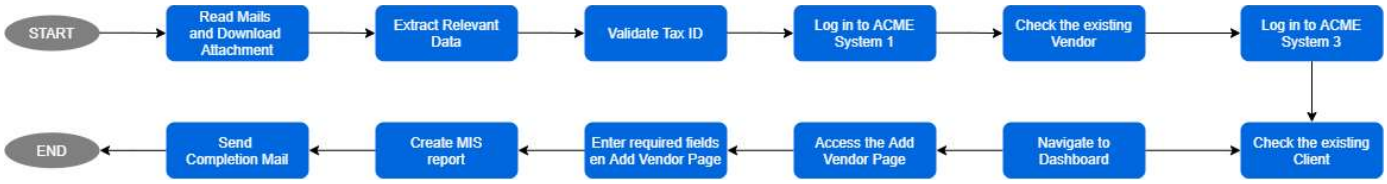
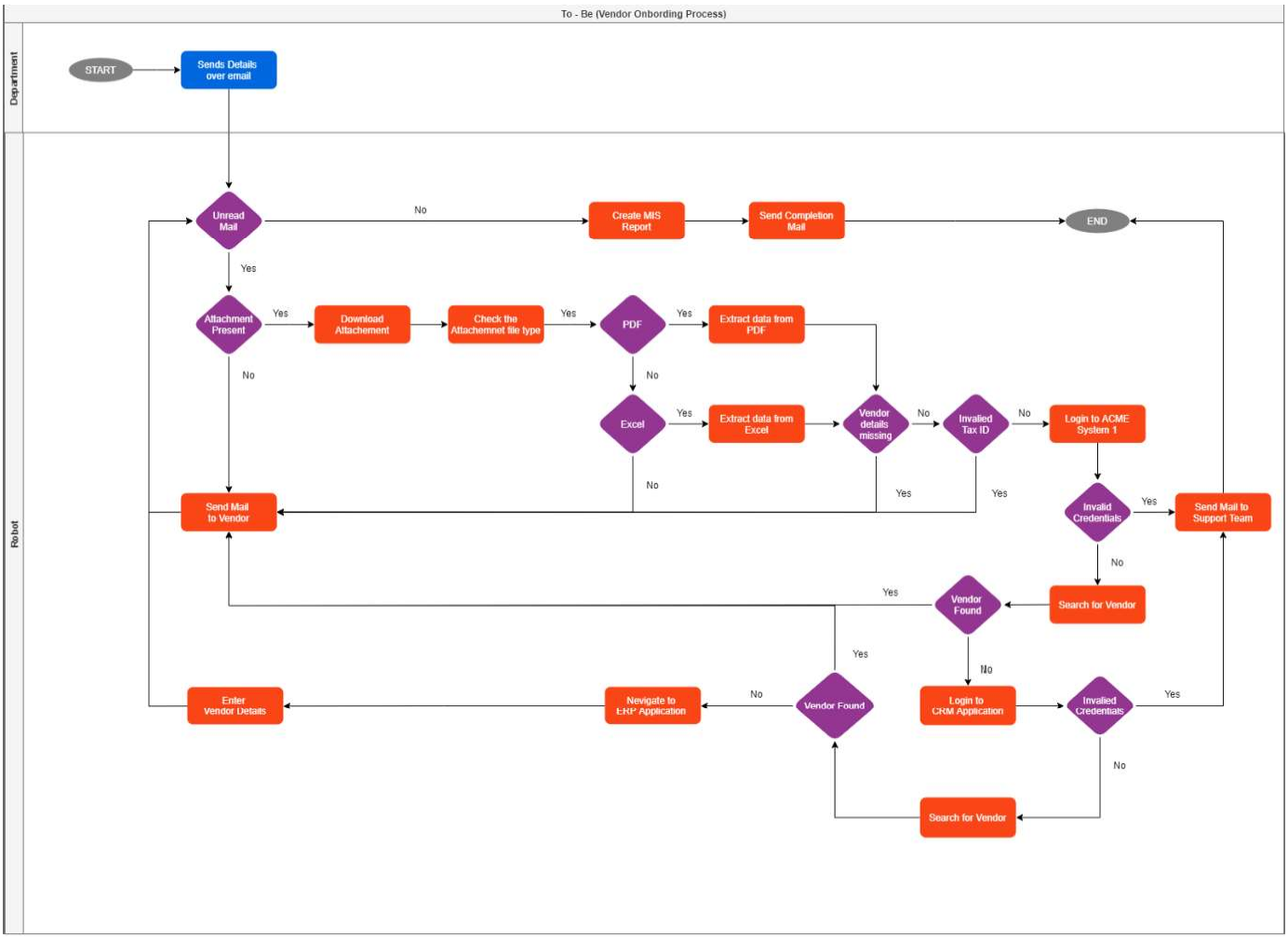
III. To Be Process description.

