Process Design Document

Calculate Client Security Hash

Process Design Document History

Date	Version	Role	Name	Organization	Function	Comments
28.09.2017	1.0	Draft	Olfa Ben Taarit	ACME Systems Inc.	SME	Creation v 1.0
28.09.2017	1.2	Reviewer	Vrabie Stefan	UiPath	BA	Approved v 1.0
09.01.2019	1.3	Reviewer	Silviu Predan	UiPath	RPA Dev	Updated

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1. Introduction

1.1 Purpose of the document

The Process Design Document describes the business processes chosen for automation using the UiPath Robotic Process Automation (RPA) technology.

This document describes the sequence of steps performed as part of the process, as well as the conditions and requirements prior to its automation. This design document serves as a base documentation for developers to collect the details required for robotic automation of the same business process.

1.2 Objectives

The process has been selected for RPA as part of the larger project initiative conducted within ACME Systems Inc., the Finance and Accounting department.

The objective of this process automation is linked to the project business case and is mainly intended to:

- Deliver faster processing
- Reduce redundant activities
- Improve overall performance and reliability

1.3 Process key contacts

The Design Document includes a brief, but comprehensive set of requirements for the process. Its structure is based on the input provided by the Subject Matter Expert (SME) in the process.

Role	Name	Date of action	Notes
Process SME	Aurel Vlaicu	TBD	Point of contact for questions related to business exceptions and passwords
Reviewer / Owner	Sergiu Celibidache	TBD	POC for process exceptions
Approval for production	Nicoale Herlea	TBD	Escalations, Delays

2. AS IS Process Description

2.1 Process overview

General information about the process selected for RPA implementation, prior to its automation:

AS IS process details	
Process full name	Calculate Client Security Hash
Function	Security
Department	Finance and Accounting
Process short description (operation, activity, outcome)	Generate the Security Hash for each Client based on their personal information.
Role required for performing the process	System 1 User
Process schedule	Daily
# of item processes / day	7 – 15 Clients
Average handling time per item	2 min / Client
Peak period (s)	No peak period
# of FTEs supporting this activity	1
Level of exception rate	No expected exceptions
Input data	Client Data
Output data	Client Security Hash

2.1.1 In scope for RPA

The activities and exceptions in this process that are in the scope for RPA, are listed below:

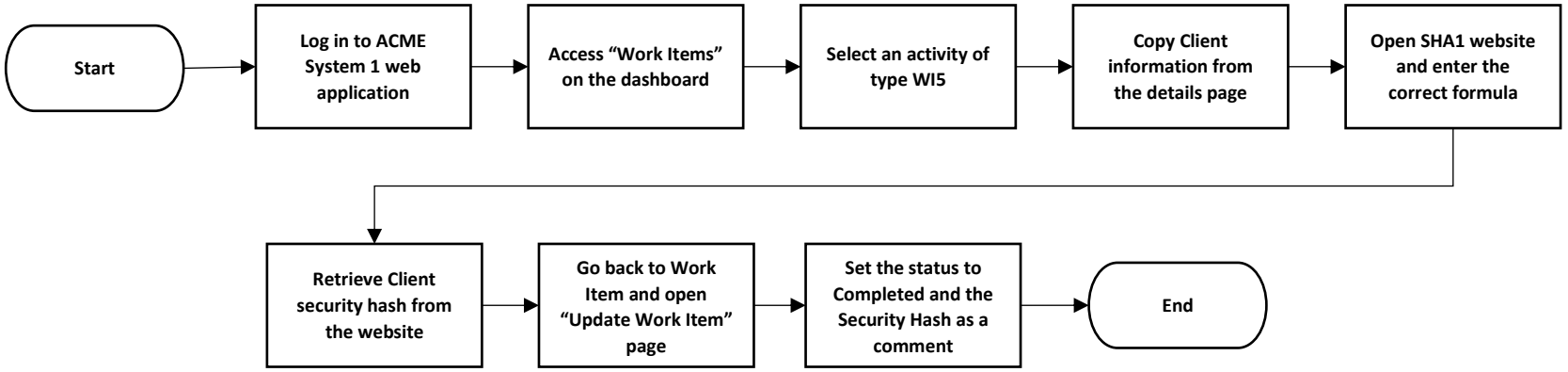
- Full Scope for RPA - the process is to be 100% automated.

2.1.2 Out of scope for RPA

There are no activities out of scope for RPA

2.2 Detailed Process map

This chapter presents the chosen process in detail, which enables the developer to build the automated process.

