



# Process Definition Document

**UiPath**

# Financepeer Automation Documentation

*Financepeer Website Automation Documentation*

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# I. INTRODUCTION

---

## 1.1 Purpose

The Process Definition Document outlines the business process chosen for automation. The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation (**AS IS**) as well as the new sequence of actions that the process will follow as a result of preparation for automation (**TO BE**).

Here the Business process chosen for automation is creating multiple applications for an already registered user via the Financepeer webapp (<https://uat15.financepeer.com>)

**The PDD is a communication document between:**

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

## 1.2 Objectives

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

- Reduce the short comings of Other normal testing and automation tools.
- Better Testing of the overall activity by using the logs provided by the robots.

- The BOTs perform all the activities like humans, hence it interacts with both the frontend and backend of the website, effectively. This can hence be treated as a highly scalable and effective method of testing, compared to other tools such as selenium.

## 1.3 Key Contacts

Add here any stakeholders that need to be informed or to approve changes to the process:

| Role              | Name               | Contact Details (email, phone number) | Notes |
|-------------------|--------------------|---------------------------------------|-------|
| Project Lead      | Naveen Vijayakumar | naveen.vijayakumar@ndimensionz.com    |       |
| Software Engineer | Jishnu Madhu       | jishnu.madhu@ndimensionz.com          |       |
| Senior QA         | Jaimol Joy         | jaimol.joy@ndimensionz.com            |       |

## 1.4 Minimum Pre-requisites for the Automation

- Filled in Process Definition Document
- Test Data to support development
- User access and user accounts creations (licenses, permissions, restrictions to create accounts for robots)
- Credentials (user ID and password) required to logon to machines and applications

## 1.5 Hardware Requirements

|            | Minimum   | Recommended              |
|------------|---|--------------------------|
| CPU Cores  | 2 x 1.8 GHz 32-bit (x86)  | 4 x 2.4 GHz 64-bit (x64) |
| RAM        | 4 GB  | 8 GB                     |
| Disk Space | 3.5 GB for new installations,<br>5 GB for upgrades (including temporary files required during installation) | N/A                      |

## 1.6 Software Requirements

|  | Supported Versions | Particularities |
|--|--------------------|-----------------|
|  |                    |                 |

|                                       |                                   |   |
|---------------------------------------|-----------------------------------|---|
| Operating System                      | Windows 8.1<br>Windows 8.1 N      | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022:<br>- x86 version for a 32-bit OS (required for SVN and GIT source control)<br>- x64 version for a 64-bit OS (required for GIT source control)  |
|                                       | Windows 10<br>Windows 10 N        | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022:<br>- x86 version for a 32-bit OS (required for SVN and GIT source control)<br>- x64 version for a 64-bit OS (required for GIT source control)  |
|                                       | Windows 11                        | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022, x64 version (required for GIT source control)  |
|                                       | Windows Server 2012 R2            | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022, x64 version (required for GIT source control) 1  |
|                                       | Windows Server 2016               | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022, x64 version (required for GIT source control) 1  |
|                                       | Windows Server 2019               | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022, x64 version (required for GIT source control) 1  |
|                                       | Windows Server 2022               | Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, 2019, and 2022, x64 version (required for GIT source control) 1  |
| <u>Citrix environments</u>            | XenApp v6.5 or greater            |   |
|                                       | XenDesktop v7.0 or greater        |   |
| .NET Framework                        | Version 4.6.1 or greater          | If your machine runs Windows OS in a language other than English, install the corresponding language pack for the .Net framework version you are using.<br>This is required for running Studio in any of the available languages. The .Net framework and related language pack version must correspond, and any conflicting .Net framework versions installed on the machine should be removed. |
| Web Browsers (for browser automation) | Internet Explorer v8.0 or greater |   |

|  |  |   |
|--|--|---|
|  | Google Chrome version 64 or greater                  | Automated with the extension for Chrome or the Webdriver protocol.  |
|  | Mozilla Firefox version 52.0 or greater              | Automated with the extension for Firefox or the Webdriver protocol. |
|  | Microsoft Edge on Windows 10 version 1803 or greater | <u>Automated with the extension for Edge.</u>                       |
| Microsoft Office (for projects created in the StudioX profile) | Office: 2013   |   |
|  | Office: 2016   |   |
|  | Office: 2019   |   |
|  | Office 365   |   |

## II. AS IS PROCESS DESCRIPTION

---

In this section the Business Analyst will document the process. This section will serve as the starting point for the re-engineering and automation effort.

