

**Robotic Process Automation For**

**<TOPIC>**

**Solution Design Document**

Version 1.0

Date:

**Document History**

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| **Ver. No.** | **Date** | **Author Name** | **Reviewer Name** | **Approver Name** | **Summary** |
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**Change Log**

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|  |  |  |  |  |  |

**Client SME Details**

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Email ID** |
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# 1. Objective

* 1. Project Background

This document contains the Solution Design for <topic>.

It lays out the solutions for requirements automated using the selected Robotic Process Automation (RPA) tool. It also elaborates upon key aspects of the automation that is being implemented.

**High Level Overview:**

* Point1
* Point2

Clover Infotech will be building an RPA solution for <text>.

1.2 Scope

The scope for the automation is the policy renewal with validation of the discounts based on policy type and status.

Following list of requirements are “In-Scope” for this RPA Implementation:

* Point1
* Point2.

# 2. Applications and pre-defined paths

|  |  |  |  |
| --- | --- | --- | --- |
| **No** | **Name of Application** | **Type** | **Credentials required for BOT ID** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

**Note:**

•1

•2

# 3. Input Requirements

The inputs and pre-requisites detailed out below, need to be present for the Bot to function in the desired manner.

|  |  |  |  |
| --- | --- | --- | --- |
| **No** | **Format** | **Name** | **Description** |
| 1 |  |  |  |
| 2 |  |  |  |

# 4. Change Request Details (CR)

The following sections capture the CR details through the process.

CR1

CR2

CR3…

# 5. Detailed Solution Design

The following sections capture the business logic necessary for BOT to navigate through the process:

1. <Text>
2. <text>

# 6. Exception Handling

Exceptions handled by robotic process automation can primarily be classified into system and business exceptions. The automation under discussion handles each error type in a standardized manner.

In general, if the Bot encounters any unexpected scenario, the Bot will generate an exception message and inform the same to system. The Bot will generate exception email, with mitigating actions specified below.

6.1 Business Exceptions

All known business exceptions are accounted for within the solution design. If an unexpected scenario is found, the Bot will log an exception in UiPath for that record and inform the same to Team.

1. Known Business Exceptions:

|  |  |
| --- | --- |
| **Exception Scenario** | **Exception Status Message** |
|  |  |
|  |  |
|  |  |

1. Any unexpected business scenarios that the Bot encounters will cause the Bot to skip the case, leaving it open and informing to team

For any business exception, the following steps occur:

1. **Action taken by automation**: Error captured in the Exception Report for the business exceptions
2. **Reporting Type**: The Exception message for the business scenario will be preserved within the Exception Report
3. **Manual Action required**:
4. Team Supervisor: Manual review recommended if business exception occurs frequently
5. Bot Controller: None

6.2 System Exceptions

For all types of system exceptions, robot will do 3 retry and will enter the data in excel with details about the exceptions.

# 7. Completion Criteria

The bot will send out the job completion email notification as mentioned below:

1. Point1
2. Point2

# 8. Key Assumptions

* 1
* 2
* 3

# 9.Document Review Guidelines

This document is to be reviewed every 12 months and updated with relevant process and system changes to reflect the current process and automation functionality. This review should be conducted by a nominee of the document owner and signed off by the document owner.

# 10. Glossary

|  |  |
| --- | --- |
| **Term** | **Description** |
| RPA | Robotics Process Automation |
| UiPath | UiPath (Automation tool) |
| SIT | System Integration Testing |
| SLA | Service Level Agreement |
| SME | Subject Matter Expert |
| UAT | User Acceptance Testing |
| CR | Change Request |

# 11. References

* Guidelines and process maps shared by Client using recorded calls