

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	
Business Analyst	Niyaz Ahmed	niyaz.ahmed@uipath.com	

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
	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.

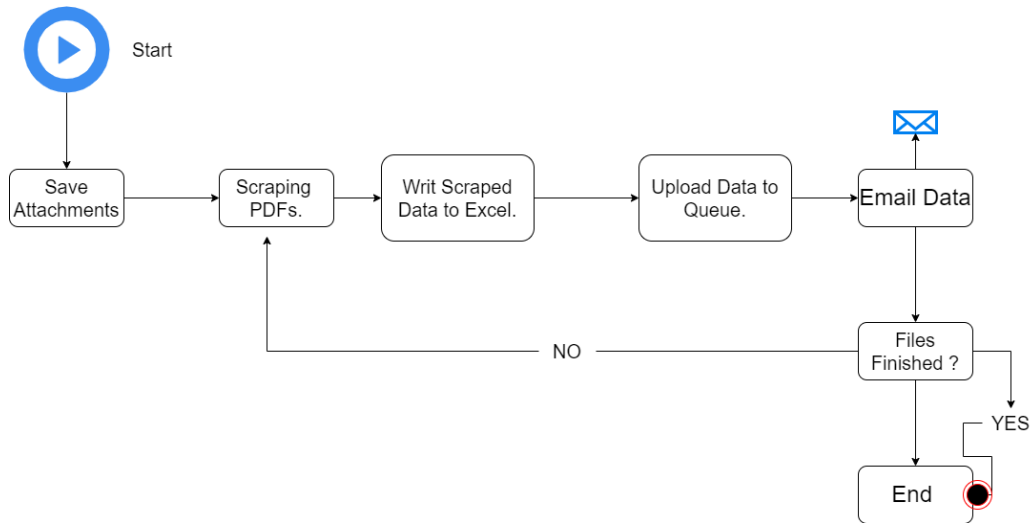
#	Application Name & Version	System Language	Thin/Thick Client	Environment/ Access Method	Comments
1	Microsoft Outlook Version 2006	English	Thin	PC	
2	Microsoft Excel 2016	English	Thin	PC	
3	Adobe Reader PDF	English	Thin	PC	

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

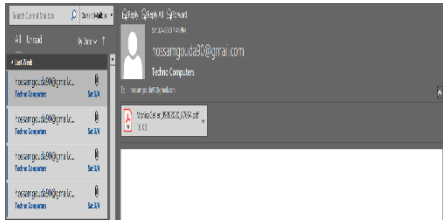
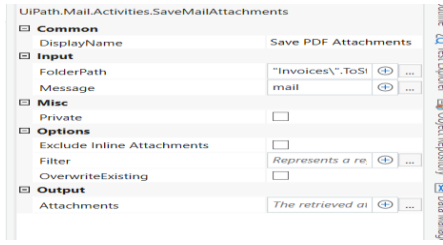
-----Complete the rest of the document and submit along with your final submission.-----

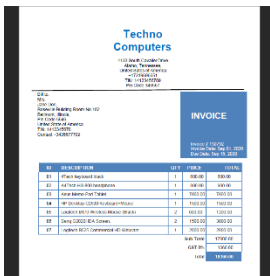
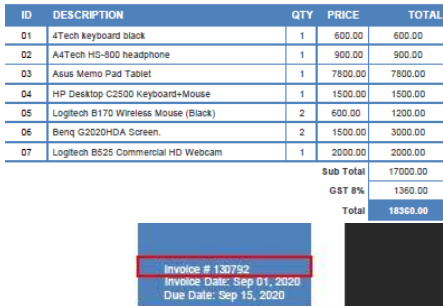
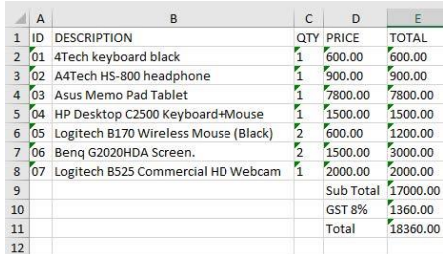
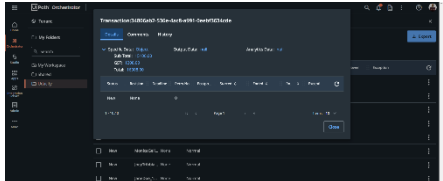
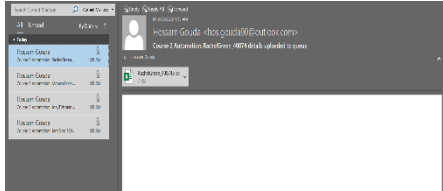
III. As-Is Process Map

