

|  |
| --- |
| **UM – 061 – MSISDN Blocking Information Broadcast** |
| **User Manual Document** |

Table of Contents

[Document Control Sheet 3](#_TOC_250011)

[Introduction 3](#_TOC_250010)

[2.1 Purpose of this Document 3](#_TOC_250009)

[Robot Operating Procedure 4](#_TOC_250008)

* 1. [Process Flow 4](#_TOC_250007)
  2. [Pre-Requisite: Input and Supporting Files 5](#_TOC_250006)
  3. [Pre-Requisite: Details 6](#_TOC_250005)
  4. [Robot Access and Execution 21](#_TOC_250004)
  5. [Execution Schedule / Triggers 26](#_TOC_250003)
  6. [Communications by Robot 27](#_TOC_250002)
  7. [Possible Business/System Exception Errors 31](#_TOC_250001)
  8. [Business Continuity Management 32](#_TOC_250000)

# Document Control Sheet

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision** | **Date** | **Description** | **Author** |
| **1.0** | 29/10/2021 | Draft | Oscar Ian J. |
| **1.1** | 9/10/2024 | Draft | Steven Tjayadi |
| **1.2** | 17/10/2024 | Draft | Steven Tjayadi |
| **1.3** | 28/10/2024 | Draft | Steven Tjayadi |

# Introduction

## 2.1 Purpose of this Document

This document is for the Robot User who is responsible for executing the Software Robot. User manual document for the Robot operation has been developed to meet these specific objectives:

* To maintain the pre-requisites to execute the Robot such as:
  + Robot Work Queue Items & Assets management in Power Automate.
  + Config file & Supporting Files management.
* Provide the series of steps to be followed to execute the Robot.
* To be aware of the various communications the Robot will share, how to interpret them to perform appropriate actions.

The purpose of this document is to explain the activities involved in the Robot execution and monitoring, thereby the Robot User will understand and perform their role and responsibilities.

3

Robot User (RU)

Post-run Action

Bot Execution

# Robot Operating Procedure

## 3.1 Process Flow

A Visio (flow) diagram of the steps for the Robot User to execute the Robot:

RU to re-run the bot upon discretion

IT to setup robot run schedules, or create trigger (DPA) in Power Automate

IT to ensure the Google Chrome Application is available in the Robot VM and able to access PBCM In Outlook 365

IT to ensure the Outlook Application is opened and connected to specified Robot’s email Account in the VM

RU to maintain updated

mapping files (e.g. Account Manager Mapping file, User Settings file)

IT to maintain Queue & Assets in Orchestrator (e.g. Queue Item, Root Path)

IT to maintain updated Config file (e.g. URL, Folder Path, Email Subject, and Email Body)

PDD – 061 – MSISDN Blocking Information Broadcast – User Manual

RU to check process log attachment within emall notifications

RU to check email notification for completion or exception

Robot User (RU) & IT

Pre-run Preparation

## 3.2 Pre-Requisite: Input and Supporting Files

Details the list of files and their maintenance required to execute the Robot.

|  |  |  |  |
| --- | --- | --- | --- |
| **File Type** | **File Name** | **Authorized**  **Role** | **File Path** |
| **Configuration File** | Config.xlsx | IT | https://365tsel.sharepoint.com/sites/Repository-PA/Shared Documents/PA-061-B2B-MSISDNBlockingInformation Broadcast/Robot/Config/Config.xlsx |
| **User Settings File** | UserSettings.xlsx | IT, SME | https://365tsel.sharepoint.com/sites/Repository-PA/Shared Documents/PA-061-B2B-MSISDNBlockingInformationBroadcast /User/Input/UserSettings.xlsx |
| **Account Manager Email Address List** | AccountManagerMapping.xlsx | SME | https://365tsel.sharepoint.com/sites/Repository-PA/Shared Documents/PA-061-B2B-MSISDNBlockingInformationBroadcast /User/Input/AccountManagerMapping.xlsx |
| **Pivot Template File** | PivotTemplate.xlsx | SME | https://365tsel.sharepoint.com/sites/Repository-PA/Shared Documents/PA-061-B2B-MSISDNBlockingInformationBroadcast /User/Input/PivotTemplate.xlsx |

## 3.3 Pre-Requisite: Details

Below shows, in detail, the list of activities to be conducted before each Robot execution:

