

<<client/customer>> <process name>

SOLUTION DESIGN DOCUMENT

**Version: #.#**



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 |
| Process Creation Guide | This guide describes how to create your Blue Prism process using the standard process template.  Blue Prism portal path: Home> Documents |
| Blue Prism - Solution Design Overview | This document sets out to explain the key principles central to designing scalable, efficient and robust solutions for unattended automation.  Blue Prism portal path: Home> Documents |
| Blue Prism - Development Best Practice | This guide describes the basic best practice that should be adopted during process and object development.  Blue Prism portal path: Home> Documents |
| Advanced Exception Handling Guide | This guide is intended to supplement the Blue Prism Foundation Training course and is aimed at students who have completed the course and are beginning to put their education into practice.  Blue Prism portal path: Home> Documents |
| Advanced Work Queues Guide | This document is a guide to using Work Queues within Blue Prism. During the Foundation Training course, you were taught that Work Queues provide the functionality to store, manage, share and report on process work. This guide will provide additional knowledge of Work Queue features not covered by the Foundation course.  Blue Prism portal path: Home> Documents |

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# Introduction

## Document References

<List the filename and locations of the supporting Process Definition Document (PDD) and the Functional Requirements Questionnaire (FRQ). Also list references to any other documentation that has influenced the design>

## Robotic Resource Requirement

<Estimate the number of Runtime Resources that the solution is expected to need? Include the maximum and minimum amount. Provide details of how the estimates were calculated.>

# Solution Overview

<Describe at a high level how the process will work. Include a flow diagram for completeness. Also include a list of target systems their operational hours and any scheduling requirements of the solution processes>

## Solution Diagram

<Illustrate the proposed solution and use more than one diagram if necessary. Label the steps using the same terminology as in the Solution Description below.>

## Solution Description

<Describe in more detail each part of the above solution diagram. Do not describe processing steps that are already captured in the PDD. >

### Step 1

### Step 2

# Object Model

## Object Model Diagram

<Diagram should show all Blue Prism processes, component objects and also any COM objects and external web services>

# Operational Control and Alerting

## Scheduling and Starting

<Describe here how the process solution will be triggered to start>

## Alerting

<Describe here any alerts that are to be sent by the process solution>

|  |  |  |
| --- | --- | --- |
| Scenario | Method | Recipient(s) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Data Security and Credentials

## Data Storage

<Outline where data outside of Blue Prism Work Queues and target systems will be stored. E.g. data files, databases. >

## Data Privacy

<Describe how data will be kept private in the solution. What work queue data will be visible in Control Room? What logging level will be employed and how will the exposure of sensitive data to logs be prevented?>

## Data Preservation

<Describe how long all data in the solution will be stored for and how it will be purged>

## Credentials

<Describe which Windows domain and application credentials will be used and if and how they will be maintained by the robot>

# Assumptions

## Technical

<Describe any technical assumptions, e.g. the resource PC has a mapped network drive etc>

## Business

<Describe any business process related assumptions, e.g. incoming spreadsheet has fixed format etc>