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

Procurement Analysis

Fill PO details in Purchase Order Page by getting PO details from Procurement Anywhere Page.

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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:

* 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**** |
| BA | Karthik Ballary | kkk@domain.com |  |
| PO | Vajrang B | vvv@domain.com |  |
| Project Manager | Hari | hhh@domain.com |  |
| SA | Pragati | ppp@domain.com |  |
| Devloper | Ganesh | ggg@domain.com |  |
| QA | Prashanth | pp@domain.com |  |

## 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 Excel file
5. Google Chrome

# 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** | Procurement Analysis |
| 2 | **Process Area** | Purchase and Sales |
| 3 | **Department** | Purchase |
| 4 | **Process short description (operation, activity, outcome)** | Fill PO details in Purchase Order Page by getting PO details from Procurement Anywhere Page. |
| 5 | **Role(s) required for performing the process** | Purchase Domain |
| 6 | **Process schedule and frequency** | Daily |
| 7 | **# of items processed /reference period** | 10 |
| 8 | **Process execution time** | 1 min. 38 sec. |
| 9 | **Peak period (s)** | Dec |
| 10 | **Transaction Volume During Peak period** | 2000 |
| 11 | **Total # of FTEs supporting this activity** | 12 |
| 12 | **Expected increase of volume in the next reference period** | 80% |
| 13 | **Level of exception rate** | 1% |
| 14 | **Input data** | Agent List-Excel, PO Details- UI |
| 15 | **Output data** | Filled PO Details in UI |

\*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.

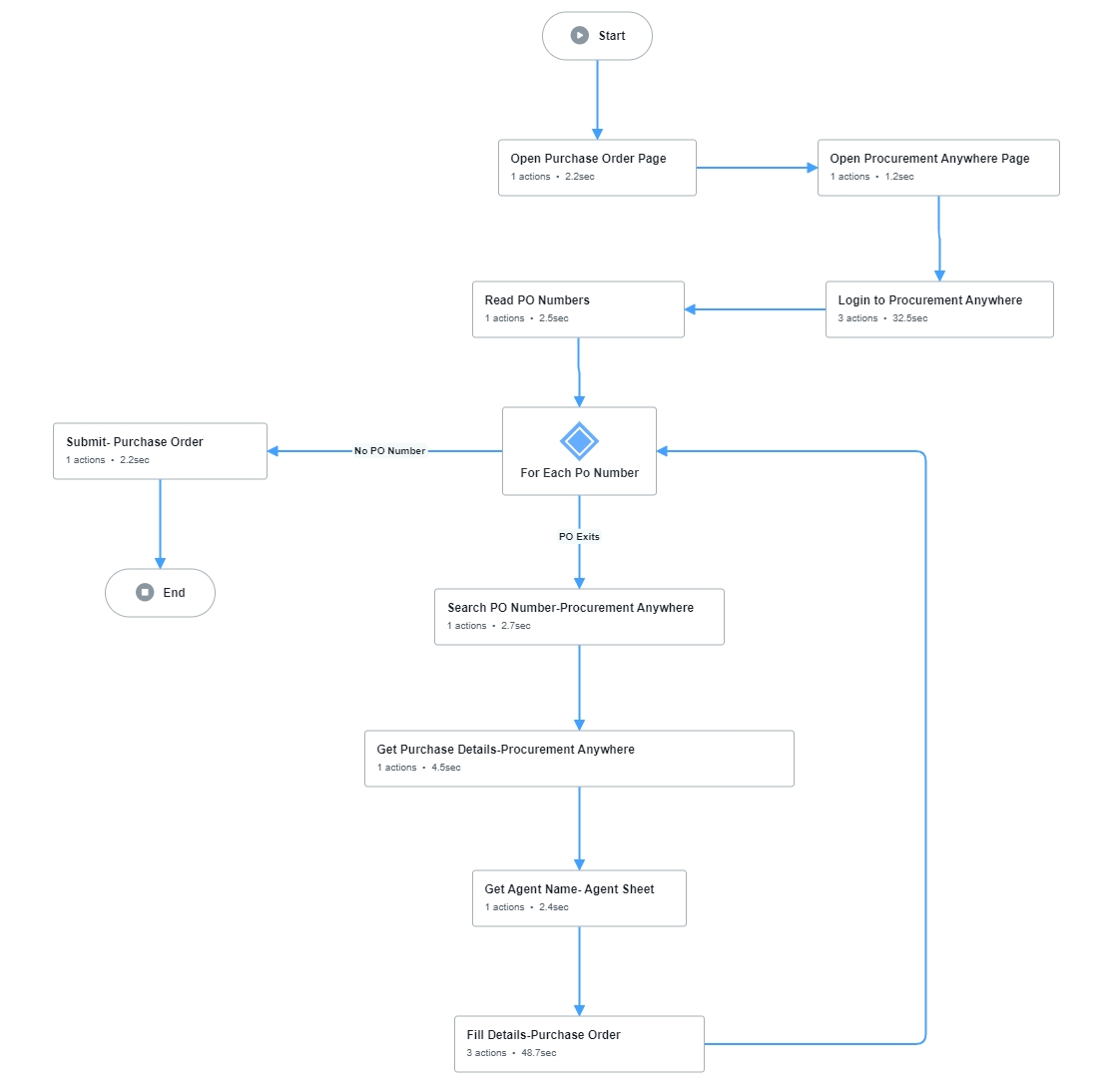
|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Application name & version | System Language | Thin/Thick Client | Environment/ Access method | Comments |
| 1 | Google Chrome | English | Thick | Production |  |
| 2 | Procurement Anywhere | English | Thin | Production | To Get PO Details |
| 3 | Purchase Order Page | English | Thin | Production | To Enter PO Details/Read PO Number |
| 4 | Excel | English | Thick | Production | To get Agent List |

\*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.



## II.4 Process statistics

### High level statistics

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Processes** | ****Windows**** | **Actions** | **Mouse clicks** | **Keys pressed** | **Text entries** | **Hotkeys used** | **Time** |
| 2 | 5 | 13 | 10 | 3 | 0 | 1 | 1 min. 38 sec. |

### Detailed statistics

|  |  |  |  |
| --- | --- | --- | --- |
| Window name | Mouse Clicks | Text entries | Keys pressed |
| Google Chrome | 0 | 0 | 2 |
| Login-Procurement Anywhere | 3 | 0 | 0 |
| Purchase Order Page | 5 | 0 | 0 |
| Procurement Anywhere- PO Tracking Lookup | 1 | 0 | 1 |
| StateAssignments.xlsx | 1 | 0 | 0 |

## II.5 Detailed As-Is Process Actions

#### Open Purchase Order Page

|  |  |
| --- | --- |
|  | **Est. time: 2.2 sec.** |

##### Type URL

|  |  |
| --- | --- |
| Type Purchase Order Page URL | **Est. time: 2.2 sec.** |
| image | Action: Special Key |

#### Open Procurement Anywhere Page

|  |  |
| --- | --- |
|  | **Est. time: 1.2 sec.** |

##### Type Procurement Anywhere URL

|  |  |
| --- | --- |
| Type Procurement Anywhere Order URL | **Est. time: 1.2 sec.** |
| image | Action: Special Key |

#### Login to Procurement Anywhere

|  |  |
| --- | --- |
|  | **Est. time: 32.5 sec.** |

##### Type Email

|  |  |
| --- | --- |
| Enter Procurement Anywhere Account Email | **Est. time: 0.9 sec.** |
| image | Action: Click |

##### Type Password

|  |  |
| --- | --- |
| Enter Procurement Anywhere Account Password | **Est. time: 24.6 sec.** |
| image | Action: Click |

##### Sign In

|  |  |
| --- | --- |
| Sign In to Procurement Anywhere Account | **Est. time: 6.10 sec.** |
| image | Action: Click |

#### Read PO Numbers

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

##### Copy PO Number

|  |  |
| --- | --- |
|  | **Est. time: 2.5 sec.** |
| image | Action: Click |

#### For Each Po Number

|  |  |
| --- | --- |
| If 'PO Exits' then go to '6. Search PO Number-Procurement Anywhere'  If 'No PO Number' then go to '10. Submit- Purchase Order' | **Est. time: 0.0 sec.** |

#### Search PO Number-Procurement Anywhere

|  |  |
| --- | --- |
|  | **Est. time: 2.7 sec.** |

##### Type PO Number

|  |  |
| --- | --- |
|  | **Est. time: 2.7 sec.** |
| image | Action: Click |

#### Get Purchase Details-Procurement Anywhere

|  |  |
| --- | --- |
|  | **Est. time: 4.5 sec.** |

##### Get Purchase Results

|  |  |
| --- | --- |
| **Read PO Details**  Take only: City, State, State Order and Ship Date | **Est. time: 4.5 sec.** |
| image | Action: Hotkey |

#### Get Agent Name- Agent Sheet

|  |  |
| --- | --- |
|  | **Est. time: 2.4 sec.** |

##### Get Agent Name

|  |  |
| --- | --- |
| Based on State Code get the Agent Name in the Agent Sheet provided. | **Est. time: 2.4 sec.** |
| image | Action: Click |

#### Fill Details-Purchase Order

|  |  |
| --- | --- |
|  | **Est. time: 48.7 sec.** |

##### Type Ship Date

|  |  |
| --- | --- |
|  | **Est. time: 1.0 sec.** |
| image | Action: Click |

##### Type Order Total

|  |  |
| --- | --- |
|  | **Est. time: 17.10 sec.** |
| image | Action: Click |

##### Select Agent

|  |  |
| --- | --- |
| Select Agent Name with ref to Agent Sheet | **Est. time: 29.7 sec.** |
| image | Action: Click |

##### Go to: For Each Po Number

|  |  |
| --- | --- |
|  | **Est. time: 0.0 sec.** |
|  | Action: NONE |

#### Submit- Purchase Order

|  |  |
| --- | --- |
|  | **Est. time: 2.2 sec.** |

##### Click Submit

|  |  |
| --- | --- |
| **Click on Submit** | **Est. time: 2.2 sec.** |
| image | Action: Click |

# To-Be Process Description

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

## 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) |

## Untitled Diagram.drawio

## 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. Actions 1-10

## 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 | 1.1.1 | Input: handwritten form | If Agent List is handwritten. PO Details will be partially Filled. |  |

\*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 |
| Reading wrong PO Number | Selecting Wrong Agent |

### 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 | Business Exception-wrong PO Number |  |  |  |

### Unknown Exceptions

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

## 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:

## 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? | NA |
| 2 | Process logs | Monthly | How many robots worked on this process per each month? | Csv file posted daily on share drive |
| 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.