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 1 | **Config.xlsx maintenance**  Ensure the Config file is available in https://365tsel.sharepoint.com/sites/Repository- PA/Shared Documents/PA-061-B2B MSISDNBlockingInformation Broadcast/Robot/Config/Config.xlsx. Ensure that the values in the Config file are fit for purpose. If there are any changes in the Config file, the IT support team need to changes in the config sharepoint file.  Values can be maintained in Settings sheet:   * “logF\_BusinessProcessName” is configured for the name of the process in Orchestrator logs; * “MSISDNBlockingInformationBroadcastQueue” is configured for the name of Orchestrator Queue used; * “CompletionEmailSubject\_Dispatcher” is configured for   Subject for Completion Email in Dispatcher;   * “CompletionEmailBody\_Dispatcher” is configured for body for Completion Email in Dispatcher; * “ExceptionEmailSubject\_Dispatcher” is configured for subject for Exception Email in Dispatcher; * “ExceptionEmailBody\_Dispatcher” is configured for Body in Exception Email in Dispatcher; * “ProcessLogFilePath” is configured for Path of Process Logs (yyyy-MM-dd\_HHmm); * “UserSettingsFilePath” is configured for Path of UserSettings File; * “OutputFolderPath” is configured for Path of Output folder; * “CurrentOutputFolderPath” is configured for   Path of current month output folder;   * “UserSettingsSheetName” is configured for   Excel sheet name for User Settings File;   * “ProcessLogSheetName” is configured for Excel sheet name for Process Log; * “CurrentMonthFormat” is configured for   Formatting convension of current month;   * “PivotTemplateDataSheetName” is configured for Excel sheet name for Pivot Template File to store the data; * “PivotTemplatePivotSheetName” is configured for Excel sheet name for Pivot Template File to store the pivot table; * “UserSettingsSheetName” is configured for   Excel sheet name for User Settings File;   * “AccountManagerMappingSheetName” is configured for Excel sheet name for Account Manager Mapping File; * “FilteredTempSheetName” is configured for   Excel sheet name for Filtered Temp File;   * “ProcessLogSheetName” is configured for   Excel sheet name for Process Log; |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
|  | * “AccountManagerMappingFilePath” is configured for Path of AccountManagerMapping File; * “CompletionEmailSubject\_Performer” is configured for   Subject for Completion Email;   * “CompletionEmailBody\_Performer” is configured for Body for Completion Email; * “ExceptionEmailSubject\_Performer” is configured for   Subject for Exception Email;   * “ExceptionEmailBody\_Performer” is configured for Body   for Exception Email;   * “PivotTemplateFilePath” is configured for Path of PivotTemplate File;   Values can be maintained in Constants sheet:   * “ExScreenshotsFolderPath” is configured for Where to save exceptions screenshots - can be a full or a relative path; * “ProcessID” is configured for Process PDD ID in Process Log; * “ProcessName” is configured for Process name in Process Log; * “RobotID” is configured for Robot ID in Process Log; * “Requestor” is configured for Robot User's email in Process Log; * “Directorate” is configured for Responsible directorate of the process in Process Log; * “Group” is configured for Responsible group of the process in Process Log; * “Division” is configured for Responsible division of the process in Process Log; * “Department” is configured for Responsible Department of the process in Process Log; * “EmailAccount” is configured for email account for original sender default when triggering an email * “EmailTo” is configured for email account to send a notification into robot user for completion and Exception * “EmailSubjectPCBM” is configured for subject that send email to user. |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
|  | Values can be maintained in Assets sheet:   * “RootPath” is configured for Robot's foldering root path stored in Orchestrator’s Asset; |  |

