



TRAVEL TRACKER

PROJECT DEFINITION DOCUMENT

PREPARED BY
FIREFLIES

ISSUE DATE
05 Aug 2025



Issued By	Fireflies
Peer-Reviewed By	Fireflies, James Barton Jr Sanidad
Date of Approval	August 5, 2025

TABLE OF CONTENTS

Purpose	4
Objectives	4
Document Version Control	4
1 Review and approval	5
2 References	5
3 Project Purpose	6
4 Business Process	6
Overview	6
Applications Used	7
4.1 Business Process #1 – As Is Process	8
● Diagram.....	8
● Architectural Structure of Master Project.....	8
● Step Description.....	9
● Detail As-Is Process Actions.....	11
● Exception Scenarios.....	14
4.2 Business Process #2 – To Be Functional Requirements	15
● To-Be Process Flow.....	16
● Solution Design Diagram.....	16
● Step Description.....	20
● Out of Scope for Automation.....	24
● Enhancements.....	26
5 Business Rules	27
6 Non-Functional Requirements	27

7 Requirements Modifications.....	28
8 Assumptions / Risks.....	29
9 Appendix A – Definitions and Acronyms.....	30
10 Appendix B – Sample Summary Report Output File.....	30

PURPOSE

The Process Design Document (PDD) outlines the business process chosen for automation.

The document describes the sequence of steps performed as part of the business process, the conditions and rules of the process before automation (AS IS) as well as the new sequence of steps that the process will follow as a result of preparation for automation (TO BE).

The PDD is a communication document between:

- The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
- The RPA Business Analyst and the Development team (represented by the BA Developer and RPA Developer Team). The goal is to ensure that the process is documented appropriately and to a sufficient level of detail so that the Development Team can then create the solution based on the PDD content.

OBJECTIVES

The business objectives and benefits expected by the Business Process Owner after automation of the Travel Tracker process are:

- Significant reduction in time required to manage and track employee travel records.
- Save time in encoding, validating, and retrieving travel information.
- Increase processing speed for travel request approvals and updates.
- Better data visibility and easier tracking and reporting of travel-related metrics.
- Ensure data accuracy, consistency, and security.

DOCUMENT VERSION CONTROL

Date Issued	Version	Description	Author
30/07/2025	V0.1	Draft	Fireflies
04/08/2025	V0.2	Initial Version	Fireflies
05/08/2025	V1	Final Version	Fireflies

1. REVIEW AND APPROVAL

Name	Role	Area/Team	Responsibility
Cristelle May Sandoval	Travel Tracker Automation Lead	RPA Team	Process Design Document (PDD) Review and Assessment
James S. Barton	Solutions Architect	RPA Team	Automation Solution Design & Infrastructure Preparation
Elaine Negrite	Product Owner	HR Team	Process Design Document (PDD) Review and Assessment
Katherine Roldan	Product Owner	HR Team	Process Design Document (PDD) Review and Assessment
Jared Ferdinand S. Posada	Developer/Tester/BA	Leader	Solution Review and Development
Maria Dianne Alexa R. Allauigan	BA/Tester/Documentation	Documentation Team	Document Creation and Testing
Đặng Nguyễn Gia Bảo	Developer/Tester	Development Team	Solution Review and Development
Nguyễn Thu Ngân	Developer/Tester	Development Team	Solution Review and Development
Vo Hoang Lam	Developer/Tester	Development Team	Solution Review and Development

2. REFERENCES

Document Type	Document Name in Shared Directory/Shared Drive
Project Storage References	UIPATH_Project_Storage

3. PROJECT PURPOSE

The Travel Tracker Automation team has commenced an automation initiative to streamline the process of managing and monitoring employee travel records, aiming to reduce manual work, improve efficiency, and enhance data security.

The existing process is a time-consuming activity carried out manually which may introduce inefficiencies and errors. The identified pain points are as follows:

- Collect travel details from travel request forms along with multiple supporting requirements needed for travel application.
- Encode and update travel data manually into Excel spreadsheets.
- Generate reports manually for tracking travel frequency, destinations, and associated costs.
- Difficulty in accessing updated travel data across departments in real-time.
- Inconsistent file storage practices leading to data security risks and difficulty in file retrieval.

With these identified pain points, the Travel Tracker Automation team has recognized this as a prime candidate for automation.

The purpose of this automation project is the full automation of predefined processes, ensuring improved accuracy, centralized tracking, timely reporting of travel-related information, and secure storage of all files and requirements in a single, protected repository accessible to authorized users.

4. BUSINESS PROCESS

OVERVIEW

The Travel Tracker Automation project focuses on automating the end-to-end process of handling employee travel requests and tracking. This includes collecting information from travel request forms, validating required documents, encoding data into tracking systems, and generating reports.

Item	Description/Answer
Process Full Name	Travel Tracker Automation
Process Area	N/A
Department	Human Resources
Short Description	The Travel Tracker Automation team is automating employee travel record management

	to improve efficiency, accuracy, and data security by eliminating manual tasks, ensuring centralized tracking, and secure data storage.
Role(s) Required in Applications to Perform the Process	HR Manager and Bot System Administrator.
Process Schedule and Frequency	Manually triggered by the user.
Process Execution Time	1 to 5 minutes response time.
Peak Period(s)	N/A
Peak Volume Approximation Increase	N/A
Number of People Performing the Process	1
Expected Volume Increase During the Next Period	N/A
Percentage of Unhandled Exceptions	N/A
Input Data Description	Travel Request Form and Employee personal information related to the trip.
Output Data Description	Send an email including the status and a summarized file for the employees, and update the monitoring sheet.

APPLICATIONS USED

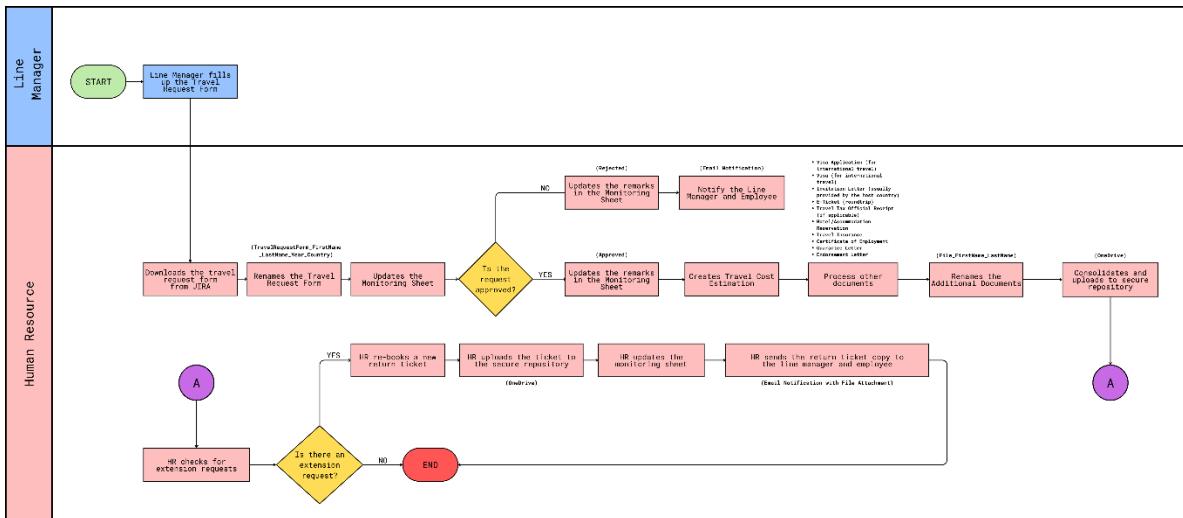
Application Name	Environment/Access Method	Comments
UiPath	Developing/Testing	Used in development environments to design, build, and test automated workflows using bots.
Orchestrator App	Developing/Testing/Production	Used to securely upload, organize, and manage related files, ensuring reliable and efficient data storage.
Google Mail	Production	Used to send and receive automated email notifications,

		managing travel request communications within the automation workflow.
Microsoft Excel	Production	Used to import, process, and export travel request data as part of automated workflows.
OneDrive – File Explorer	Production	Used to securely upload and manage files locally, enabling efficient and organized data storage.

