A blue and white logo

Description automatically generated­­­­­

|  |  |
| --- | --- |
|  |  |



Process Definition

Document

LPL Contract Chasing project

LPL contract Chasing Project

Table of Contents

[I. INTRODUCTION 4](#_Toc97211767)

[1.1 Purpose 4](#_Toc97211770)

[1.2 Objectives 4](#_Toc97211771)

[1.3 Key Contacts 5](#_Toc97211772)

[1.4 Minimum Pre-requisites for the Automation 5](#_Toc97211773)

[II. AS IS Process description 5](#_Toc97211774)

[2.1 Process Overview 5](#_Toc97211776)

[2.2 Applications Used 7](#_Toc97211777)

[2.3 AS IS Process Map 7](#_Toc97211778)

[2.3.1 High Level Process Map 8](#_Toc97211779)

[2.3.2 Detailed Level Process Map 8](#_Toc97211780)

[2.4 Process Statistics 8](#_Toc97211781)

[2.5 Detailed As Is Process Actions 9](#_Toc97211782)

[2.6 Exceptions Handling 9](#_Toc97211783)

[2.7 Input Data Description 10](#_Toc97211784)

[III. TO BE Process description 11](#_Toc97211785)

[3.1. Detailed TO BE Process Map 11](#_Toc97211786)

[3.2. Parallel Initiatives 11](#_Toc97211787)

[IV. Other 14](#_Toc97211797)

[4.1. Additional sources of process documentation 14](#_Toc97211798)

# INTRODUCTION



## Purpose

The Process Definition Document outlines the business process chosen for automation. The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation (**AS IS**) as well as the new sequence of actions that the process will follow as a result of preparation for automation (**TO BE**).

**The PDD is a communication document between:**

* The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
* The RPA Business Analyst and the Development team (represented by the Solution Architect and RPA Development Lead). The goal is to ensure that the process is documented appropriately and to a sufficient level of detail so that the Solution Architect can then create the solution based on the PDD content.

## Objectives

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.

## Key Contacts

Add here any stakeholders that need to be informed or to approve changes to the process:

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact Details (email, phone number) | Notes |
| RPA Developer | A.Mahesh Reddy | [ambulurimahesh@anzaservicesllp.com](mailto:ambulurimahesh@anzaservicesllp.com) |  |
|  |  |  |  |

## Minimum Pre-requisites for the 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

# AS IS Process description

In this section the Business Analyst will document the process. This section will serve as the starting point for the re-engineering and automation effort.



## Process Overview

Section contains general information about the process before automation.

|  |  |
| --- | --- |
| Item | Description/Answer |
| Process Full Name | LPL Contract Chasing project |
| Process Area | Chrome , Excel , outlook |
| Department |  |
| Short Description (operation, activity, outcome) | LPL contract Chasing Project |

## Applications Used

The table includes a comprehensive list of all the applications that are used as part of the process to be automated to perform the given actions in the flow.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Application Name | Version | Application Language | Thin/Thick Client | Environment/ Access method | Comments |
|  | [*This is important for the RPA Developers as:*  *It is not uncommon for development environments to have lower versions compared to the production one;*  *The developer will know (or will know they have to investigate) if they can re-use a component that exists for a previous version or if they need to develop a new one*] | Application Language  [*This is important as different application languages can also mean different settings (e.g. dot versus comma as decimal separator). If the developer is aware of the language then they will know what are the challenges that come with that.*] |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

