

**Tobor Inc.**

ToborAutomator

Automating User Registration and Updating Process, Including Sending Aggregated Information to Users on an Interval

Version 1.0

Revision History

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Contributors

The content of this document has been authored with the combined input of the following group of key individuals.

|  |  |  |
| --- | --- | --- |
| Name | Role | Area |
| *Lukasz Dudek* | *RPA Consultant* | *QAC* |

Business Sign-off

The following table contains the people required to sign-off and/or review this document and those that require the document for information only.

|  |  |  |
| --- | --- | --- |
| Name | Department | Responsibility |
| *David Bradbury* | *Managing Director* | *Sign Off* |
| *Roberto Fernandez* | *Backend Application Manager and Project PM* | *Sign Off* |
| *Chris Lucas* | *Consultant Project Liaison* | *Review* |

Document Classification

|  |  |
| --- | --- |
| Classification | Company Confidential |
| Definition | *Information that the company owns and is responsible for after the user has submitted it* |
| Context | *Where loss of information confidentiality would result in significant harm to the interests of the company, financial loss, embarrassment or loss of information. Including and not limited too legal actions taken against the company, depend on the harm done.* |
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# 1 Introduction

With the successful launch of a new Application made by Tobor Inc. They have seen a significant increase in users registering and using the application. The process takes 1 Manager approximately 50% of there time each day, to sort through registrations, move them to a database and then send out the correct information to clients. While doing that, all materials send are also scanned and checked to ensure they are legible and have clear connect, including but not limited to ensuring no content is repeated. Automating this process would not only give the manager more time to work on other aspects of the growing business but also reduce the human error in things like checking past information sent or ensuring the content is clean.

Additionally, to the information above, there should be a report produced each day with information and details of what was send that day. Mentioned in the specification that it is not always done as there is a time constraint, making this a robotic task would ensure it is always done and stored in a secure location for archiving porpoises and audits.

# 2 Manual Process

## 2.1 Overview

*The process is triggered every time a user registers on the System before the cut off time. Backend Application Manager deals with the Email accordantly to the request and sends out the information to the correct people are the specific intervals:*

* Users’ needs to register before they will receive the aggregated information
  + User must send an Emails to the Company’s Email Address with the following information: Users First Name, Last Name, Address and Topic of interest for the information.
* On receipt of the user’s information, the company stores the data safely
* Once the user’s information has been processed, the request is filled accordingly
* The actions are recorded to measure the app growth
* After the users is sent a confirmation email
* Based on users’ preferences, content is aggregated from a minimum of 3 sites
* Manager ensure that there is no repeat content
* Content that is sent, is read and ensured it is clean and readable
* Content is separated into categories, specified by the company
* Content is sent from the Company direct to the user’s email address
* All users’ actions are recorded for Audit purposes
* Managers record several items against all content transmissions (Example, User’s name and the date)
* A daily report is sent as a PDF, via email to the Company and stored in a local folder

## 2.2 Detailed Process Flow

*Detailed flow diagram covering* ***all*** *steps in the current manual process*

# 3 Automation Proposal

## 3.1 Overview

The details supplied of the manual process shows a full end-to-end process in one.

QA Ltd proposes to automate all sections of the manual process - providing 2 processes opposing to 1. Process 1 running on 5-minute intervals assigned to a dynamic robot dealing with Emails sign ups, ensuring all Emails are dealt with a timely manner. Process 2 running on a Scheduled task at 11:30am which would ensure all users who are registered/changed their details would receive their information at a specific time and it will exclude any new sign ups after 11:30am.

Details process are shown below:

Process 1 (Email Responder [Interval: 5 Minutes])