4.1. BUSINESS PROCESS #1 - AS IS PROCESS

This section contains various process maps that contribute to a better understanding of how the process is performed pre-automation. This information is crucial for identifying inefficiencies, bottlenecks, and areas for improvement that can be addressed through automation.

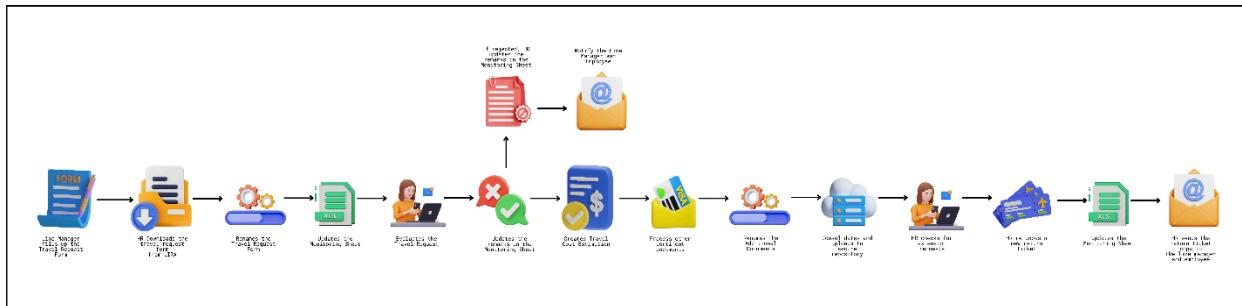
- **Diagram**



- **Architectural Structure of Master Project**

The architectural structure of the Master Project is designed to ensure robustness, scalability, and maintainability. It is composed of several interconnected components, each serving a specific purpose to support the overall objectives of the project.

This structure ensures that the project can evolve to meet changing requirements and technological advancements.



- Step Description

Step	Description
1. Line Manager will fill out the Travel Request Form	The process begins when the Line Manager completes the official travel request form.
2. Download the Travel Request Form from JIRA	HR retrieves the submitted form from the JIRA system.
3. Rename the Travel Request Form	For standardization, HR renames the document using a specific naming format.
4. Update the Monitoring Sheet	HR inputs the travel request data into the Monitoring Sheet. This enables tracking and visibility of the travel request's status.
5. Approval Check – Is the request approved?	HR evaluates whether the request has been approved. This determines the next course of action.
6. a. Update Remarks in the Monitoring Sheet (If Not Approved)	a. HR notes the rejection in the Monitoring Sheet. b. An email notification is sent to inform about the disapproval.
7. a. Update Remarks in the Monitoring Sheet (If Approved)	a. HR notes the approval in the Monitoring Sheet.

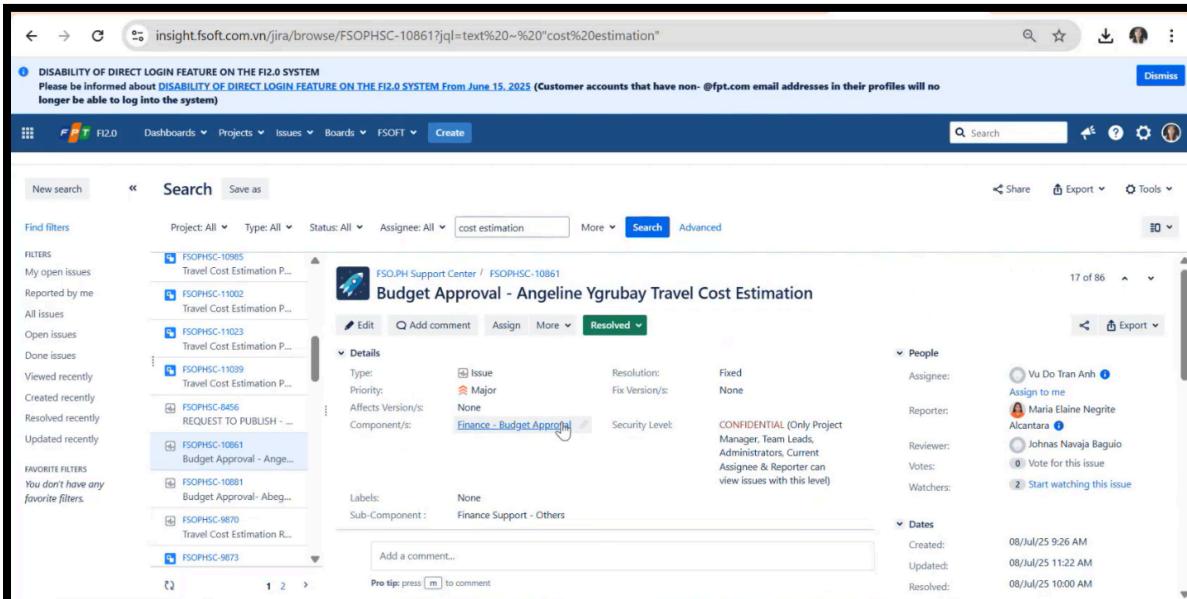
	b. Create Travel Cost Estimation	b. HR prepares a travel cost estimation based on the travel request.
	c. Process Other Documents	c. HR handles any other necessary documents.
	d. Rename the Additional Documents	d. HR renames documents like for consistency.
8.	Consolidate and Upload to Shared Repository	HR compiles all documents and uploads them to a secure repository.
9.	Send Return Ticket Copy to Line Manager and Employee	HR sends a copy of the return ticket and notifies both the Line Manager and Employee.
10.	Update the Monitoring Sheet (Return Ticket)	HR updates the Monitoring Sheet with return travel details.
11.	Upload Ticket to Shared Repository	The return ticket is uploaded to the central repository for secure access.
12.	Check for Extension Requests	HR verifies if there is a request to extend the travel.
13.	a. Rebook a New Return Ticket (If Extension Requested) b. End Process (If No Extension)	a. HR coordinates the rebooking of the return trip. b. If no extension is needed, the process concludes.

- Detailed As-Is Process Actions
 - The Line Manager or requestor completes the travel request form.

TRAVEL INFORMATION	
Type Of Travel	Domestic
If International Travel, is VISA Required?	No
If with Visa requirement, indicate details below:	
Country of Origin/Province/ Port of Exit	
Destination Country / Province	
Airport / Port Of Entry	
Start Date Of Travel	30-Jul-25
End Date Of Travel	5-Aug-25
Total Days Of Travel	5 Working Days
Nature of the Travel	STA - SHORT TERM ASSIGNMENT / BUSINESS TRIP (less than 1 month)
Purpose of the Travel	Training For Skills Enhancement (Mandatory MOA)

REQUESTING MANAGER / DEPARTMENT DETAILS	
Requesting Manager	Laila
Offshore BUL / Sponsor Manager	
Offshore Department	
Project Manager	Laila
Project Code / Department To Charge The Cost Of The Trip	U-Phi/EPL/250109/004
Indicate % of Cost Sharing, If Applicable	
Onshore Code (For Pass Thru Arrangements)	
Office Address While On Business Trip	Unilever BGC Office
Housing / Accommodation / Hotel Requirements	Yes - Check in July 29 to Aug 1 and Aug 3 to 5
Should Employee Bring Business PC / Laptop?	YES
If Yes, with specific requirements, indicate below:	Company issued laptop
Other Relevant Information	MOA not applicable

- The HR downloads the travel request file from JIRA.



