

<<client/customer>> <process name>

PROCESS DESIGN INSTRUCTIONS

**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> University |
| 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 - 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

This document describes in detail the Blue Prism processes, components, business objects, work queues and credentials used to support the Blue Prism solution. The document is intended for those developing and supporting the Blue Prism solution. It is a dynamic document that will continually be revised as changes are applied. Its accuracy is essential if different personnel are to successfully support the process.

# Process Diagram

*<Provide process diagram(s) to illustrate the high level process flow.>*

# Process Description

<Describe in more detail the steps that the process will take. For each separate flow diagram displayed in section 2 provide a section here>

## <Process Flow 1>

### <key process stage>

<Detail any important information about the stages within the process. Reference where Blue Prism components and objects are called and what data is passed in as an input and received as an output.>

# Data

## Work Queues

|  |  |  |
| --- | --- | --- |
| Work Queue Name | Key Name | Attempts |
| *Queue name goes here (where possible use the Blue Prism process name as the queue name)* | *Data item to be used as the key* | *Number defined* |

<list the each element of case data that will be stored>

## Environment Variables

<detail any environment variables used in the solution>

|  |  |
| --- | --- |
| Environment Variable | Description |
| *Variable Name (if the variable is process specific put the process name at the start of the variable name)* | *Description* |

## Session Variables

<detail any variables which may be viewed and optionally set within Control Room at runtime>

|  |  |
| --- | --- |
| Session Variable | Description |
| *Variable Name* | *Description* |

## Environment Locks

<detail any environment locks used in the solution>

|  |  |
| --- | --- |
| Environment Lock | Description |
| *Lock Name* | *Description* |

# Referrals and Exceptions

## Business Exceptions

<List the business scenarios and cases that are out of scope of the automation i.e. the cases that cannot or will not be worked and will be passed to the business for manual review>

## Known System Exceptions

<A system exception is an out of scope system response in the target systems. In general system exceptions tend to be unwanted system pop-ups, systems freezing or system crashes>

## Unknown System Exceptions

The Blue Prism process takes a planned route through a sequence of system screens. At each interaction it will check that the expected response is exhibited both beforehand and afterwards. Known system exceptions, outlined above, fall into the category of expected responses; the unexpected responses will be those that have not been documented. All such unexpected responses will be classed as System Exceptions.

< Upon encountering a System Exception, the Blue Prism process will attempt to back out of any screens it has opened in order to return to [a known starting point]. From here it will be able to move on to the next work case. This approach is an optimistic tactic rather than a universal solution, since the process is being asked to deal with an unknown situation.

Where the “backing out” procedure fails, the target system will be restarted. If the restart fails then the process will stop and an alert will be sent out. The Process Administrator will be expected to check that all is well before restarting the process. >