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.

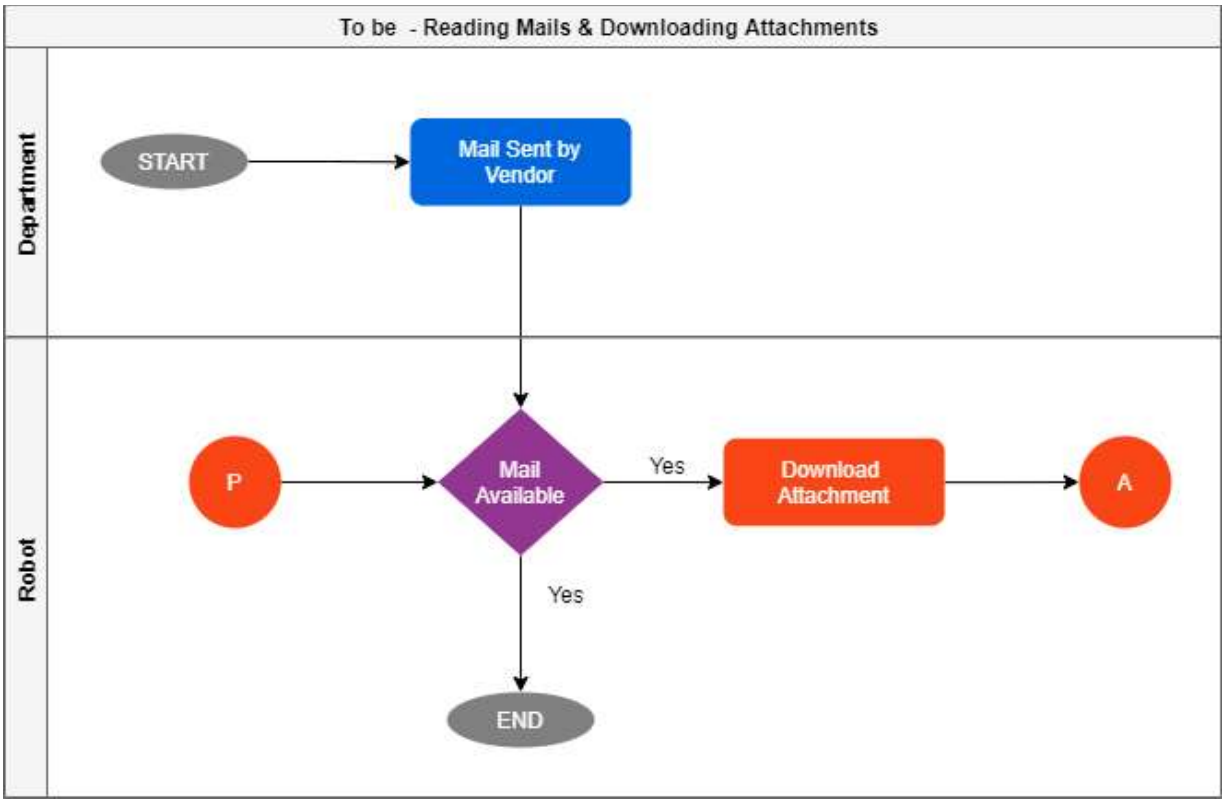


