proservartner

PDD

PROCESSNAME

Version 1.0

Contents

Purpose of Document

The Process Definition Document outlines the business process chosen for automation and it's the living document which should be updated with every approved change request. 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 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. Only described version of the process will be automated, every change in it should be reflected in this file and approved by stakeholders.

Date	Short Description	Version	Approval
23.10.2024	Initial document created	1.0	Mikolaj Zielinski

Risk Assessment

The business team together with the assigned project Business Analyst from the RPA team did not identify any process-specific risks which would have to be taken into consideration.

Success Criteria

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%.
- Reduce the number of errors in process.
- Better Monitoring of the overall activity by using the logs provided by the robots.

Project Stakeholders Mapping

Role	Name	Contact Details	Deputy
Process Owner			
Application Owner			
Project Sponsor			
SME			
Business Analyst			
Project Manager			
Solution Architect			
RPA Developer			

Automation Pre-requisites

- SME Availability: Secure access to Subject Matter Experts (SMEs) who can provide in-depth knowledge of the process.
- Test Data: Prepare and make available representative test data for development and testing phases.
- System Accesses: Arrange necessary system accesses and permissions for RPA development and execution.
- Access to [client] network(VPN Setup)
- Exception Handling Procedures: Define procedures for handling exceptions and errors that may occur during automation. (BCP)

Process Overview

| Item	Description/Answer
Process Full Name	
Process Area Affected	
Department Affected	
Short Description	
Process schedule and frequency	
The number of times the process is executed based on the selected frequency.	
Process manual execution time (1 item) min.	
Peak Period	
Peak Volume Approximate increase	
Number of people performing the process	
Input data description	
Output data description	

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Software Preparation

ID	Application Name	Application Language	Access Req. (*Roles*)	Software Update Frequency	Authorization Method	Password Policy	Application Owner
1.	*SAP*	*ENG*	*BW_ADMIN*	*Annually*	*SSO login*	*Monthly password update*	*John.Smith@example.com*

As Is Process Map and Program Logic
(Expected exceptions marked by colour and assigned to Swimline+ID)
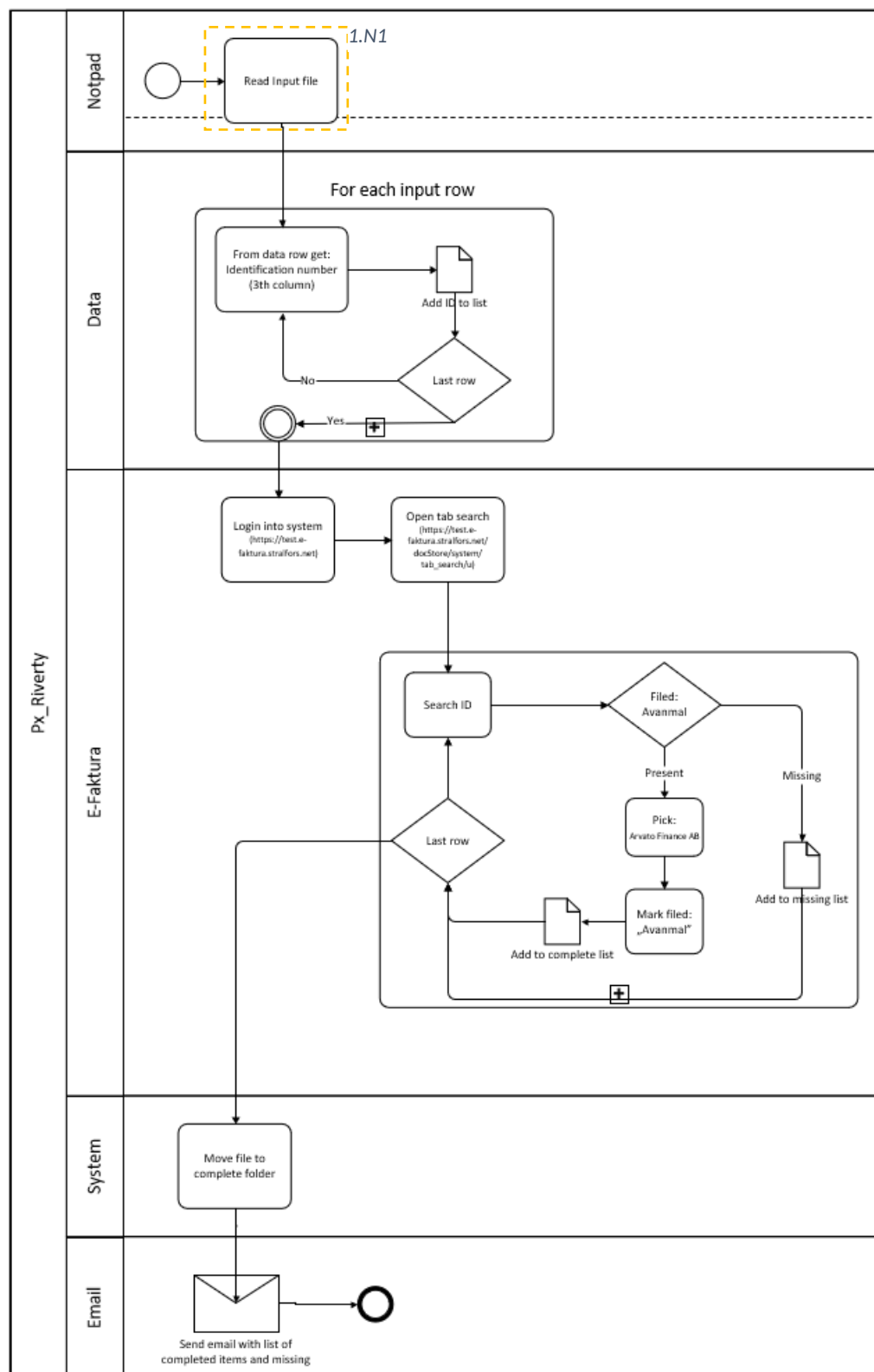
To Be Process Map and Program Logic

(Expected exceptions marked by colour and assigned to Swimline+ID)

If process As Is the same as To Be leave section with:

> *The process was optimized, and the automation will follow the same process as in presented in AS IS section*

If process was modified during working on PDD please present its new version here.

Process workflow Description

<Step Number>-<Step Name>

  <Screenshot>

  <Description>

<Step Number>-<Step Name>

  <Screenshot>

  <Description>

Exception Scenario

Exception ID	Name	Type (BE/SE)	Description
1.N1	*Missing data*	*BE*	*If file is missing data, mark this transaction as "Manual Check Required". Add this entry to final report and send it as registered BE*

Process Reporting

In order to verify that robot is processing data as required Business will receive a report generated by robot after processing last item in defined time. The report contains 3 tabs:

- Success
- BE
- SE

Business Receiver	Frequency	Role
John.Smith@example.com	Weekly	Business Owner

PDD Signoff

Email	Role	Date	Approval
John.Smith@example.com	SME	15.10.2024	Approved

Additional sources of process documentation

Document name	Description	Localization
Process Assessment	*Documents describe assessment potential of process.*	*Automation team SharePoint/RPA/[ProcessName]*