Calculate Client Security Hash
Process Definition Document- (PDD)
ACME Systems Inc

NOTE:

This version of the document and its current content is meant to serve as an example for business users (e.g. process SME) and it is intended to help with the creation of the process design documentation for RPA.

The current example`s content is fictive or adjusted to remove real confidential data and it should not be replicated to the automation of other business processes. All the process steps and screenshots in the PDD should be captured entirely from scratch and included here for the automation of the process is scope.

The list of examples is not exhaustive. Additional entries may be added or removed, case by case, as required to provide relevant data for RPA.

Document History

Date	Version	Role	Name	Organization (Dept.)	Function	Comments
01.02.2018	1.0	Author	Maria Ionescu	*CoE*	*Business Analyst*	Created document v 1.0
03.02.2018	2.0	SME	Andrew Lloyd	*Finance & Accounting*	*Business Process Owner*	Updated according to SME feedback
04.02.2018	3.0		James Peterson	*CoE*	*Dev/RPA Solution Architect*	Updated according to Solutions Architect feedback

Document Approval Flow

Version	Flow	Role	Name	Organization (Dept.)	Signature and Date:
4.0	**Document prepared by**	*Business Analyst*	Maria Ionescu	*CoE*	
4.0	**Document Approved by:**	*Head of Accounting*	Ion Popescu	*Finance & Accounting*	
4.0	**Document Approved by:**	*CoE Manager*	John Smith	*CoE*	

Contents

Introduction

Purpose of the document

The Process Definition Document outlines the business process chosen for automation using UiPath Robotic Process Automation (RPA) technology.

The document describes the sequence of steps performed as part of the business process, the conditions and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them the details required for applying robotic automation to the selected business process.

Objectives

The process that has been selected for RPA is part of the larger project ACME processes conducted within the ACME Systems Inc, Finance and Accounting department.

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*

Process key contact

The specifications document includes concise and complete requirements of the business process and it is built based on the inputs provided by the **process Subject Matter Expert (SME)/ Process Owner.**

The **Process Owner** is expected **to review it and provide signoff for accuracy** and completion of the steps, context, impact and complete set of process exceptions.

The names have to be included in the table below.

Role	*Name*	*Contact details (email, phone number)*	*Notes*
Process SME	Andrew Lloyd	andrew.lloyd@acme-test.com Mobile: 44 0735 325 209	Point of contact for questions related to process details & exceptions
Process Reviewer	John McDonald	john.mcdonald@acme-test.com Mobile: 44 0735 325 209	Point of contact for questions related to process details & exceptions
Process Owner/ Approver for production	Ion Popescu	ion.popescu@acme-test.com Mobile: 44 0735 325 209	Escalations, Delays,etc

Minimum Pre-requisites for automation

1. Filled in Process Definition Document
2. Test Data to support development
3. User access and user accounts creations (licenses, permissions, restrictions to create accounts for robots)
4. Credentials (user ID and password) required to logon to machines and applications
5. Dependencies with other projects on the same environment

AS IS process description

Process Overview

General information about the process selected for RPA prior to automation.

#	Item	Description
1	**Process full name**	Calculate Client Security Hash
2	**Process Area**	Security
3	**Department**	Finance and Accounting
4	**Process short description** (operation, activity, outcome)	Generate the Security Hash for each Client based on their personal information.
5	**Role(s) required for performing the process**	ACME System 1 – Role name Fin ACC: Module " Work Items" – Rights " Read &Write"
6	**Process schedule and frequency**	Daily, Monday to Friday, 9 am – 6 pm
7	**# of items processes /reference period**	~450/ day business as usual

8	**Average handling time per item**	3 min
9	**Peak period (s)**	Beginning of month, usually from 28th to 30th day of each month
10	**Transaction Volume During Peak period**	600
11	**Total # of FTEs supporting this activity**	3-4
12	**Expected increase of volume in the next reference period**	Volumes will increase with 20%
1	**Level of exception rate**	No expected exceptions
12	Input data	Client Data from ACME Systems 1
13	Output data	Client Security Hash uploaded in ACME & task completed

**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.*

Applications used in the process

The table includes a comprehensive list all the applications that are used as part of the process automated, at various steps in the flow.