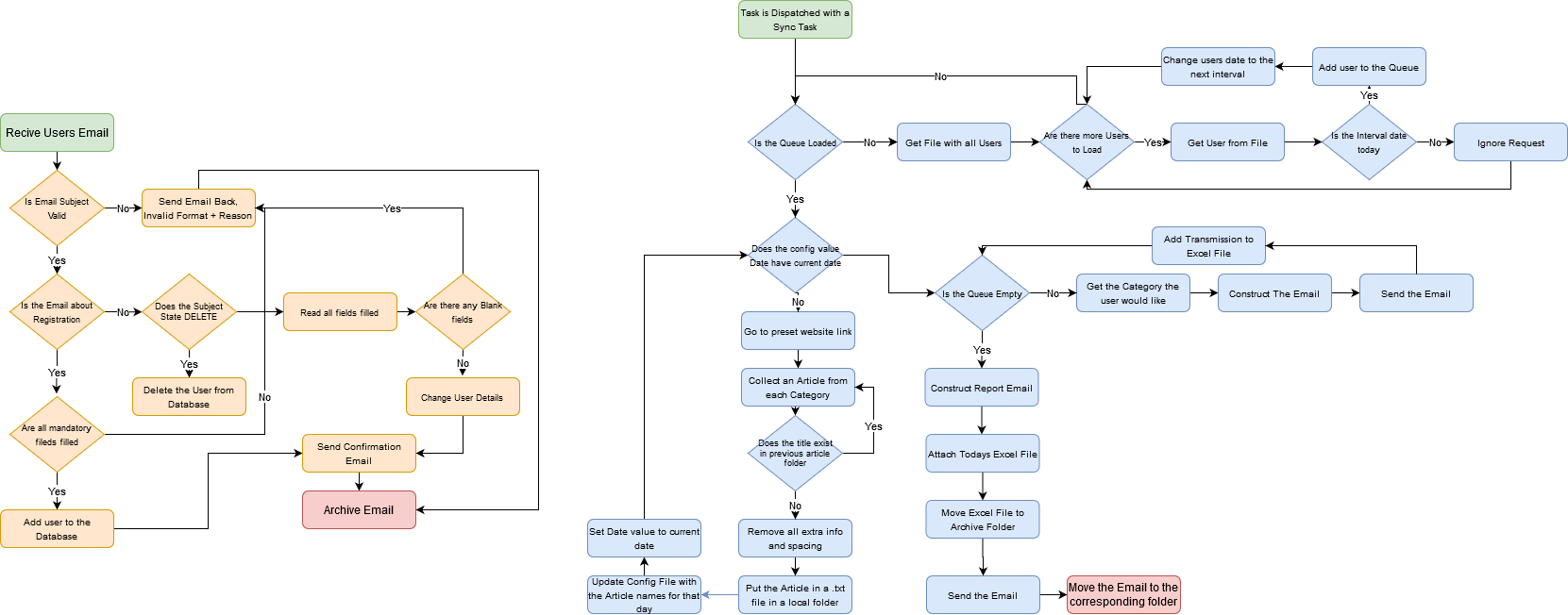
* Checks for Unread Emails
* Validated the Title
* Create/Edit user details
* Sends confirmation email
* Logs user’s activity
* Archives email

Process 2 (Data Responder [Scheduled: 11:30AM])

* Get all people in database
* Add people with correct interval to the queue
* Go to website to gather articles
* Each article is checked, and extra info is removed
* Article is saved on a local folder
* Article is checked against older articles saved
* Configuration file is updated with article saved location
* Get Users in queue
* Send out the saved articles in the pre-set format through email
* Log the bot action if successful or not
* Log the bot action in excel file named report\_DATE.xlsx
* Construct end of day report
* Attach Excel file named report\_DATE.xlsx
* Send it to Company Email and transfer it to an archive folder
* End Process

## 3.2 Automated Process Flow

*The automated process will follow the manual process with minor changes to support an extensive logging system and split into 2 different processes like shown above. A new Process Flow Diagram has been attached below, showcasing the 2 process.*

**

## 3.3 Target Systems & User Requirements

| Name | Description | User Permissions/Access |
| --- | --- | --- |
| *MS Outlook* | *Emails Access* | *ToborAutomator requires access to Company’s email inbox* |
| *Database* | *Customer Information Database* | *Administration Permissions* |
|  |  |  |

## 3.4 Impacted Business Areas

* Backend Application Department

## 3.5 Workload

*Metrics related to the automation, table example below*

|  |  |
| --- | --- |
| *Max. no. of Login Requests per week* | *70* |
| *Min. no. of Login Requests per week* | *10* |
| *Average no. of Login Requests per week* | *50* |
| *Are there any periods when a higher workload is anticipated?* | *August* |
| *How many people do this process per day?* | *1* |

***Summary of average time process takes a user to run manually, include timings of any dependant parts such as responses coming back from 3rd parties.***

***Automating the steps below will realise an average time saving of X minutes (X hrs) per day for <Process Name>:***

* *List of manual steps with manual execution time (Breakdown of all time saved)*

*Acronyms – detail the meanings of any acronyms used above e.g. systems, clients etc.*

## 3.6 Operational Constraints

* Websites used to aggregate the information
* Email services
* Network speeds available to aggregate the information

## 3.7 Delivery

The project is delivery is set to be due on Friday 26th of June 2020.