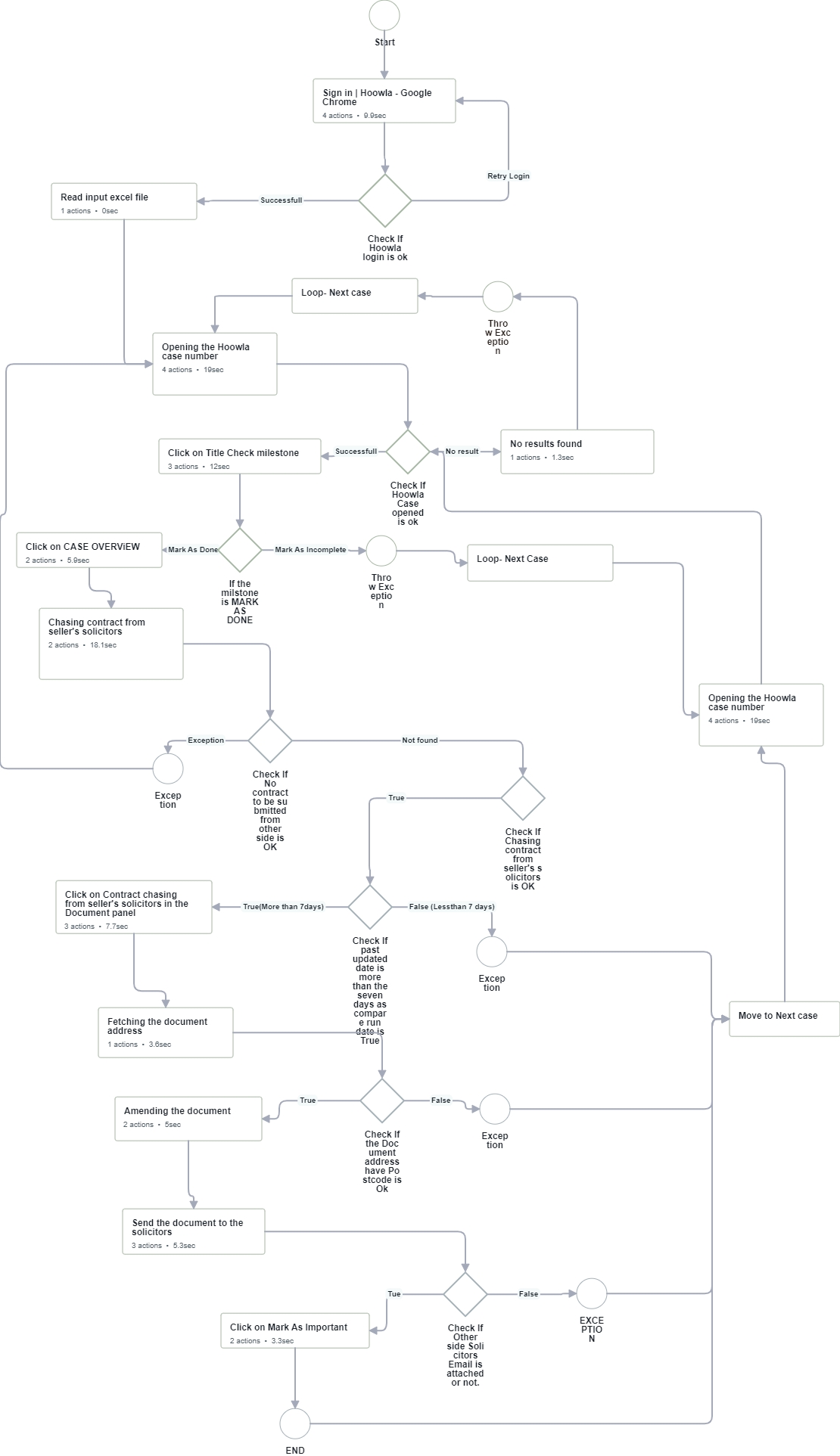
\*Add more rows to the table to include the complete list of applications.

## AS IS Process Map

This section contains various process maps contributing to a better understanding of how the process is performed pre-automation.

### High Level Process Map

This section is useful for the Business Analyst in presentations and discussions with management to underline areas of weakness, inefficiency or to demonstrate which actions could be in scope for automation.



### Detailed Level Process Map

This section describes the process at key-stroke level and is an essential part for the communication with the developers.

