

<Client Name> - <Process Name>

Process Definition Document

Document Control

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Glossary/Terms/Acronyms:

The following terms, acronyms, and definitions are used throughout this document:

Acronym	Description

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1 Introduction

The Process Definition Document (PDD) captures the flow of a business process to be automated.

The flowchart contained within the document captures, at a high level, the business process to be automated, the target systems used within the process and any assumptions that have been taken into account.

Once agreed as the basis for the automation of the target process, the flowchart and assumptions will be used as a platform from which the automated solution will be designed. Changes to this business process may constitute a request for change and will be subject to the agreed agility program change procedures.

Note: This document must be completed in the absence of existing process documentation that provides the level of detail required for a process to be automated.

If existing process documentation is to be used instead of a new PDD the following steps should still be undertaken

1. Existing process documentation reviewed to ensure it is still up to date and fully captures the current manual process
2. Existing process documentation provides the same level of detail that is required for automation
3. Agreed by the business as an accurate description of the manual process

2 Overview

<Process overview goes here>

2.1 Team

S.No.	Name	Division / Department	Role
1			SME
2			RPA Analyst
3			RPA Developer
4			

2.2 Timeline

S.No.	Job	Start Date	End Date
1	Development		
2	Testing		
3	UAT		
4	Deployment		

2.3 Target Systems

List all the systems that that are part of the process.

S.No.	Procedural Steps	Comments
1		
2		
3		
4		

2.4 Manual Process Description

The process involves the following steps:

S.No.	Procedural Steps	Comments
1		
2		
3		
4		
5		
6		
7		
8		
9	Send notification email	

2.5 Impacted Business Areas

The Operations team that currently perform the process manually need to reengineer their process to support exception cases that cannot be automated.

List the exception cases that cannot be automated here:

- Case 1
- Case 2
- Case 3

3 Process Diagram

The following diagram depicts the detailed process flow

4 Process Details

Step 1: Open Microsoft Terminal Services Client from “C:\Windows\System32\mstsc.exe”



Step 2: Enter the User Name and Password to login into the remote desktop at

Step 3: Navigate to the folder path mentioned below:

Step 4: Access State website per the below list, by entering the URL in browser

State	Link	Website Notes	Login Credentials Required (Y/N)
Alabama	https://alabama.findyourunclaimedproperty.com/app/claim-search#results-form		N
Alaska	http://www.missingmoney.com/		N
Arizona	http://www.azunclaimed.gov/		N

Step 5: In the state URL enter the below information to access the Lowes unclaimed property

	Property Name	Login Credentials if required
Name/ Business Name:		

*Most of the website do not accept special character like - ', "-

Note: Lowes could be listed in the State websites under different names.

Step 6: Enter Business name Lowes and click on SEARCH.

The screenshot shows the 'CLAIM UNCLAIMED PROPERTY' website interface. The page title is 'SEARCH FOR UNCLAIMED PROPERTY'. The navigation bar includes a 'HOME' button and a progress indicator with steps: 1. Search, 2. Review, 3. Claimant Info, 4. Preview Claim, and 5. Summary. The search form contains a 'SEARCH:' label with a question mark icon, a 'SEARCH' button, and three input fields: '* Name/ Business Name' (containing 'Lowes'), 'City/Zip Code', and 'Property ID'. A red oval highlights the 'Name/ Business Name' field. A note and an example are provided on the left side of the form.

Secure | <https://alabama.findyourunclaimedproperty.com/app/claim-search#results-form>

ALABAMA UNCLAIMED PROPERTY

1. Search > 2. Review > 3. Claimant Info > 4. Preview Claim > 5. Summary

SEARCH FOR UNCLAIMED PROPERTY

SEARCH: ?

NOTE: When searching for unclaimed property, please note that separate claims must be generated based on your relationship to the property reported.

For example: If you find property in your name, initiate a claim as the Owner of the property. If you also find property in a deceased relative's name, initiate a separate claim, selecting the situation applicable to you as either Heir or Estate Representative.

* Name/
Business Name:

City/Zip Code:

Property ID:

SEARCH

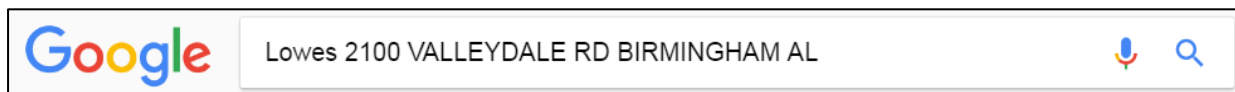
If you have any questions or concerns regarding the privacy of your information or the legitimacy of this website, please see our [Privacy Information page](#).