## 3.8 Contact List

Managing Director - David Bradbury

Backend Application Manager and Project PM - Roberto Fernandez

Consultant Project Liaison – Chris Lucas

RPA Consultant – Lukasz Dudek

# 4 Automation Details

## 4.1 Automation Walkthrough

### 4.1.1 *First robot action*

* *Description of first Robot step to complete action, include screenshots where necessary*
* *Description of second Robot step to complete action, include screenshots where necessary*
* *Etc.*

### 4.1.2 *second robot action*

* *Description of first Robot step to complete action, include screenshots where necessary*
* *Description of second Robot step to complete action, include screenshots where necessary*
* *Etc.*

### 4.1.3 *third robot action etc.*

* *Continue as required to complete all Robot actions within the automation*

## 4.2 Reporting

### 4.2.1 Business Exceptions

|  |  |
| --- | --- |
| Exception | Solution |
| *List of expected or assumed exceptions* | *Details of method of handling exception* |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### 4.2.2 System Exceptions

|  |  |
| --- | --- |
| Exception | Solution |
| *List of expected or assumed exceptions* | *Details of method of handling exception* |

A performance report will be emailed to *<Client Contact>* each time the process runs (showing worked cases, exceptions and a cumulative processing log)

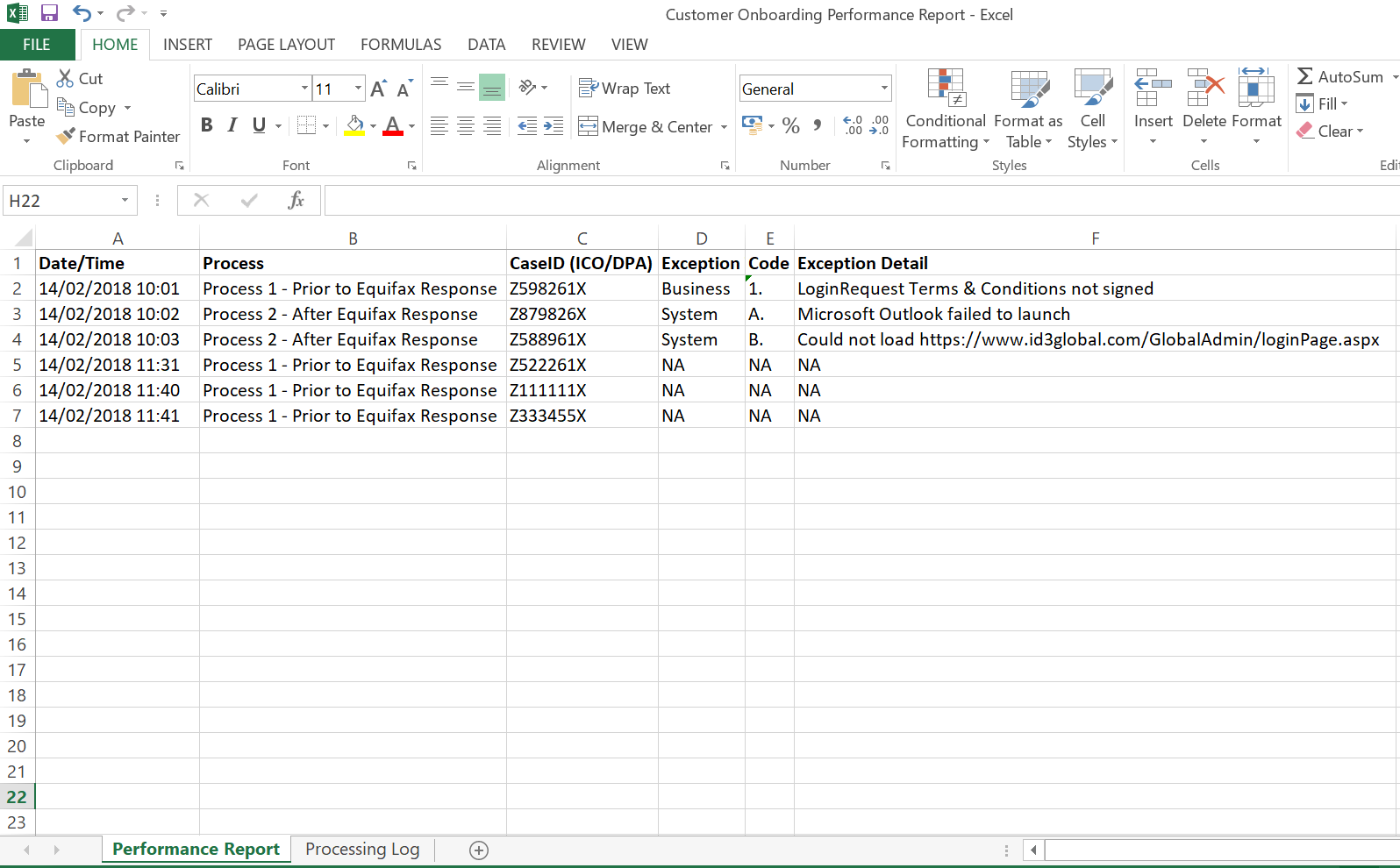
### 4.2.3 Performance

Once the processes have successfully completed a performance report and processing log will be emailed to *<Client Contact>* as an excel file.