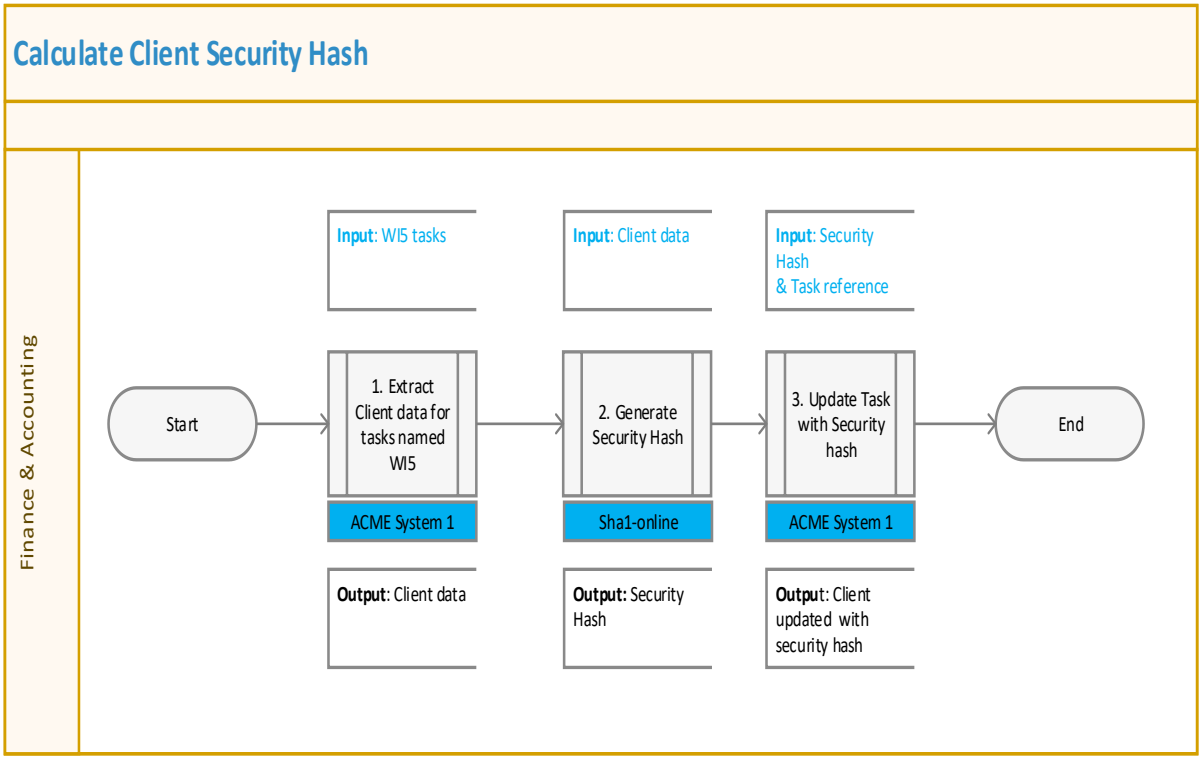
#	Application name & version	System Language	Thin/Thick Client	Environment/ Access method	Comments
1	ACME System 1	EN	Thick Client	Web Browser	Task management
2	Sha1-com	EN	Thick Client	Web Browser	Hash ID generator

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

AS IS Process map

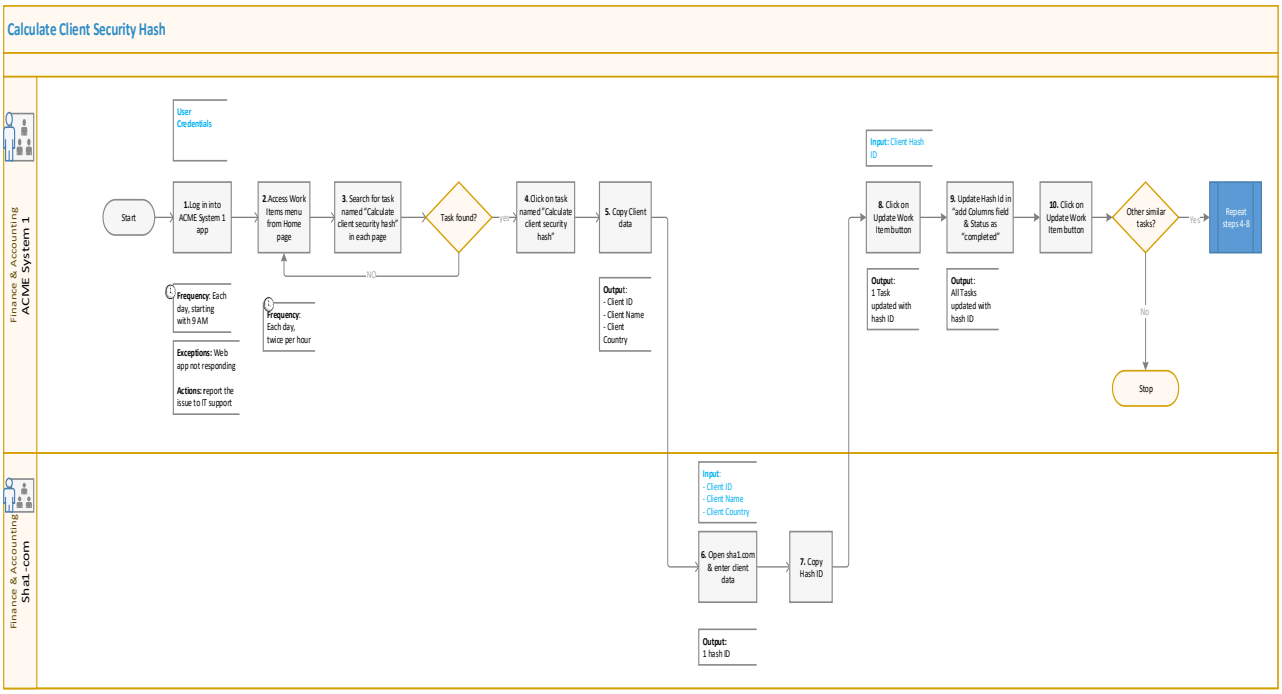
High Level As-Is Process Map:

This chapter depicts the As Is business process at a High Level to enable developers to have a high-level understanding of the current process.



Detailed As-Is Process Map:

This chapter depicts the AS IS business process in detail to enable the developer to build the automated process.



Detailed AS IS Process Steps

	Detailed As-Is Process Steps					
Step	Input	Description	Details (Screen/ Document/ Video recording Index)	Exception Handling	Possible Actions	Business Rules Library Index

See doc attached

WI5_Process_Details.xlsx

Input data description

Step	Sample (Printscreen)	Input type	Location	Inputs are standard? (Yes/ NO)	Inputs are structured?	Data to be used from
6	See WI5_ Detailed Process	Screen	n/a	YES	YES	Client Name Client ID Client country

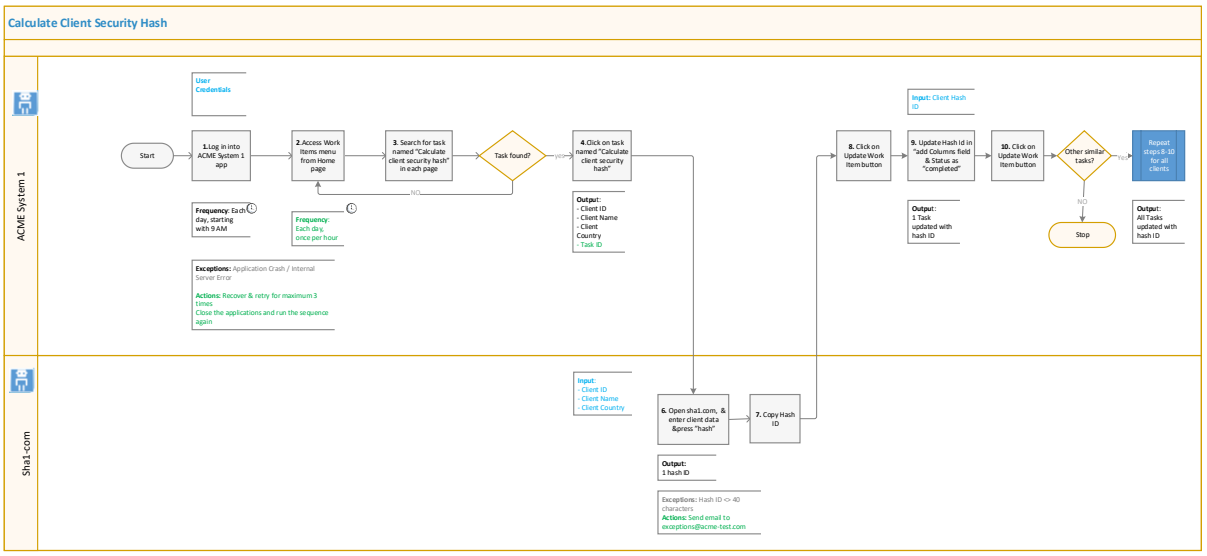
** Inputs are **standard** if the content is positioned in the same place even if the input types are different.*
*Eg: a process that uses at each transaction the same template, so fields to be extracted are always fixed. Inputs are **structured** if it is machine readable and digital. Scanned PDF Images/ Free flow texts in Emails are unstructured inputs*

To BE Process Description

This chapter highlights the expected design of the business process after automation.