### 2.1 Process Overview

Section contains general information about the process before automation.

| Item              | Description/Answer                              |
|-------------------|---|
| Process Full Name | Financepeer New Application creation Automation |

|   |  |
|---|--|
| <b>Process Area</b>   | <a href="https://uat15.financepeer.com/">https://uat15.financepeer.com/</a>  |
| <b>Department</b>   | Design & Development Department,<br>NdimensionZ Solutions Pvt Ltd  |
| <b>Short Description (operation, activity, outcome)</b>         | Financepeer Website Automation Documentation   |
| <b>Role(s) required in applications to perform the process</b>  | Customer   |
| <b>Process schedule and frequency</b>                           | Undefined  |
| <b>Number of times the process is ran by selected frequency</b> | Undefined  |
| <b>Process execution time</b>                                   | 120-180 seconds per application creation   |
| <b>Process Restrictions</b>                                     | <ul style="list-style-type: none"> <li>1) The process can be run only after logging in manually using the customer mobile number and OTP delivered to the customer Mobile Number</li> <li>2) The process can be performed only for a registered user for creating new applications.</li> </ul>           |
| <b>Peak Period (s)</b>  | <i>There is no defined Peak Period for this process, as this is used for testing. The process can be run as and when required for the purpose of Testing.</i>  |
| <b>Peak Volume Approximate increase</b>                         | Not Defined.   |
| <b>Number of persons performing the process</b>                 | Not Defined.   |
| <b>Expected Volume increase during next periods</b>             | Not Defined.   |
| <b>Percentage Un-handled exceptions</b>                         |  |
| <b>Input data description</b>                                   | <p>Page 1</p> <p>Student Name<br/>         Roll Number<br/>         Date of birth<br/>         Student Gender<br/>         Institute Name<br/>         Branch Location<br/>         Pincode (optional)<br/>         Course Name<br/>         Tenure<br/>         Course fees(optional)</p> <p>Page 2</p> |

|                                |  |
|--------------------------------|--|
|                                | <b>Choose current occupation type</b><br><b>Color photo of PAN</b><br><b>Color copy of Aadhaar front side</b><br><b>Color copy of Aadhaar back side with address</b><br><b>Latest Applicant color photo or selfie</b><br><b>ITR-V (optional)</b><br><b>Bank Statement</b><br><br><b>Page 3</b><br><b>Full name (Autofill)</b><br><b>Date of birth (Autofill)</b><br><b>Aadhaar number (Autofill)</b><br><b>PAN number (Autofill)</b><br><b>Aadhaar address (Autofill)</b><br><b>Relation with student</b><br><b>Email address (Autofill)</b> |
| <b>Output Data description</b> | <b>Application Ids</b><br><b>Process execution Logs</b>  |

\*Add more rows to the table to include relevant data for the automation process. No fields should be left empty. Use "n/a" for the items that don't apply to the selected business process.

## 2.2 Applications Used

The table includes a comprehensive list of all the applications that are used as part of the process to be automated to perform the given actions in the flow.

| Application Name      | Version  | Application Language             | Thin/Thick Client | Environment/Access method | Comments |
|-----------------------|--|----------------------------------|-------------------|---------------------------|----------|
| 1) UiPath Studio      | 2022.4.3   | Visual Basic.NET, Windows Legacy |                   | Windows 10                |          |
| 2) UiPath Assistant   | 2022.4.3   | Visual Basic.NET, Windows Legacy |                   | Windows 10                |          |
| 3) Google Web Browser | Version 103.0.5060.134 (Official Build) (64-bit) |                                  |                   | Windows 10                |          |
| 4) Microsoft Excel    | Microsoft 365                                    |                                  |                   | Windows 10                |          |

|                        |          |  |  |                 |                                   |
|------------------------|----------|--|--|-----------------|-----------------------------------|
| 5) UiPath orchestrator | 2022.4.3 |  |  | Web Application | Used on Google Chrome Web Browser |
|------------------------|----------|--|--|-----------------|-----------------------------------|

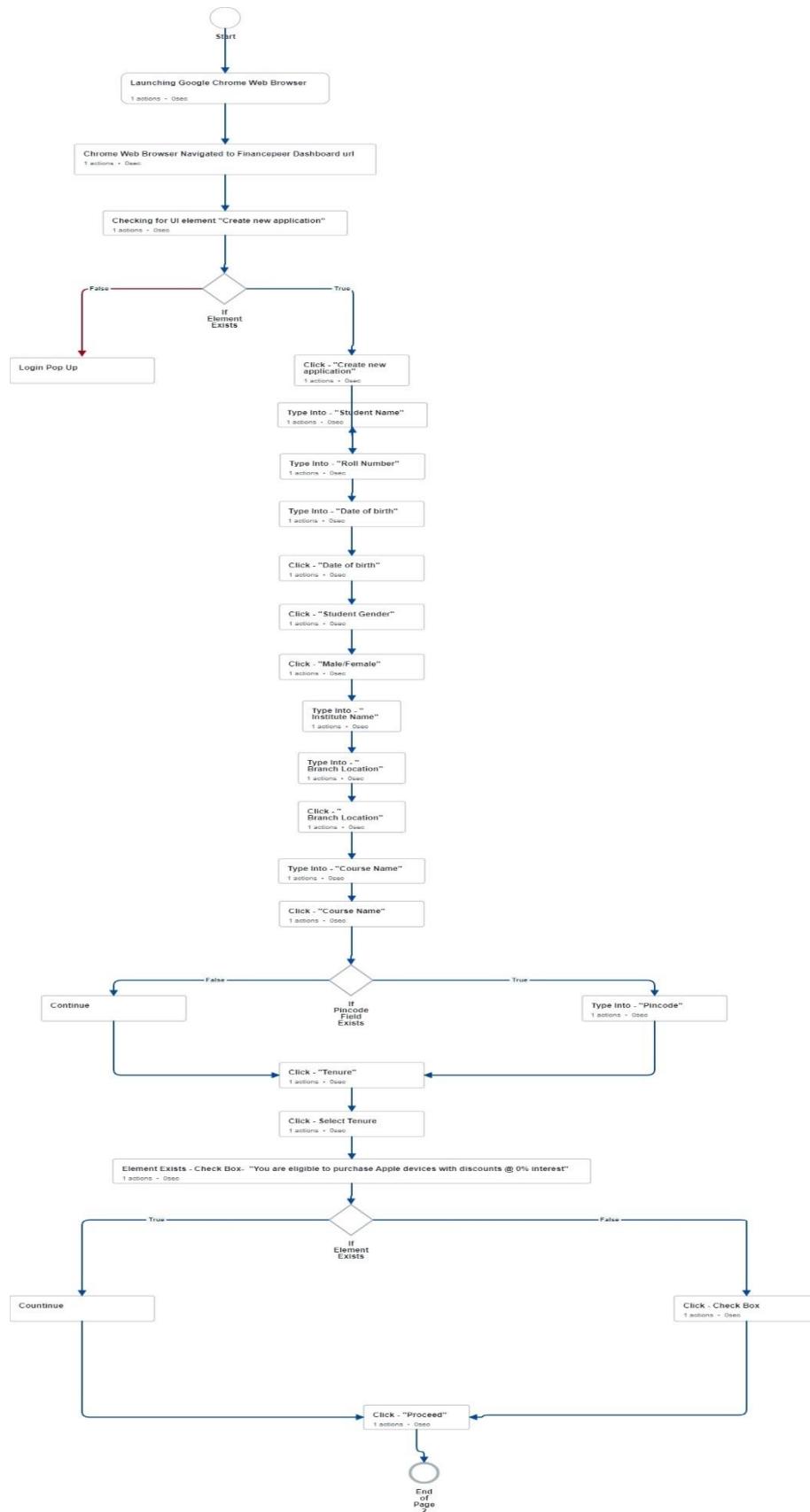
\*Add more rows to the table to include the complete list of applications.

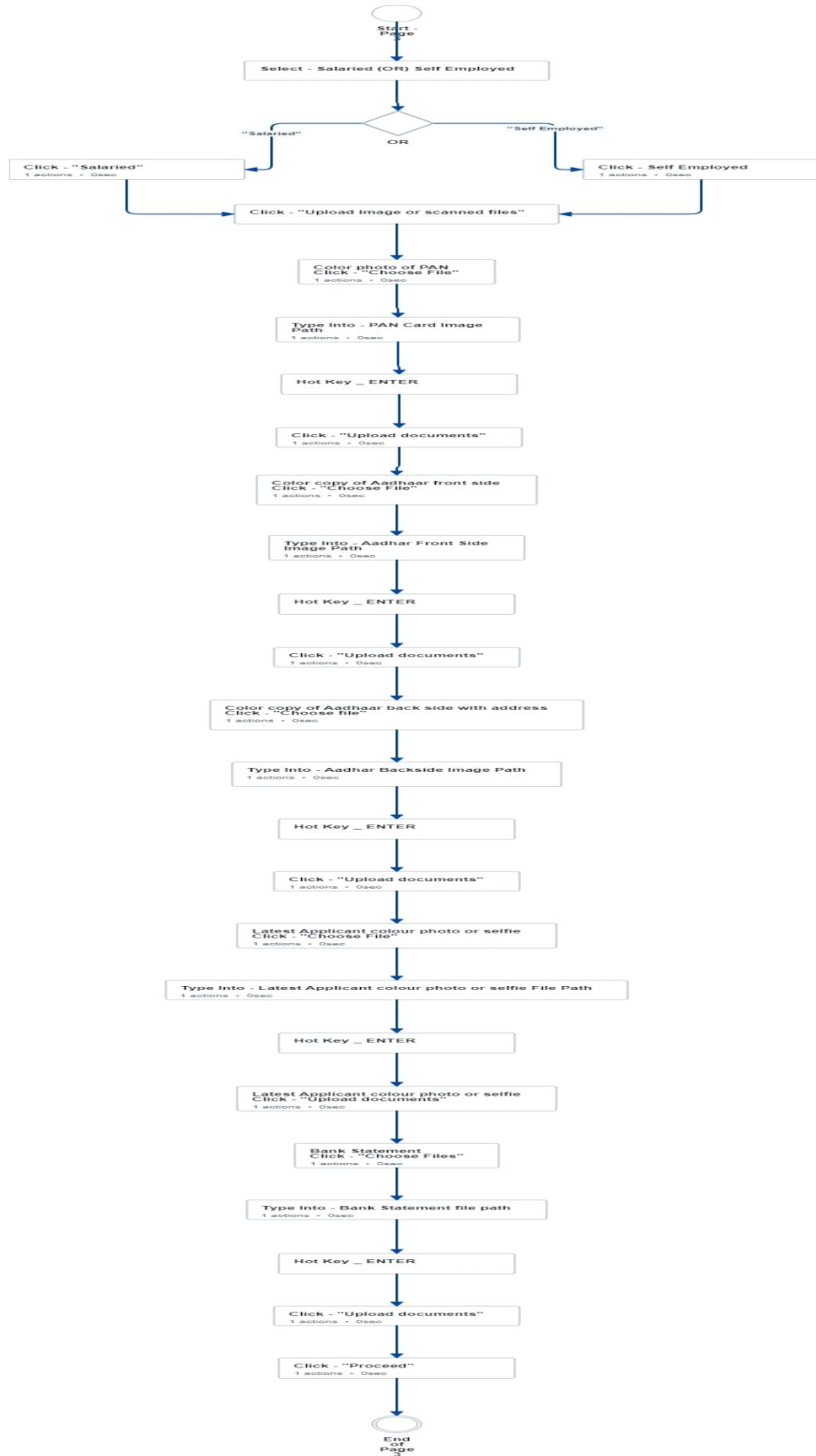
## 2.3 AS IS Process Map

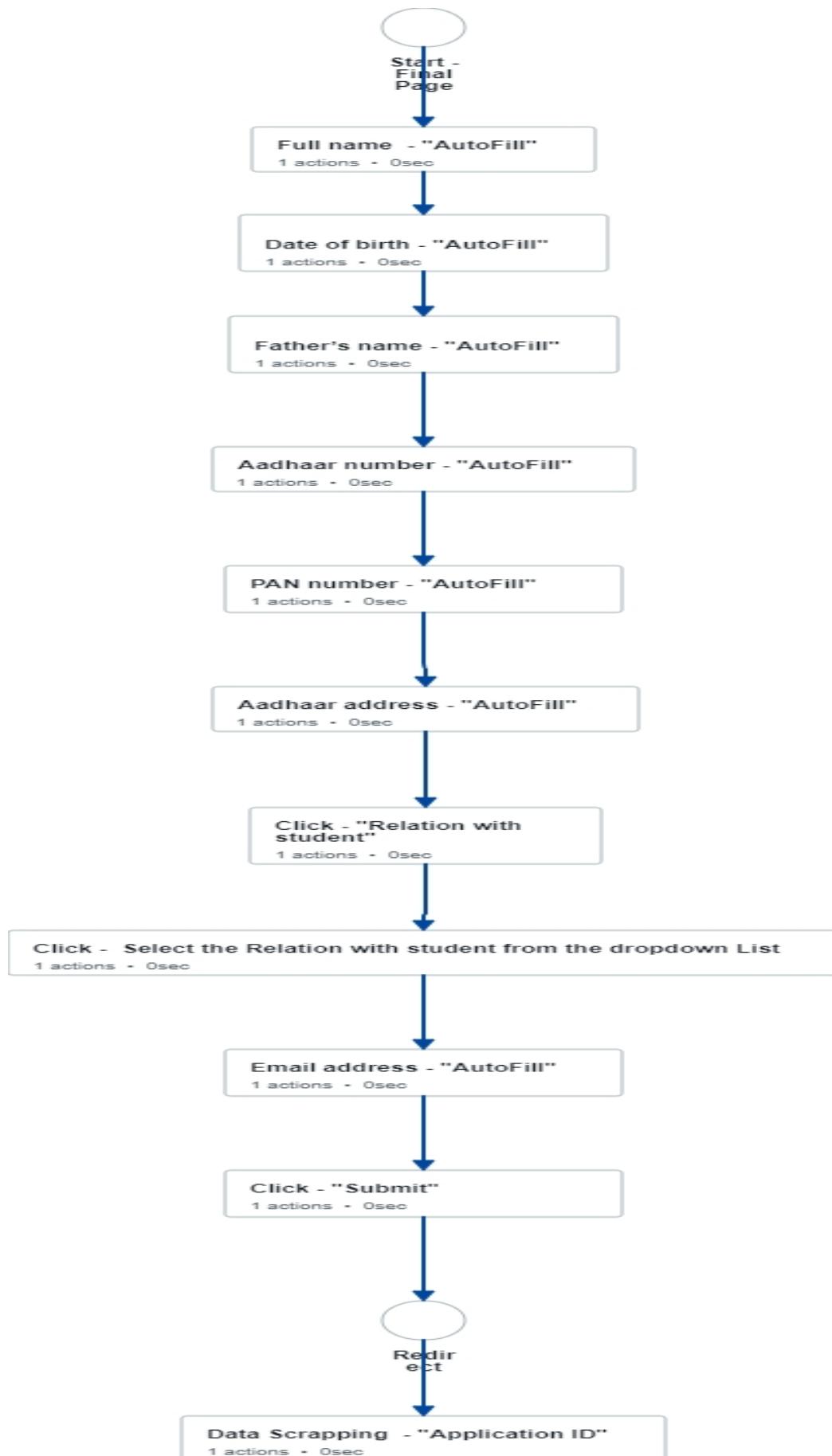
This section contains various process maps contributing to a better understanding of how the process is performed pre-automation.

### 2.3.1 High Level Process Map

This section is useful for the Business Analyst in presentations and discussions with management to underline areas of weakness, inefficiency or to demonstrate which actions could be in scope for automation.







### 2.3.2 Detailed Level Process Map

This section describes the process at key-stroke level and is an essential part for the communication with the developers.

Part 1 :

[https://github.com/JISHNUNDZ/Financepeer-Automation-Documentation/blob/93d60c7291cf432342e4ea7ce0b7068ec7f44d36/Financepeer-Process-Diagrams/financepeer\\_proces\\_diagram\\_1.jpg](https://github.com/JISHNUNDZ/Financepeer-Automation-Documentation/blob/93d60c7291cf432342e4ea7ce0b7068ec7f44d36/Financepeer-Process-Diagrams/financepeer_proces_diagram_1.jpg)

Part 2 :

[https://github.com/JISHNUNDZ/Financepeer-Automation-Documentation/blob/93d60c7291cf432342e4ea7ce0b7068ec7f44d36/Financepeer-Process-Diagrams/financepeer\\_process\\_diagram\\_2.jpg](https://github.com/JISHNUNDZ/Financepeer-Automation-Documentation/blob/93d60c7291cf432342e4ea7ce0b7068ec7f44d36/Financepeer-Process-Diagrams/financepeer_process_diagram_2.jpg)

Part 3:

[https://github.com/JISHNUNDZ/Financepeer-Automation-Documentation/blob/93d60c7291cf432342e4ea7ce0b7068ec7f44d36/Financepeer-Process-Diagrams/financepeer\\_process\\_diagram\\_3.jpg](https://github.com/JISHNUNDZ/Financepeer-Automation-Documentation/blob/93d60c7291cf432342e4ea7ce0b7068ec7f44d36/Financepeer-Process-Diagrams/financepeer_process_diagram_3.jpg)

## 2.4 Process Statistics

High Level statistics

| Processes | Windows | Actions | Mouse clicks | Keys pressed | Text entries | Hotkeys used | Time used  |
|-----------|---------|---------|--------------|--------------|--------------|--------------|------------|
| 1         | 2       | 50      | 26           | 5            | 12           | 5            | 180.0 sec. |
|           |         |         |              |              |              |              |            |
|           |         |         |              |              |              |              |            |

Detailed statistics

| Window name           | Mouse clicks | Text entries | Key pressed |
|-----------------------|--------------|--------------|-------------|
| Google Chrome         | 26           | 11           | 0           |
| Windows File Explorer | 0            | 5            | 5           |
|                       |              |              |             |

## 2.5 Detailed As Is Process Actions

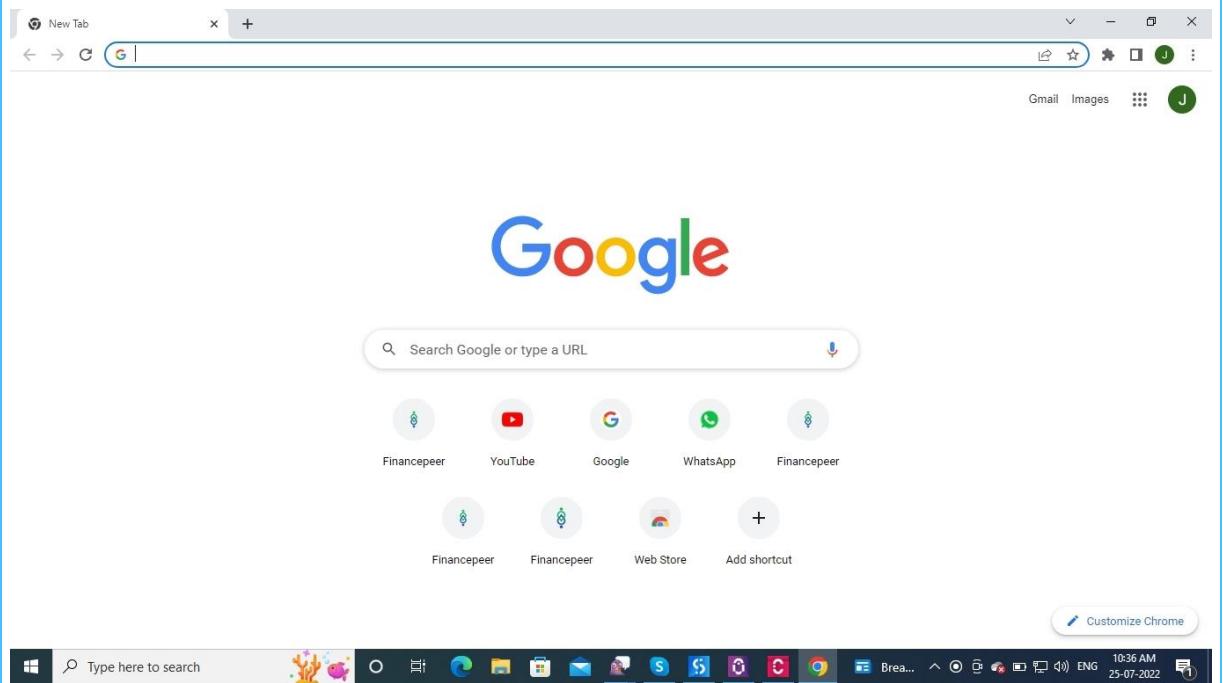
| #Action   | Input                                  | Description   | Details<br>(Screen/Video<br>Recording<br>Index) | Exceptions<br>Handling                      | Possible Actions   |
|---|--|---|---|---|--|
| Financepeer Application Creation Dispatcher Version 1.0.0 | CSV File with Data sets for Automation | The dispatcher is used to push different data sets to the Uipath Orchestrator Queue   |   | System exceptions                           | Looping through the csv file and pushing the data to the Orchestrator Queue                        |
| Financepeer Application Creation Performer Version 1.0.0  | Data queue from Orchestrator Queue     | The Performer is the BOT that is designed to interact with the Financepeer webapp and create applications on the basis of the data sets from the orchestrator queue |   | System exceptions<br>Application exceptions | Retrieving data from the Orchestrator Queue and creating applications from the Financepeer webapp. |

| 1 Launching Google Chrome Web Browser | Est. time: 0.5 sec. |
|---------------------------------------|---------------------|
|                                       |                     |

### 1.1 Launching Google chrome Browser

The Bot Launches the Google chrome or any configured web browser

Est.  
time:  
0.5 sec.



Action:

### 2 Chrome Web Browser Navigated to Financepeer Dashboard url

Est. time: 0.5 sec.

