**RPA Design – Project Name**

**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Revision | Author | Description |
|  |  |  |  |
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# Introduction

This document outlines the design and goals for the automation of the *Project Name*. This is a considered a living document that will grow and change as the project is actively developed or modified.

## Intended Audience

This document is intended for RPA Developers and those involved in the project management of the RPA XXXXXXXXXX. For this document, assumption is made that the reader has knowledge of RPA, and the processes up to this point.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Role | Name | Level of Impact / Influence | Key Concerns / Issues / Needs | Will person require training? | Contact Info |
| Functional Owner |  |  |  |  |  |
| Sponsor |  |  |  |  |  |
| Process SME |  |  |  |  |  |
| Solution Architect |  |  |  |  |  |
| RTS Project Manager |  |  |  |  |  |
| Developer |  |  |  |  |  |

## Accompanying Material

* *Functional Documentation folder:*
* *Qualification Document:*
* *Process Flow:*
* *UAT Plan & Scenarios:*

# Functional design

## Process Description

*Brief Description of Functional Process from PDD*

## Current Process

Current As-is Functional Process from PDD

## Robotic Process

Flowchart/Diagram describing To-Be RPA Process from PDD

## Process Videos

[Folder](https://ge.ent.box.com/folder/111882383103) Location for any Process Videos from Functional team

## 

# Automated process details

Details filled in need to reflect the actual information for the Master Project released for production. The following table will be populated:

|  |  |
| --- | --- |
| Item | Description |
| Master Project Name | = process name |
| Robot Type | e.g. Back Office, Front Office or Mix |
| Orchestrator used? | e.g. Yes |
| Scalable | e.g. No |
| UiPath version used | e.g. 2019.4 |

# Architectural structure of the Master Project

Display the interaction between components (package / robots, Orchestrator queues, and running order) in a diagram. This should be how bot flow is working.

# Master Project Runtime Details

Outlines the details of the automated process by filling in the table below

|  |  |
| --- | --- |
| ITEM NAME | DESCRIPTION  *Fill in each bolded section - empty fields are not allowed. If the section does not apply to your automation then mark as n/a.* |
| Production environment details | ***Example:*** *Running on Sparky , the virtual Backoffice machine. Scheduled every night after the report is generated from Zendesk.* |
| Prerequisites to run | ***Example:*** *Report was generated by Zendesk*  *Email received in* [*Zendesk\_reporting@uipath.com*](mailto:Zendesk_reporting@uipath.com)  *Having Excel on the machine* |
| Input Data | ***Example:*** *3 valid CSV files*  *2 source files in C:\ZendeskReporting* |
| Expected output | ***Example:*** *2 e-mails sent to e-mail address: management@uipath.com* |
| How to start the automated process | ***Example:*** *The process will be started from orchestrator server (demo.uipath.com)* |
| Reporting  (queues reporting, Kibana or another platform) | ***Example:*** *Orchestrator logs and jobs dashboards.* |
| How is Orchestrator used? | ***Example:*** *Orchestrator used for scheduling and asset passwords.* |
| Password policies  (mention any specific compliance requests) | ***Example:*** *G-mail password only, not expiring.* |
| Stored credentials  (Never use hardcoded credentials in the workflow!) | ***Example:*** *Stored in Orchestrator Assets* |
| List of queues names  (Naming convention: ProcessName\_QueueName) | ***Example:*** *n/a* |
| Schedule Details | ***Example:*** *Daily, 6 A.M CET* |
| Multiple Resolutions Supported?  (in case of image automation / Citrix and VDI) | ***Example:*** *Yes, No or N/A* |
| Recommended Resolution | ***Example:*** *n/a* |

