RPA Project Details



## Objectives

The process has been selected for RPA as part of the larger project initiative conducted within ACME Systems Inc., the Finance and Accounting department.

The objective of this process automation is linked to the project business case and is mainly intended to:

* Deliver faster processing
* Reduce redundant activities
* Improve overall performance and reliability

# AS IS Process Description

## Process overview

General information about the process selected for RPA implementation, prior to its automation:

|  |  |
| --- | --- |
| **AS IS process details** | |
| Process full name | Calculate Client Security Hash |
| Function | Security |
| Department | Finance and Accounting |
| Process short description (operation, activity,  outcome) | Generate the Security Hash for each Client based on their personal information. |
| Role required for performing the process | System 1 User |
| Process schedule | Daily |
| # of item processes / day | 7 – 15 Clients |
| Average handling time per item | 2 min / Client |
| Peak period (s) | No peak period |
| # of FTEs supporting this activity | 1 |
| Level of exception rate | No expected exceptions |
| Input Data | Client Data |
| Output Data | Client Security Hash |

* 1. **Detailed Process map**

This chapter presents the chosen process in detail, which enables the developer to build the automated process.

**START**

Retrive CLient security hash from the website

Open sha1.com website and enter the correct formula, using client Id, name and country

Set the status to Completed and add the Security Hash info on the comment section

Go back to the Work item Details and open the

“Update Work Item”

Select Client details on the details page

Select an activity type of W15

Access “Word listing item” on the dashboard

Log into ACME System 1 Web application

**END**

|  |  |
| --- | --- |
| **Step Short Description** | |
| **1.1** | Open the ACME System 1 Web Application. |
| **1.2** | Log in to System 1. Required input data: email and password. |
| **1.3** | Access the Dashboard - the central location, where the user can pick a specific menu item. |
| **1.4** | Access the Work Items listing to view all the available tasks to be performed (Output data: Work Items). |
| **1.5** | **For each activity** of theWI5type,performthefollowing steps: |
| **1.5.A** | Open the Details page of the selected activity to retrieve the Client Details. |
| **1.5.B** | Open the SHA1 Online webpage - [http://www.sha1-online.com,](http://www.sha1-online.com/) and provide the following  i-nput:**ClientID ClientCountry**. Replace all the variableswith the correspondingvalues. Use dashes between each item and the above. |
| **1.5.C** | Retrievethe Client**Security Hash** valuefromthewebpage. |
| **1.5.D** | Go back to Work Item Details and open Update Work Item. |
| **1.5.E** | Set the status to “Completed”.Adda commentwiththeobtained**SecurityHash**. |
| **1.6** | Continue with the next WI5 Activity. |

## Detailed Process Steps

The complete set of steps in the process, including keystrokes and clicks, are to be deﬁned with screenshots. If there are any data restrictions, mask the sensitive information, such as Policy Number, Customer ID, bank account number, etc).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *#* | **Step action**  **description** | **Screenshot** | **Expected**  **result** | **Remarks** |
| 1.1 | Open the ACME System 1 Web Application |  | The display of the System 1 Web App screen. | Possible exception:  - Handl exception if Web app not  available |
| 1.2 | Log in to System 1. Required input data: email and password. |  | Access to the dashboard | Possible exception:  - Handl exception if Incorrect email or Password |
| 1.3 | Access the Dashboard - the central location, where the user can pick a speciﬁc menu item |  | The display of each item in the menu |  |
| 1.4 | Access theWork Items listingto view all theavailable tasksto be performed (Outputdata:task) |  | The display of the task list |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1.5** | **For each activity** of the type WI5 perform the following steps: |  |  | Possible exception: Handle exceptionif no task of type 'Calculate Client SecurityHash’  exist |
| **1.5.A** | Open the Details page of the selectedactivityto retrievethe Client Details  (Outputdata:  Client Details) |  |  |  |
| **1.5.B** | Open the SHA1 Online Webpage - http://www.sha1- [online.com/](http://www.sha1-online.com/)  [and provide](http://www.sha1-online.com/)the following input: **ClientID**- **ClientName**- **ClientCountry** Replace all the variableswith the corresponding values. Use dashes betweeneach item and the next one, as shown above. |  |  |  |
| **1.5.C** | Retrieve **Client Security Hash** from the  webpage |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1.5.E** | Go back to the Work Item Details and select Update Work Item |  |  |  |
| **1.5.F** | Setthe statusto “Completed”.Add a Commentwith theobtained **SecurityHash** |  |  |  |
| **1.6** | Continue with the next WI5  Activity |  |  |  |

## Exceptions handling

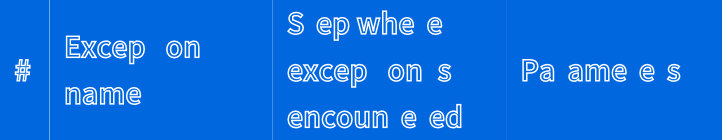
The types of exceptions identifiable in the automation process can be classified according to the table below.



|  |  |  |
| --- | --- | --- |
| **Area** | **Known** | **Unknown** |
| **Business** | Previously encountered situation. A possible scenario is defined, and clear actions and workarounds are provided for each case. | A situation never encountered before. It can be caused by external factors. |

Based on the above criteria, the table below should reflect all the known exceptionsidentified throughout the process and map the expected action the robot needs to take in each case.

Insertas manyrowsas requiredin the table,to captureall exceptionsin a comprehensivelist.



|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Exception name** | **Step where**  **exception is encountered** | **Parameters** | **Action to be taken** |
| **1** | Incorrect email or password | Step# **1.2** | If message for incorrect username or password exist | Sendemailto [exceptions@acme-](mailto:exceptions@acme-test.com) [test.com](mailto:exceptions@acme-test.com)  “Hello,  The usernameor theemailis incorrect.Please checkand restart  Thank you’’ |
| **2** | No task of  type WI5 exists | Step# **1.5** |  | Stop process |

For any other unanticipated or unknown exceptions, the robot should send an emailnotification at [exceptions@acme-test.com](mailto:exceptions@acme-test.com) with the original email and error message screenshot attached.

ThanK You