

**Tobor Inc**

Customer Signup Process and Email Automation

Detailed Process Description

Version 1.0

Revision History

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| *29.06.2020* | *1.0.0* | DPD | Tshepiso Precious Khoarane |
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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.

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Document Classification

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| --- | --- |
| Classification | *Company Confidential* |
| Definition | *All customer databases and Application data are confidential and kept securely by Tobor Inc under the supervision of the Backend Application Manager; Roberto Fernandez.* |
| Context | *If information confidentiality is broken it would result in significant harm to the interests of the Organization, financial loss and/or tarnished Reputation.* |
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# 1 Introduction

*The Process of administration, aggregation and reporting has become cumbersome due to the exponential growth of the App. This has meant that these tasks have staff tied up doing repetitive work rather than focusing on the growth of the company and the App. These tasks through evaluation have shown themselves to be perfect candidates for automation. This document will outline the benefits of having these processes automated.*

# 2 Manual Process

## 2.1 Overview

*A typical day at Tobor Inc. as it pertains to the user and application process begins with a receipt of an email from the application containing a user’s details to execute the stated request in the email subject line. The email is then scanned for the user information that is required to execute the stated request. Below is an outline of how the manual process looks like:*

* *Process the email, this is processed by 11:30am and a confirmation email sent:*

*New User Request- The new user data is read from the email and transferred to the company’s secure database.*

*Update User Request- The user Information is compared to the secure database and the data relevant data is update with all changes.*

*Delete User Request- The information about the user is checked against the database and removed*

* *Aggregate content data, this is processed by development team:*

*The company collates data based on the user’s preference from three different websites and ensures that the data is clean and formatted correctly.*

* *Prepare content to be sent:*

*The content is inspected to ensure that there isn’t any duplicated content being sent out to the users.*

* *Send content to users:*

*The content is sent is sent to each user based on their content preferences and interval choices.*

* *Compile report:*

*A daily report is made of the user requests and the transmission data and compiled on a pdf, which is held in a local folder.*

* *Send report to manager:*

*The daily report is retrieved from the local folder and sent to the backend application manager.*

*The backend application manager spends 50% of their dealing with the ever-growing user base.*

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

## 2.2 Detailed Process Flow

A screenshot of a cell phone

Description automatically generated

# 3 Automation Proposal

## 3.1 Overview

*After closer inspection of the manual processes it shows strong indication for automation. Below is a high-level overview of the proposed automation for increased efficiency, thus translating to time and money saved, allowing for more focus on the rest of the business.*

* *Process for the email: every morning from 08:00am the Tabor Inc. customer retrieved email is access log the bot and is checked for all new emails and the request of either creating, updating and deleting user one executed and the user database is updated.*
* *Aggregate and Prepare content data: as the process is performed by the application it will be developed to on the development machine to create a content database. the aggregated content will be manipulated and formatted on the development machine.*
* *Reporting: each completed process writes a log message and this information will be collected daily and formatted into a PDF document to be sent automatically everyday to the backend application manage.*

## 3.2 Automated Process Flow

*All the automated processes will be exact replicas of the current manual processes. All the work of sending out content and managing the user base that is carried out by the manager will now be automated including the reporting process.*

## 3.3 Target Systems & User Requirements

| Name | Description | User Permissions/Access |
| --- | --- | --- |
| *MS Outlook* | *Email Inbox* | *Robot Inbox required (this will be mimicked for this automation) the email address to be used is TPKhoarane@outlook.com* |
| *MS Excel* | *The user database and the content aggregation will be stored there during development. This data is only to mimic the real database.* | *Admin development* |
| *Adobe Acrobat* | *Writes collected reports for and transactions made by the robot to a daily document.* | *Adobe Acrobat.* |
|  |  |  |

***Note: The robot will require access to the above software for developmental purposes and post development to complete development but will be simply exchangeable to the actual company systems used when the app goes live.***

## 3.4 Impacted Business Areas

* *The automation will affect the manager and the development team, as these processes will be performed by the automation robot.*

## 3.5 Workload

*Metrics related to the automation, table example below*

|  |  |
| --- | --- |
| *Max. no. of New user Requests per day* | *35* |
| *Min. no. of User delete/update Requests per day* | *10* |
| *Average no. of emails processed per day* | *45* |
| *Are there any periods when a higher workload is anticipated?* | *During major news and high sports seasons* |
| *How many people do this process per day?* | *1* |

*The time it takes to complete the manual processes is as follows; user requests are normally around 10 minutes per user and about 30-35 new signups per day and about 10 changes.*

*In terms of content the user base is currently 567 users and content aggregation takes a couple of hours. Transmission and reports about 1-2 hours as well*

***Automating the steps below will realise an average time saving of 240 minutes (4 hrs) per day for Email processing, content sending and adhoc reporting:***

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

## 3.6 Operational Constraints

* *List of all operational constraints. Examples could be working hours, system availability etc. – essentially anything that could have a bearing on how the automation can function.*

## 3.7 Delivery

*The delivery of the project is Monday 29th June 2020*

## 3.8 Contact List

*David Bradbury – Managing Director*

*Roberto Fernandez – Backend Application Manager*

*Chris Lucas – Project Manager*

# 4 Automation Details

## 4.1 Automation Walkthrough

### 4.1.1 *first Robot action*

* *Retrieve new emails from the app inbox.*
* *Execute the user requests stated on the email.*
* *Update the user database.*
* *Queue all users from the database by 11:30am.*

### 4.1.2 *second robot action*

* *Check content data is not duplicated.*
* *Send content to the user base according to interval and content preference.*

### 4.1.3 *third robot action*

* *Collect all logged messages from completed processes and the transaction data.*
* *Write the collection in a formatted manner on to a pdf document held on a local file.*
* *Send document to backend application manager.*

## 4.2 Reporting

### 4.2.1 Business Exceptions

|  |  |
| --- | --- |
| Exception | Solution |
| *Unable To send content* | *Debug and include try catches and report to manager in the for an email report* |
|  |  |
|  |  |
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### 4.2.2 System Exceptions

|  |  |
| --- | --- |
| Exception | Solution |
| *Web browser not opening* | *Use try catches and keep record website might need to be updated* |

A performance report will be emailed to *Roberto Fernandez* 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 *Roberto Fernandez* 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

A screenshot of a computer

Description automatically generated

www.xip.com/Admin/loginPage.aspx

**CredBest**

**CredBest**

### 4.2.4 Triggers

*The robot will be running continuously to read the emails received from new and existing users and every day at 11:30 it will stop reading the emails and start sending them into a queue which will then be processing the updated user database with each users preferred content.*