The screenshot shows a JIRA issue page for a travel cost estimation. The issue key is FSOPHSC-10861. The title is "Budget Approval - Angeline Ygrubay Travel Cost Estimation". The status is "Resolved". The issue is assigned to Vu Do Tran Anh and reported by Maria Elaine Negrite Alcantara. The priority is Major. The component is Finance - Budget Approval. The security level is CONFIDENTIAL. The labels are None. The sub-component is Finance Support - Others. The issue was created on 08/Jul/25 9:26 AM, updated on 08/Jul/25 11:22 AM, and resolved on 08/Jul/25 10:00 AM.

- The HR updates the Travel Monitoring Sheet

AutoSave (Off) FPHI- Employee Travel Monitoring_S... • Saved to this PC ▾ Search

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat

Comments Share

Clipboard Font Alignment Number Styles Cells Editing Add-ins Analyze Data Create a PDF Adobe Ac...

A1 A B C D E F G H I J K L

Travel Monitoring

YEAR	NAME	PROJECT	LINE MANAGER	POSITION	CLASSIFICATION OF TRAVEL	TYPE OF TRAVEL	DEPARTURE DATE	RETURN DATE	EXTENTION RETURN	TRAVEL FROM	TRAVEL TO
2024	Djuan Cris C. Dela Cruz	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	August 4, 2024	August 11, 2024		Manila, Philippines	Hanoi, Vietnam
2024	Mark Cardo A. Dalisay	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	August 17, 2024	August 31, 2024		Manila, Philippines	Hanoi, Vietnam
2024	Aldrin M. Lansan	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	April 20, 2024	July 15, 2024	October 11, 2024	Manila, Philippines	Ho Chi Minh, Vietnam
2024	Kenneth J. Silbayan	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	April 20, 2024	July 15, 2024	October 11, 2024	Manila, Philippines	Ho Chi Minh, Vietnam
2024	Alejandro Karibayan	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	August 4, 2024	August 31, 2024	December 21, 2024	Manila, Philippines	Ho Chi Minh, Vietnam
2024	Mae C. Sindrum	BOM	Virgilio Sando	Line Manager	International	Short Term Assignment	September 9, 2024	September 15, 2024		Cebu City, Philippines	Atlanta, USA
2024	Jacky J. Bautista	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	October 12, 2024	December 15, 2024		Manila, Philippines	Ho Chi Minh, Vietnam
2024	Orizza Diane S. Soleded	RPA	Donato Aras	RPA Developer	International	Short Term Assignment	October 12, 2024	December 22, 2024		Cebu City, Philippines	New York, USA
2024	Mark Anthony A. Chavez	ULP	Laila Lima	End User Support Specialist	Domestic	Short Term Assignment	October 9, 2024	October 26, 2024		Manila, Philippines	Tacloban City, Philippines
2024	Mary Ann L. Merilla	ULP	Laila Lima	End User Customer Support Specialist	Domestic	Short Term Assignment	October 9, 2024	October 26, 2024		Manila, Philippines	Tacloban City, Philippines
2024	Jose E. David	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	November 2, 2024	January 9, 2025		Cebu City, Philippines	Hanoi, Vietnam
2024	Toledo, Eduard	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	November 2, 2024	January 29, 2025		Cebu City, Philippines	Hanoi, Vietnam
2024	Semenio, Bellinda	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	November 16, 2024	February 9, 2025		Manila, Philippines	Ho Chi Minh, Vietnam
2024	Privito, Ern	FPHI.FA	Juan Antonio	Software Development Engineer	International	Short Term Assignment	December 8, 2024	December 21, 2024		Cebu City, Philippines	Ho Chi Minh, Vietnam

- The HR creates a travel cost estimation for the requested travel.

AutoSave (Off) Travel Cost Estim... • Saved to this PC ▾ Search

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat

Comments Share

Clipboard Font Alignment Number Styles Cells Editing Add-ins Analyze Data Create a PDF Adobe Ac...

G21 A B C D E F G H


Fpt Software

TRAVEL COST ESTIMATION FORM

Please fill-out the cells in white.

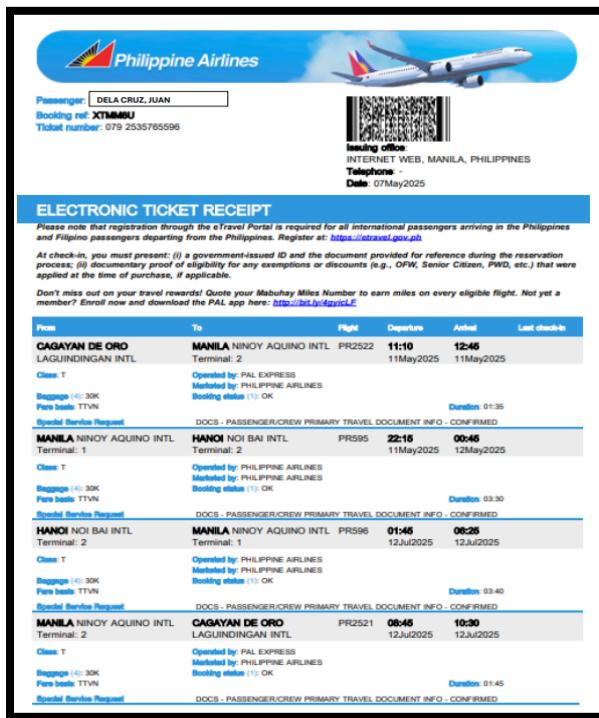
Requestor:					
Employee to travel:					
Nature of Trip:					
Travel Type:					
Destination Country / Route:	From (Place of Origin):	To (Place of Destination):			
Travel Period (Date):	From:	To:			
Conversion Rate (Buy):	0				
Conversion Rate Of Usd To Php (Use Recent From BSP)	0				
Conversion Rate Of Destination Country Currency to USD	0				
Standard Per diem in destination country (USD/day)	#N/A				
Standard Accommodation allowance in destination country (USD/day)	#N/A				
Standard Laundry allowance in destination country (USD/7days)	0				
ITEM	UNIT PRICE (PHP)	QTY	PHP	USD	REMARKS
Visa Application Fee	-	-	-	#DIV/0!	
*contingent to destination country					
Roundtrip Airline Ticket	-	-	-	#DIV/0!	

Travel Cost Est Standard +

Ready Accessibility: Investigate 70%

- The HR processes the required documents for their travel request, which vary depending on whether the travel is local or international.

Sample documents:



The screenshot shows an electronic ticket receipt from Philippine Airlines. At the top, it displays the airline's logo and a QR code. Below that, it shows the passenger's name (DELA CRUZ, JUAN), booking ref (XTMM00), and ticket number (079 2535765596). It also indicates the issuing office (INTERNET WEB, MANILA, PHILIPPINES) and the date (07May2025).

