Process Definition Document

**Name of process being automated / project name**

Names of key project members

Date: Date of latest update

|  |
| --- |
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**Document Control**

Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version Number** | **Author** | **Date** | **Description** |
| 001 |  |  | Version number |

Document Authorization

*<This table may be used for obtaining document approval / sign-off from the concerned authority>*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Authority** | **Authorization & Justification** | **Version Number** | **Date** |
| Usually data protection | *Written evidence of approval* | 001 |  |

Document Location

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| **Container** | **Location** |
| Location of document (drive) | Link to file location |

**Referenced Documents**

| **Document Name** | **Version No.** | **Issue Date** | **Issued By** |  |
| --- | --- | --- | --- | --- |
| Any document referenced in this document |  |  |  |  |

| **Change Request Documentation** | **Requested No** | **Issue Date** | **Issued By** | **Authorization** |
| --- | --- | --- | --- | --- |
| [Any](#_Change_Request) change documentation |  |  |  |  |

# Objective

### 1.1 Statement of business

# Current Process

### 2.1. Process Overview

### 2.2. Business Objectives and Benefits

|  |  |
| --- | --- |
| **Objectives** | **Expected Benefits** |
|  |  |
|  |  |
|  |  |

### 2.3. Standard of Metrics

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

|  |  |
| --- | --- |
| Process name |  |
| Function |  |
| Department |  |
| Process short description |  |
| Process schedule |  |
| #of items process/month |  |
| Average handling time |  |
| Peak period(s) |  |
| # of FTE supporting this activity |  |
| Level of exception rate |  |
| Input Data |  |
| Output Data |  |
| Return of Investment |  |

### 2.4. Volume of data

|  |  |  |
| --- | --- | --- |
| **Business / Activity** | **Time taken per month (hours)** | **Volume of data to-be process** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Business Requirements

Define constraint and aspects of the business that needs to-be follow throughout the process.

|  |  |  |
| --- | --- | --- |
| **BR#** | **Requirement** | **Additional Information** |
| BR001 |  |  |
| BR002 |  |  |
| BR003 |  |  |
| BR004 |  |  |
| BR005 |  |  |
| BR006 |  |  |
| BR007 |  |  |
| BR008 |  |  |
| BR009 |  |  |
| BR010 |  |  |
| BR011 |  |  |
| BR012 |  |  |
| BR013 |  |  |
| BR014 |  |  |
| BR015 |  |  |
| BR016 |  |  |

# Anchor Applications

Application that are currently in use for the manual process and will be use for the automation.

|  |  |  |  |
| --- | --- | --- | --- |
| **Application and Version** | **URL** | **Type** | **Credentials required for Robot ID** |
|  |  |  |  |

# Detailed Process Steps – AS IS

Attached here a PDF version of the process map, documenting the process being automated.

# To-be Pre-process steps (Proposed solution)

The developers should attach a PDF version of the process map showing the automated solution.

# In Scope

Table below shows the high-level steps that are in scope for the automation.

|  |  |
| --- | --- |
| **Business Process** | **Comments** |
|  |  |
|  |  |
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# Out of Scope

Shows the elements that are **NOT** in scope for automation project.

# Non-functional requirements

## 9.1. Operability

**Input parameter file location:**

|  |  |  |
| --- | --- | --- |
| **Report** | **Directory** | **Filename Format** |
|  |  |  |
|  |  |  |
|  |  |  |

Highlight here any key parts that are required from an operability perspective that will need to be looked at in this project, often around reports or 3rd party provided information.

## Reporting

The automation will only provide report with the consolidated information:

**Output parameter file location:**

|  |  |  |
| --- | --- | --- |
| **Report** | **Directory** | **Filename Format** |
|  |  |  |

**File headers for the output parameter file:**

## 9.3. Archiving

This section should identify where all information, generated by the automated solution, will be stored and archived, addressing any data protection points.

## 9.4. Exception Management and Error Handling

The automation can encounter during the execution of the process. Exceptions fall into one of two categories. They can be categorize as either system exceptions or business exceptions.

System exceptions are cause by unexpected behavior of the systems interfaced by the robot. Unexpected behavior can cause by i.e. instability of the system, unannounced release of new version of the system etc. System exceptions shall resolve by robotic process controller.

Business exceptions prevent robot from completing a task due to inconsistency in input and output data based on the business rules provided by the Subject matter experts or business owners. In this case, task handed over to human operator who will resolve the inconsistency and complete the task themselves or hand it back to the automation.

# Security and data retention

Think through – will any sensitive information be handled or stored by the digital solution.

# Assumptions for success to automate

What will make this project successful – detail those key items.

# Appendix

For security concerns, all documents are stored via which link, with further information being shared via email.

# Open Questions

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **OP #** | **Date Issued** | **Date Closed** | **Description** | **Comments from the reviewer** | **Status** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Escalations

For immediate contacts for the process automation project, kindly contact the respective contact on the table below:

|  |  |
| --- | --- |
| **Email Address** | **Roles** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Change Request

For process that subject to-be change in the future, as part of this document a change request form will be needed and subject for approval for the RPA Manager/Lead.

Attach here a copy of the change request form available in your project / organisation.