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

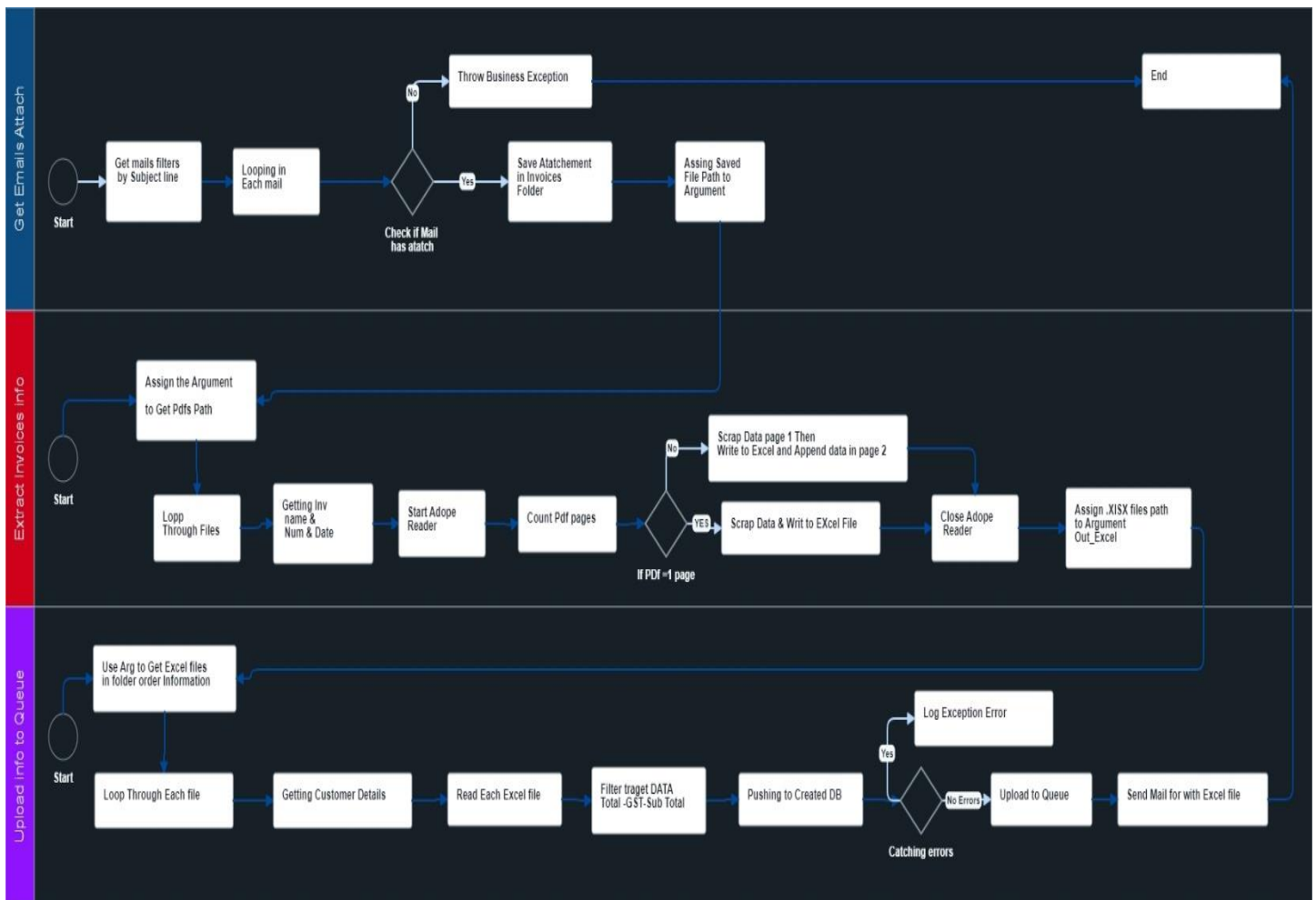
#	Step Action/Description	Screenshot	Remarks
1	Open Outlook	N/A	
2	Open Mails / filter subject line "Techno Computers"		Filter Option applied with Subject Line: "Techno Computers"
3	Save attachments in Invoices Folder/named CustomerName_InvoiceDate_InvoiceNumber		Create Invoices Folder in the Project Directory and Save all Pdfs inside.

4	Looping to Open attachments / With adobe Acrobat.		Loop to Open all Pdfs.
5	Scraping Target Data		Loop To Scrape Data from all Pdfs.
6	Save Scraped Data to Excel / Order Information.		Loop all Excel files.
7	Upload Data to Queue/ Sub-Total, GST and Total.		
8	Mail the Excel: Subject: "Course 2 Automation: CustomerName_InvoiceNumber details uploaded to queue"		Loop to Send all Excel files in the Order Information folder.
9	Repeat for all files / repeat steps 4-8 for all the files.	N/A	

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
Get Emails Attach	opening Outlook, searching for unread emails with a "Techno Computers" subject, processing emails by downloading the pdf Attachments in the invoices folder in the project directory.	internet concoction & mail box with 4 unread emails with the target subject line.	Emails marked as read and attachments downloaded in the invoices folder.	Out_Source	Invoked in Main Workflow
Extract Invoices info	Automation to extract Order Information from the downloaded Pdf invoices and save all the extracted data in an Excel spreadsheet named "CustomerName_InvoiceNo.xlsx"	Pdf Invoices downloaded	All Order Information extracted and saved in an Excel spreadsheet named "CustomerName_InvoiceNo.xlsx"	In_source Out_ExcelSource	Invoked in Main Workflow
Upload info to Queue	extracting and uploading the Order Information 'Subtotal', 'GST' & 'Total' to Orchestrator Queue and email Order Information in Excel spreadsheet format "CustomerName_InvoiceNo.xlsx" to my Outlook email address.	Extracted Order Information saved in Excel spreadsheet named "CustomerName_InvoiceNo.xlsx"	Order Information extracted and uploaded to Orchestrator Queue, and Excel spreadsheet containing all Order Information emailed to the Outlook email address.	in_ExcelSource	Invoked in Main Workflow

II. Robot Type

#	Attended	Unattended	Trigger	Comments
1		✓		

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	Business Exception	Check if mail has attachments.	N/A	Throw Business Exception: mails have not Attachments
2	System Exception	Uploading to Queue	N/A	Log Error Message: Unable to upload data to Queue

Unknown Exceptions

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

- Log System Exception Error 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	Business Exception	Check if mail has attachments.	N/A	Throw Business Exception: mails have not Attachments
2	System Exception	Uploading to Queue	N/A	Log Error Message: Unable to upload data to Queue

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

Other Observations

Include below any other relevant observations you consider needed to be documented here.

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Additional sources of process documentation

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