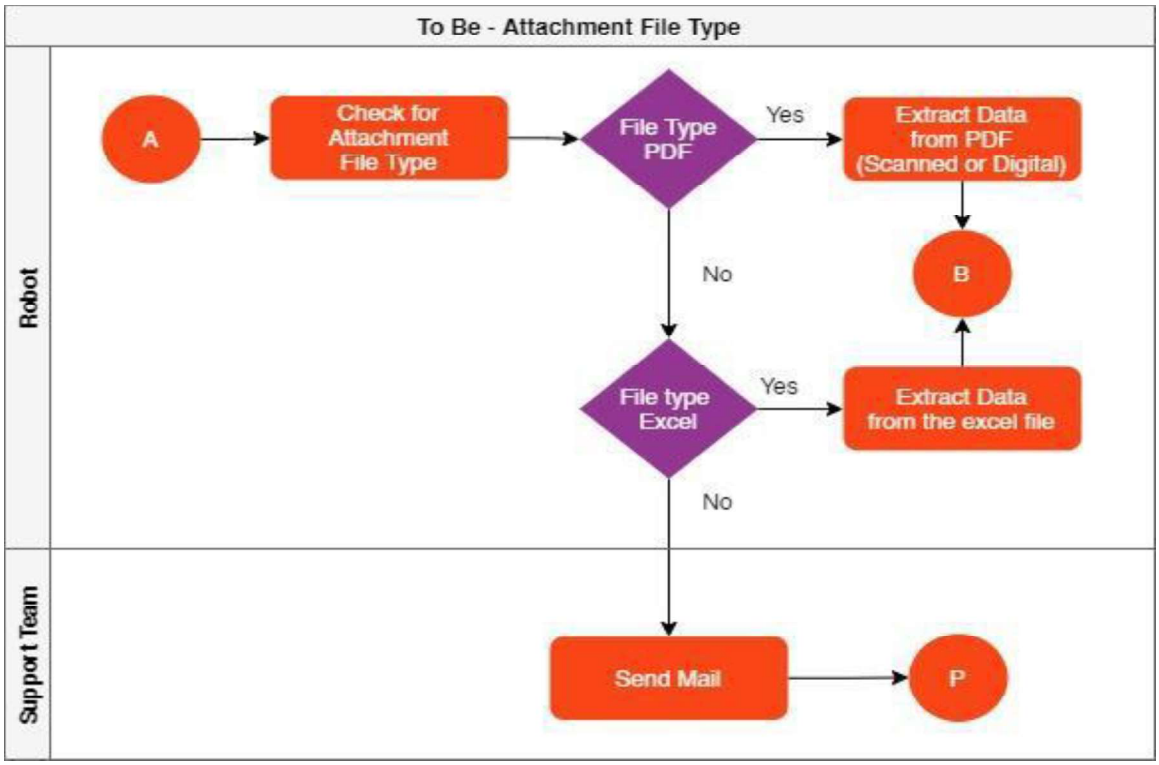


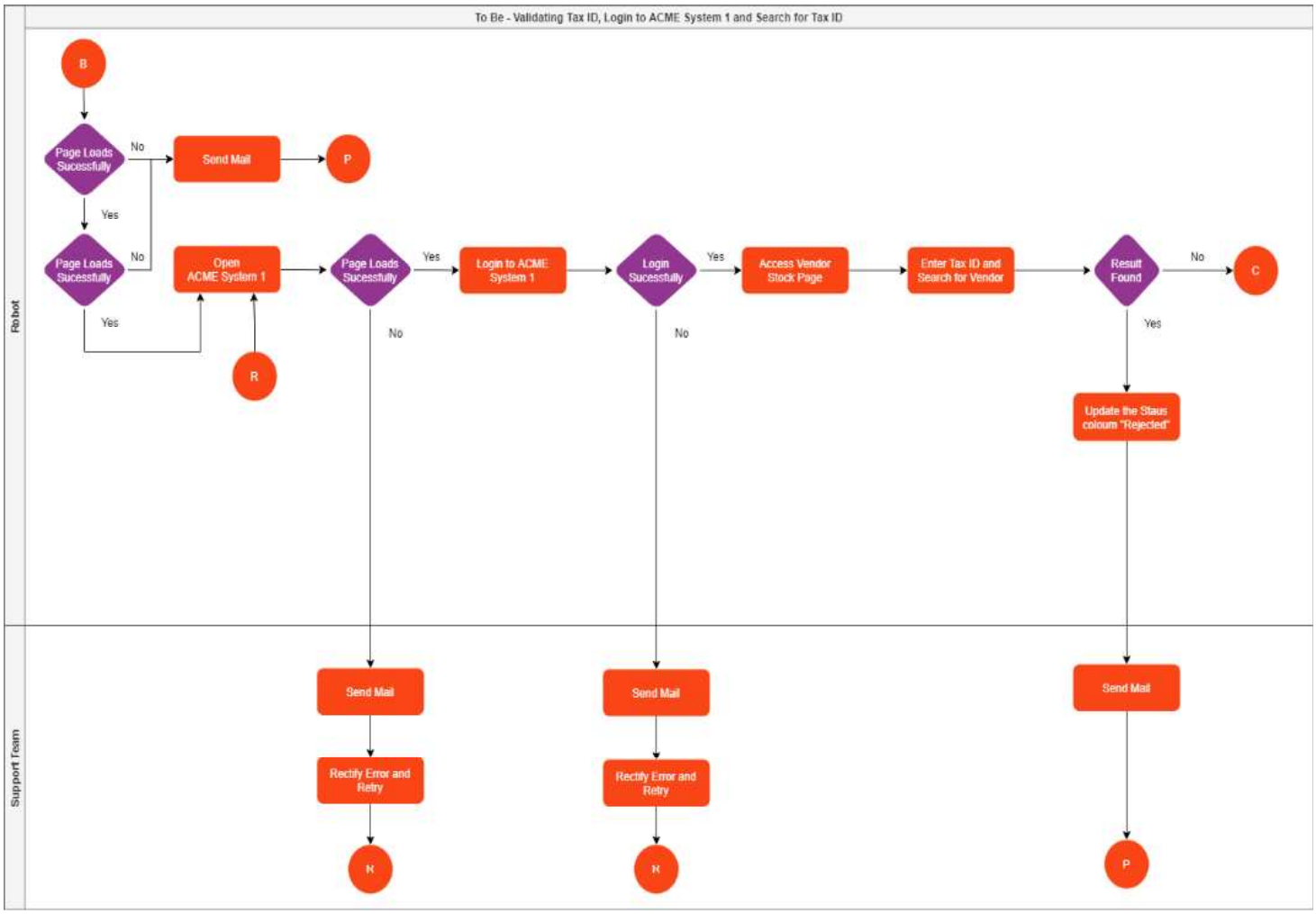
3.1. Detailed To Be Process Map

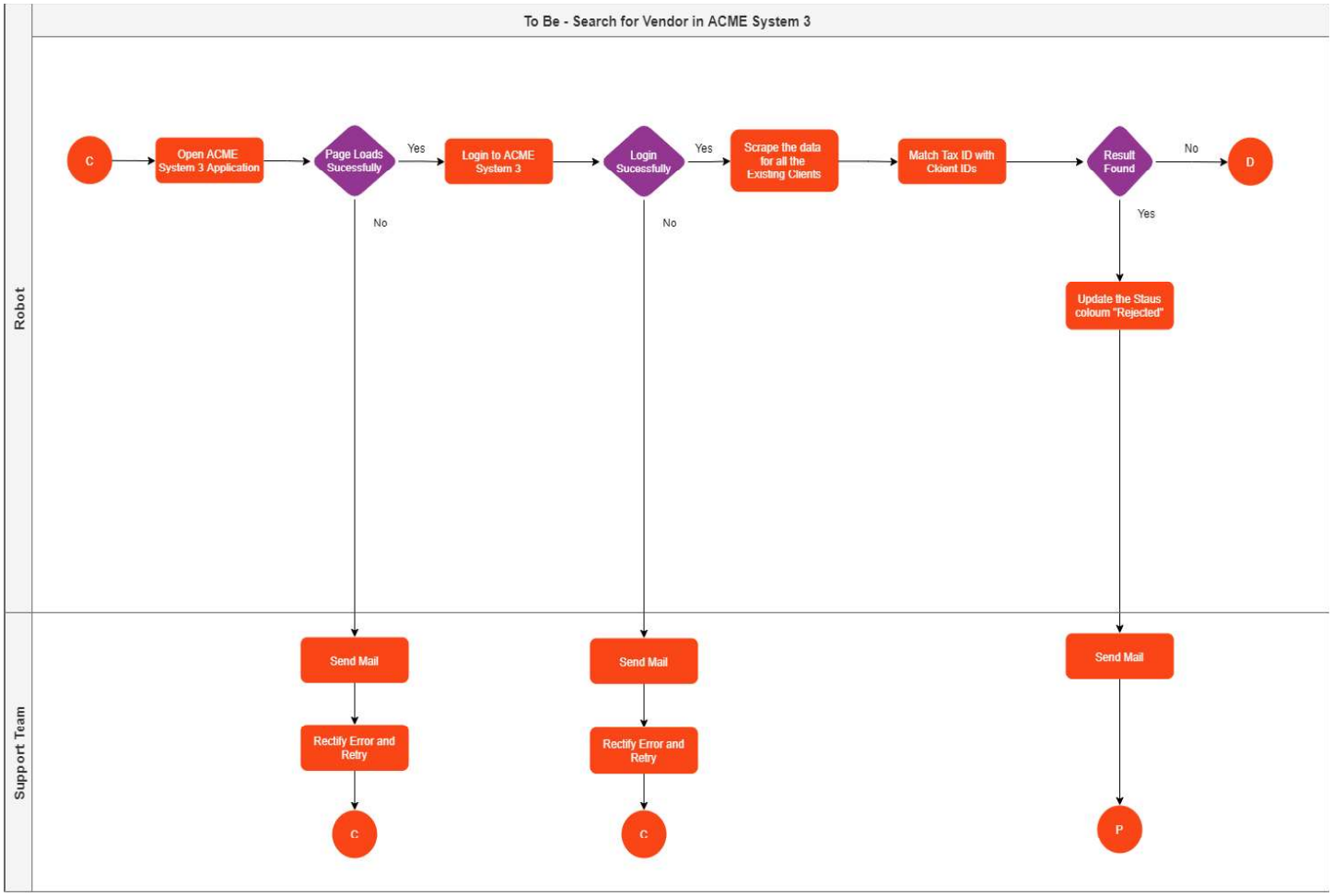
A detailed process map of the process as it will look like post-automation will be outlined here.