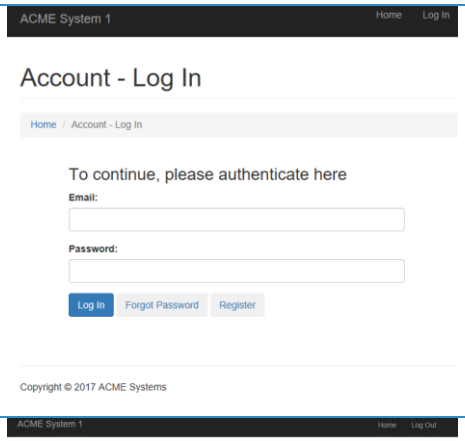
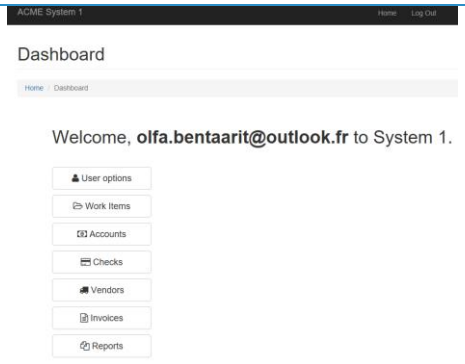


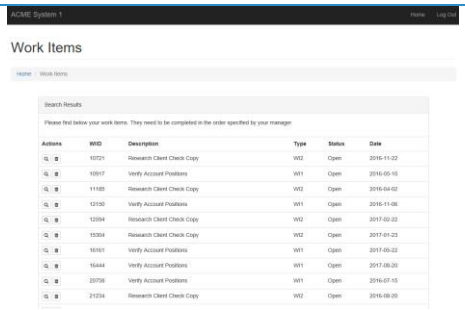
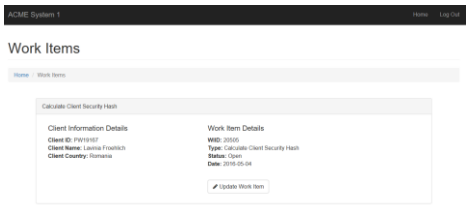
Step	Short Description
1.1	Open the ACME System 1 Web Application.
1.2	Log in to System 1. Required input data: email and password.
1.3	Access the Dashboard - the central location, where the user can pick a specific menu item.
1.4	Access the Work Items listing to view all the available tasks to be performed (Output data: Work Items).
1.5	**For each activity** of the WI5 type, perform the following steps:

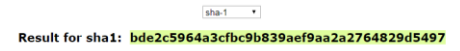
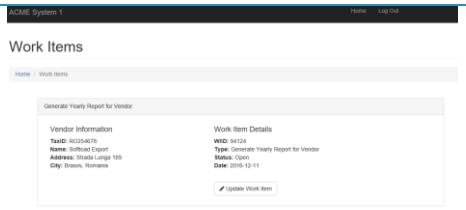
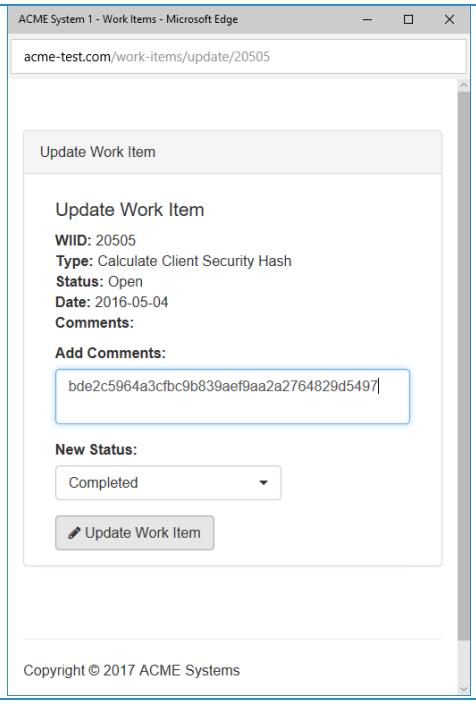
1.5.A	Open the Details page of the selected activity to retrieve the Client Information Details.
1.5.B	Open the SHA1 Online webpage - http://www.sha1-online.com/, and provide the following input: **[ClientID]**-**[ClientName]**-**[ClientCountry]**. Replace all the variables with the corresponding values. Use dashes between items, as shown above.
1.5.C	Retrieve the Client **Security Hash** value from the webpage.
1.5.D	Go back to Work Item Details and open Update Work Item.
1.5.E	Set the status to "Completed". Add a comment with the obtained **[SecurityHash]**.
1.6	Continue with the next WI5 Activity.

2.3 Detailed Process Steps

The complete set of steps in the process, including keystrokes and clicks, are to be defined with screenshots. If there are any data restrictions, mask the sensitive information, such as Policy Number, Customer ID, bank account number, etc).

