**Orchestrator API’s**

**Solution Design Document**

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**SUMMARY**

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**CLIENT SME DETAILS**

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# **Objective**

This document contains the solution design for the **Orchestrator API’s** process. It lays out the high-level “As-Is” process steps as well as the “To-Be” process steps to be automated using the selected Robotic Process Automation (RPA) tool. It also elaborates upon key aspects of the automation that is being implemented for this use case.

* **High Level Overview of As-Is Process:**
* In this process, we create assets, queues, processes, and folders using the Orchestrator HTTP request activity.
* As part of the same process, we retrieve folders, assets, and queues from Orchestrator and store them in an Excel if needed
* In addition, we create libraries, publish them to Orchestrator, and commit and push them to GitHub.

# **Scope for Automation**

Utilize the Orchestrator HTTP Request activity for communication, ensuring proper authentication and handling of error scenarios. Develop reusable libraries in UiPath Studio and publish them to Orchestrator. Implement version control by committing and pushing UiPath projects (including libraries) to a GitHub repository, automating this process as part of your development workflow.

# **Applications**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Application Name& Version** (including any upgrade information) | **External / Internal** | **Type** | **Credentials required for BOT ID** | **Read/ Write** |
| Orchestrator | Internal | Cloud Based Application | Yes | Read & Write |
| Excel | Internal | Desktop Application | No | Read & Write |
| GitHub | Internal | Web Application | Yes | Read & Write |

# **Input Requirements**

The inputs and pre-requisites detailed out below, need to be present for the Bot to function in the desired manner.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Type** | **Format** | **Name** | **Description** | **Location** | **Initial Value** |
| 1 | Folder iD’s ,Asset Keys,Names | Xlsx | Storing the required details (data) of the processes | The Excel file will contain Folder IDs, names, asset names, asset keys, queue names, etc., which we can use as input. | TBD | Folder Id and Key |

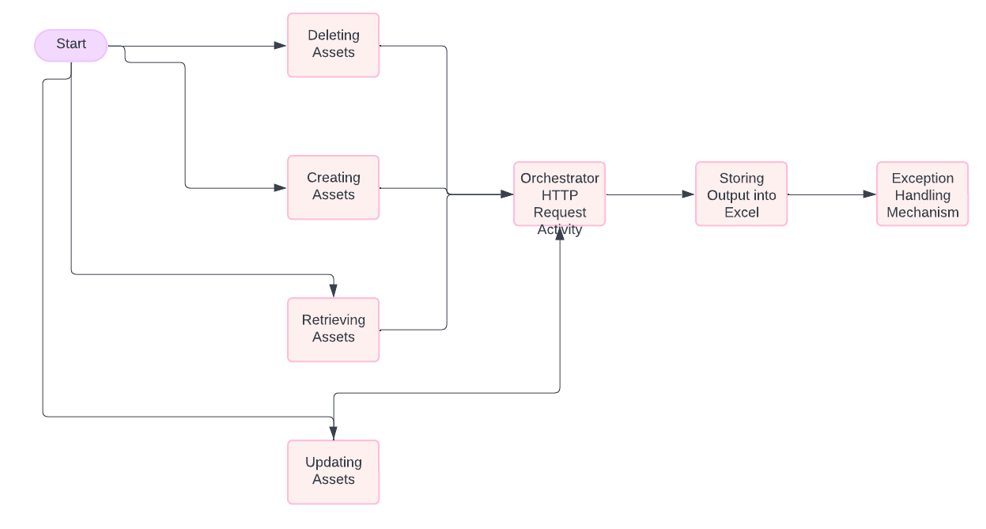
# **Complexity of the To-Be Process**

This process has been categorized as a ‘**Simple**’ process from an RPA Implementation perspective.

# **Detailed Solution Design**

**High-Level Design**

The following sections capture the business logic necessary to navigate through the process.