**Performance Report**

This will contain all exceptions (business and system) and successes for the automated Process, based on the last automation execution completion (i.e. based on the last time the process ran)

EXAMPLE REPORT



www.xip.com/Admin/loginPage.aspx

CredBest

CredBest

CredBest

CredBest

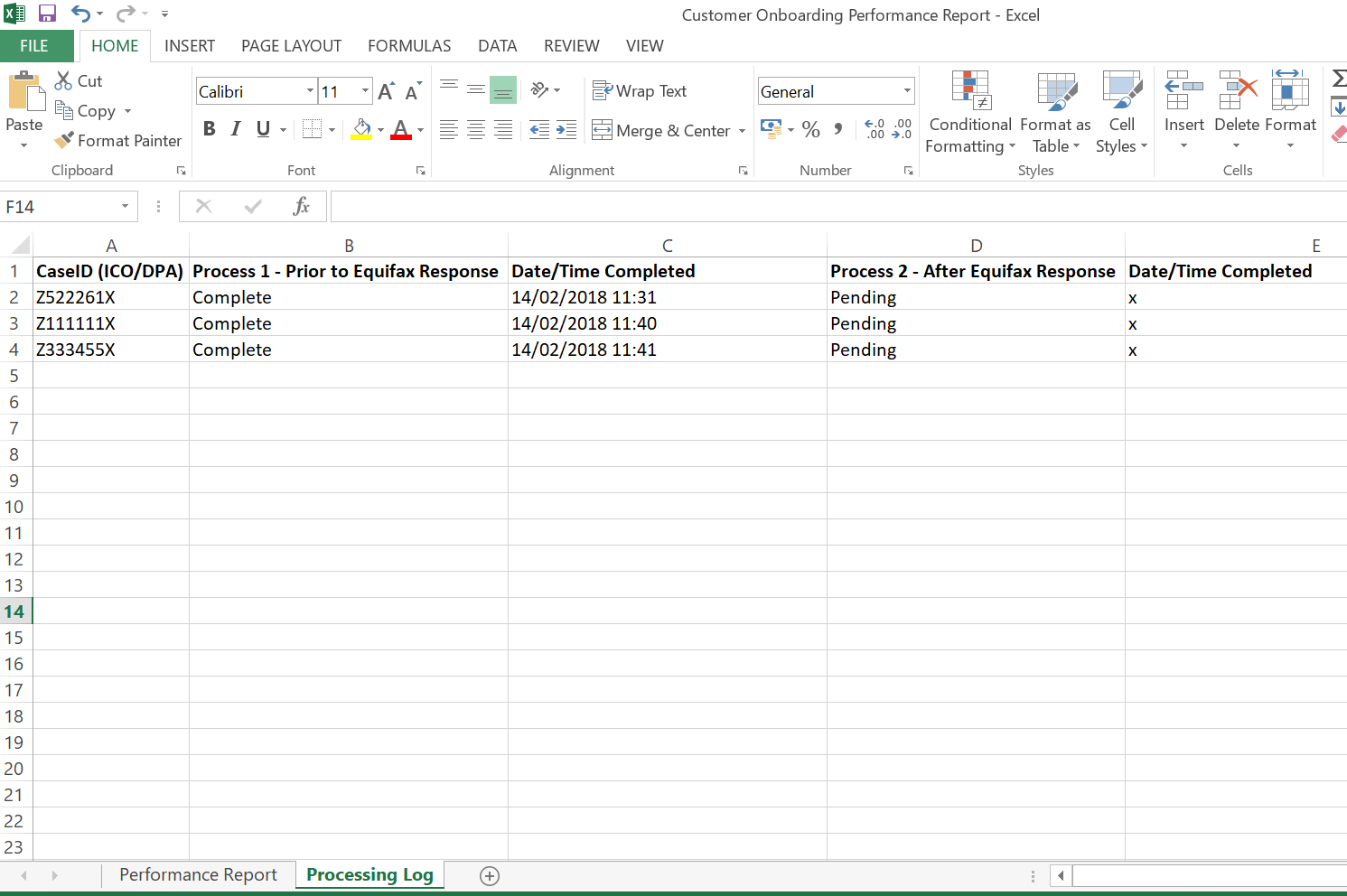
CredBest

CredBest

**Processing Log**

This will show cumulative successes from the automated Process:

EXAMPLE REPORT



**CredBest**

**CredBest**

### 4.2.4 Triggers

*Definition of how the Robot will be triggered. This could simply define that this is a manual trigger i.e. an attended start, or could indicate more advanced triggers such as on a particular event or schedule.*

**UPDATE THE TABLE OF CONTENTS AND ENSURE ALL RED TEXT HAS BEEN UPDATED/REMOVED PRIOR TO DISTRIBUTION**