#	Step action description	Screenshot	Expected result	Remarks
1.1	Open the ACME System 1 Web Application		The display of the System 1 Web App screen.	Possible exception: - Handle exception if Web app not available
1.2	Log in to System 1. Required input data: email and password.		Access to the dashboard	Possible exception: - Handle exception if Incorrect email or Password
1.3	Access the Dashboard - the central location, where the user can pick a specific menu item		The display of each item in the menu	

1.4	Access the Work Items listing to view all the available tasks to be performed		The display of the task list	
1.5	**For each activity** of the type WI5 perform the following steps:			Possible exception: Handle exception if no task of type 'Calculate Client Security Hash' exist
1.5.A	Open the Details page of the selected activity to retrieve the Client Details (Output data: Client Details)			
1.5.B	Open the SHA1 Online Webpage - http://www.sha1-online.com/ and provide the following input: **[ClientID]-[ClientName]-[ClientCountry]** Replace all the variables with the corresponding values. Use dashes between items, as shown above.			

1.5.C	Retrieve **Client Security Hash** from the webpage			
1.5.D	Go back to the Work Item Details and select Update Work Item			
1.5.E	Set the status to “Completed”. Add a Comment with the obtained **[SecurityHash]**			
1.6	Continue with the next WI5 Activity			

2.4 Exceptions handling

The types of exceptions identifiable in the automation process can be classified according to the table below.

Area	Known	Unknown
Business	Previously encountered situation. A possible scenario is defined, and clear actions and workarounds are provided for each case.	A situation never encountered before. It can be caused by external factors.

Based on the above criteria, the table below should reflect all the known exceptions identified throughout the process and map the expected action the robot needs to take in each case.

Insert as many rows as required in the table, to capture all exceptions in a comprehensive list.

#	Exception name	Step where exception is encountered	Parameters	Action to be taken
1	Incorrect email or password	Step # **1.2**	If message for incorrect username or password exist	Send email to exceptions@acme-test.com "Hello, The username or the email is incorrect. Please check and restart Thank you"
2	No task of type WI5 exists	Step # **1.5**		Stop process

For any other unanticipated or unknown exceptions, the robot should send an email notification at exceptions@acme-test.com with the original email and error message screenshot attached.

2.5 Error mapping and handling

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

The errors identified in the automation process can be classified according to the table below.

Area	Known	Unknown
Technology	Previously encountered situation - action plan or workaround available.	A situation never encountered before, or may happened independent of the applications used in the process.

Based on the above criteria, the table below should reflect all the identifiable errors in the process, and map the expected action of the Robot in each case.

Insert as many rows as required in the table, to capture all the errors in a comprehensive list.

#	Error Name	Step where error is encountered	Parameters	Action to be taken
1	Application unresponsive / page not loading	Any step	No response / blank page	Retry 2 times. Close application and run the sequence again

*Feel free to insert an additional error mapping table for more complete explanation.

2.6 In-Scope application details

The table below lists all the applications that are used as part of the automated process.

#	Application name & Version	Syst. Lang.	Login module	Interface	Environment/ Access method	Comments
1	ACME System 1	EN	Web	Web	Web Browser	
2	SHA1 Online	EN	n/a	Web	Web Browser	

3. Development details

3.1 Prerequisites for development

- Development or testing environment are to be provided for development purposes.
- The provided development and testing environments are exact replicas of the production environment.
- Dedicated system and application access are given to developers with the adequate permissions.

3.2 Password policies

Users manage their own passwords. There are no special policies in place.

3.3 Credentials and asset management

Login details (user IDs and passwords) should be stored under **Windows Credential Manager** or **UiPath Orchestrator Assets**.

4. Document Approval Flow

Version	Flow	Role	Name	Organization (Dept.)	Signature and Date:
1.0	Document prepared by	Business Analyst	Name Surname		
1.0	Document Approved by:	Business Process Owner	Name Surname		
1.0	Document Approved by:	Dev/RPA Solution Architect	Name Surname		

5. Appendix

5.1 UiPATH automated process details

Note: this step is to be filled in after automation process is complete

Automation overview: (time to dev, test, etc)

Robots type: Unattended

Level of human intervention required:

Use of Orchestrator:

Exceptions recorded in automation process:

Errors identified in the automation process:

Challenges identified in the automation process:

Lessons Learned:

Any adjustments made to facilitate the automation process and any steps taken to shift from the human way of working to the automatic one. Any activity performed to improve the As Is process and to enable higher rates of automation of the process:

- Process Assumption
- Input data assumption
- Number or types of input to be received
- Skipping the login interface and collecting backend details
- Extracting backend data without opening the file
- Data conversion / formatting

Reporting: The details and format of the logging mechanism available in the workflow have to be specified here, whether it is a local log report or the Orchestrator log).

The format should be specified by the business users.

Workflow and scripts: A brief overview of each workflow and the sequence in which it is executed should be provided here.