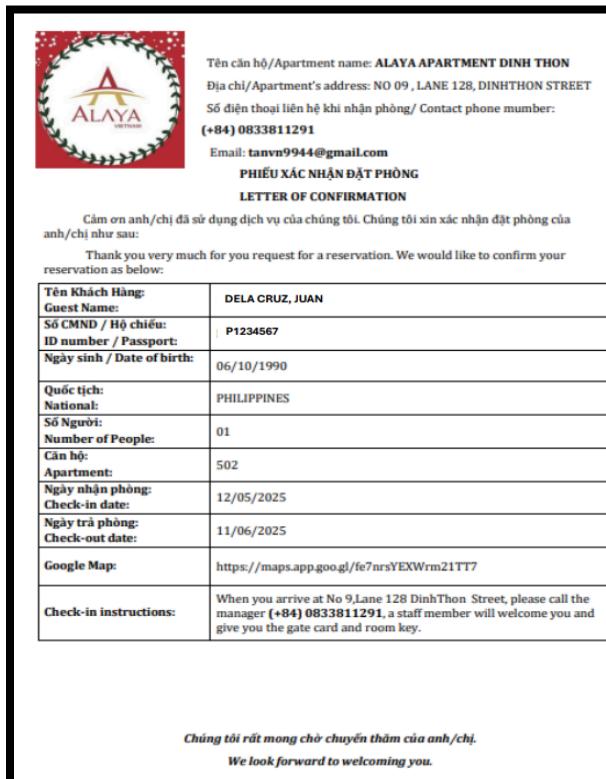
ELECTRONIC TICKET RECEIPT

Please note that registration through the eTravel Portal is required for all international passengers arriving in the Philippines and Filipino passengers departing from the Philippines. Register at: <https://travel.gov.ph>

At check-in, you must present: (i) a government-issued ID and the document provided for reference during the reservation process; (ii) documentary proof of eligibility for any exemptions or discounts (e.g., OFW, Senior Citizen, PWD, etc.) that were applied at the time of purchase, if applicable.

Don't miss out on our travel rewards! Quote your Mabuhay Miles Number to earn miles on every eligible flight. Not yet a member? Enroll now and download the PAL app here: <http://bit.ly/AGPALapp>

From	To	Flight	Departure	Arrival	Last check-in
CAGAYAN DE ORO LAGUINDINGAN INTL	MANILA NINOC AQUINO INTL PR2522	11:10	12:46		
Class: T	Terminal: 2		11May2025	11May2025	
Baggage (40): 30K Pax seats: TTWN	Operated by: PAL EXPRESS Marketed by: PHILIPPINE AIRLINES Booking status: TX OK				Duration: 01:35
Special Service Request:	DOCS - PASSENGER/CREW PRIMARY TRAVEL DOCUMENT INFO - CONFIRMED				
MANILA NINOC AQUINO INTL Terminal: 1	HANOI NOI BAI INTL PR595	22:16	00:46		
Class: T	Terminal: 2		11May2025	12May2025	
Baggage (40): 30K Pax seats: TTWN	Operated by: PHILIPPINE AIRLINES Marketed by: PHILIPPINE AIRLINES Booking status: TX OK				Duration: 03:30
Special Service Request:	DOCS - PASSENGER/CREW PRIMARY TRAVEL DOCUMENT INFO - CONFIRMED				
MANILA NINOC AQUINO INTL Terminal: 2	MANILA NINOC AQUINO INTL PR596	01:46	06:26		
Class: T	Terminal: 1		12Jul2025	12Jul2025	
Baggage (40): 30K Pax seats: TTWN	Operated by: PHILIPPINE AIRLINES Marketed by: PHILIPPINE AIRLINES Booking status: TX OK				Duration: 03:40
Special Service Request:	DOCS - PASSENGER/CREW PRIMARY TRAVEL DOCUMENT INFO - CONFIRMED				
MANILA NINOC AQUINO INTL Terminal: 2	CAGAYAN DE ORO INTL LAGUINDINGAN INTL PR2521	08:45	10:30		
Class: T	Terminal: 1		12Jul2025	12Jul2025	
Baggage (40): 30K Pax seats: TTWN	Operated by: PAL EXPRESS Marketed by: PHILIPPINE AIRLINES Booking status: TX OK				Duration: 01:45
Special Service Request:	DOCS - PASSENGER/CREW PRIMARY TRAVEL DOCUMENT INFO - CONFIRMED				



The screenshot shows a confirmation letter for a room reservation at ALAYA APARTMENT DINH THON. It features the apartment's logo and address (NO 09, LANE 128, DINHTHON STREET).

Tên căn hộ/Apartment name: ALAYA APARTMENT DINH THON
Địa chỉ/Apartment's address: NO 09 , LANE 128, DINHTHON STREET
Số điện thoại liên hệ khi nhận phòng/ Contact phone number:
(+84) 0833811291
Email: tanvn9944@gmail.com

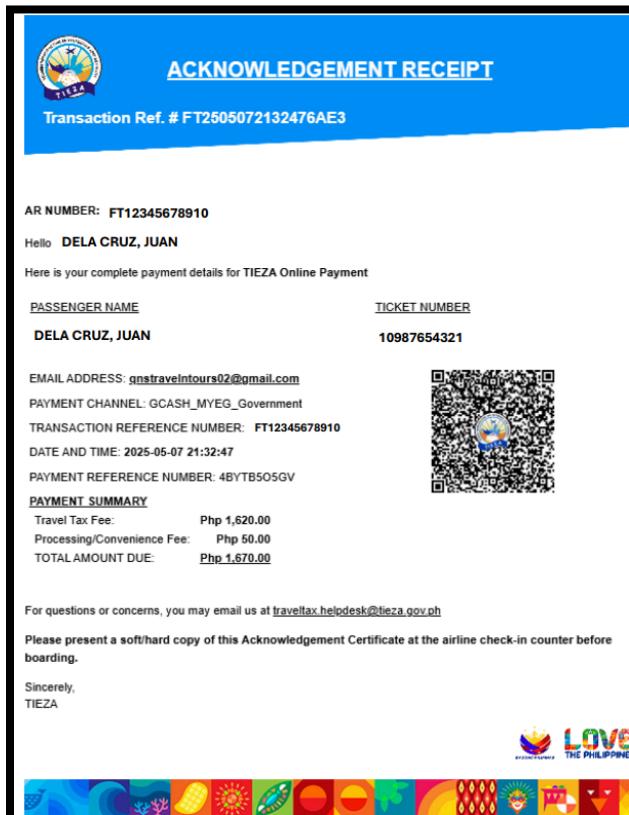
PHIẾU XÁC NHẬN ĐẶT PHÒNG
LETTER OF CONFIRMATION

Cám ơn anh/chị đã sử dụng dịch vụ của chúng tôi. Chúng tôi xin xác nhận đặt phòng của anh/chị như sau:

Thank you very much for your request for a reservation. We would like to confirm your reservation as below:

Tên Khách Hàng: Guest Name:	DELA CRUZ, JUAN
Số CMND / Hộ chiếu: ID number / Passport:	P1234567
Ngày sinh / Date of birth:	06/10/1990
Nationality: National:	PHILIPPINES
Số Người: Number of People:	01
Căn hộ: Apartment:	502
Ngày nhận phòng: Check-in date:	12/05/2025
Ngày trả phòng: Check-out date:	11/06/2025
Google Map:	https://maps.app.goo.gl/fe7nrsYEXWrm21TT7
Check-in instructions:	When you arrive at No 9,Lane 128 DinhThon Street, please call the manager (+84) 0833811291, a staff member will welcome you and give you the gate card and room key.

Chúng tôi rất mong chờ chuyến thăm của anh/chị.
We look forward to welcoming you.



