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**Process Name: ODS AutoCrib Process**

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Solution Design

Document

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# Purpose



Outlines the major components of the Master Project (the overall output of the development, containing one or multiple projects that together cover the scope of the robotic process automation) taking into account all the business restrictions (scheduling, peaks, future increases in volume etc.). The focus of the Solution Architect will be on:

* Robustness;
* Scalability;
* Efficiency;
* Replicability;
* Reusability of component

The information herein is targeted primarily at the developers that will initially implement the solution and subsequently at the support developers in case of change requests.

# Automated process details

|  |  |
| --- | --- |
| Item | Description |
| Master Project Name | ODS AutoCrib Process |
| Robot Type | Unattended |
| Orchestrator used? | Yes |
| Scalable | Yes |
| UiPath version used | 2019.4.4 |

# DETAILED PROCESS FLOW

Step 1 – Robot will login to AutoCrib site <https://www.autocrib.net/login.asp> with valid Credential.

Step 2 – Robot will click on Reports.

Step 3 – Click on Standard.

Step 4 – Under Report category select “Custom” and click on “Go”.

Step 5 – Click on Transaction by supplier.

Step 6 – On Date selection. Enter start date as 1st day of the month and end date as today -1 and Click on Print and preview It will open crystal report window.

Step 7 – Once crystal report window will open, Select export icon.

Step 8 – Select File format as Microsoft Excel (97-2003) data-only and page range as All Pages. And click on export. It will download data to excel format.

Step 9 - Save the excel file as “ODS\_Autocrib\_Report\_ddmmyyyy” and move report to FTP server.

Step 9 – Save the excel file as “ODS\_Autocrib\_Report\_ddmmyyyy” and move report to FTP server.

Step 10 – Log off from autocrib

# Runtime guide

## Master Project Runtime Details

Outlines the details of the automated process by filling in the table below.

|  |  |
| --- | --- |
| ITEM NAME | DESCRIPTION |
| Production environment details | Running on Remote Desktop , the virtual backoffice machine. Scheduled every day at 1.30 PM. |
| Prerequisites to run | Report was generated by Autocrib site  Having Excel on the machine  Move the Excel Report to FTP server |
| Input Data | 1 valid Excel Report from AutoCrib site |
| Expected output | Report sent to FTP sever |
| How to start the automated process | Login to AutoCrib site |
| Reporting | Generate excel report from Autocrib site |
| How is Orchestrator used? | The process will be started from orchestrator server |
| Password policies | N/A |
| (mention any specific compliance requests) | Orchestrator logs and jobs dashboards. |
| Stored credentials | Config File and Window credential Manger |
| (Never use hardcore credentials in the workflow!) | AutoCrib Credentials, Mail credentials and FTP Credentials |
| Schedule Details | Daily, 1.30 P.M IST |
| Multiple Resolutions Supported?  (in case of image automation / Citrix and VDI) | N/A |
| Recommended Resolution | N/A |

## Project ODS AutoCrib Process

|  |  |
| --- | --- |
| ITEM NAME | DESCRIPTION |
| Environment used for development  (name, location, configuration details etc) | Production |
| Environment prerequisites  (OS details, libraries, required apps) | BackOffice&Studio license, Microsoft Excel, Internet Explorer |
| Repository for project  (where is the developed project stored) | C:\Users\TRA-Bot-login\Documents\UiPath\ODS\_Autocrib\_Automation |
| Configuration method  (assets, excel file, Json file) | Config File |
| List of reused components | Logging log message workflow |
|
| List of new reusable components | AutoCrib Login & Logout workflow |

## Project(s) workflows

|  |  |
| --- | --- |
| Workflow Name | Description |
| Main | invokes all the other workflows |
| AutoCrib\_Login | Login to Autocrib |
| AutoCrib\_Logout | Logout to AutoCrib |
| AutoCrib\_ExporttheReport | Export the report |
| Logging\_Logmessage | Log messages for the project |
| InitAllApplication | Initialize all applications |
| InitAllSetting | Initialize all settings |
| Kill Process | Kill existing process |
| CloseAllApplication | Close all application |

## Packages

Include the list of packages and high-level description for each of them, to explain their purpose

|  |  |
| --- | --- |
| Package Name | Description |
| ods\_autocrib\_automation.1.0.1.nupkg | Generate the report from AutoCrib site and upload in FTP server. |
| UiPath.Credentials.Activities | Credentials activities |
| UiPath.FTP.Activities | FTP activities |
| UiPath.Excel.Activities | Excel activities |
| UiPath.Mail.Activities |  |
| UiPath.System.Activities | System activities |
| UiPath.UIAutomation.Activities | Uiautomation activities |

# Glossary

The main terms used in the Solution Architecture Document are defined below:

**Master project** - the overall output of the development, containing one or multiple projects that together cover the scope of the robotic process automation. There is a 1 to 1 connection between the Master Project and the Process to be automated (As presented in the PDD).

**Project** - an UiPath Studio project containing one or multiple workflow files. A project can be converted to a package and run independently, covering a particular scope within the master project. Or multiple projects can be converted into one package depending on the aims and restrictions of the automation. The project is used when defining the development and support phase of the automation.

**Package** - the output of compiling one or multiple projects. A package can be deployed on the robot machine and be executed by the robot service. Only one package can be executed at a given time by a robot. The package is used when defining the running phase of the automation.

Workflow - a component of the package, the workflow encapsulates a part of the project logic. The workflow can be of type: sequence, flowchart or state machine. A workflow is saved as an .xaml file inside the project folder. A workflow file can be invoked from another workflow and by default there is an initial workflow file that will run when executing the package.

**Activity** - an action that the robot executes.

**Sequence** - a workflow where activities are executed one after another, in a sequential order

**Flowchart** - a workflow where activities are connected by arrows and the logic of the workflow can be easily followed in a visual manner. The flowchart can also be exported as an image from UiPath studio.

**State machine** - a more advanced way of organizing a workflow, similar to a flowchart.

**BOR** - Back office robot

**FOR** – Front office robot

**Orchestrator** – Enterprise architecture server platform supporting: release management, centralized logging, reporting, auditing and monitoring tools, remote control, centralized scheduling, queue/robot workload management, assets management.