TO BE Detailed Process Map

Highlight Bot interventions/ to-be automated steps with different legend/ icon (purple)



**Mention below if process improvements were performed on the TO BE design and detail them*

Legend	
1.	Step number in the process. Referred in the details or Exceptions and Errors table
	This process step is proposed for automation
	This process step remains manual (to be performed by human agent)

Parallel Initiatives/ Overlap (if case)

This chapter captures the proposed Business, Process & System changes in near future and its impact

S.No	Initiative Name	Process Step(s) where it is identified	Impact on current automation request? How?	Expected Completion Date	Contact person for more details
	n/a				

In Scope for RPA

The activities **in scope of RPA**, are listed here:

1. *Steps 1-10*

Out of Scope for RPA

The activities **OUT of scope of RPA**, are listed here:

Sub-process (if case)	Activity (step)	Reasons for Out of scope*	Impact on the TO BE	Possible measures to be taken into consideration for future automation
1.1	*1.1.3*	*Input: handwritten form*	*After processing step 1.1.2, an email is sent to the user to perform step 1.1.3 in a csv file* *In order to go to step 1.1.4 the robot will read the csv file*	*Collect the form in an editable pdf format and electronically signed*

**Add more rows to the table to reflect the complete documentation provided to support the RPA process.*

Business Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. These can be classified as:

Known	Unknown
Previously encountered. A scenario is defined with clear actions and workarounds for each case.	New situation never encountered before. It can be caused by external factors. Cannot be predicted with precision, however if it occurs, it must be communicated to an authorized person for evaluation.

Known Exceptions

The table below reflects all the business process exceptions captured during the process evaluation and documentation. These are **known exceptions,** met in practice before. For each of these exceptions, define a corresponding expected action that the robot should complete if it encounters the exception.

BE #	Exception name	Step	Parameters	Action to be taken
1	Hash ID <> 40 characters	n/a	Hash ID	Send email with screenshot to exceptions@acme-test.com "Hash ID <> 40 characters" Go the next transaction

Unknown Exceptions

For all the other **unanticipated or unknown business (process) exceptions**, the robot should:

Send an email notification at exceptions@acme-test.com and error message screenshot attached.

Application Error and Exception Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here with the description and action to be taken, for each, by the Robot.

Errors identified in the automation process can be classified as:

Area	Known	Unknown
Technology/ Applications	Experienced previously, action plan or workaround available for it.	New situation never encountered before, or may happened independent of the applications used in the process.

Know Errors or Exceptions

The table below reflects all the errors identifiable in the process evaluation and documentation.

For each of these errors or exceptions, define a corresponding expected action that the robot should complete if it is encountered.

#	Error name	Step	Parameters	Action to be taken
1	Application Crash / Internal Server Error	Any step	Error message	Recover & retry for maximum 3 times Close the applications and run the sequence again

Unknow Errors and Exceptions

For all the other **unanticipated or unknown application exceptions/errors**, the robot should:

Send an email notification at exceptions@acme-test.com and error message screenshot attached.

Reporting

#	Report type	Update frequency	Details	Monitoring Tool to visualise the data
1	Process logs	Daily	How many times was this process run since the beginning of the month and what was the average run duration?	Kibana
2	Process logs	Monthly	How many robots worked on this process per each month?	Csv file posted daily on sharedrive
3	Transaction logs	Daily	How many transactions were run by this process since the beginning of the month and what was the average transaction duration?	Kibana
4	Error logs	Daily	Average number of errors by type per day	Kibana
5	Error logs	Daily	All errors per month grouped by type	Csv file posted daily on drive

** For complex reporting requirements, include them into a separate document and attach it to the present documentation*

Other Observations

Include below any other relevant observations you consider needed to be documented here.

Example: Specific Business monitoring requirements (audit and reporting) etc

Additional sources of process documentation

If there is additional material created to support the process automation please mention it here, along with the supported documentation provided.

Additional Process Documentation		
Video Recording of the process [Optional]	*ACME-System1-Process-WI5-Manual-Walkthrough*	*Insert any relevant comments*
Standard Operating Procedure (s) (Optional)		*Insert any relevant comments*
Business Rules Library (Optional)	*Insert link to Business rules library*	*Insert any relevant comments*
Other documentation (Optional)	*Insert link to any other relevant process documentation (L4, L5 process description, fields mapping files etc)*	*Insert any relevant comments*

**Add more rows to the table to reflect the complete documentation provided to support the RPA process.*