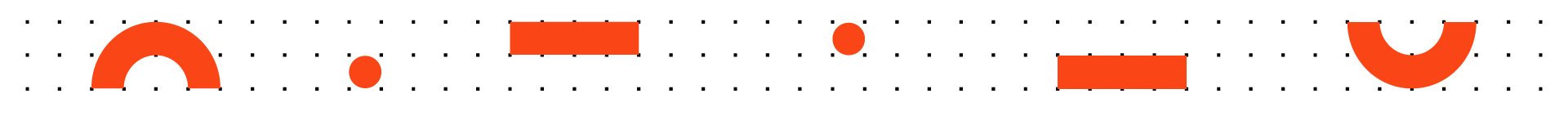




**Process Design Document (PDD)**

**Global Health Marketing RPA**



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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
* Reduce the human error that can occur during copying data from the table and transferring to databank
* Removes the need to manually check if every field is validated for use
* The password used to access medical records are also used to start the other processes

## I.3 Key Contacts

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 steps, context, impact and complete set of process exceptions. The names have to be included in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact details  (email, phone number) | Notes |
| Process SME | Sng Xue Bin | 180605U@mymail.nyp.edu.sg | Point of contact for questions related to process details & exceptions |
| Process Reviewer | Sng Xue Bin | 180605U@mymail.nyp.edu.sg | Point of contact for questions related to process details & exceptions |
| Process Owner/ Approver for production | Sng Xue Bin | 180605U@mymail.nyp.edu.sg | Escalations, Delays etc. |

## 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** | Marketing Team |
| 4 | **Process short description**  (operation, activity, outcome) | *The marketing Team will get the Customer records from the portal and enter the records into the databank. They will also email the customer promotional materials based on their records after validating that the information given is correct.* |
| 5 | **Role(s) required for performing the process** | Marketing Team |
| 6 | **Process schedule and frequency** | Daily, Monday to Friday, 9 am – 6 pm |
| 7 | **# of items processes /reference period** | *Up to 60 records per day / usual business* |
| 8 | **Average handling time per item** | *7 mins* |
| 9 | **Peak period (s)** | *End of year festive period* |
| 10 | **Transaction Volume During Peak period** | *100 per day* |
| 11 | **Total # of FTEs supporting this activity** | 3 |
| 12 | **Expected increase of volume in the next reference period** | Volumes will increase with 10% |
| 13 | **Level of exception rate** | Wrong data input from medical records |
| 14 | **Input data** | *Medical records from Global Health Administrative Portal* |
| 15 | **Output data** | Email sent to customer and Report generated sent to admin |

## II.2. Applications Used in the Process

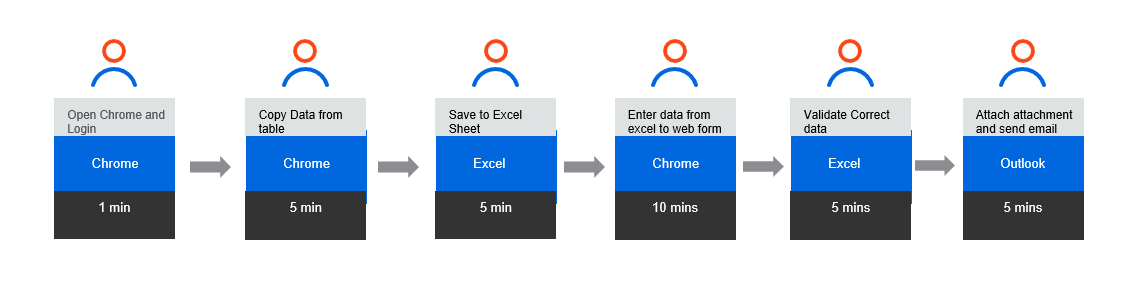
The table includes a comprehensive list all the applications that are used as part of the process automated, at various steps in the flow.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Application name & version | System  Language | Thin/Thick Client | Environment/  Access method | Comments |
| 1 | Outlook | EN | Thick Client | Web Application | Send email to customer and admin |
| 2 | Chrome | EN | Thick  Client | Web Browser | Accessing records and saving to databank |
| 3 | Excel | EN | Thick Client | Windows Application | Recording data from website |