|  |  |  |
| --- | --- | --- |
| 2 | **UserSettings.xlsx maintenance**  Ensure the UserSettings file is available in https://365tsel.sharepoint.com/sites/Repository- PA/Shared Documents/PA-061-B2B MSISDNBlockingInformation Broadcast/User/Input/UserSettings.xlsx. Ensure that the values in the Config file are fit for purpose. If there are any changes in the Config file, the IT support need to changes in the config sharepoint file.   * “CompletionEmailTo” is configured for   Completion email recipient;   * “CompletionEmailCC” is configured for   Completion email cc;   * “MSISDNBlockingEmailSubject” is configured for MSISDN Blocking Information Email Notification Subject; * “MSISDNBlockingEmailBody” is configured for MSISDN Blocking Information Email Notification Body; * “PBCMDownloadLink” is configured for PBCM Info Link to download input data; * “MaxDownloadWaitTime” is configured for Maximum wait time to download PBCM MSISDN Block List File is 300 seconds; * “OutputPBCMFile” is configured for Output file name of PBCM MSISDN Block List File (DO NOT change the [DateToday]); * “OutputCleansedPBCMFile” is configured for Output file name of Cleansed PBCM MSISDN Block List File (DO NOT change the [DateToday]); * “PBCMFileSheetName” is configured for Excel sheet name for Cleansed PBCM MSISDN Block List File (DO NOT change the [CurrentMonth]); * “CleansedPBCMFileSheetName” is configured   for Excel sheet name for Cleansed PBCM   * “OutputPCBMFileWest” is Output file name of Cleansed PBCM MSISDN Block in West * “OutputPCBMFileEast” is Output file name of Cleansed PBCM MSISDN Block in Eest * “OutputPCBMFileInfrastructure” is Output file name of Cleansed PBCM MSISDN Block in Infrastructure * “OutputPCBMFileBanking” is Output file name of Cleansed PBCM MSISDN Block in Banking * “OutputPCBMFileGovernment” is Output file name of Cleansed PBCM MSISDN Block in Government * “OutputCleansedPCBMFileWest” is configured for Output file name of Cleansed PBCM MSISDN Block List File in West * “OutputCleansedPCBMFileEast” is configured for Output file name of Cleansed PBCM MSISDN Block List File in East * “OutputCleansedPCBMFileInfrastructure” is configured output of Cleansed PBCM MSISDN Block List File in Infrastructure “OutputCleansedPCBMFileBanking” is configured for Output file name of Cleansed PBCM MSISDN Block List File in Banking * “OutputCleansedPCBMFileGovernment” is configured for Output file name of Cleansed PBCM MSISDN Block List File in Banking   Noted: all Output do not change the DateToday |  |

|  |  |  |
| --- | --- | --- |
| 3 | **AccountManagerMapping.xlsx maintenance**  Ensure the Account Manager Mapping file is available in https://365tsel.sharepoint.com/sites/Repository- PA/Shared Documents/PA-061-B2B MSISDNBlockingInformation Broadcast/User/Input/AccountManagerMapping.xlsx. Ensure that the values in the Config file are fit for purpose. If there any changes or add new account manager name, User need to Input the AccountManager Name with UpperCase and using the Space. (Do not use capitalize and Underscore) for example:   1. ADI RISWANTO  * “AccountManagerName” Column is configured   for Account Manager Name.   * “EmailTo” Column is configured for email address list that will be used for MSISDN Blocking Information Email Notification * “EmailCC” Column is configured for email address list that will be used for MSISDN Blocking Information Email Notification |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |

|  |  |  |
| --- | --- | --- |
| 4 | **PivotTemplate.xlsx maintenance**   * “Data” Sheet is configured for PBCM Data that has been filtered by Account Manager Name by the Robot. The data inside this sheet will be replaced with current Account Manager Name by the Robot; * “Pivot” Sheet is configured for the Pivot Table that will be inserted into the body email of MSISDN Blocking Information Email Notification by the Robot. * This Pivot Template in Power Automate is automatically use in Local Environment and Create with VB.Script. |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 5 | **Power Automate & Work Queues maintenance**   * Ensure the correct format that connect and stored into Power Automate to process in DPA and RPA. * Ensure the process of Power Automate can be status process and queued. * Ensure the Process Status is Active |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 6 | **Sharepoint List Config Access**   * Make Sure the Sharepoint List in Global Robot Asset is on stable in Cloud |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 7 | **Excel Online Connection**   * Ensure the Excel file need to insert a table and give a name of the table to get a run in Power Automate * Ensure Excel connector access is allowed. If not, then Robot User need to report to the IT Operation to give access of Excel Connector Reference |  |
| 8 | **Sharepoint Download File Path Connection**   * Ensure the file path in Sharepoint is correct and give the access to install from cloud into Local * Ensure the Sharepoint connector access is allowed. If not, then Robot User need to report to the IT Operation to give access of Sharepoint Connector Reference to download a file into local |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 9 | **Outlook Application (Online) in Office 365 Outlook can be Accessed/Opened in Robot Environment**   * Ensure the Microsoft Outlook Office 365 Application has been accessed/opened. The application may be minimized from the taskbar, but the service is still running. * Ensure that the Robot Email Account has already been configured in Microsoft Outlook Application within the Robot VM; and * Ensure the status of Microsoft Outlook Application and Office 365 is connected and accessed. * If the Connector Email has not been Accessed/Error, the robot User need to request the IT Operation Support for the Outlook Office 365 Connection References in Power Automate. |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 10 | **Robot Run Schedule is set in Power Automate (DPA)**   * Ensure that the run schedules are already set in Power Automate (Cloud Flow). * Ensure the format of the Email trigger is Match with the System * Ensure the format and Work Queue ID is match with format of the Work Queue (061) * If there is any Adhoc request to run the process, then Robot User needs to request to IT operation support. * If there is any different connection reference and different Virtual Machine Device for Power Automate Desktop, then Robot User needs to request to IT operation support and fix the DPA Connection reference. |  |

## 3.4 Robot Access and Execution

List of steps with screenshots on how to access and execute the Robot process.

