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**MTR DU Processing**

**Process Definition Document**

**Intelligent Automation**

**Document History**

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| --- | --- | --- | --- | --- |
| Date | Version | Role | Name | Comments |
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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

@SolutionOverview\_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?

|  |  |
| --- | --- |
| Leading Measures | Lagging Measures |
| * Zero touch MTR submissions | ## hours back to the business per month |
| ## time savings per transaction | $$ cost per transaction decrease |
| * ## % of transactions successful (defined as MTRs processed by the bot) | $$ total annual cost of business process |

## Process Summary

Provide information on the process to be automated.

@ProcessSummary\_Table\_PlaceHolder

|  |  |  |
| --- | --- | --- |
| # | Process Summary Item | Process Summary |
| 1 | Process Name |  |
| 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

|  |  |  |
| --- | --- | --- |
| **Exception**   **Reference/Message** | **Description** | **Action Required** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
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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 | **Dispatcher**   * Scrape mailbox of all attachments. * Save attachments in network folder. * Extract MTRs from Network Share.   **DU**   * Extract Heat# * PO# (when present) * DNOW Part # (when present * MFG Part # (when present)   **Performer**   * Complete Import2trace template * Email out Template and MTRs to Import2trace |
| **Scope**   * Specific types of transaction handled * Specific types of transactions ignored or treated as exception | * All Mill Test Reports (MTR) * All Certificate of Conformance (COC) documents |
| **Successful Processing**   * Success rate thresholds | Target is **75%+** Straight Pass through |
| **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** | Austin Keeler | [DNOW\_MTR\_DU Test Scenario Matrix.xlsx](https://dnow.sharepoint.com/:x:/s/MTR/EY8HB4C1bBdDmPSkCKWrgxwBCJrnpAOB7RIA-e2LlXurnw?e=P4Rf0R) |

## Decisions

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

|  |  |
| --- | --- |
| # | Key Decision |
| 1 | The automation will leverage a share drive to store the MTRs to be processed |
| 2 | We will leverage BAPIs for SAP instead of accessing through the UI. |
| 3 | **Industrial Search** function will be **out of scope**. |
| 4 | The automation will Track the following data points   * Volume of MTRs submitted by branch * Volume of MTR lines indexed by Vendor (Success/Failure * Volume of MTR lines processed through Action Center * Volume of lines/heat codes stored in ZMTR by branch, customer * Compare volume of POs that should have MTRs as a % of MTRs actually submitted by branch. |
| 5 | When heat#, Serial# (Valves), Lot#, and Heat Code are all absent the document will be sent to Action Center. |
| 6 | We will use designated mailboxes for:   * US * International * Canada |
| 7 | When a Valve has a serial number of “N/A” we will use “COC” for heat #. |
| 8 | MTRs without a PO# will not go to Action Center unless other required information is missing. Sending the document to AC when PO is absent would cause I high number of human in the loop activities since about the majority of the MTR do not reference the PO#. |
| 9 | DU will have to extract **DNOW Part#** or **MFG Part# & PO#**, if not MTR will go to Action Center for human in the loop to provide DNOW Part#. |
| 10 | We will continue to create new rules and tweak existing rules around when to send a document to AC for Human in the Loop to accomplish the highest level of Straight Pass-Through possible. |
| 11 |  |
| 12 |  |
| 13 |  |
| 14 |  |

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.

A screenshot of a computer

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