

blueprism[®]

Robotic Process Automation Software

<<client/customer>>

<project/process name>

PROCESS DEFINITION DOCUMENT

Version: #.#

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Revision History

Date	Revision	Author	Description

Reference Training

The following guidelines will help complete training for this delivery documentation.

Title	Description
Lifecycle Orientation	This is a Blue Prism portal page, providing a brief explanation of the Blue Prism Lifecycle Orientation and related documents. Blue Prism portal path: Home> Learning> Lifecycle Orientation
Delivery Roadmap	This document describes the end-to-end steps in creating and delivering a Blue Prism process solution. The key process phases are outlined from Initial Process Assessment through to Testing. Blue Prism portal path: Home> Documents
Lifecycle Orientation Sample Delivery Documents	All prescribed delivery documents are fully completed. These are referenced within the Delivery Roadmap and provide an example of the content and level of detail required. Blue Prism portal path: Home> Documents
Process Delivery Methodology	The Blue Prism Process Delivery Methodology is a proven means of delivering ongoing business benefit through process automation using a controlled and structured Automation Framework. Blue Prism portal path: Home> Documents
Blue Prism - Creating a Process Definition Document (PDD)	Creating the PDD is the most important task in the definition phase and this guide outlines how to do it correctly. Blue Prism portal path: Home> Documents

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RESTRICTED DISTRIBUTION

The information is standard Company Confidential but due to its sensitivity it has restricted distribution and viewing within the <client name>.

Document Version Control

Date Issued	Version	Description	Author

Contributors

The content of this document has been authored with the combined input of the following group of key individuals.

Name	Role	Area

Source Documents

Title	Author	Version	Date

Document Sign-off Requirements

The following table contains the people required to sign-off and/or review this document and those that require the document for information only.

Name	Department	Responsibility
		Sign Off
		Review
		Information

Document Classification

Classification	Company Confidential
Definition	Information is Group confidential and needs to be protected
Context	Where loss of information confidentiality would result in significant harm to the interests of the organisation, financial loss, embarrassment or loss of information

1. Introduction

The Process Definition Document (PDD) captures the flow of a business process to be developed within Blue Prism.

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

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

2. Overview

2.1. Manual Process Description

< A brief overview of the current manual process >

2.2. Target Systems

Name	Description

3. Impacted Business Areas

<detail the business areas that are impacted by the change. They may be the areas that work the manual process before automation, or the areas that will work the exceptions after automation or any other dependent area>

4. Process Diagram

<Detailed business process flow depicting each stage of the business process>

5. Process Details

< This section should contain a detailed explanation of the manual process.

Each stage on the diagram should have a separate detailed section below.

Preferably this should be at key stroke level so that this document can be used to configure the automated Blue Prism process.

Screenshots of the target systems at each stage highlighting the fields or buttons etc. that are to be used are also useful>

1.1.1. <Process stage 1>

1.1.2. <Process stage 2>

6. Exceptions

6.1. Business Exceptions

<detail the business exceptions expected. These may be due to parts of the process that are deemed out of scope or cases that require manual review.

Include estimated volumes per exception>