



Spixii Conversational Process Automation for Banking Loan applications

Installation and Configuration Manual

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1. Introduction

Spixii Conversational Process Automation (CPA) platform creates customer-facing interfaces that converse with the applicant to capture all the necessary information regarding a loan application. The integration with Blue Prism RPA platform is designed to transmit the loan data and process it efficiently while leveraging the capabilities of a Blue Prism Digital Worker.

2. Solution overview

The integration uses one exposed visual business object (VBO) and one process.

The **Spixii - Import loan data** VBO is used to expose a web service with which the Spixii chatbot will be connected to in order to send the loan data.

That data will be entered into a Blue Prism work queue to be processed by the **Spixii - process loans** process. This process creates a new record into a csv file named **loans.csv**. The process also creates a folder with the **company number** as a name to store the documents uploaded by the user during the conversation.

The solution has the following components:

2.1. Spixii - Process loan

- Process all the loans in the work queue.
- Adds a new record with the loan data in a csv file
- Creates a folder with the name of the company number
- Downloads the documents uploaded by the user into the folder

2.2. Spixii - Import loan data VBO

- Exposes a web service to send the loan data
- Adds the loan data into the work queue to be processed

2.3. Environment variables

- Spixii - Loan Data Path: the path of the csv file to store the loan data
- Spixii - Loan Documents Directory: the directory to create the folders that contain the uploaded documents

2.4. Spixii - LoansQueue work queue

The queue holding the loans to be processed

3. Connection setup

To integrate with Spixii Conversational Process Automation for Banking Loan applications solution, it is required for us to set up a connection to the exposed Blue Prism Digital Worker on port 8181.

You can contact Spixii to discuss various integration options depending on your Blue Prism installation by using a Spixii - Blue Prism connector.

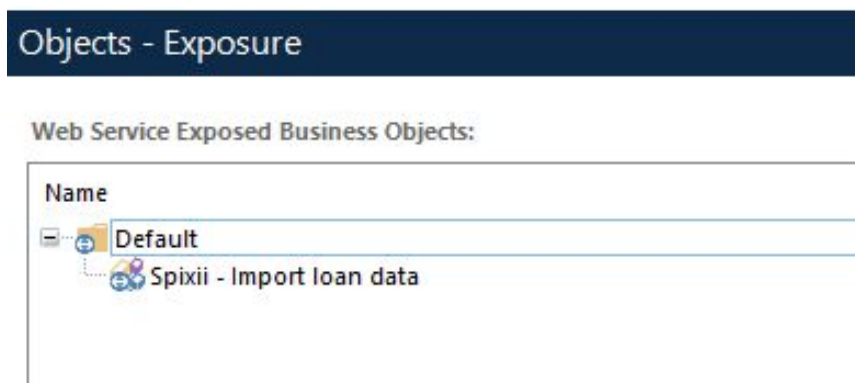
4. Blue Prism setup

4.1. Prerequisites VBOs

Import Utility - File Management VBO

4.2. Installation steps

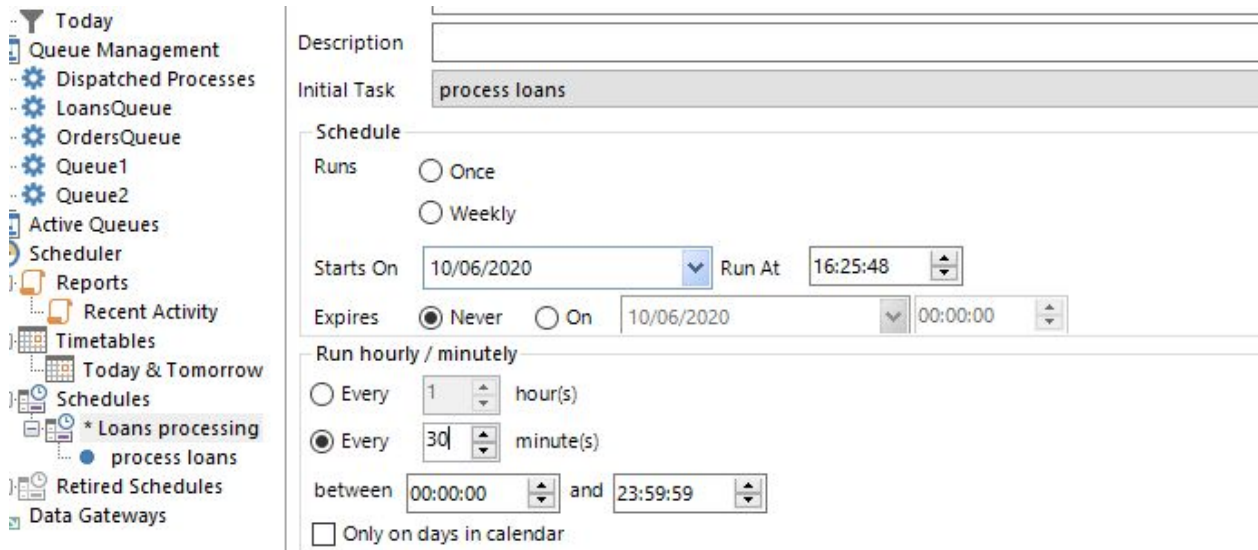
Expose the **Spixii - Import loan data** VBO



