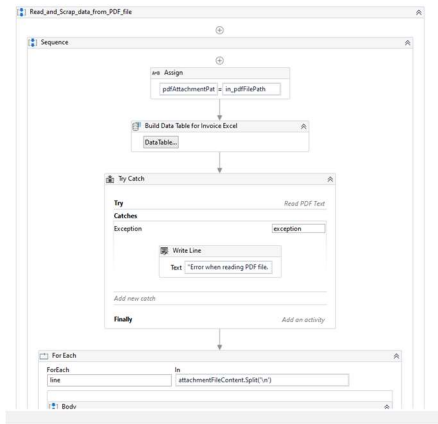
III. As-Is Process Map

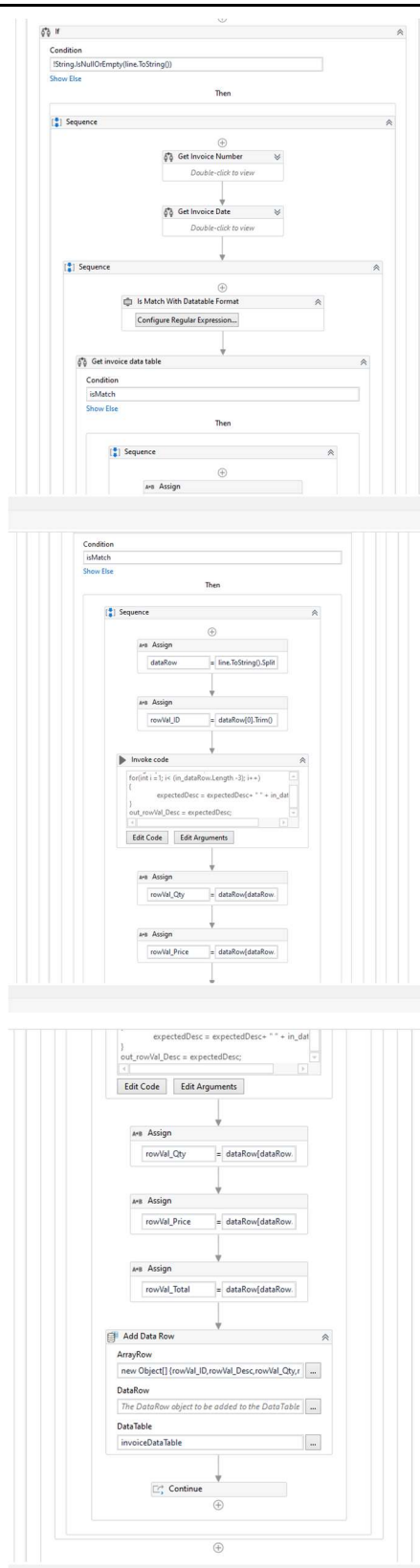
To complete the project's requirements, we need to divide the project into small modules such as:

1. Module to read Email
2. Get attachments from email by matching required format
3. Save attachment file
4. Extract the relevant field from PDF file:
 - a) InvoiceNo
 - b) InvoiceDate
 - c) Order Information
 - d) ItemNo
 - e) Description
 - f) Quantity

- g) Price
 - h) SubTotal
 - i) GST
 - j) Total
5. Save Data of Order information into Excel file "CustomerName_InvoiceNumber.xlsx"
 6. Upload following Oder info detail to the Orchetrator Queue, including:
 - a) SubTotal
 - b) GST
 - c) Total
 7. Send Email including generated excel.

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	Module to read Email		
2	Get attachments		
3	Save attachment file		
4	Extract the relevant		



5	Save into Excel file		
6	Upload following to Queue		
7	Send Email		

I. Business Exceptions Handling

None

Known Exceptions

None

BE #	Exception Name	Step	Parameters	Action to be Taken

Unknown Exceptions

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

-

II. System Exceptions Handling

SE #	Exception Name	Step	Parameters	Action to be Taken

Other Observations

Additional sources of process documentation

- <https://docs.uipath.com/document-understanding>