Step 7: Copy the address, “2100 VALLEYDALE RD” Birmingham, AL. listed for Lowes

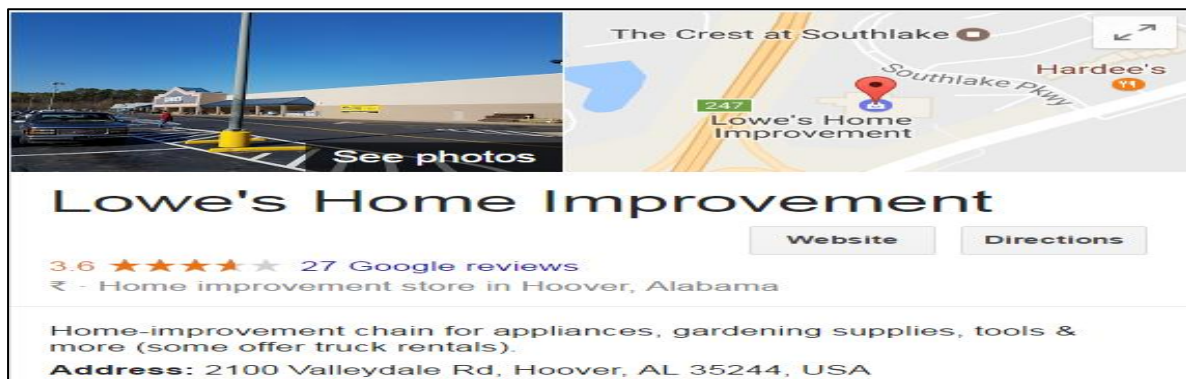
To file a claim for the property on this list, click the box next to those properties you wish to claim, then click on the Claim Properties button.

Select	Property ID	Owner Name	Address	City	State	ZIP Code	Reporting Business Name	Amount
<input type="checkbox"/>	3999267	GEMB/LOWES	1723 COLORADO ST	GADSDEN	AL	35903	WELLS FARGO FINANCIAL ALABAMA INC	Over \$100
<input type="checkbox"/>	3075357	LOWES	2100 VALLEYDALE RD	BIRMINGHAM	AL	35242	MAYTAG CORPORATION	Over \$100
<input type="checkbox"/>	4124653	LOWES	21029 PLEASANT GROVE RD	VANCE	AL	35490	GREEN TREE AL LLC	Over \$100
<input type="checkbox"/>	5057062	LOWES	PO BOX 530954	ATLANTA	GA	30353	STATE OF ALABAMA -EXPIRED STATE CHECK	Over \$100
<input type="checkbox"/>	5276208	LOWES #1599	4401 RANGELINE RD	MOBILE	AL	36619	STATE OF ALABAMA -EXPIRED STATE CHECK	Over \$100
<input type="checkbox"/>	4780047	LOWES COMMERCIAL SERVICE	PO BOX 530954	ATLANTA	GA	30353	STATE OF ALABAMA -EXPIRED STATE CHECK	Under \$100
<input type="checkbox"/>	5474002	LOWES COMPANIES INC	1950 S EASTERN BLVD	MONTGOMERY	AL	36119	STATE OF ALABAMA -EXPIRED STATE CHECK	Over \$100
<input type="checkbox"/>	5474003	LOWES COMPANIES INC	1950 S EASTERN BLVD	MONTGOMERY	AL	36119	STATE OF ALABAMA -EXPIRED STATE CHECK	Over \$100
<input type="checkbox"/>	5507566	LOWES COMPANIES INC	1950 S EASTERN BLVD	MONTGOMERY	AL	36119	STATE OF ALABAMA -EXPIRED STATE CHECK	Over \$100

Step 8: Cross-verify the property address through Google maps or Lowe's Location Master.xlsx to ensure that the property belongs to Lowes. Take a print screen of the address match that can be used as attachments while submitting the claim



Step 9: Screenshot of the Location found in Google.



Step 10: Update the claim record details in inventory

Property ID	Owner Name	Address	City	State	Zip	Reporting business	Amount
3075357	LOWES	2100 VALLEYDALE RD	BIRMINGHAM	AL	35242	MAYTAG CORPORATION	Over \$100

Step 11: Select your property and click on “CLAIM PROPERTIES”, to begin the claim process

RESULTS: Your search returned 200 unclaimed properties. CLAIM PROPERTIES

Display: 1 property(s) selected

To file a claim for the property on this list, click the box next to those properties you wish to claim, then click on the Claim Properties button.

Select	Property ID	Owner Name	Address	City	State	ZIP Code	Reporting Business Name	Amount
<input type="checkbox"/>	3999267	GEMB/LOWES	1723 COLORADO ST	GADSDEN	AL	35903	WELLS FARGO FINANCIAL ALABAMA INC	Over \$100
<input checked="" type="checkbox"/>	3075357	LOWES	2100 VALLEYDALE RD	BIRMINGHAM	AL	35242	MAYTAG CORPORATION	Over \$100
<input type="checkbox"/>	4124653	LOWES	21029 PLEASANT GROVE RD	VANCE	AL	35490	GREEN TREE AL LLC	Over \$100
<input type="checkbox"/>	5057062	LOWES	PO BOX 530954	ATLANTA	GA	30353	STATE OF ALABAMA -EXPIRED STATE CHECK	Over \$100

Step 12: Enter your information. Complete your information as the claimant. This should include your current Mailing Address, as it will be the address where the funds are mailed. Select your ‘Relationship to Owner.’ For example please select either ‘Heir’ or ‘Representative,’ depending on the applicable situation. This information will provide you with the appropriate details necessary to claim the property. Click NEXT to move to the Preview screen

Claim info	
Name	John Doe
Relationship	"Business representative"
Address	123 One way
	Mooresville,
	NC 28115
EIN/SSN	222333444
Company Name	Lowe's Companies Inc.
Email address	john.doe@example.com

Phone

123-456-7890

◀ PREV

ENTER YOUR CURRENT CONTACT INFORMATION

NEXT ▶

*Required field

<p>Claimant Type: <input type="text" value="Business"/></p> <p>* Business Name: <input type="text" value="Lowe's Companies Inc."/></p> <p>Contact Name: <input type="text" value="David Moore"/></p> <p>Middle Name: <input type="text"/></p> <p>Date of Birth: <input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/></p> <p>*Email Address: <input type="text" value=":david.moore@lowes.com"/></p> <p>*Email Address Confirmation: <input type="text" value=":david.moore@lowes.com"/></p> <p>*Business Phone: <input type="text" value="704-948-0787"/></p> <p>Other Phone: <input type="text"/></p>	<p>? SSN/Tax ID: <input type="text" value="Optional"/> <input type="checkbox"/> Show SSN/Tax ID</p> <p>*Relationship to Owner: <input type="text" value="Business Representati"/></p> <p>Country: <input type="text" value="United States of Americ"/></p> <p>*Address 1: <input type="text" value="PO Box 1000"/></p> <p>Address 2: <input type="text" value="TTN Recovery AP NB4PA"/></p> <p>*City: <input type="text" value=" Mooresville"/></p> <p>State: <input type="text" value="NC - North Carolina"/></p> <p>*Zip Code: <input type="text" value="28115"/></p>
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Step 13: Preview the claim details and capture the screen as an image. Save the screenshot to the local machine and extract the content of the image. Store the text content into a SQL Server.

◀ PREV

PREVIEW YOUR CLAIM

SUBMIT

By affixing my signature, I hereby swear or affirm that the information provided in support of this Claim is true and correct. It is my intention that this statement is given under oath; and, I understand and acknowledge that any false statement I have given is punishable as Perjury under Section 13A-10-100, et seq., Code of Alabama. I hereby indemnify and hold harmless the State of Alabama, Office of Treasurer, its officers, employees or agents from any claim, loss or damage of any kind, including reasonable attorney fees, for actions taken in reliance upon any statement, representation or document I will make or provide in support of this Claim.

Enter/Type Name here:

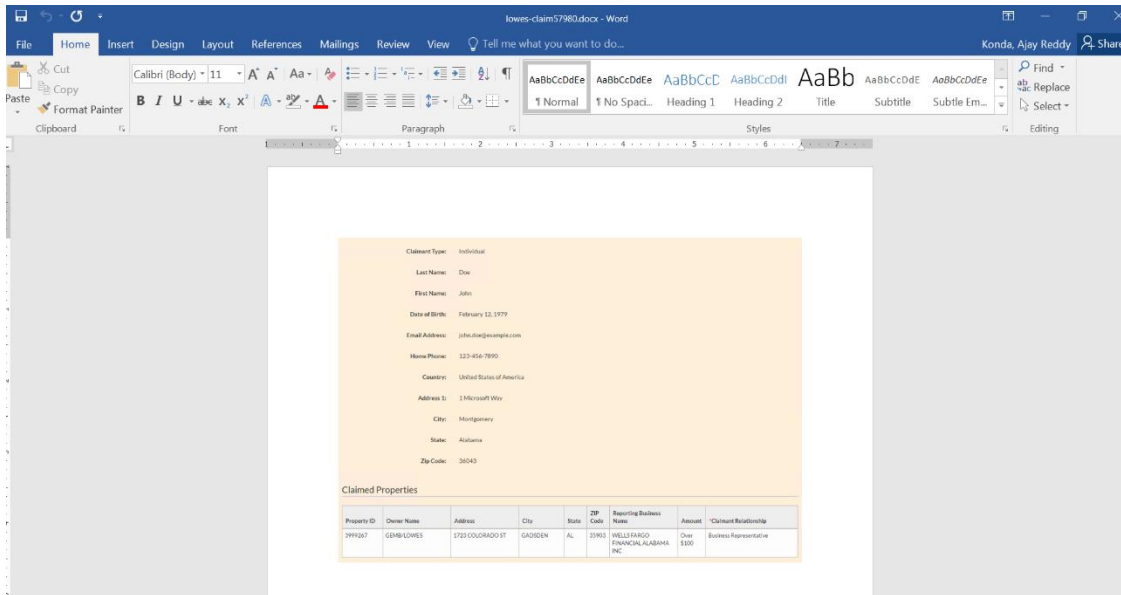
Your Information:

<p>Claimant Name: David Moore Lowe's Companies Inc.</p> <p>Mailing Address: PO Box 1000 Mooresville NC 28115 United States of America</p>	<p>Claimant Type: Business</p> <p>SSN/Tax ID:</p> <p>Date of Birth:</p> <p>Email Address: vc.david.moore@lowes.com</p> <p>Business Phone: 704-948-0787</p> <p>Other Phone:</p> <p>Relationship to Owner: Business Representative</p>
---	---

Properties to Claim:

Property ID	Owner Name	Address	City	State	ZIP Code	Reporting Business Name	Amount
3075357	LOWES	2100 VALLEYDALE RD	BIRMINGHAM	AL	35242	MAYTAG CORPORATION	Over \$100

Step 14: Create word document and insert the image into it



Step 15: Create a claim packet by zipping the images and the word document.

Step 16: Send the claim packet created in step 15 to some.one@example.com

5 Prerequisites

Mention all the prerequisites for proceeding with automation.

5.1 Access to Systems

To perform automation, a bot would need access to the following systems:

- Web Terminal Server
- Access to save files on the Terminal Server
- SMTP account details

5.2 Access Details

- Access to the Web Terminal Server

IP Address: 10.1.234.125

Username: Administrator

Password: *****

Retrieved from LDAP

- Access to save files on the Terminal Server

Send a request to servicedesk@example.com to seek administrator access to 10.1.234.125

Retrieved from LDAP

- SMTP account details

SMTP Server: smtp.example.com

Username: smtp.rpaupc@example.com

Password: 123@rpa\$d*

Retrieved from LDAP

6 Data Management

6.1 Input

What input will feed work into this solution?	SQL Server
Where will the work come from?	Data will be loaded into the candidate tables at 10.2.4.5.623 by the engineering team
What time and frequency will the work arrive? (e.g. once per day at 9am, every 2 hours)	9am, 12pm, 3pm Everyday
Is it possible that no work will arrive?	Yes
What should happen then?	Bot should not run.

6.2 Input Structure

How will the data be structured? Where relevant, provide an example of the input.

The following fields will be provided (actual header names):

- Request_Date
- Member_ID
- Title
- First_Name
- Last_Name
- Email
- Contact_Number
- Postcode

6.3 Identification

Can records be uniquely identified?	Yes
What field or combination of fields will be used as the identifier? Only non-sensitive data should be used as an identifier. Records can be uniquely identified using a combination of fields. Field1 + Field 2	
Is it possible that the solution could be supplied with duplicate cases?	Yes
Once detected, how should duplicates be dealt with?	Duplicates should not be processed.
Is it possible that a record can legitimately reappear at a later date?	Yes
How will a legitimate reoccurrence be distinguished from an unwanted duplicate? It will have a different request date and time.	

6.4 Output

How will exceptions be sent back to the Business?	Excel file created at the end of processing.
What will be the file structure or message format used for exceptions? Where relevant, provide an example of the required output. The exception file structure must mirror the input file structure	
When will they be sent?	At end of processing
Where will they be sent?	File to be saved to shared network drive //shareserver/operations/RPA/
Apart from exceptions, will the solution create any Management Information output?	Yes
What will be the file structure or message format used? Excel file:	
	<ul style="list-style-type: none"> Loaded - Time the record was loaded to the work queue Work Time - Time taken to work on the record Request Received - Date and time the quote was requested within the portal Completed - Date and time email sent

6.5 Output Structure

How will the data be structured? Where relevant, provide an example of the input.

The following fields will be provided (actual header names):

- Request_Date
- Member_ID
- Title
- First_Name
- Last_Name
- Email
- Contact_Number
- Postcode

6.6 Preservation

How long should input data be kept for?	30 days
How long should output data be kept for?	30 days

7 Business Continuity

7.1 Bot Unavailability

<p>If this solution became inoperable and the current DR strategy was unable to ensure availability how continuity should be achieved?</p> <p>After 12 hours of downtime of the bot, for whatever reason, the Operations Team will begin working manually until the robotic processes can be restored by the Process Administrators.</p>
<p>How would the Business like to be informed of bot unavailability?</p> <p>Send an email to service@example.com</p>
<p>What is the business effect of the process not running for one hour?</p> <p>No effect</p>
<p>What is the business effect of the process not running for four hours?</p> <p>No effect</p>

Client requirement for automation throughput
Response time, slow don't hammer

7.2 Excessive Workload

Is it possible that the solution could be overwhelmed by an excessive workload?	No
Is this solution required to detect such an event?	No
Quantify an overload threshold	1000
Is this solution required to respond to such an event?	No
How would this be achieved?	
How should the Business be informed?	

8 Control

8.1 Operating Hours

Will the solution run outside normal working hours?	No
What time will the solution start? Scheduler will start the process to coincide with the automatic input file creation. Files are created at 9am, 12pm and 3pm. Scheduler will start process at 9.15am, 12:15pm and 15:15pm.	
Will the solution work to a stop time?	No
What days of the week will the solution run?	7 days per week
Are there any days or times when the solution must not run?	No
Do we need to go through 2-Factor authentication to access client systems?	No

9 Execution

9.1 Restrictions

Are there any business thresholds that must be adhered to? E.g. payments below a certain value	No
What are they?	
Are there any time windows or periods when any of the target systems are unavailable?	No
List the systems and when they are unavailable.	

9.2 Alerts

Will the solution need to send out any alerts?	Yes	
What events should trigger an alert?		
Scenario	Method	Recipient(s)
Failure to create exception report	Email	service@example.com
Input file not available when process starts.	Email	service@example.com
Input folder not accessible	Email	service@example.com
Report folders (exception / MI) no accessible	Email	service@example.com
How will alerts be sent?		
Alerts should be sent from the following email id. notifications@example.com		
Who will receive alerts?		
RPA_Team@example.com support@example.com		

10 Exceptions / Alternate Paths

10.1 Business Exceptions

S.No.	Exception	Alternate Path
1	Due to lack of validation, account number can be less than 10 digits	Add 3 zeros before to the beginning
2	No data is available for a particular search	Save data with N/A in all fields
3	Form is not available for a search type	Skip step 3 and move to step 4
4	Form is not available for a search type	Skip step 3 and move to step 4
5	Form is not available for a search type	Skip step 3 and move to step 4
6	Form is not available for a search type	Skip step 3 and move to step 4

10.2 Technical Exceptions

S.No.	Exception	Alternate Path
1	Login failed	Try alternate credentials and shoot an email to service@example.com
2	Website is not available	Send an email to some.one@example.com
3	Website is not available	Send an email to some.one@example.com
4	Email bounced	Send an email to some.one@example.com
5	Website is not available	Send an email to some.one@example.com

11 Assumptions

11.1 Technical

- All the required data will be loaded into the candidate table by the engineering team
- Assumption 2
- Assumption 3

11.2 Business

- Sufficient Operations Team staff will be available to work exceptions, which are expected to represent 10% of the workload.

12 Out of Scope

12.1 Technical

- All the required data will be loaded into the candidate table by the engineering team
- Assumption 2
- Assumption 3

12.2 Business

- Sufficient Operations Team staff will be available to work exceptions, which are expected to represent 10% of the workload.