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 1 | Navigate to <http://make.powerautomate.com/> in Internet Explorer, Mozilla Firefox, or Google Chrome |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 2 | Log in by Input the Email Account |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 3 | Check if the Power Automate Flow is accessible   * To check Cloud Flow, click **“My Flows”** and search desired flow * To check Desktop Flow, click **“My Flows”** and search desired flow. |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 4 | To check on executed jobs:   * The triggered jobs will have state “**Running**” subsequently “**Successful**” * To view the state, select flow and   click the “**All Runs**” button. |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 5 | To configure Triggers:   * Identify the desired process to configure (e.g. DPA-061) * Click the “**Edit**” button on the upper left corner * The edit flow window will appear * Change the trigger time/ method to the desired time/ method * Click “**Save**” |  |

## 3.5 Execution Schedule / Triggers

Bot execution time and schedules are configurable by the Robot User in the Orchestrator (as described in Section 3.4):

|  |  |
| --- | --- |
| **Parameters** | **Values** |
| **Frequency (Daily/Weekly/Monthly)** | Trigger by Email Sent by PCBM Info |
| **Time** | Monday, Wednesday, Friday (10:30-11:00) |
| **Subject Filter** | Jadwal Pemblokiran Pelanggan Corporate |

## 3.6 Communications by Robot

List of the emails triggered by the Robot during its execution span, actions required on receipt of these emails.

**Robot Execution – Error**

If the Robot encounters the errors below, it is unable to proceed further. Hence, an Error email will be sent to the Robot User.

|  |  |
| --- | --- |
| **Scenarios** | **Screenshots** |
| **System Exception**  If there is any unexpected error, the bot will send email notification to Robot User with the error message. Some of system exception cases which may happen:   * Application timeout * UI element not found, because of the application error/ there is a pop-up window blocked * Cannot communicate with browser because of UiPath extension activation * Floating license is not available * Queue Item is not available in Orchestrator   Robot will send email notification to Robot User email address. Robot will also log the error in process log file and system log in the Orchestrator. |  |
| **Process Business Exception**  Business exception is an expected exception handling for defined possible business rule/ error. Some of business exception cases which may happen:   * Config file (Config.xlsx) is not available * User Settings file (UserSettings.xlsx) is not available * Asset is not available in Orchestrator * Account Manager Mapping file (AccountManagerMapping.xlsx) is not available * Pivot Template file (PivotTemplate.xlsx) is not   Available (Automatically) |  |

|  |  |  |  |
| --- | --- | --- | --- |
| For any business exception happened  – where there is invalid user input or certain business rule in target application within the transaction process, Robot will send a business exception email to inform user the exact transaction details and errors. Robot will also log the error in process log file and system log in the Orchestrator.  Robot User or IT may need to revise the data and re-trigger the bot by updating the invalid data. |  |  |  |
|  | | |
| **Transaction Business Exception**  Business exception is an expected exception handling for defined possible business rule/ error. Some of business exception cases which may happen:   * Account Manager name is not found on AccountManagerMapping.xlsx * Account Manager name is found, but the EmailTo or EmailCC field is empty on AccountManagerMapping.xlsx * The email address retrieved from AccountManagerMapping.xlsx is not valid   For any business exception happened  – where there is an invalid transaction or email addresses within the transaction process, Robot will proceed to the next available transaction. Robot will also log the error in process log file and system log in the Orchestrator.  Robot User or IT may need to revise the data and re-trigger the bot by updating the invalid data. |  | | |

**Robot Execution – Completion**

|  |  |  |  |
| --- | --- | --- | --- |
| **Scenarios** | **Screenshots** | | |
| **Report Completed Email**  Once the Robot has successfully completed the transaction, an email will be sent to the corresponding Account Manager attached with the detailed MSISDN Blocking file. |  |  |  |
|  | | |
| **Process Log**  The purpose of the Process Log is to detail every transaction status performed by Robot with the error remark if fails.  Robot User can use Process Log to check the detailed transaction status performed by the robot. Process Log consists of this column, i.e.:   1. ID – to capture the PDD/ process ID; 2. TransactionID – to capture the unique transaction combination, Row Index + “\_” + File Name; 3. StartTime – to capture the start timestamp of each transaction; 4. EndTime – to capture the end timestamp of each transaction; 5. Status – to capture the transaction status: |  | | |