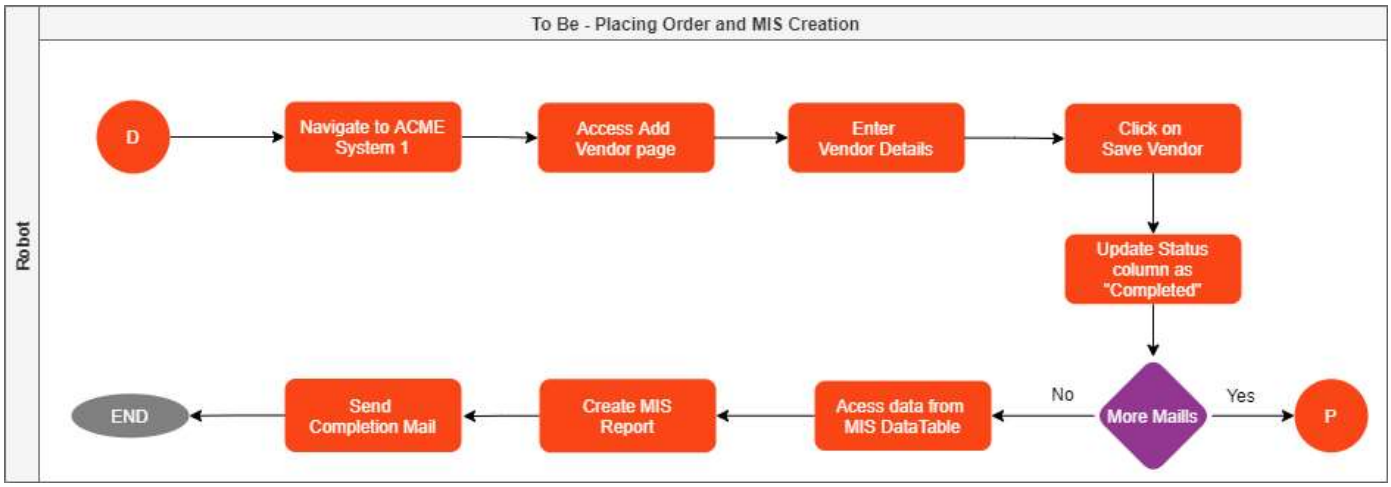
Legend	Description
	Decisions made throughout the process.
	This process action is proposed for automation.
	This process remains manual (to be performed by a human agent).




