

<Client Logo>

**Process Definition Document**

<Process Name>😊

**Version: approval for development**

**Document History**

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| --- | --- | --- | --- | --- |
| Date | Version | Name | Organization (Dept.) | Comments |
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**Document Approval Flow**

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# 1. Introduction

## **I.1 Purpose of the document**

The Process Design Document outlines the <Process details>

The document describes the sequence of steps performed as part of the business process, the conditions, and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them the details required for applying robotic automation to the selected business process.

## **I.2 Objectives**

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

|  |  |
| --- | --- |
| Objectives | Benefits |
| Reduce manual and repetitive tasks | Reduce Team load |
| Reduce backlog | Faster response |
| Process standardization | Increase accuracy |

## **I.3 Process key contact**

This specifications document includes concise and complete requirements of the business process and it is built based on the inputs provided by the process Subject Matter Expert (SME)/ Process Owner.

The Process Owner is expected to review it and provide signoff for accuracy and completion of the steps, context, impact, and complete set of process exceptions. The names must be included in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact details  (email, phone number) | Notes |
| Process SME |  |  | Point of contact for questions related to process details & exceptions |
| Process Reviewer |  |  |  |
| Process Owner/ Approver for production |  |  |  |

## **I.4 Minimum Pre-requisites for automation**

* Completed in Process Definition Document, with ‘As-Is’ and ‘To-Be’ solution signed off by all relevant parties involved
* <Remaining Automation>

# 2. AS IS process description

## **II.1 Process Overview**

General information about the process selected for RPA prior to automation.

|  |  |  |
| --- | --- | --- |
| # | Item | Description |
| 1 | **Process full name** |  |
| 2 | **Process Area** |  |
| 3 | **Department** |  |
| 4 | **Process short description**  (operation, activity, outcome) |  |
| 5 | **Role(s) required for performing the process** |  |
| 6 | **Process schedule and frequency** |  |
| 7 | **# of items processes /reference period** |  |
| 8 | **Average handling time per item** |  |
| 9 | **Peak period (s)** |  |
| 10 | **Transaction Volume During Peak period** |  |
| 11 | **Total # of FTEs supporting this activity** |  |
| 12 | **Expected increase of volume in the next reference period** |  |
| 13 | **Level of exception rate** |  |
| 14 | **Input data** |  |
| 15 | **Output data** |  |

## **II.2. Applications used in the process**

The table includes a comprehensive list all the applications that are used as part of the process automated, at various steps in the flow.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Application name & version | System  Language | Thin/Thick Client | Environment/  Access method | Comments |
| 1 | Chrome Browser | English | Thick | Desktop Application |  |
| 2 | Adobe Acrobat - PDF | English | Thick | Desktop Application |  |
| … | … | … |  |  |  |

## **II.3. AS IS Process map**

### High-level process map

<High Level process>

### Low level process map

<Detail low Level process>

## **II.4. Detailed AS IS process steps**

|  |  |  |
| --- | --- | --- |
| Step | Description | Details (Screenshot) |
| 1.1 | **Login** | **<image>** |

# 3. TO BE Process Description

This chapter highlights the expected design of the business process after automation.

<Detail of process>

|  |  |
| --- | --- |
| Legend | Description |
|  | Action number in the process. Referred to in details or Exceptions and Errors table. |
|  | This process action is proposed for UiPath automation. |
|  | This process action remains manual (to be performed by a human agent). |
| Cog, gear, settings icon | This process action will be automated as a Service |

## **III.1 TO BE Detailed Process Map**

### High-level process overview

<Image of process>

### Low Level process overview

<Image of process>

## **III.2 Parallel Initiatives/ Overlap (if case)**

This chapter captures the proposed Business, Process & System changes in near future and its impact.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| No. | Initiative Name | Process Step(s) where it is identified | Impact on current automation | Expected Completion Date | Contact person for more details |
|  |  |  |  |  |  |

## **III.3 In Scope for RPA**

The automated process will be developed as described in this document.

## **III.4 Out of Scope for RPA**

The following will be considered out of scope for this automated process:

* <Details missing>

## **III.5 Business Exceptions Handling**

### Known Exceptions

The table below reflects all the business process exceptions captured during the process evaluation and documentation. These are known exceptions, met in practice before. For each of these exceptions, define a corresponding expected action that the robot should complete if it encounters the exception.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| BE # | Exception name | Step | Parameters | Action to be taken |
|  |  |  |  |  |
|  |  |  |  |  |

### Unknown Exceptions

For all the other **unanticipated or unknown business (process) exceptions**, the robot should:

* Take a screenshot and save locally.
* <Other details>

## **III.6 Application Error and Exception Handling**

### Known Errors or Exceptions

The table below reflects all the errors identifiable in the process evaluation and documentation.

For each of these errors or exceptions, define a corresponding expected action that the robot should complete if it is encountered.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Error name | Step | Parameters | Action to be taken |
| 1 | Application Crash / Internal Server Error | Any step | Error message | Recover & retry for maximum 3 times  Take Screenshot  Close the applications and run the sequence again |
| 2 | Timeouts | Any step | Error message | Recover & retry for maximum 3 times  Take Screenshot  Close the applications and run the sequence again |

### Unknown Errors and Exceptions

For all the other **unanticipated or unknown business (process) exceptions**, the robot should:

* Take a screenshot and save locally.
* <Other details>

## **III.7 Reporting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No. | Report type | Update frequency | Details | Monitoring Tool |
|  |  |  |  |  |

# 4.Other

## **IV.1 – Acronyms**

|  |  |
| --- | --- |
| Abbreviation | Long Form |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

## **IV.2 – Glossary of RPA Terms**

|  |  |
| --- | --- |
| Term | Description |
| UiPath | The Robotics Process Automation tool used to automate this process. |
| Dispatcher | The initial stage of the automated process, where all the information that is needed for the processing of a work item is gathered and added to an automation queue of work. |
| Performer | The stage of the automated process that performs the work. It uses all the details gathered by the dispatcher to execute a complete run of a work item. |
| Orchestrator | The Orchestrator is a UiPath Webservice that manages and orchestrates automations. |
| Orchestrator Queue | This is the queue that the dispatcher adds the data to. |
| Queue Item | This is where the data extracted is stored in an item by item basis. It is analogous to the work ticket in Freshdesk. |
| Validation Queue | This is the queue of invoices that Abbyy requires human validation for due to the characters falling below the Confidence Threshold Level. |
| Exceptions Queue | This is the Freshdesk exceptions queue. Items will be moved here if they encounter specific exceptions that require a human to manually perform the process. |

## **IV.3 –** **Additional sources of process documentation**

|  |  |  |
| --- | --- | --- |
| Type | Link or Attachment | Comments |
| Video Recording of the process |  |  |
| Business Rules Library |  |  |
| Other documentation |  |  |
| Standard Operating Procedure(s) |  |  |
| Input Files |  |  |
| Output Files |  |  |