SUCCESS/ FAIL/ BUSINESS EXCEPTION;

1. ErrorRemark – to capture the business or system exception remark if the transaction status is FAIL/ BUSINESS EXCEPTION;
2. RobotID – to capture the user ID used by the robot to login into application;
3. ComputerID – to capture the computer name used by the robot to run the process;
4. Requestor – to capture the Requestor email in the Input file;
5. Directorate – to capture the directorate name of this process;
6. Group – to capture the group name of this process;
7. Department – to capture the department name of this process;
8. Division – to capture the division name of this process; and
9. Case\_Creation\_Time – to capture the creation time of the input file.
10. Log\_Id – Consists of auto Log of each database

Process log files can also be found in Sharepoint Online in Repository PA Robot Asset (061/Robot/Process Log).

## 3.7 Possible Business/System Exception Errors

During Robot execution, there are some situations that will cause exception errors.

For companies that encounter business and/or system exception errors, refer to the possible root causes and their respective corrective actions below:

|  |  |
| --- | --- |
| **Possible Root Causes** | **Corrective Actions** |
| Sharepoint List is not available in the cloud connector SharePoint | Contact IT operation support to check the Config file of Sharepoint list availability in Repository PA Robot. |
| Config excel file is not available in the designated folder in Sharepoint Online | Contact IT operation support to check the Asset availability in Repository PA Robot defined in Config file (currently in Shared Documents ROB-061/Robot/Config). |
| Queue Item is not available in the Orchestrator | Contact IT operation support to check the Queue Item availability in Power Automate defined in Work Queue (currently in ROB-061). |
| User Settings file is not available in the designated folder | Check “UserSettings.xlsx” availability in the designated folder defined in Config File (currently at Shared Documents//061/User/Input folder). |
| Account Manager Mapping file is not available in the designated folder | Check “AccountManagerMapping.xlsx” availability in the designated folder defined in Config File (currently at Shared Documents//061/User/Input folder). |
| PBCM Email Subject and file is incorrect | Check “PBCMSubjectFormat” value in Config Constants file and use report\_blockir\_data.csv as default. |
| Account Manager Name is not found on the Account Manager Mapping file, or is found but missing the value | Check the availability of the Account Manager Name and the email addresses in the Account Manager Mapping file |
| Email addresses stated in the Account Manager Mapping file is invalid email | Check and validate the email addresses stated in the Account Manager Mapping file |

## 3.8 Business Continuity Management

Robot users will be executing workload manually referring to the internal standard operating manual until bot resumes operation.

## Rerun Transaction

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 1 | **Check the downloaded PBCM Data**  PBCM and the cleansed PBCM file will be downloaded and available on excel files at  \User\Output folder if the Dispatcher Robot runs successfully.  For Dispatcher Rerun:   * Delete the PBCM and the cleansed PBCM file for today’s date on local “Output” folder (currently on   \\User\output\CurrentMonth); and   * Empty the today’s Transaction Item in Orchestrator Queue Items. If you choose to delete the Queue Item, please create a new one with the same configurations as before.   For Performer Input data:   * Check if the cleansed PBCM file for today’s date existed in the local “Output” folder (currently on \\User\Output\CurrentMonth); |  |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
|  | * Check if the Transaction Item on Orchestrator Queue Item is still available to be processed   It is important to make sure that the remaining Transaction Orchestrator Queue Item and the remaining Account Manager Name to be processed is aligned to prevent duplicate on sending the MSISDN Blocking Information Email Notification and business exception. |  |
| 2 | **Trigger the Robot**  Run the “RPA-061-B2B MSISDN Blocking Information Broadcast Dispatcher” by clicking the “Run” button on the “Trigger” menu in Power Automate Desktop (If not trigger) and still in Inbox.  The parameter on EmailSubject must match the PCBM Info email.  The FileData parameter based on region of email trigger (Must be Uppercase Capital based on PCBM Info region based and Sent Date Email, Example: 28 October 2024 in)  Run the “RPA-061 MSISDN Blocking Information Broadcast-Performer” by clicking the “Run” button on the “Trigger” menu in Power Automate Desktop (If not trigger) | Dispatcher    Performer |

|  |  |  |
| --- | --- | --- |
|  | **Steps** | **Screenshot** |
| 3 | **Monitor Robot Logs**  Monitor the “Logs” menu under “Jobs” for the Robot to ensure the robot is running as expected. |  |