To Be - Attachment File Type
Robot
Support Team
A
Check for Attachment File Type
File Type PDF
Yes
Extract Data from PDF (Scanned or Digital)
B
No
File type Excel
Yes
Extract Data from the excel file
No
Send Mail
P


To Be - Validating Tax ID, Login to ACME System 1 and Search for Tax ID
Robot
Support Team
B
Page Loads Sucessfully
No
Send Mail
P
Yes
Page Loads Sucessfully
No
Open ACME System 1
Page Loads Sucessfully
Yes
Login to ACME System 1
Login Sucessfully
Yes
Access Vendor Stock Page
Enter Tax ID and Search for Vendor
Result Found
No
C
Yes
Update the Staus coloum "Rejected"
Yes
R
No
No
Send Mail
Rectify Error and Retry
K
Send Mail
Rectify Error and Retry
K
Send Mail
P


To Be - Search for Vendor in ACME System 3
Robot
Support Team
C
Open ACME System 3 Application
Page Loads Sucessfully
Yes
No
Login to ACME System 3
Login Sucessfully
Yes
No
Scrape the data for all the Existing Clients
Match Tax ID with Client IDs
Result Found
No
Yes
D
Update the Staus coloum "Rejected"
Send Mail
Rectify Error and Retry
C
Send Mail
Rectify Error and Retry
C
Send Mail
P


To Be - Placing Order and MIS Creation
Robot
D
Navigate to ACME System 1
Access Add Vendor page
Enter Vendor Details
Click on Save Vendor
Update Status column as "Completed"
More Mails
No
Yes
P
Acess data from MIS DataTable
Create MIS Report
Send Completion Mail
END

3.2. Input/Output Data Description

The following table should contain details regarding the inputs that every action of the process takes.

#	Sample	Type	Process step #	Storage location	Are inputs Natively Digital*?	Are the inputs Structured*?
1	Vendor.pdf	PDF	2	Input Folder	Yes	Yes
2	Vendor-photo.pdf	PDF	2	Input Folder	No	Yes
3	Vendor.xlsx	Excel	2	Input Folder	Yes	Yes

3.3. 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.

3.4.1. Known Business Exceptions

Details regarding how the robot should handle the exceptions.

#	Exception Name	Action	Parameters	Actions to be taken
1	Tax ID found in ACME System 1	9	VendorTaxID	Send an e-mail to vendor with the text: Vendor is already added in our system.” Go to the next transaction
2	Tax ID found in ACME System 3	11	VendorTaxID	Send an e-mail to vendor with the text: Vendor is already added in our system.” Go to the next transaction
3	Input File Type	3	InputFileType	Send an e-mail to vendor with the text: Invalid FileType received.”

				Go to the next transaction
4	Email Subject	1	MailSubject format is not supported	Send an e-mail to vendor with the text: Incorrect Format of the Subject." Go to the next transaction
5	Attachment not present	2	Input Folder is Empty	Send an e-mail to vendor with the text: Vendor onboarding form is missing in the mail." Go to the next transaction
6	Relevant Fields	4	VendorName/ VendorAddress/ VendorCity/ VendorCountry	Send an e-mail to vendor with the text: Data missing for 'x' field." Go to the next transaction
7	Invalid Credentials	6	Invalid Credentials	Send an e-mail to support team with the text: Invalid Credentials." Go to the next transaction

3.4.2. 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.

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

3.4. 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.

3.5.1. Known Applications Errors and Exceptions

Details regarding how the robot should handle the exceptions.

#	Error/Exception Name	Action	Parameters	Actions to be taken
1	Application (Crash / Non-Responsive)	10	Application Unresponsive	Recover and retry 3 times

2	Webpage not loaded	5	Webpage Unresponsive.	Recover and retry 3 times

3.5.2. 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.

Robot should attempt to access the application 3 times then it should terminate thread.

3.5. 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
Process logs	Daily	How many times was this process run since the beginning of the month and what was the average run duration	Orchestrator
Transaction logs	Daily	How many transactions were run by this process since the beginning of the month and what was the average transaction duration?	Orchestrator
Error logs	Daily	Average number of errors by type per day	Orchestrator
MIS report	Daily	All transactions processed during the day	Excel file over an email to be sent

3.6. In Scope For RPA

The actions in scope for RPA should be listed below:

- Full Scope for RPA - the process is to be 100% automated.

3.7. Out Of Scope for RPA

The actions **out of scope** for RPA should be listed below together with the reasoning:

- There are no activities out of scope for RPA.

3.8. Change/Improvement details

Use this section to detail the list the change or improvement opportunity in the To-Be Process.
Important aspects to be mentioned: what is the initiative, expected outcome, expected completion date, contact person for details, and if will impact the current automation request.

#	Initiative Name	Process Action(s) where it is identified	Impact on current Automation Request	Expected Completion Date	Contact Person
	NA	NA	NA	NA	NA