

Process Definition Document



Project Name: Bookle Automation

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I. INTRODUCTION

1.1 Purpose

The Process Definition Document outlines the business process chosen for automation. The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation (**AS IS**) as well as the new sequence of actions that the process will follow as a result of preparation for automation (**TO BE**).

The PDD is a communication document between:

- The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
- The RPA Business Analyst and the Development team (represented by the Solution Architect and RPA Development Lead). The goal is to ensure that the process is documented appropriately and to a sufficient level of detail so that the Solution Architect can then create the solution based on the PDD content.

1.2 Objectives

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

- Reduce processing time per item by 80%.
- Better Monitoring of the overall activity by using the logs provided by the robots.

1.3 Key Contacts

Add here any stakeholders that need to be informed or to approve changes to the process:

Role	Name	Contact Details (email, phone number)	Notes
RPA Developer	Leqa'a Abujubbeh	Leqaa.abujubbeh97@gmail.com	
Process Owner	Artikeys		

1.4 Minimum Pre-requisites for the Automation

a)

II. AS IS PROCESS DESCRIPTION

In this section the Business Analyst will document the process. This section will serve as the starting point for the re-engineering and automation effort.

2.1 Process Overview

Section contains general information about the process before automation.

Item	Description/Answer
Process Full Name	Bookle Automation
Process Area	
Department	
Short Description (operation, activity, outcome)	Extract orders and send messages to customers, Drivers and Publishers
Process schedule and frequency	Runes every 5 minutes
Input data description	BookleDelivryInfo Excel Sheet
Output Data description	WhatsApp messages

**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.*

2.2 Applications Used

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 actions in the flow.

Application Name	Version	Application Language	Thin/Think Client	Environment/ Access method	Comments
Bookle	1.0.0	English			

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

2.3 AS IS Process Map

This section contains various process maps contributing to a better understanding of how the process is performed pre-automation.

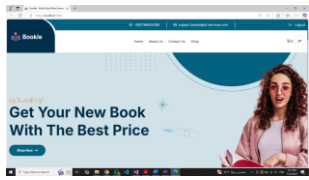

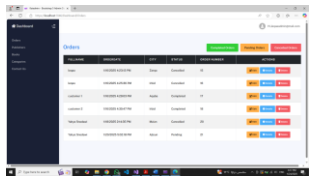

2.3.1 High Level Process Map

This section is useful for the Business Analyst in presentations and discussions with management to underline areas of weakness, inefficiency or to demonstrate which actions could be in scope for automation.

2.3.2 Detailed Level Process Map

This section describes the process at key-stroke level and is an essential part for the communication with the developers.

2.4 Detailed As Is Process Actions

Step	Action	Screenshot	Expected results	Remarks
1.1	Open Bookle website			Possible exception: - Handle exception if <i>Web app not available</i>
1.2	Navigate to login page			
1.3	Write Admin username and password that retrieved from get transaction and then login		Dashboard opened	If Incorrect email or Password send message to admin
1.4	Navigate to pending orders page			
1.5	Extract pending orders		Data table contains pending orders	
1.6	Navigate to order details			
1.7	Extract order info		Data table contains order details	
1.8	Read drivers info			
1.9	Read messages templates			
1.10	Send messages to customer, driver and publisher via WhatsApp			If the phone number is not on WhatsApp, send email to admin and mark order as cancelled
1.11	Mark order as completed			


III.TO BE PROCESS DESCRIPTION

In this section the proposed improvements to the process, actions to the process will be outlined as well as the actions proposed for automation and the type of robot required. **This will be cross-checked by the Solution Architect.**

3.1. Detailed TO BE Process Map

A detailed process map of the process as it will look like post-automation will be outlined here.

*Highlight Bot interventions/ To-Be automated actions with different legend/ icon (purple).
Mention below if process improvements were performed on the To-Be design and provide details.*

Legend	Description
1	Action number in the process. Referred to in details or Exceptions and Errors table.
	This process action is proposed for automation.



This process action remains manual (to be performed by a human agent).

3.2. Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. Exceptions are of 2 types and both need to be addressed:

Known exceptions = previously encountered. A scenario is defined with clear actions and workarounds for each case.

Unknown = New situation that was not encountered before. It cannot be predicted and in case it happens it needs to be flagged and communicated to an authorized person for evaluation.

3.2.1. Known Business Exceptions

Details regarding how the robot should handle the exceptions.

Exception Name	Action	Parameters	Action to be taken
<i>Invalid username or password</i>	<i>Login to bookle</i>		<i>Send email to admin</i>

3.5.2 Unknown Business Exceptions

An umbrella rule that includes a notification needs to be designed for all other exceptions that could happen and cannot be anticipated.

e.g.: for all other cases which do not follow the rules defined an e-mail should be sent to: exceptions@company.com with a screen shot and robot should proceed to next transaction.

3.3. Applications Errors & Exceptions Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here together with the action to be taken for each by the Robot. There are 2 types of exceptions/errors:

Known = Previously encountered and action plan or workaround available for it (e.g. SAP unresponsive during peak times)

Unknown = these are exceptions and errors that cannot be anticipated but for which the robot needs to have a rule so that the RPA solution is sustainable.

3.3.1. Known Applications Errors and Exceptions

Details regarding how the robot should handle the exceptions.

Error/Exception Name	Action	Parameters	Action to be taken
<i>Bookle is not opened or system down</i>	<i>Launch Bookle</i>		<i>Message box ("can't open Bookle system ")</i>

3.3.2. Unknown Applications Errors and Exceptions

An umbrella rule that includes a notification needs to be designed for all other exceptions that could happen and cannot be anticipated.

e.g. robot should attempt to access the application 3 times then it should terminate thread.

3.4. Reporting

In this section all the reporting requirements of the business should be detailed so that when the RPA solution is moved to production the administrators can track the performance of the solution.

Report Type	Update frequency	Details	Monitoring Tool to visualize the data
<i>All orders report</i>	<i>After each run</i>	<i>Add completed and cancelled orders</i>	

