@ProcessName\_PlaceHolder

**Process Definition Document**

**Intelligent Automation**

**Document History**

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| --- | --- | --- | --- | --- |
| Date | Version | Role | Name | Comments |
|  |  | BA |  |  |
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**Document Approval Flow**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Flow | Role | Name | Signature and Date: |
| **1.0** | **Prepared by:** |  |  |  |
| **1.0** | **Approved by:** |  |  |  |
|  | **Approved by:** |  |  |  |
|  | **Approved by:** |  |  |  |

**Change Log**

|  |  |  |
| --- | --- | --- |
| Date | Section | Change Requested By |
|  |  |  |
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Process Definition Document

# Introduction

## Document Purpose

The Process Definition Document (PDD) provides details and context on the process chosen for Intelligent Automation. This document details the process steps performed, sequence, rules, inputs, outputs, reports, and success factors. This document provides context on the process to be automated and can be leveraged by both business/functional users as well as developers.

## Objectives

The Process Definition Document (PDD) intends to provide a concise description of the requirements, process details, and expected outcomes to be achieved through automation of this process. The details in this document are based upon interviews and videos of Subject Matter Experts and Process Owners. The business/process owners and engagement team should thoroughly review this document for accuracy.

## Definitions

These documentation levels define the level of detail that will be included in each section:

* **Level 1**: Macro Level Process Map (1-10 milestone steps)
* **Level 2**: End-to-End Process Map (Swim Lanes and linear flow with major decision points)
* **Level 3**: Complete Process Flow Diagram (click level detail and screenshots)

## Key Contacts

The following are the key contacts associated with this specific process.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Contact Details | Organization | Responsibilities |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |

### Notifications

Document who should be notified by the automation based on various events:

|  |  |
| --- | --- |
| Notification Type | Recipient |
| Business Exception Report | Report on Shared Folder |
| System Exception Email |  |
| Successful Completion Report | Report on Shared Folder |
| Other? |  |

# Process Details

## Process Description

@ProcessOverview\_PlaceHolder

## Process Metrics

How much manual time/effort does the current process consume?

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | minutes per transaction | x |  | transactions per month | = |  | annually |
|  |  |  |  | *Converts to:* | |  | hours per month |

***Note: Total hours annually 6,674***

What metrics will be used to measure the success of automating this process?

@metrics\_table

|  |  |
| --- | --- |
| Leading Measures | Lagging Measures |
|  |  |
|  |  |
|  |  |

## Process Summary

Provide information on the process to be automated.

|  |  |  |
| --- | --- | --- |
| # | Process Summary Item | Process Summary |
| 1 | Process Name | @ProcessName\_PlaceHolder |
| 2 | Department / Ownership |  |
| 3 | Systems Touched |  |
| 4 | Schedule and Frequency |  |
| 5 | Business Criticality & Timing |  |
| 6 | # of Items Processed |  |
| 7 | # of FTEs Performing the Process |  |
| 8 | Estimated runtime |  |
| 9 | Multiple bots required? |  |

## Applications Used in the Process

The following applications will be used to either perform the Intelligent Automation functionality or will interact with applications involved in the process.

|  |  |  |  |
| --- | --- | --- | --- |
| # | Application | URL/Version | Any Specific Needs (Reports, Screens, Queries) |
| 1 | SAP |  |  |
| 2 | Excel |  |  |
| 3 | Adobe PDF |  |  |
| 4 | Outlook |  |  |
| 4 | UiPath Studio |  |  |
| 5 | UiPath Action Center |  |  |
| 6 | UiPath DU |  |  |

## Process Map & Documentation

Embed the process map and other documentation here:

|  |  |
| --- | --- |
| Item | Embed document here |
| **Process Map – Current State**  *Visual flow of the current state process* |  |
| **Process Map – Future State**  *Visual flow of the future state process* |  |
| **Process Detail**  *Full detail for future state process steps* |  |
| **Reporting / Process Outputs** –  *Template(s) will be filled out and distributed as an output of this automated process* |  |
| **Input Templates, Matrices, etc. –**  *Additional templates that are used to store logic, configuration, or any other inputs that will be used by this automated process* |  |
| **Process Dependencies –**  *Access, network folders, data mapping, databases, user setup, and other items required to build, deploy, and support the process. Finally, include upstream and downstream data and process considerations.* |  |

## Expected Exceptions

Detail out any business/application exceptions that occur in the current process and/or may be anticipated to occur in the future business process post-automation.

Business Exceptions

@businessexceptions\_table\_placeholder

|  |  |  |
| --- | --- | --- |
| **Exception**   **Reference/Message** | **Description** | **Action Required** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

@systemexceptions\_table\_placeholder

System Exceptions

|  |  |  |
| --- | --- | --- |
| **Exception**   **Reference/Message** | **Description** | **Action Required** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Automation Acceptance Criteria

Describe what the automated process needs to accomplish in order to begin generating value.

|  |  |
| --- | --- |
| Category | Specific Criteria |
| **Functionality**   * Key Features | @PerformanceConsideration\_PlaceHolder |
| **Scope**   * Specific types of transaction handled * Specific types of transactions ignored or treated as exception | @DataInputs\_PlaceHolder |
| **Successful Processing**   * Success rate thresholds |  |
| **Other** |  |

## Test Strategy

### Test Scenarios

Include the matrix of test scenarios that the automated process must pass in order to be accepted.

|  |  |  |
| --- | --- | --- |
| Item | Completed By | Embed/Link document here |
| **Test Scenarios** |  |  |

## Decisions

The following decisions have been made regarding this Intelligent Automation solution:

The following decisions are outstanding:

|  |  |  |
| --- | --- | --- |
| # | Outstanding Decision | Options |
| 1 | Confirm data tracking above? |  |
| 2 | Can we implement change management to have all downloaded MTRs saved as Part#? | What if there are multiple parts? |
| 3 | Can we leverage a single import2trace for all MTRs? |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |

# Appendix A.

Breakdown of value calculations.