- **Exception Scenarios**

Describe situations where the normal process flow is interrupted, requiring special handling or alternative actions to fix problems. These scenarios help identify and address common issues that can disrupt the usual workflow. They provide guidelines on what to do when things don't go as planned, ensuring that issues are resolved quickly and effectively. By understanding these exceptions, users and support teams can better manage unexpected situations and maintain smooth operations.

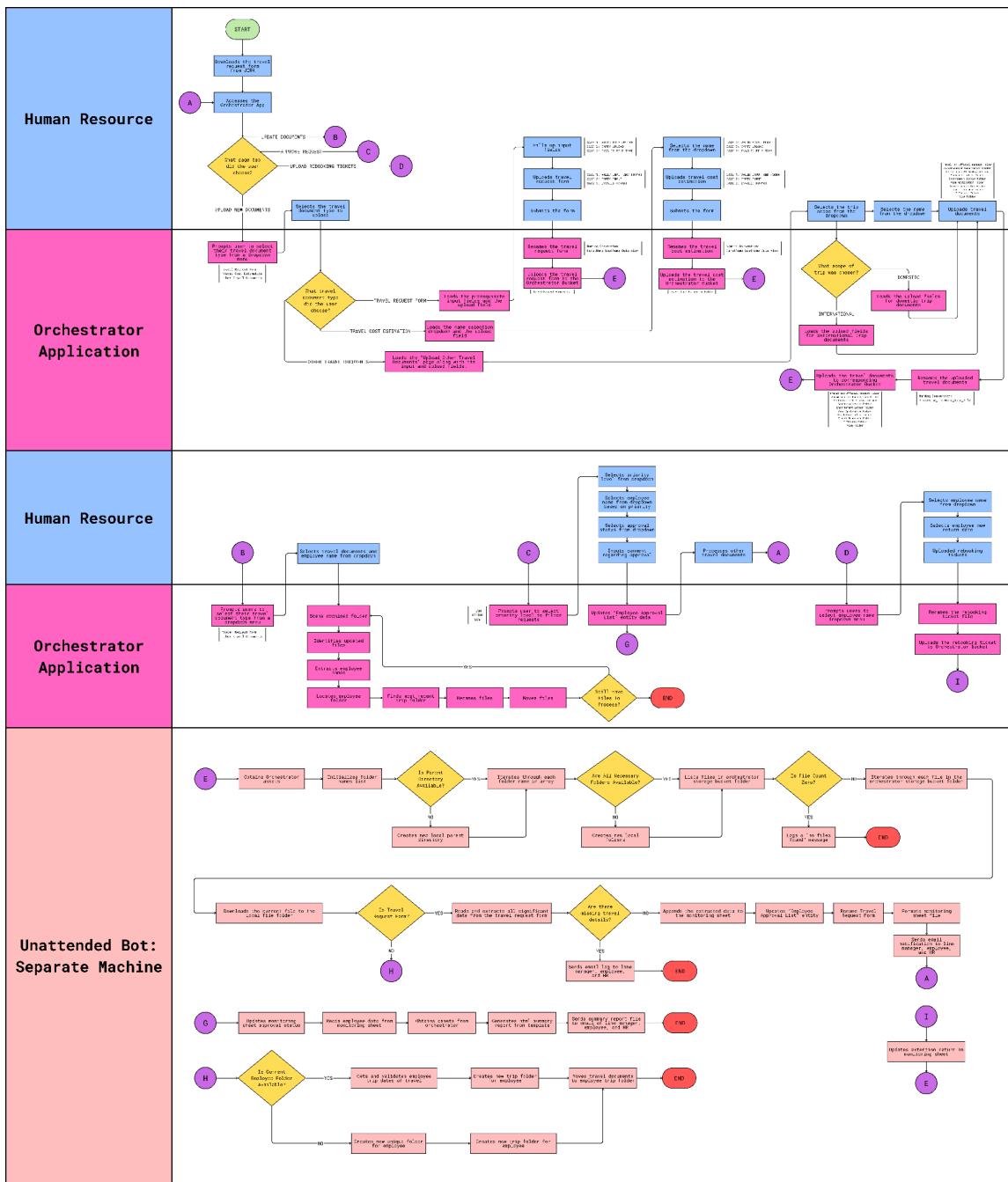
ID #	Name	Description
------	------	-------------

EE-1	Missing Travel Details	The travel request form is missing mandatory fields, requiring the requestor to provide complete information.
EE-2	Invalid Travel Date	The travel dates entered are invalid, triggering a validation error.
EE-3	Budget Exceeded	The requested travel expenses exceeded the allocated budget, requiring additional approval.
EE-4	Document Upload Failure	Required travel documents fail to upload successfully or are in an unsupported file format.
EE-5	Approval Not Received	The travel request is pending due to lack of response from the approving personnel within the required timeframe, requiring follow-up.
EE-6	System Integration Error	The travel data could not be synchronized with the HR system due to a technical issue, requiring manual intervention.
EE-7	Duplicate Travel Request	The employee submitted the same travel request multiple times, resulting in duplicate entries that need to be reviewed and merged.
EE-8	Travel Policy Violation	The travel request does not comply with company travel policies (e.g., class of travel, advance booking requirements), requiring exception handling.
EE-9	File Not Found	The documents could not be found or retrieved from the storage location (e.g., OneDrive)

4.2. BUSINESS PROCESS #2 - TO BE FUNCTIONAL REQUIREMENTS

The To-Be diagram illustrates the desired future state of the process, highlighting improvements and optimizations. It outlines the ideal workflow, identifying changes needed to achieve enhanced efficiency and effectiveness. This diagram serves as a roadmap for process transformation and continuous improvement.

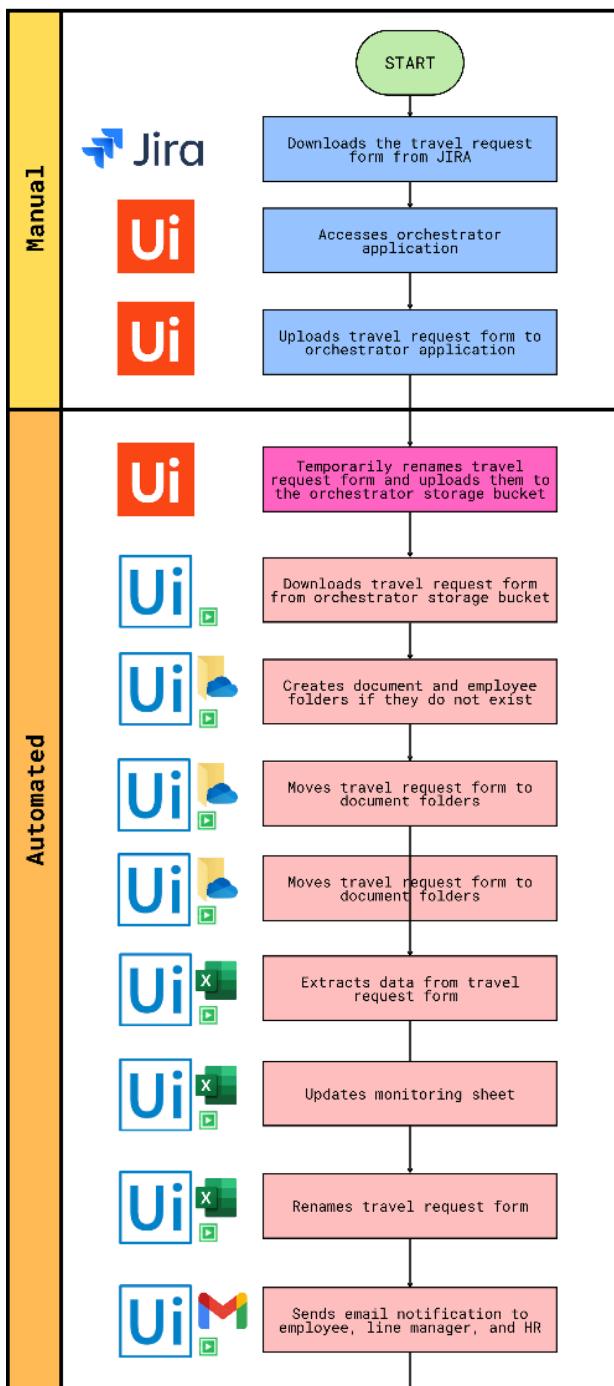
- To-Be Process Flow

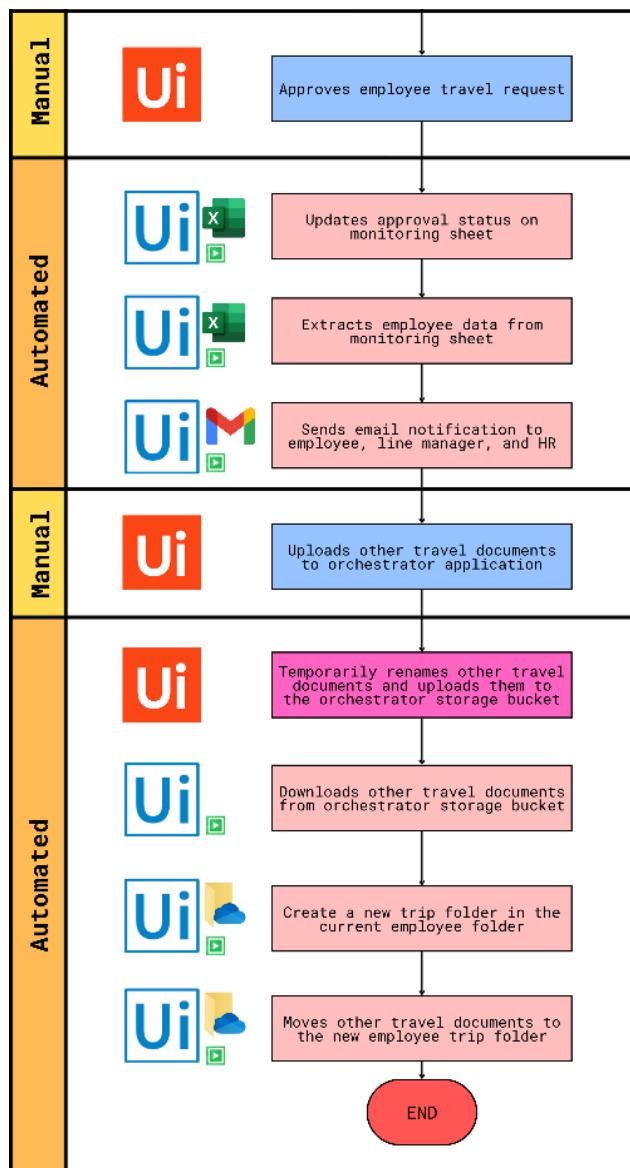


- Solution Design Diagram

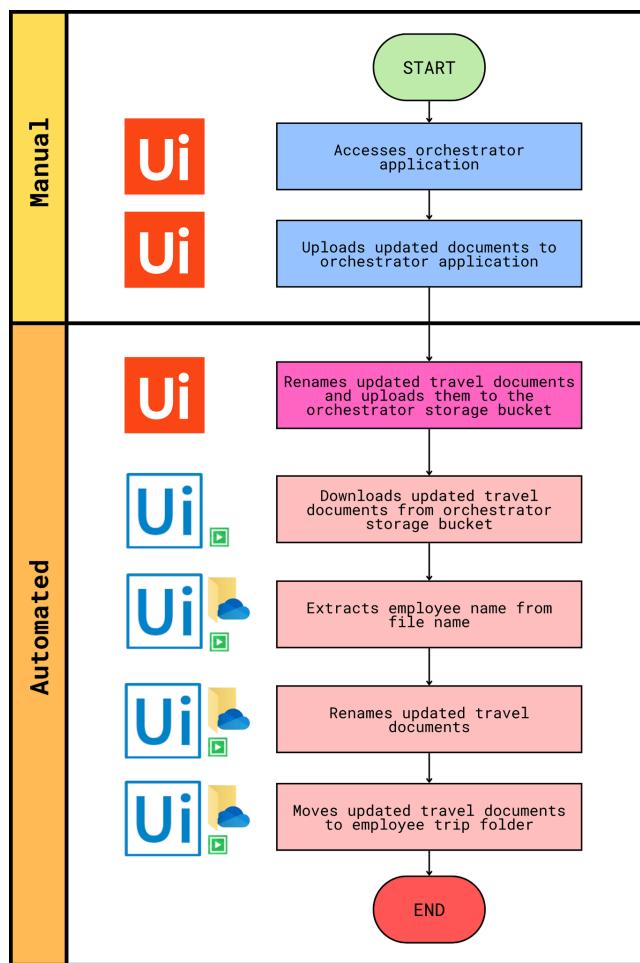
This solution design diagram illustrates how different parts of the system work together to achieve the desired outcome. It clearly outlines the process and data flow, making it easy to understand the overall system architecture and interactions.

Approval Process

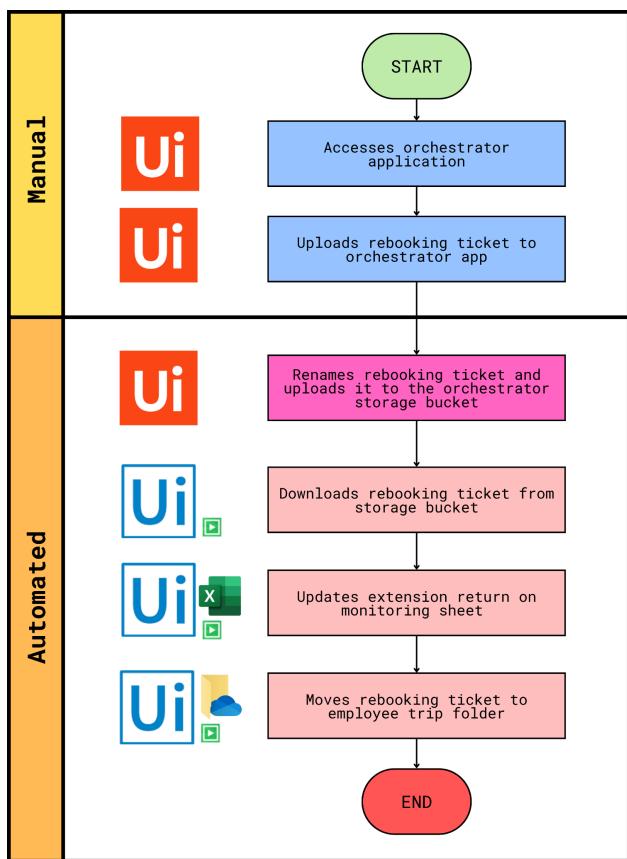




Update Document Process



Update Extended Return Process



- Step Description

Approval Process

Step	Description
1. Downloads the travel request form from JIRA	The HR initiates the process by downloading the travel request form from JIRA
2. Access Orchestrator Application	The HR accesses the Orchestrator application to prepare for uploading documents.
3. Uploads travel request form to Orchestrator	The HR uploads the downloaded travel request form to the Orchestrator transaction queue for processing.
4. Temporarily rename travel request form	The automation renames the travel request form and uploads it to the

	orchestrator storage bucket to improve identification and tracking.
5. Download travel request form from Orchestrator	The robot downloads the travel request form from the Orchestrator transaction queue to begin automated processing.
6. Create or open employee folder	The automation checks for an existing folder or creates a new one for the employee in the document library.
7. Move travel request form to employee folder	The travel request form is moved to the corresponding employee's folder.
8. Move travel request form to processing folder	The automation transfers the form to a temporary processing folder for data extraction.
9. Extract data from travel request form	The robot extracts employee information, travel dates, and relevant details from the request form.
10. Update Monitoring Sheet	The extracted information is recorded in the monitoring Excel sheet for tracking purposes.
11. Rename Travel Request Form	The automation renames the travel request form with a standardized naming convention before archiving.
12. Send Email Notification	The system sends an email to the employee, line manager, and HR with the travel request details and next steps.
13. Approve employee travel request	The HR or designated approver manually reviews and approves the travel request.
14. Update approval status in monitoring sheet	The system updates the approval status in the monitoring sheet to reflect the request decision.

