|  |  |
| --- | --- |
|  | | Process Definition Document |

Sales Opportunity Data Capture Process

This process captures the data from Sales Opportunity in internal web application and stores it into an Excel file and also uploads it to Orchestrator Queue.

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# Introduction

## I.1 Purpose of the document

The Process Definition Document outlines the business process chosen for automation using UiPath Robotic Process Automation (RPA) technology.

The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them with the details required for applying robotic process automation to the selected business process.

## I.2 Objectives

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

* Capture the sales Opportunities from internal web application
* Store the data into Excel File
* Upload the data into Orchestrator Queue
* Reduce processing time per item by 80%
* Better Monitoring of the overall activity by using the logs provided by the robots.

## I.3 Process key contact

The specifications document includes concise and complete requirements of the business process and it is built based on the inputs provided by the **process Subject Matter Expert (SME)/ Process Owner.**

The **Process Owner** is expected **to review it and provide signoff for accuracy** and completion of the actions, context, impact and a set of process exceptions. The details are to be included in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| ****Role**** | ****Name**** | ****Contact details (email, phone number)**** | ****Notes**** |
| Solution Architect | Ganesh Soley | [ganeshsoley@gmail.co](mailto:ganeshsoley@gmail.co) |  |
| Developer | Praveen |  |  |
| Developer | Sowmiya |  |  |
| Business SME | Karthik Bellary |  |  |
| Product Owner | Pragati Arora |  |  |

## I.4 Minimum Pre-requisites for automation

1. A filled in Process Definition Document
2. Test Data to support development
3. User access and creation of user accounts (licenses, permissions, restrictions to create accounts for robots)
4. Access to RPA sample website
5. Access to UiPath Orchestrator for adding QueueItems.

# As-Is process description

## II.1 Process Overview

General information about the process selected for RPA prior to automation.

|  |  |  |
| --- | --- | --- |
| # | Item | Description |
| 1 | **Process full name** | Sales Opportunity Data Capture Process |
| 2 | **Process Area** | Data Capture |
| 3 | **Department** | Sales |
| 4 | **Process short description (operation, activity, outcome)** | This process captures the data from internal portal and stores it into an Excel file and also uploads it to Orchestrator Queue |
| 5 | **Role(s) required for performing the process** | Any User |
| 6 | **Process schedule and frequency** | Daily at 9 PM |
| 7 | **# of items processed /reference period** | 15 items |
| 8 | **Process execution time** | 23.7 sec. |
| 9 | **Peak period (s)** | Every Sunday |
| 10 | **Transaction Volume During Peak period** | 50 |
| 11 | **Total # of FTEs supporting this activity** | 10 |
| 12 | **Expected increase of volume in the next reference period** | 20% |
| 13 | **Level of exception rate** | 1% |
| 14 | **Input data** | From website |
| 15 | **Output data** | Excel File, Orchestrator Queue Items |

\*Add more rows to the table to include relevant data for the automation process. No fields should be left empty. Use “n/a” for the items that don`t apply to the selected business process.

## II.2. Applications used in the process­

The table includes a comprehensive list of all the applications that are used as part of the process to be automated to perform the given actions in the flow.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Application name & version | SystemLanguage | Thin/Thick Client | Environment/ Access method | Comments |
|  | Google Chrome | English | Thick Client | Prod |  |
|  | Microsoft Excel | English | Thick Client | Prod |  |

\*Add more rows to the table to include the complete list of applications.

## II.3 As-Is Process map

### High Level As-Is Process Map:

This chapter depicts the As-Is business process at a High Level to enable developers to have a high-level understanding of the current process.