## Process Statistics

**High Level statistics**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Processes | Windows | Actions | Mouse clicks | Keys pressed | Text entries | Hotkeys used | Time |
| 2 | 5 | 32 | 30 | 0 | 0 | 0 | 1 min. 50 sec. |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

**Detailed statistics**

|  |  |  |  |
| --- | --- | --- | --- |
| Window name | Mouse clicks | Text entries | Key pressed |
| Sign in | Hoowla - Google Chrome | 4 | 0 | 0 |
| Dashboard | Hoowla - Google Chrome | 2 | 0 | 0 |
| My Cases | Hoowla - Google Chrome | 5 | 0 | 0 |
| Call with LPL - Chasing Contract BOT-20230817\_163655-Meeting Recording.mp4 - Google Chrome | 19 | 0 | 0 |
|  | 0 | 0 | 0 |
|  |  |  |  |
|  |  |  |  |

## Detailed As Is Process Actions

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| #Action | Input | Description | Details (Screen/Video Recording Index) | Exceptions Handling | Possible Actions |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |  |
| --- | --- |
| 1. Sign in | Hoowla - Google Chrome | |
|  | **Est. time: 9.9 sec.** |

|  |  |
| --- | --- |
| * 1. Open Hoowla portal |  |
| Open the Hoowla portal using the below URL: https://app.hoowla.com/app/login | Est. time: 2.1 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Type Username |  |
| Type user Email :Support1@lpropertylawyers.co.uk | Est. time: 3.8 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Type Secured Password |  |
| Type User Secured password | Est. time: 2.1 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on SIGN IN |  |
| Click on SIGN IN | Est. time: 1.8 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Check If Hoowla login is ok | |
| If 'Retry Login' then go to '1. Sign in | Hoowla - Google Chrome'  If 'Successfull' then go to '3. Read input excel file'  Check If Hoowla login is ok | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Read input excel file | |
| Read input excel file and copy all Hoowla case reference number | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| * 1. Get the input Hoowla case reference numbers |  |
| Read the input excel file and get all Hoowla reference numbers | Est. time: 0.0 sec. |
| image | Action: |

|  |  |
| --- | --- |
| 1. Opening the Hoowla case number | |
|  | **Est. time: 19.0 sec.** |

|  |  |
| --- | --- |
| * 1. Click on CASES |  |
| Click on the CASES to search new cases | Est. time: 2.6 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Type Copied Hoowla reference number |  |
| Type copied hoowla reference number | Est. time: 7.10 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on Search button |  |
| Click on the search button | Est. time: 4.1 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on first row case address |  |
| Click on the first row case address to open the case | Est. time: 4.3 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Check If Hoowla Case opened is ok | |
| If 'Successfull' then go to '6. Click on Title Check milestone'  If 'No result' then go to '29. No results found'  Check If Hoowla case opened | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Click on Title Check milestone | |
|  | **Est. time: 12.0 sec.** |

|  |  |
| --- | --- |
| * 1. Click on TITLE CHECK |  |
| Click on the Title check milstone | Est. time: 1.7 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Check the Request contract milstone |  |
| 1.Check the Request contract milstone Todo list column and 2. check if the milstone is MARK AS DONE or MARK AS INCOMPLETE and 3.check Completed by date | Est. time: 8.8 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Check Contract received?/Acknowledge receipt of contract Milstone |  |
| 1.Check the Contract received?/Acknowledge receipt of contract milstone Todo list column and 2. check if the milstone is MARK AS DONE or MARK AS INCOMPLETE | Est. time: 1.5 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. If the milstone is MARK AS DONE | |
| If 'Mark As Done' then go to '8. Click on CASE OVERViEW'  If 'Mark As Incomplete' then go to '26. Thro w Exc eptio n'  check if the milestone is MARK AS DONE or MARK AS INCOMPLETE | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Click on CASE OVERViEW | |
|  | **Est. time: 5.9 sec.** |

|  |  |
| --- | --- |
| * 1. Click on back icon(49 Calverley moor) |  |
| Click on address tab and go back to the cases page | Est. time: 3.3 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on Case Overview |  |
| Click on Case Overview tab in the CONTOL PANEL | Est. time: 2.6 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Chasing contract from seller's solicitors | |
|  | **Est. time: 18.1 sec.** |