15. Extract approval date	The robot extracts the date of approval from the monitoring sheet for record keeping.
16. Send approval notification	The system sends an email notification to the employee, line manager, and HR confirming the travel approval.
17. Upload other travel documents to Orchestrator	The HR uploads additional required travel documents (e.g., tickets, visas) to the Orchestrator for further processing.
18. Temporarily rename other travel documents	The automation renames these additional documents with the employee's name for identification.
19. Download other travel documents	The system downloads the renamed travel documents from the Orchestrator transaction queue.
20. Create a new trip folder	The automation creates a new trip-specific folder in the employee's directory for current travel documents.
21. Move other travel documents to trip folder	The additional travel documents are organized and moved into the new trip folder for the employee.

Update Document Process

Step	Description
1. Access Orchestrator Application	The HR or requestor opens the Orchestrator application to upload updated documents for travel processing.
2. Upload updated documents	The HR uploads updated travel documents (e.g., revised itineraries, approval letters) to the Orchestrator transaction queue.
3. Rename updated travel documents	The automation temporarily renames updated documents with the employee's

	name for easier identification during processing.
4. Download updated travel documents	The system downloads the updated documents from the Orchestrator transaction queue
5. Extract employee name	The robot reads the documents and extracts the employee's name to determine the correct destination folder.
6. Rename updated travel documents	The automation renames the files with a standardized naming convention before moving them.
7. Move updated travel documents	The updated documents are moved to the employee's existing trip folder in the document library, completing the update process.

Update Extended Return Process

Step	Description
1. Access Orchestrator Application	The HR accesses the Orchestrator application to upload an extended return request ticket.
2. Uploads rebooking ticket to orchestrator app	The HR uploads the ticket for processing the extended return of the employee.
3. Renames rebooking ticket and uploads it to the orchestrator storage bucket	The automation temporarily renames the rebooking ticket with the employee's name and uploads it to the Orchestrator storage bucket for organized processing.
4. Downloads rebooking ticket from storage bucket	The system downloads the renamed rebooking ticket from the Orchestrator storage bucket to update monitoring sheet.

5. Updates extension return on monitoring sheet	The automation updates the monitoring sheet with the employee's new return date.
6. Moves rebooking ticket to employee trip folder	The rebooking ticket is transferred into the employee's designated folder.

- Out of Scope for Automation**

Business process inputs/steps/outcomes agreed as out of scope for this project.

Item	Reason
1. Downloading of travel request form from JIRA	Requires human judgment and discretion beyond predefined rules, which automation cannot fully replicate.
2. Manual approval of travel requests by senior management	Requires human judgment and discretion beyond predefined rules, which automation cannot fully replicate.
3. Physical handling of travel documents (e.g., passports, visas)	Involves physical documents that cannot be processed digitally by the bot.
4. Negotiation with travel agencies for discounts or special arrangements	Involves physical documents that cannot be processed digitally by the bot.
5. Employee briefing on how to use the Travel Request Form	Involves briefing and human interaction outside the automation scope.
6. Handling of travel insurance claims	Involves complex decision-making and external coordination not suitable for automation.
7. On-site travel support during employee trips	Requires physical presence and real-time problem-solving.
8. Manual verification of travel expense receipts	Involves subjective validation of physical or scanned receipts.

9. Resolving disputes related to travel bookings	Requires human intervention for conflict resolution and customer service.
10. Customizing travel itineraries based on employee preferences	Involves subjective preferences that are difficult to standardize for automation.
11. Managing travel cancellations due to unforeseen events	Requires dynamic human decision-making and external coordination.
12. Integration with external travel booking platforms	Out of scope due to dependency on third-party systems not controlled by the project.
13. Conducting employee satisfaction surveys post-travel	Involves qualitative data collection and analysis, which is not automated.
14. Auditing travel compliance with company policies	Requires complex human judgment and policy interpretation.
15. Handling emergency travel situations (e.g., medical evacuations)	Involves urgent, case-specific decisions unsuitable for automation.
16. Managing travel budgets across departments	Requires strategic financial oversight beyond data processing.
17. Updating travel policies and guidelines	Involves policy-making, which is a human governance task.
18. Physical storage of hard-copy travel documents	Involves non-digital processes not suitable for RPA.
19. Coordinating group travel for company events	Requires complex coordination and human input for group dynamics.
20. Handling multi-country visa applications	Involves external processes and documentation beyond automation scope.
21. Providing real-time travel advisories (e.g., safety alerts)	Requires integration with external data sources and real-time human judgment.
22. Creating and logging in to Microsoft account	Requires personal credentials and user verification steps.

23. Installing OneDrive Desktop app	Involves software installation and system-level permissions requiring manual intervention by IT personnel.
24. Maintaining stable internet connection	Depends on external network infrastructure and conditions beyond the control of the automation.
25. Ensuring sufficient cloud storage	Requires manual monitoring and upgrade actions outside the automation scope.
26. Obtaining permissions for shared folders	Involves user-specific access rights and security approvals requiring manual administration.
27. Checking admin restrictions	Relies on organizational IT policy and security rules that need human review and oversight.

- **Enhancements**

This section offers suggestions to refine the process, focusing on improving efficiency, data accuracy, and workflow for future iterations

ID #	Name	Description
ENH-1	Generate consolidated travel report by country and per employee	Implement a process for generating yearly reports by country and per employee for all consolidated data from the monitoring sheet/folder.
ENH-2	Deploy the travel tracker system for public access with a secure login mechanism.	Implement a role-based access control (RBAC) system to differentiate user roles and permissions, ensuring that only authorized users can access specific features and data based on their assigned roles.
ENH-3	Real-time monitoring dashboard on UiPath Orchestrator application	Implement a real-time dashboard within UiPath Orchestrator to display consolidated travel data from the monitoring sheet.
ENH-4	Track All Travel Itineraries	Implement a comprehensive tracking system within UiPath Orchestrator to manage and monitor all travel itineraries.

ENH-5	Send Reminders and Updates	Automate notifications for travel-related events and changes using UiPath Orchestrator's automation capabilities.
ENH-6	Enable Quick Sharing of Travel Information	Facilitate efficient sharing of travel itineraries with stakeholders.

5. BUSINESS RULES

Outline any Business Rules that apply to this project. (e.g., any audit requirements.)

ID #	Name	Description
BR-1	Empty Input Field	All required input fields must be populated before proceeding. Black entries will trigger a validation error.
BR-2	Empty Upload Field	Required file uploads must not be left empty. The process will halt until mandatory documents are provided.
BR-3	Invalid Email Format	Email addresses must follow standard format (e.g., user@domain.com). Invalid formats will be rejected.
BR-4	Invalid File Type Format	Only supported file types are accepted. Other formats will be blocked by validation rules.

6. NON-FUNCTIONAL REQUIREMENTS

The following business requirements were captured during our engagement with the stakeholders, and the scope of automating this business process has been defined.

Note: Non-functional requirements capture conditions that do not directly relate to the behavior or functionality of the solution but rather describe environmental conditions under which the solution must remain effective or qualities that the systems must have.

e.g., User security and audit logging of the process.

ID #	Description	Owner	Essential, Important, Desired

NFR-1	User security – There needs to be control over who can initiate the bot.	Solution Architect	Essential
NFR-2	Response time – The bot must respond within 5 seconds.	Solution Architect	Important
NFR-3	Audit logging – All bot actions must be logged to comply with legal requirements.	IT Manager	Essential
NFR-4	Disaster recovery – The system must have a backup mechanism in case of server failure.	IT Manager	Important
NFR-5	Data security – The system must ensure encryption of candidate data at rest and in transit.	IT Security Manager	Essential

7. REQUIREMENTS MODIFICATIONS

The following aspects of the functional and/or non-functional requirements have been either added, modified, or removed from the scope of the solution as approved by the Change Management Team. This section summarizes any modifications raised after the approval of the Business Requirements Document (BRD).

The requirements modification details can be found below:

Change ID #	Type of Change and relevant FR/NFR # (Addition, Modification, Removal)	Description	Reason for Change
CM-01	Modification (NFR-2)	Bot response times changed from 5 minutes to 3 seconds.	To improve user experience and increase processing speed.
CM-02	Addition (NFR-5)	The added requirement is that the system needs	Ensure data security in case of system

		backup storage for data.	failure.
CM-03	Modification (NFR-3)	Updated audit logging requirements to include tracking for all user interactions, not just bot actions.	Ensure complete compliance with legal requirements and track all interactions with candidate data.
CM-04	Addition (NFR-4)	Added a requirement for a periodic disaster recovery test every 6 months.	To ensure readiness in case of a real system failure and to validate the disaster recovery plan.

8. ASSUMPTIONS / RISKS

ID #	Description	Impact if not Valid	Validated By
AS-1	Who will be responsible for monitoring and updating bot performance metrics regularly?	Bots may need to work more efficiently, resulting in poor performance.	Leader
AS-2	Is there a backup plan in place if the bot experiences a serious problem or goes down?	The process may be interrupted, causing delays and requiring manual intervention.	Leader
AS-3	Is data backed up regularly and who is responsible for this?	Without backups, data can be permanently lost in the event of a system failure.	Leader
AS-4	Does the bot have an automatic update and upgrade mechanism, and who will monitor this process?	If the bot doesn't update automatically, it can become outdated and not meet new requirements.	Leader
AS-5	Is there a specific process for notifying a manager if the bot detects an issue or problem?	Without a notification mechanism, issues can go unnoticed, leading to serious system failures.	Leader
AS-6	Are all integrated systems compatible with	Incompatibility may cause process breakdowns, requiring manual fixes and	Leader

	the bot's automation workflow?	delaying travel request processing.	
AS-7	Is there sufficient IT support available to address technical issues during bot operation?	Lack of support may lead to prolonged downtime, affecting travel tracking efficiency.	Leader
AS-8	Are employees and HR staff trained to handle bot-generated exceptions or errors?	Untrained staff may struggle with exceptions, increasing manual workload and reducing automation benefits.	Leader

9. APPENDIX A – DEFINITIONS AND ACRONYMS

Define any abbreviation used in this document. BOT and RPA are often utilized and are defined in the table below.

Abbreviation	Definition
BOT	UiPath attended/unattended robot
RPA	Robotics Process Automation
PO	Product Owner
BA	Business Analyst
HR	Human Resources
PDD	Project Definition Document

10. APPENDIX B - SAMPLE SUMMARY REPORT OUTPUT FILE

Pending Status Email

 **Request Awaiting Review**

Your travel request is in the queue

Hi Juan Dela Cruz,

This is a quick update to let you know that your travel request is currently **pending approval**.

Our HR team is reviewing your details and will notify you once the status changes.

Meanwhile, feel free to verify the information submitted below.

 **Your Submitted Info**

Year: 2025	Name: Juan Dela Cruz
Project: FPHI	Manager: Lebron James
Position: RPA Developer	Travel Classification: Domestic
Type of Travel: Short Term Assignment	Billing Code: 99213
From: Manila, Philippines	Departure Date: January 10, 2025
To: Cebu, Philippines	Return Date: February 1, 2025
Email: juandelacruz@gmail.com	Status: Pending

If something needs to be updated, don't hesitate to reach out.

— *HR Admin Team*

Approved Status Email



Travel Monitoring

Official Travel Record & Documentation

Jared Ferdinand S. Posada

Dear Jared Ferdinand S. Posada,

We would like to inform you that your travel has been officially enrolled in our *Travel Monitoring* system. This initiative is designed to enhance safety, ensure compliance, and provide real-time support throughout the duration of your business trip.

Our system will continuously track key travel details, including your departure and return dates, destinations, and any changes in itinerary. Should any issues or emergencies arise during your trip, our team will be ready to assist you promptly.

We appreciate your cooperation and wish you a smooth and successful journey.

Sincerely,



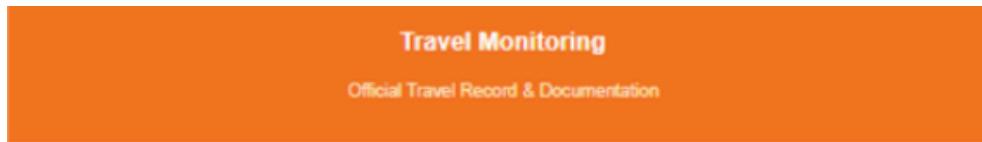
Travel Details:

 Year: 2025	 Line Manager: Antonette
 Project: U-Phi	 Travel Classification: Domestic
 Position: RPA Intern	 Type of Travel: Short Term Assignment
 Departure Date: October 1, 2025	 Return Date: October 29, 2025
 Travel To: Cebu, Philippines	 Travel From: Manila, Philippines
 Email: jaredferdinandposada@gmail.com	 Billing Code: 12345
 Status: Approved	

If you have any questions or need further assistance, please do not hesitate to contact the HR department.

Best regards,
HR Team

Rejected Status Email



Jared Ferdinand S. Posada

Dear Jared Ferdinand S. Posada,

We would like to inform you that your travel has been officially enrolled in our *Travel Monitoring* system. This initiative is designed to enhance safety, ensure compliance, and provide real-time support throughout the duration of your business trip.

Our system will continuously track key travel details, including your departure and return dates, destinations, and any changes in itinerary. Should any issues or emergencies arise during your trip, our team will be ready to assist you promptly.

We appreciate your cooperation and wish you a smooth and successful journey.

Sincerely,



Travel Details:

Year: 2025	Line Manager: Antonette
Project: U-Phi	Travel Classification: Domestic
Position: RPA Intern	Type of Travel: Short Term Assignment
Departure Date: October 1, 2025	Return Date: October 29, 2025
Travel To: Cebu, Philippines	Travel From: Manila, Philippines
Email: jaredferdinandoosada@gmail.com	Billing Code: 12345
Status: Rejected	

If you have any questions or need further assistance, please do not hesitate to contact the HR department.

Best regards,

HR Team