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| Robotic Process Automation  Business Flow Design Document |
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**DOCUMENT PURPOSE**

The Process Document has been designed for use on process documentation efforts. Approvals must be obtained prior to implementation of a new process or updates to this document.

Business Flow Design Document Anywhere

Template Released [Date]

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Document Control

1. **Document History**

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1. **Document Reviewers/Approvers**

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| --- | --- | --- | --- |
| **Name** | **Position (e.g. Client Manager, Project Manager etc.)** | **Reviewer (only)** | **Reviewer and Approver** |
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# Introduction

The Business Flow Design Document (BFDD) captures the flow of a business process to be developed using RPA solutions. The flowchart contained within the document captures, at a high level, the business process to be automated, the target systems used within the process and any assumptions that have been taken into account.

Once agreed as the basis for the automation of the target process, the flowchart and assumptions will be used as a platform from which the automated solution will be designed. Changes to this business process may constitute a request for change and will be subject to the agreed agility program change procedures.

**Note:** This document must be completed in the absence of existing process documentation that provides the level of detail required for a process to be automated. If existing process documentation is to be used instead of BFDD the following steps should still be undertaken

* Existing process documentation reviewed to ensure it is still up to date and fully captures the current manual process
* Existing process documentation provides the same level of detail that is required for automation
* Agreed by the business as an accurate description of the manual process

# Overview

## Problem Statement

Brief summary of why this process is a candidate for automation.

## Metrics

FTE savings expected by automating this process, SLAs, existing and forecasted volumes, etc.

## Operational Constraints

System dependent constraints, e.g. process can’t interface with system A after 18:00, or the process cannot run on the last working day of the month, etc.

## Software Constraints

Software dependent constraints, e.g. process requires certain vendor packages to be installed in order to access internal and/or external systems.

## Manual Process Description

Brief overview of the current manual process.

## Target Systems

|  |  |
| --- | --- |
| Name | Description |
|  |  |

# 

# Impacted Business Areas

Detail the business areas that are impacted by the change. They may be the areas that work the manual process before automation, or the areas that will work the exceptions after automation or any other dependent area.

# Process Diagram

Detailed business process flow depicting each stage of the business process.

# Process Details

This section should contain a detailed explanation of the manual process. Each stage on the diagram should have a separate detailed section below. Preferably this should be at key stroke level so that this document can be used to configure automated RPA process. Screenshots of the target systems at each stage highlighting the fields or buttons that are to be used are also useful.

## <process stage 1>

## <process stage 2>

# Exceptions

## Business Exceptions

Detail the business exceptions expected. These may be due to parts of the process that are deemed out of scope or cases that require manual review. Include estimated volumes per exception as well.