|  |  |
| --- | --- |
| * 1. Fetch data: No contract to be submitted from other side: Note |  |
| Search : No contract to be submitted from other side - property being transferred: Note | Est. time: 10.9 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Fetch data: Chasing contract from seller's solicitors and fetch date |  |
| Search the Chasing contract from seller's solicitors and fetch corresponding date. | Est. time: 7.2 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Check If No contract to be su bmitted from other side is OK | |
| If 'Not found' then go to '11. Check If Chasing contract from seller's s olicitors is OK'  If 'Exception' then go to '25. Excep tion'  Check If No contract to be submitted from other side is found in the latest case overview list, then throw an exception ,if not check the Chasing contract from seller's solicitors | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Check If Chasing contract from seller's s olicitors is OK | |
| If 'True' then go to '12. Check If past updated date is more than the seven days as compar e run date is True'  Check If chasing contract from seller's solicitors is found in the case overview list, then check get corresponding Date. | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Check If past updated date is more than the seven days as compar e run date is True | |
| If 'True(More than 7days)' then go to '13. Click on Contract chasing from seller's solicitors in the Document panel'  If 'False (Lessthan 7 days)' then go to '23. Excep tion'  Check If past updated date is more than the seven days as compare Bot run date(P>7) is True . (11/10/2023(0 days) > 19/10/2023(8 days) | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Click on Contract chasing from seller's solicitors in the Document panel | |
|  | **Est. time: 7.7 sec.** |

|  |  |
| --- | --- |
| * 1. Going back to the cases page |  |
| Going back to the Main cases page | Est. time: 2.7 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on TITLE CHECK |  |
| Click on Title Check | Est. time: 2.9 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on the Chasing contract from seller's solicitors |  |
| Click on the Chasing contract from seller's solicitors, to open the document | Est. time: 2.1 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Fetching the document address | |
|  | **Est. time: 3.6 sec.** |

|  |  |
| --- | --- |
| * 1. Fetch the address and validate the postcode |  |
| Fetch the address and validate the postcode | Est. time: 3.6 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Check If the Doc ument address have Po stcode is Ok | |
| If 'True' then go to '16. Amending the document'  If 'False' then go to '22. Excep tion'  Check If the Document address have Postcode is Ok, if not skip this case and move the next case | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Amending the document | |
|  | **Est. time: 5.0 sec.** |

|  |  |
| --- | --- |
| * 1. Remove the duplicate names |  |
| Remove the duplicate names in the address templete. | Est. time: 2.8 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Amend the body of the document |  |
| Body: We write in regards to the above and reference to our previous correspondence dated [Insert date format (31st July 2023)], to which we do not appear to have received a response. Therefore, please can we ask that you provide an update on your position in relation to providing a draft contract and title documents. | Est. time: 2.2 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Send the document to the solicitors | |
|  | **Est. time: 5.3 sec.** |

|  |  |
| --- | --- |
| * 1. Click on SAVE & CLOSE |  |
| Click Save and close tab | Est. time: 1.7 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on SEND |  |
| Click on SEND | Est. time: 2.2 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on Other sides Solicitors (Claire Logan) |  |
| Click on Other sides Solicitors (Claire Logan) | Est. time: 1.4 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Check If Other side Soli citors Email is attached or not. | |
| If 'Tue' then go to '19. Click on Mark As Important'  If 'False' then go to '21. EXCE PTIO N'  Check If Other side Solicitors Email is attached or not, it email attached then it is true, if not it is false. | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Click on Mark As Important | |
|  | **Est. time: 3.3 sec.** |

|  |  |
| --- | --- |
| * 1. Click on Mark As Important |  |
| Click on Mark As Important | Est. time: 0.0 sec. |
| image | Action: |

|  |  |
| --- | --- |
| * 1. Click on SEND |  |
| Click on SEND Icon ,to send the Document to the other sides solicitors | Est. time: 3.3 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. END | |
| Case completed | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| * 1. Go to: Move to Next case |  |
|  | Est. time: 0.0 sec. |
|  | Action: NONE |

|  |  |
| --- | --- |
| 1. EXCE PTIO N | |
| Exception | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| * 1. Go to: Move to Next case |  |
|  | Est. time: 0.0 sec. |
|  | Action: NONE |

|  |  |
| --- | --- |
| 1. Excep tion | |
| Exception | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| * 1. Go to: Move to Next case |  |
|  | Est. time: 0.0 sec. |
|  | Action: NONE |

|  |  |
| --- | --- |
| 1. Excep tion | |
| Business Exception | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Move to Next case | |
|  | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| * 1. Go to: Opening the Hoowla case number |  |
|  | Est. time: 0.0 sec. |
|  | Action: NONE |

|  |  |
| --- | --- |
| 1. Excep tion | |
| Exception | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| * 1. Go to: Opening the Hoowla case number |  |
|  | Est. time: 0.0 sec. |
|  | Action: NONE |

|  |  |
| --- | --- |
| 1. Thro w Exc eptio n | |
|  | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Loop- Next Case | |
|  | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Opening the Hoowla case number | |
|  | **Est. time: 19.0 sec.** |

|  |  |
| --- | --- |
| * 1. Click on CASES |  |
| Click on the CASES to search new cases | Est. time: 2.6 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Type Copied Hoowla reference number |  |
| Type copied hoowla reference number | Est. time: 7.10 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on Search button |  |
| Click on the search button | Est. time: 4.1 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Click on first row case address |  |
| Click on the first row case address to open the case | Est. time: 4.3 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| * 1. Go to: Check If Hoowla Case opened is ok |  |
|  | Est. time: 0.0 sec. |
|  | Action: NONE |

|  |  |
| --- | --- |
| 1. No results found | |
|  | **Est. time: 1.3 sec.** |

|  |  |
| --- | --- |
| * 1. Case not opened |  |
| Case not found in hoowla | Est. time: 1.3 sec. |
| image | Action: Click |

|  |  |
| --- | --- |
| 1. Thro w Exc eptio n | |
| Case not found in hoowla | **Est. time: 0.0 sec.** |

|  |  |
| --- | --- |
| 1. Loop- Next case | |
|  | **Est. time: 0.0 sec.** |

## Exceptions Handling

## Input Data Description

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| #Action | Sample | Input Type | Location | Are inputs Natively Digital\*? | Are the Inputs Structured\*? |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

*\** ***Native Digital****: This is data that was originally created digitally e.g. excel, database or application reports etc. The non-native digital inputs are usually scanned images.*

***\* Structured Data****: has a predictable format and exists in fixed fields (e.g. an excel cell or a field in a form) and is easily detectable via search algorithms.*

# 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.**

## Detailed TO BE Process Map

A detailed process map of the process as it will look like post-automation will be outlined here.  
  
*Highlight Bot interventions/ To-Be automated actions with different legend/ icon (purple).  
Mention below if process improvements were performed on the To-Be design and provide details.*

|  |  |
| --- | --- |
| Legend | Description |
|  | Action number in the process. Referred to in details or Exceptions and Errors table. |
|  | This process action is proposed for automation. |
|  | This process action remains manual (to be performed by a human agent). |

## Parallel Initiatives

The table below will capture the proposed Business, Process or Application changes to be made in the near future that would impact the process at hand (if any).

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

# Other

## 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 |
| 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 |
| Standard Operating Procedure(s) (Optional) |  | Insert any relevant comments |
| High Level Process Map (Optional) |  | Insert any relevant comments |
| Detailed level process map (Optional) |  | Insert any relevant comments |
| Work Instructions (Optional) |  | Insert any relevant comments |
| Input Files (Optional) |  | Insert any relevant comments |
| Output Files (Optional) |  | Insert any relevant comments |

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