**6.1 Creating and Retrieving the Assets**

|  |  |  |
| --- | --- | --- |
| **Steps** | **Description** | **Activity Name** |
| A1 | Create assets using the HTTP POST method with data types such as integer, text, Boolean, and credentials in an Orchestrator HTTP request. Store the results in a string variable. | Orchestrator HTTP request |
| A2 | To retrieve assets using the HTTP GET method and store them in a string variable, we will use the filter function | Orchestrator Http request |
| A3 | After receiving the response from the Orchestrator HTTP request, it will convert the string to a JObject and provide structured data. | Deserialize JSON |

**6.2 Creating and Retrieving the Queues**

|  |  |  |
| --- | --- | --- |
| **Steps** | **Description** | **Activity Name** |
| A1 | To create queues using the HTTP POST method and add items to each queue in an Orchestrator HTTP request, store the results in a string variable. | Orchestrator HTTP request |
| A2 | To retrieve queues using the HTTP GET method and obtain the items related to each queue in an Orchestrator HTTP request, store the results in a string variable. | Orchestrator Http request |
| A3 | After receiving the response from the Orchestrator HTTP request, it will convert the string to a JObject and provide structured data. | Deserialize JSON |

# **6. Success Criteria**

# **Exception Handling**

Exceptions handled by robotic process automation can primarily be classified into system and business exceptions. The automation under discussion handles each error type in a standardized manner.

In general, if the Bot encounters any unexpected scenario, the Bot will generate an exception message and inform the same to account team. The Bot will generate exception email, with mitigating actions specified below.

**Business Exceptions**

All known business exceptions are accounted for within the solution design. If an unexpected scenario is found, the Bot will log an exception in UiPath for that record and inform the same to account Team.

Any unexpected business scenarios that the Bot encounters will cause the Bot to skip the case, leaving it open and informing to Account team.

For any business exception, then:

1. **Action taken by automation**: Error captured in the Exception Report for the business exceptions
2. **Reporting Type**: The Exception message for the business scenario will be preserved within the Exception Report.
3. **Manual Action required**:
4. Account Team Supervisor: Manual review recommended if business exception occurs frequently
5. Bot Controller: None

**Known Business Exceptions:**

|  |  |
| --- | --- |
| **Exception Scenario** | **Exception Status Message** |
| Counterparty Excel is not found | Counterparty Excel is not found |

**System Exceptions**

System Exception such as Retail application not working is considered in the SDD. If an unexpected scenario is found, the Bot will log an exception in UiPath for that record and inform the same to Trading Team.

|  |  |
| --- | --- |
| **Exception Scenario** | **Exception Status Message** |
| Retail is not accessible | Retail is not accessible |
| Outlook is not accessible | Outlook is not accessible |

# **Process Maintenance**

* The counterparty details excel file should be available before starting of the process

# **Automation Operational Arrangements**

|  |  |
| --- | --- |
| What part will the Business play within the end-to-end process? | Review |
| Will the Business re-submit exception cases to the solution? | Possibly |

# **Business Continuity Plan/ Disaster Recovery (DR) Plan**

In case of complete failure of the Bot, the team will need to revert to manual process.

* Operations team will perform the “Process” process manually, until notified
* RPA Capability will be responsible for operational tracking, monitoring, maintenance. In case of any temporary outages or planned downtime, the COE will communicate to business and expedite restoration of services.
* Process owners are expected to systematically review and audit the results to ensure the functional value is provided.
* Changes to host systems to be proactively communicated to members of the RPA Capability.
* The process owner will receive notification emails for all failures.

# **Key Assumptions**

* TBD

# **Document Review Guidelines**

This document is to be reviewed every 12 months and updated with relevant process and system changes to reflect the current process and automation functionality. This review should be conducted by a nominee of the document owner and signed off by the document owner.

# 

# **Glossary**

|  |  |
| --- | --- |
| **Term** | **Description** |
| RPA | Robotics Process Automation |
| UiPath | UiPath |
| SIT | System Integration Testing |
| SLA | Service Level Agreement |
| SME | Subject Matter Expert |
| UAT | User Acceptance Testing |

# **Appendix**

## Appendix A: Process Map

## Appendix B: Process Templates

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Sr.** | **File Name** | **Type** | **Purpose** | **Attachment** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |