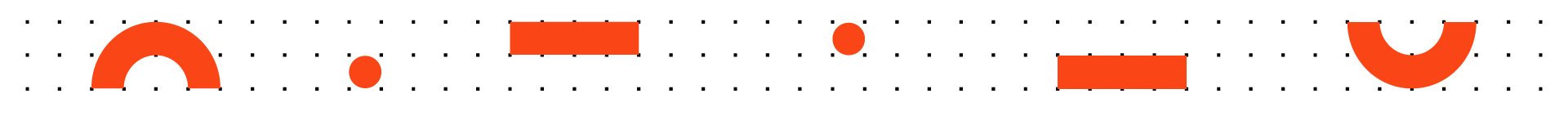




**Process Design Document (PDD)**

**<Name of Project>**



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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 steps 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 the details required for applying robotic automation to the selected business process.

## I.2 Objectives

This RPA objective is to automate the routine administrative tasks of marketing and maintaining customer records with an attended bot.

The benefits of automating the process includes:

* Reduce time taken for each customer record by at least 90 %
* Report to be sent to an admin after every run

## I.3 Minimum Prerequisites for Automation

1. Chrome to be installed with UiPath Web Automation Addon on the machine
2. Machine logged in with credentials
3. Internet connection to be stable
4. Microsoft Excel installed
5. Microsoft Outlook installed and completed setup

# **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** | Marketing and maintain customer records |
| 2 | **Process Area** | Marketing |
| 3 | **Department** | Accounts Receivable |
| 4 | **Process short description**  (operation, activity, outcome) | The AR department receives daily Purchase Orders from clients. Client and order data is processed and entered in the ERP system, after which the Sales Order is generated and sent back to the client. |
| 5 | **Role(s) required for performing the process** | Accounts Receivable |
| 6 | **Process schedule and frequency** | Daily, Monday to Friday, 9 am – 6 pm |
| 7 | **# of items processes /reference period** | ~450/ day business as usual |
| 8 | **Average handling time per item** | 3 min |
| 9 | **Peak period (s)** | Beginning of every week, when weekend orders need to be processed |
| 10 | **Transaction Volume During Peak period** | 600 |
| 11 | **Total # of FTEs supporting this activity** | 10 |
| 12 | **Expected increase of volume in the next reference period** | Volumes will increase with 20% |
| 13 | **Level of exception rate** | No expected exceptions |
| 14 | **Input data** | Email containing Purchase Order (PDF) from client |
| 15 | **Output data** | Sales order generated from ERP |

*\*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 all the applications that are used as part of the process automated, at various steps in the flow.

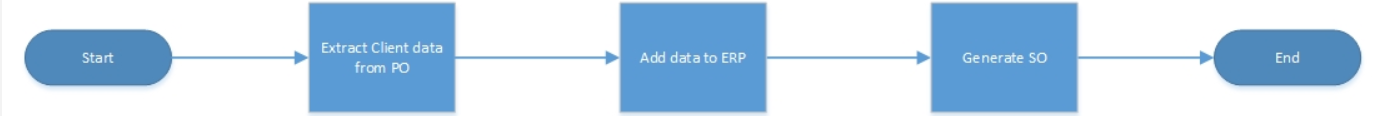
|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Application name & version | System  Language | Thin/Thick Client | Environment/  Access method | Comments |
| 1 | Outlook | EN | Thick Client | Web Browser | Task management |
| 2 | ERP | EN | Thick Client | Windows Application |  |
| 3 | Excel | EN | Thick Client | Windows Application | For master data |

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

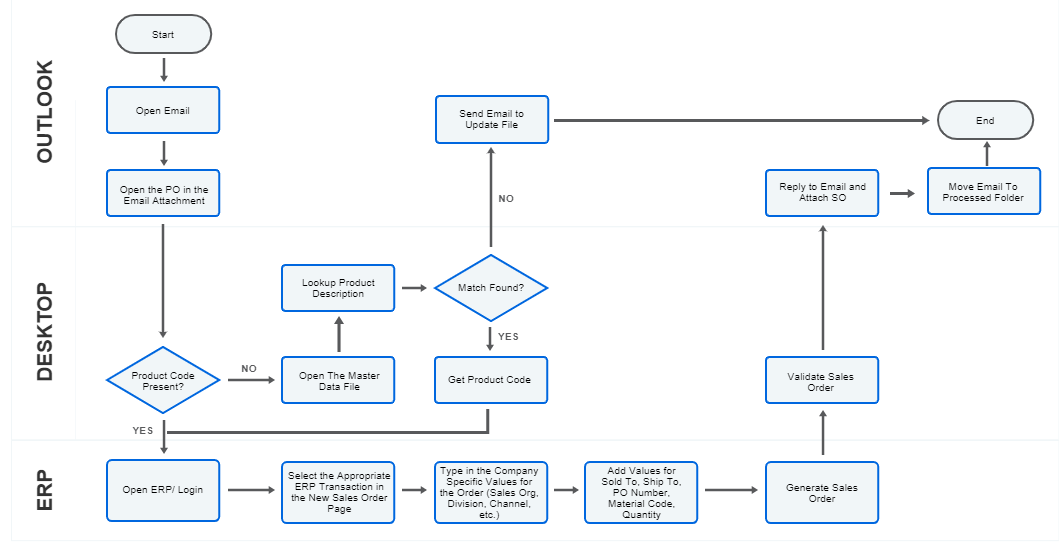
## II.3 As-Is Process Map

**High Level As-Is Process Map:**

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



**Detailed As-Is Process Map:**



## II.4 Detailed As-Is Process Steps

This chapter depicts the As-Is business process in detail to enable the Developer to build the automated process.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Detailed As-Is Process Steps | | | | | |
| Step | Input | Description | Details (Screen/ Document/ Video recording Index) | Exception Handling | Possible Actions | Business Rules Library Index |

*See doc attached*

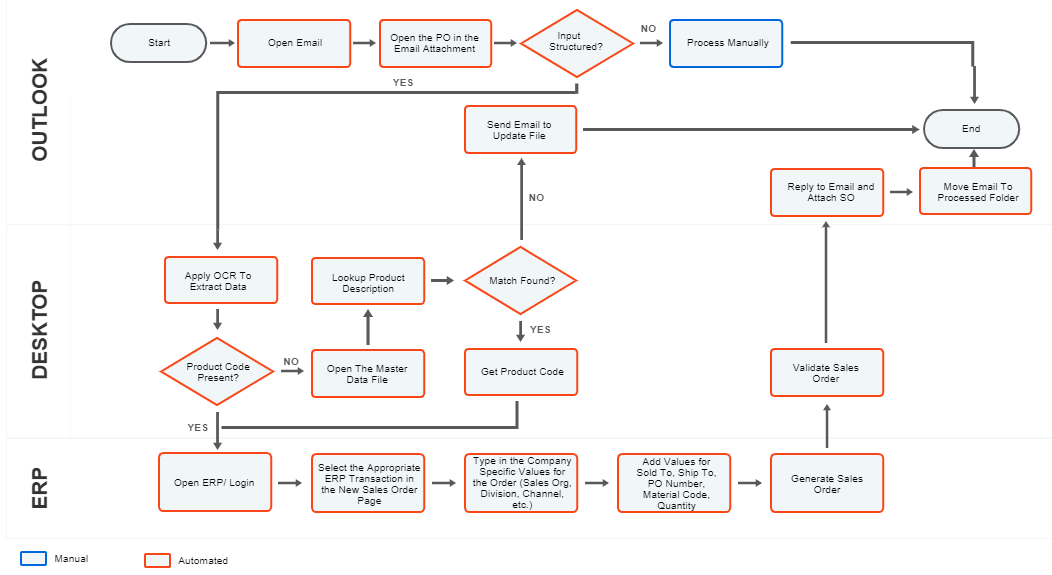
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# **To-Be Process Description**

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 steps with different legend/ icon (orange)*

*\*Mention below if process improvements were performed on the To-Be design and detail them*

## 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 |
| Previously encountered. A scenario is defined with clear actions and workarounds for each case. | 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 captured during the process evaluation and documentation. These are **known exceptions,** met in practice before. For each of these exceptions, define a corresponding expected action that the robot should complete if it encounters the exception.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **BE #** | **Exception name** | **Step** | **Parameters** | **Action to be taken** |
| 1 | Product out of stock | n/a | Product code | Ignore error, press the Continue button, fill in the data and Save. |

#### Unknown Exceptions

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

Send an email notification at [exceptions@acme-test.com](mailto:exceptions@acme-test.com) and error message screenshot attached.