# Connected Systems/Components

## Connected Systems

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| System Name | Usage | Path | Contact/Method for Requesting Access | Access? | ID |
| Website URLS if any used |  | Ex: http://www.gmail .com | Email id of Person who will setup access for this | Required or Not? | User id for the system for specific environments |
| Repository for project  (where is the developed project stored) |  | Example: \\myshare.com\Zendesk | Email Id of Person who will setup for the specific environment |  | User id for the system for specific environments |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Software

|  |  |  |
| --- | --- | --- |
| Name | Version | Source |
| Environment prerequisites  (OS details, libraries, required apps) | Example: Windows 7, Microsoft Excel, Chrome, Internet explorer | If Already part of VM, mention desktop or if downloaded from specific website |
|  |  |  |
|  |  |  |
|  |  |  |

Bot Process Considerations

|  |  |
| --- | --- |
| Expected volume of output |  |
| Transaction Run Time |  |
| Total Run Time |  |
| Number of Bots |  |
| Use of Queue |  |
| Bulk Process |  |
| Ad-Hoc Request Support |  |
| Use of Database |  |

## Bot Schedule

|  |  |
| --- | --- |
| Bot Schedule |  |
| Frequency |  |
| Blackout Start and End time (if any) |  |
| Run time (24hrs – blackout duration) |  |

## Bot Sample Weekly/Monthly Reports

Weekly and monthly status reports will provide the following fields:

|  |  |
| --- | --- |
| Delivery Method |  |
| Recipient |  |
| Format |  |
| Notification |  |

# Technical Design

## Logging Bot

* Process logs
  + Start/finish of process
    - Name:  *Project Name*
    - Project ID: *Project ID*
* Transaction logs
  + Unit of Work: *Transaction Name*
  + Transaction Name: *Transaction Name*
  + Transaction ID: *Transaction ID*
* Task logs (Examples below)
  + Login to SAP application
  + Download Billing Documents Report for Country
  + Validate billing Date Window
  + Generate the Bill
  + KNA1 - Customer Details Reports Download
  + Loading Input Transactions to Country Specific Queues
  + Trigger Country Specific Bot 2
  + Send Email to Country Specific DL
  + Send Mail to Technical Team for Bot Completion

## 

## Assets

|  |  |
| --- | --- |
| **Asset Name** | **Description** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

## Exception handling

* Operational Exceptions

|  |  |  |
| --- | --- | --- |
| Exception No. | Exception Description | Exception Resolution |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

* Functional Exceptions

|  |  |  |
| --- | --- | --- |
| Exception No. | Exception Description | Exception Resolution |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

* Coding Exceptions
  + Any errors not handled explicitly above will be captured at the framework level and would be notified through mail as generic failure.

## Workflows

*Include the list of workflows which you are planning to create and high-level description for each of them and whether it can be reused as Reusable workflow in other Bots*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Workflow Name | Description | Input | Output | Reusability? |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## 

## Packages

*Include the list of packages and high-level description for each of them, to explain their purpose*

|  |  |
| --- | --- |
| Package Name | Description |
| *Example: ZendeskReports.1.0.6285.31077.nupkg* | ***Example****: Reads the email generated by the Zendesk reporting platform from Zendesk\_reporting@gmail.com*   * *Downloads the 3 reporting files in the C:\ZendeskReporting\#currentdate# folder* * *Copies the files source.xlsx and source\_fantastic.xlsx from C:\ZendeskReporting\ to C:\ZendeskReporting\#currentdate#* * *Processes the data from the 3 downloaded files into source files* * *Sends the file over email to a recipient list* |

## Custom Code Requirements

*(If Applicable, Describe details for Custom Code)*

## Breakdown of Process Steps

Please refer to User Story Document: [Folder](https://ge.ent.box.com/folder/115280456933) Link for Functional User Story Documentation

## Challenges

# Assumptions

# Change Requests

*All change requests after functional design is signed off as a change request.*

|  |  |  |  |
| --- | --- | --- | --- |
| Change Request Log | | | |
| Request # | **Change Requested** | **Impact to Overall Timeline** | **Approved/Unapproved** |
| [#] | [Change Request] | [Impact to timeline in days] | [Decision] |
|  |  |  |  |