- Make sure the following environment variables are set to your desired values
 - Spixii - Loan Data Path
 - Spixii - Loan Documents Directory

Spixii - Loan Data Path	Text	The path where all the loan data will b...	C:\BluePrism\Training\Applications\Windows\loans.csv
Spixii - Loan Documents Directory	Text	The directory where loan documents...	C:\BluePrism\Training\Applications\Windows\

- Set Process Loans to be run periodically



The screenshot shows the SPIXII Scheduler interface. On the left is a navigation tree with the following items: Today, Queue Management, Dispatched Processes, LoansQueue, OrdersQueue, Queue1, Queue2, Active Queues, Scheduler, Reports, Recent Activity, Timetables, Today & Tomorrow, Schedules, * Loans processing (highlighted), process loans (highlighted), Retired Schedules, and Data Gateways. The main panel displays the configuration for the 'process loans' task. The 'Initial Task' is set to 'process loans'. Under the 'Schedule' section, 'Runs' is set to 'Weekly'. 'Starts On' is '10/06/2020' and 'Run At' is '16:25:48'. 'Expires' is set to 'Never'. Under 'Run hourly / minutely', 'Every 30 minute(s)' is selected. The 'between' field is set to '00:00:00' and 'and' is set to '23:59:59'. The 'Only on days in calendar' checkbox is unchecked.

5. Spixii - Import loan data VBO - Usage

Below are the available actions for the Import loan data VBO and the details of the inputs/outputs that are available

5.1. Addloantoworkqueue

This is the only available action and is used to submit a loan into the work queue for processing

5.1.1. Inputs

Parameter	Type	Description
CompanyNumber	Text	The number that the company is registered
CompanyName	Number	The name if the company
BusinessType	Text	The type of business
BusinessTin	Text	The business TIN number
BusinessAddress	Text	The address of the business
AnnualTurnover	Number	The annual turnover of the business
PrimaryContactName	Text	The name of the primary contact
PrimaryContactSurname	Text	The surname of the primary contact
PrimaryContactEmailAddress	Text	The email address of the primary contact
PrimaryContactBusinessPhone	Number	The business phone of the primary contact
LoanType	Text	The type of the loan
FundingReason	Text	The reason for funding
PaymentsFrequency	Text	The payments frequency
RequestedLoanAmount	Number	The requested loan amount
OwnerName	Text	The name of the owner
OwnerSurname	Text	The surname of the owner
OwnerTitle	Text	The title of the owner
OwnerPercentage	Text	The owner percentage
OwnerTin	Text	The TIN number of the owner
OwnerAddress	Text	The address of the owner
IsFranchise	Text	If the business is franchise
AssetsAndLiabilitiesPDF	Text	The url of the first pdf uploaded by the user
CashFlowsPDF	Text	The url of the second pdf uploaded by the user
ProfitLossPDF	Text	The url of the third url uploaded by the user

Note that the input fields can be changed according to the bank's loan application process

5.1.2. Outputs

Parameter	Type	Description
Output	Text	The success message if the loan was successfully added in the work queue

Customers of the financial institutions will benefit from an efficient and guided digital experience all along the bank loan application process. Other Spixii solutions recorded a Transactional Net Promoter Score (TNPS) averaging above 70%, which is considered world-class.

Operational efficiency of core customer-facing processes will be enhanced:



Scalable and 24/7/365 accessible solution (40%+ chatbot interactions are outside working hours)



Increase the number of applications submitted at the same time and improve the response rate



Transform data collected by the solution in actionable insights using the Spixii Advanced Analytics