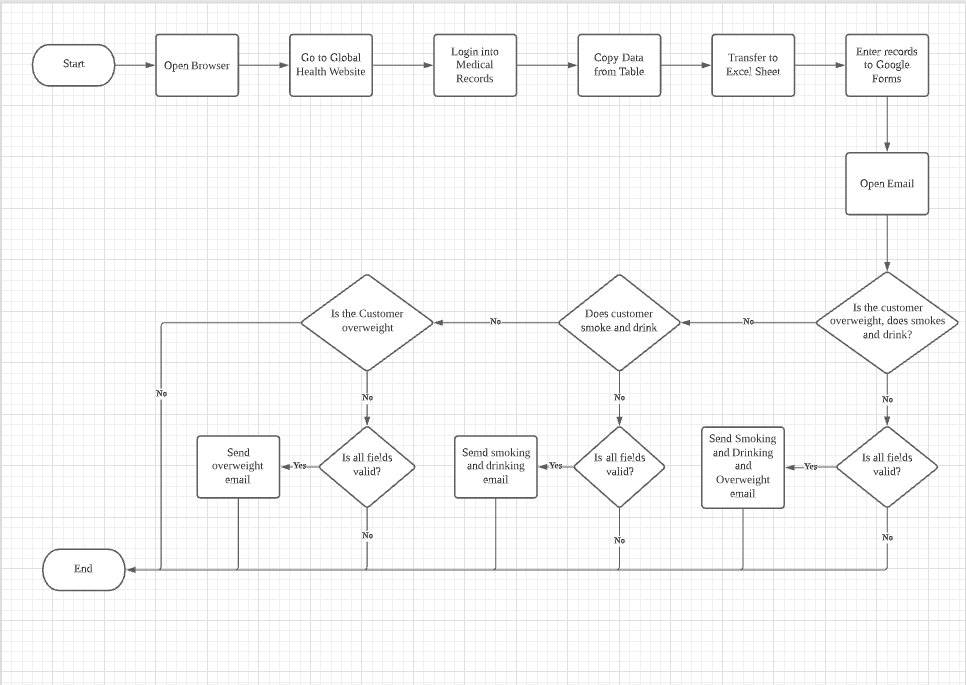
## II.3 As-Is Process Map

**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.



**Detailed As-Is Process Map:**



Yes

Yes

Yes

## 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 |

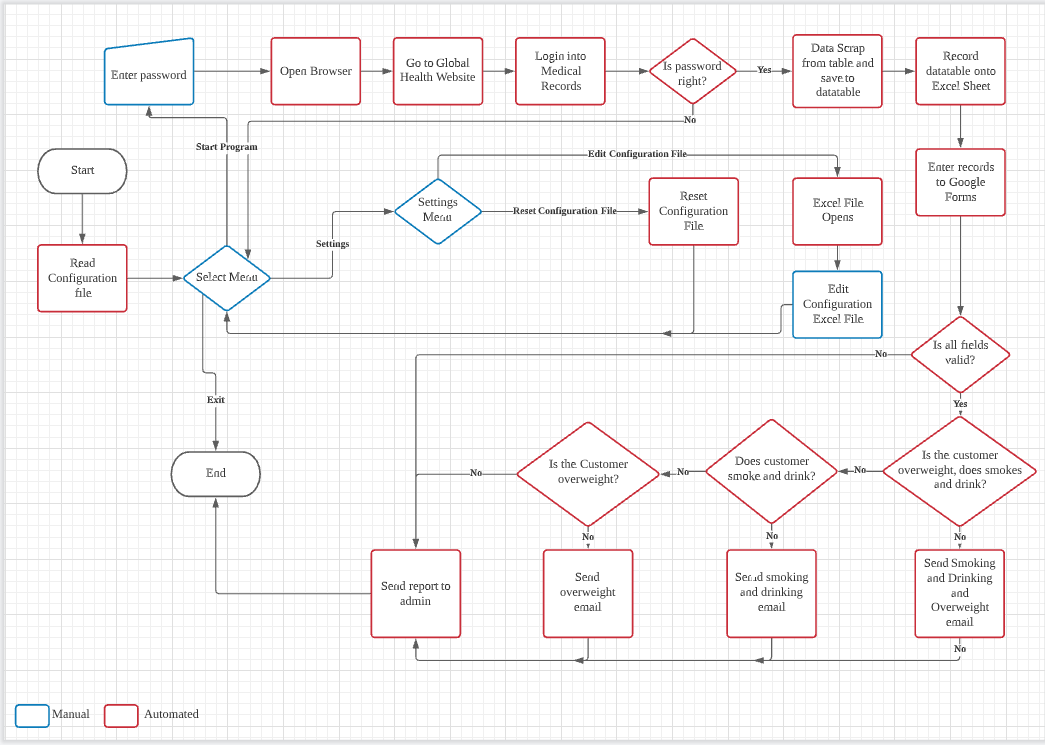
*See doc attached*

# **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*

*Process Improvements:*

* Added a configuration file to make email sending and other variables more dynamic
* Ability to edit and reset configuration file within the process
* Saves data to a excel sheet with date and time recorded as the sheet name for reference and archive
* Added a report to send to the admin at the end of the process that includes total records and failed records with the reason

## 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 | **Missing/Corrupted config file data** | 1 | configDt | **Reset config file data** |
| 2 | **Textbox/Button Element not found** | 6, 10 | N.A | **Close website and Restart RPA, After a few tries contact Process SME for help** |
| 3 | **Datatable no data saved** | 8 | ExtractDataTable | **Close website and Restart RPA, After a few tries contact Process SME for help** |
| 4 | **Email not sending** | 13 | SendOutlookMail | **Check if outlook is setup and configurated with the same email address(accountEmail) saved in config.xlsx** |

#### 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.