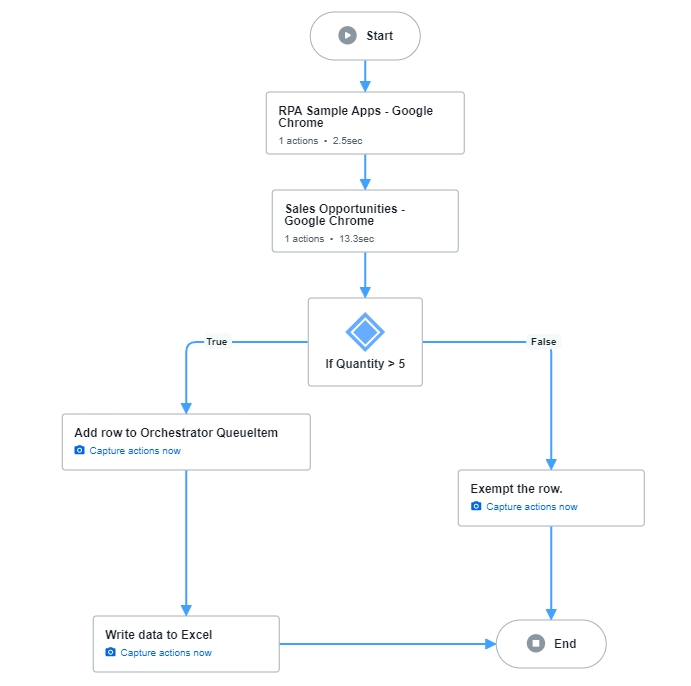


Fig.: As - Is Process

## II.4 Process statistics

### High level statistics

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Processes | **Windows** | Actions | Mouse clicks | Keys pressed | Text entries | Hotkeys used | Time |
| 1 | 2 | 2 | 2 | 0 | 0 | 0 | 15.8 sec. |

### Detailed statistics

|  |  |  |  |
| --- | --- | --- | --- |
| Window name | Mouse Clicks | Text entries | Keys pressed |
| RPA Sample Apps - Google Chrome | 1 | 0 | 0 |
| Sales Opportunities - Google Chrome | 1 | 0 | 0 |

## II.5 Detailed As-Is Process Actions

#### RPA Sample Apps - Google Chrome

|  |  |
| --- | --- |
|  | **Est. time:2.5 sec.** |

##### Click on Sales Opportunities

|  |  |
| --- | --- |
| Select Sales Opportunities in RPA Samples website. | **Est. time: 2.5 sec.** |
| image | Action: Click |

#### Sales Opportunities - Google Chrome

|  |  |
| --- | --- |
|  | **Est. time:13.3 sec.** |

##### Capture All Records

|  |  |
| --- | --- |
| Scrape all records available on the page. | **Est. time: 13.3 sec.** |
| image | Action: Click |

#### If Quantity > 5

|  |  |
| --- | --- |
| If 'True ' then go to '4. Add row to Orchestrator QueueItem'  If ' False ' then go to '7. Exempt the row.' | **Est. time:0.0 sec.** |

#### Add row to Orchestrator QueueItem

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Add following data to Orchestrator Queue Item.   | Account Name | Country | Opportunity Owner | Stage | Quantity | Unit Sales Price | Total Price | List Price | | --- | --- | --- | --- | --- | --- | --- | --- | | **Est. time:0.0 sec.** |

#### Write data to Excel

|  |  |
| --- | --- |
| Write all the data from DataTable to Excel. | **Est. time:0.0 sec.** |

#### Exempt the row.

|  |  |
| --- | --- |
|  | **Est. time:0.0 sec.** |

# To-Be Process Description

This chapter highlights the expected design of the business process after automation.

True

False

Start

Open [www.rpasamples.com](http://www.rpasamples.com) site in Google Chrome

Click on “Sales Opportunities”

Scrape Total Records

If Quantity > 5 ?

Add Record as QueueItem to Orchestrator

Skip the record

End

Fig. To Be Process

## III.1 To-Be Detailed Process Map

Highlight Bot interventions/ To-Be automated actions with different legend/ icon (purple)

\*Mention below if process improvements were performed on the To-Be design and provide details.

|  |  |
| --- | --- |
| Legend | Description |
|  | Action number in the process. Referred to in details or Exceptions and Errors table |
|  | This process action is proposed for automation |
|  | This process action remains manual (to be performed by a human agent) |

## III.2 Parallel Initiatives/ Overlap (if applicable)

This chapter covers the proposed Business, Process & System changes to be made in the near future and their impact.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| S.No | Initiative Name | Process Acion(s) where it is identified | Impact on current automation request? How? | Expected Completion Date | Contact person for more details |
|  | N/A |  |  |  |  |

## III.3 In Scope of RPA

The activities **In scope of RPA**, are listed here:

1. Read the Tabular data from internal portal.
2. If record satisfies the condition “Quantity >5” then add record to Orchestrator as QueueItem otherwise skip it.
3. Write the records to Excel file.

## III.4 Out of Scope of RPA

The activities **Out of scope of RPA**, are listed here:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Sub-process(if applicable) | Activity (action) | Reasons for Out of scope\* | Impact on the To-Be | Possible measures to be taken into consideration for future automation |
| 1.1 | Maintenance of the Internal Application |  | If web application is down, data can’t be read |  |
| 1.2 | Validating the data if it contain any false information |  |  |  |

\*Add more rows to the table to reflect the complete documentation provided to support the RPA process.

## III.5 Business Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. These can be classified as:

|  |  |
| --- | --- |
| Known | Unknown |
| Count for Total Records to be captured may be ZERO. | New situation never encountered before. It can be caused by external factors. Cannot be predicted with precision, however if it occurs, it must be communicated to an authorized person for evaluation. |

### Known Exceptions

The table below reflects all the business process exceptions encountered during the process evaluation and documentation. These are **known exceptions** that occurred before. For each of these exceptions, define a corresponding expected action that the robot should complete if it encounters the exception.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| BE # | Exception name | Action | Parameters | Action to be taken |
| 1 | BRE-001 | If Qty < 5 |  | Skip the record from uploading in Orchestrator |

### Unknown Exceptions

For all other unanticipated or unknown business (process) exceptions, the robot should:

Send an e-mail [exceptions@company.com](mailto:exceptions@company.com) with a screen shot and robot should then proceed to next transactions.

## III.6 Application Error and Exception Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here with the description and action to be taken, for each, by the robot.

Errors identified in the automation process can be classified as:

|  |  |  |
| --- | --- | --- |
| Area | Known | Unknown |
| Technology/Applications | Experienced previously, an action plan or a workaround available. | Never encountered before, or may happen independently of the applications used in the process. |

### Known Errors or Exceptions

The table below reflects all the errors identified in the process evaluation and documentation.

For each of these errors or exceptions, define a corresponding expected action that the robot should complete if it is encountered.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Error name | Action | Parameters | Action to be taken |
| 1 | Application Crash / Internal Server Error | Any action | Error message | Recover & retry for maximum 3 times. Close the applications and run the sequence again |

### Unknown Errors and Exceptions

For all the other unanticipated or unknown application exceptions/ errors, the robot should:

Send an e-mail [exceptions@company.com](mailto:exceptions@company.com) with a screen shot and robot should then proceed to next transactions.

## III.7 Reporting

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Report type | Update frequency | Details | Monitoring Tool to visualise the data |
| 1 | Process logs | Daily | How many times was this process run since the beginning of the month and what was the average run duration? | Kibana |
| 2 | Process logs | Monthly | How many robots worked on this process per each month? | Csv file posted daily on sharedrive |
| 3 | Transaction logs | Daily | How many transactions were run by this process since the beginning of the month and what was the average transaction duration? | Kibana |
| 4 | Error logs | Daily | Average number of errors by type per day | Kibana |
| 5 | Error logs | Daily | All errors per month grouped by type | Csv file posted daily on drive |

\* For complex reporting requirements, include them into a separate document and attach it to the present documentation

# Other Observations

Include below any other relevant observations you consider needed to be documented here.

Example: Specific Business monitoring requirements (audit and reporting) etc.

# Additional sources of process documentation

If there is additional material created to support the process automation please mention it here, along with the supported documentation provided.

|  |  |  |
| --- | --- | --- |
| Additional Process Documentation | | |
| Video Recording of the process (Optional) | ACME-System1-Process-WI5-Manual-Walkthrough | Insert any relevant comments |
| Standard Operating Procedure (s) (Optional) |  | Insert any relevant comments |
| Business Rules Library (Optional) | Insert link to Business rules library | Insert any relevant comments |
| Other documentation (Optional) | Insert link to any other relevant process documentation (L4, L5 process description, fields mapping files etc.) | Insert any relevant comments |

\*Add more rows to the table to reflect the complete documentation provided to support the RPA process.