## 2.1 Navigating to Financepeer Dashboard

The Google Chrome is navigated to the Financepeer dashboard url "https://uat15.financepeer.com/app/v2/dashboard"

Est. time: 0.5sec.

|  |                |
|--|----------------|
|  | <b>Action:</b> |
|--|----------------|

## 3 Checking for UI element "Create new application"

**Checking if the UI element "Create new application" exists on webpage. If element exists,  
bool\_ifCreateNewApplication\_Exists = True else  
bool\_ifCreateNewApplication\_Exists = False**

Est. time: 0.5 sec.

|            |   |
|------------|---|
| <b>3.1</b> | <p>Est. time: 0.5 sec.</p> <p><b>Action: Checking if the UI element "+ Create new application" is present on the webpage. If the element exists then a Boolean variable is set to "True".</b></p> |
|------------|---|

**4 If Element Exists**

If 'True' then go to '5. Click - "Create new application"'  
If Element exists bool\_ifCreateNewApplication\_Exists

Est. time: 0.5 sec.

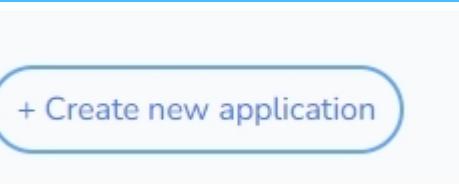
**5 Click - "Create new application"**

Click on "Create new application"

Est. time: 0.3 sec.

**5.1**

Est. time: 0.3 sec.



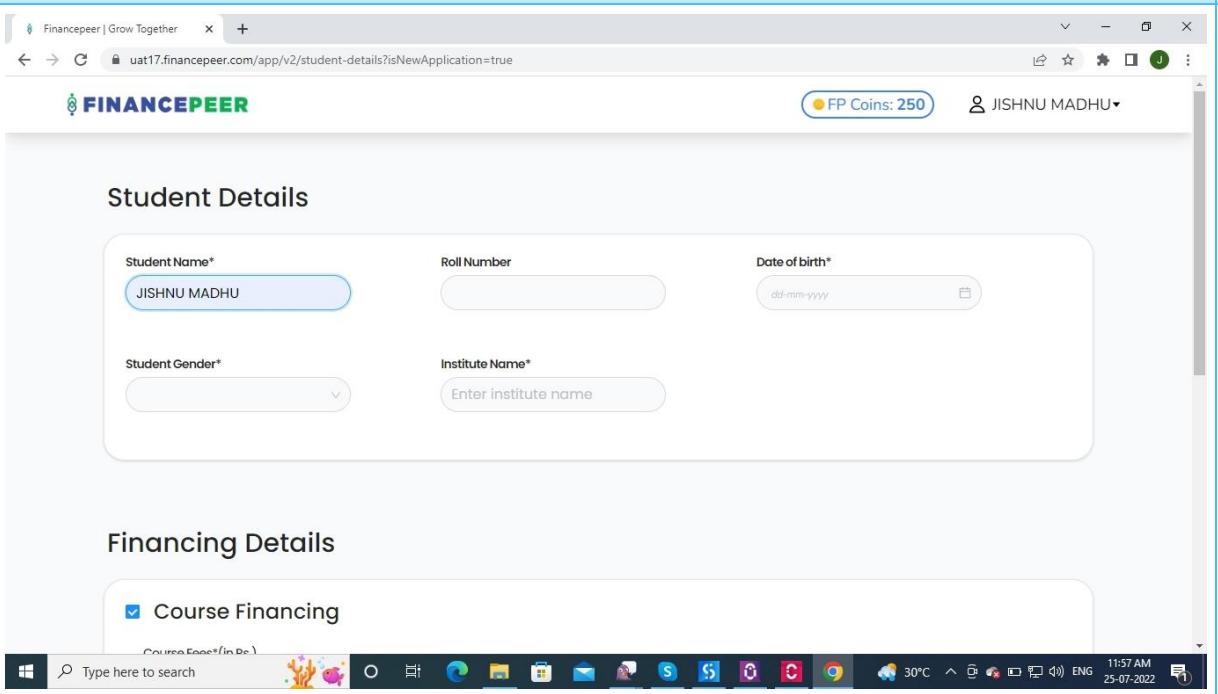
+ Create new application

Action: The BOT clicks "+ Create new application" UI element and waits for the page to redirect to page 2.

**6 Type Into - "Student Name"**

Type Student Name into CharField- "Student Name"

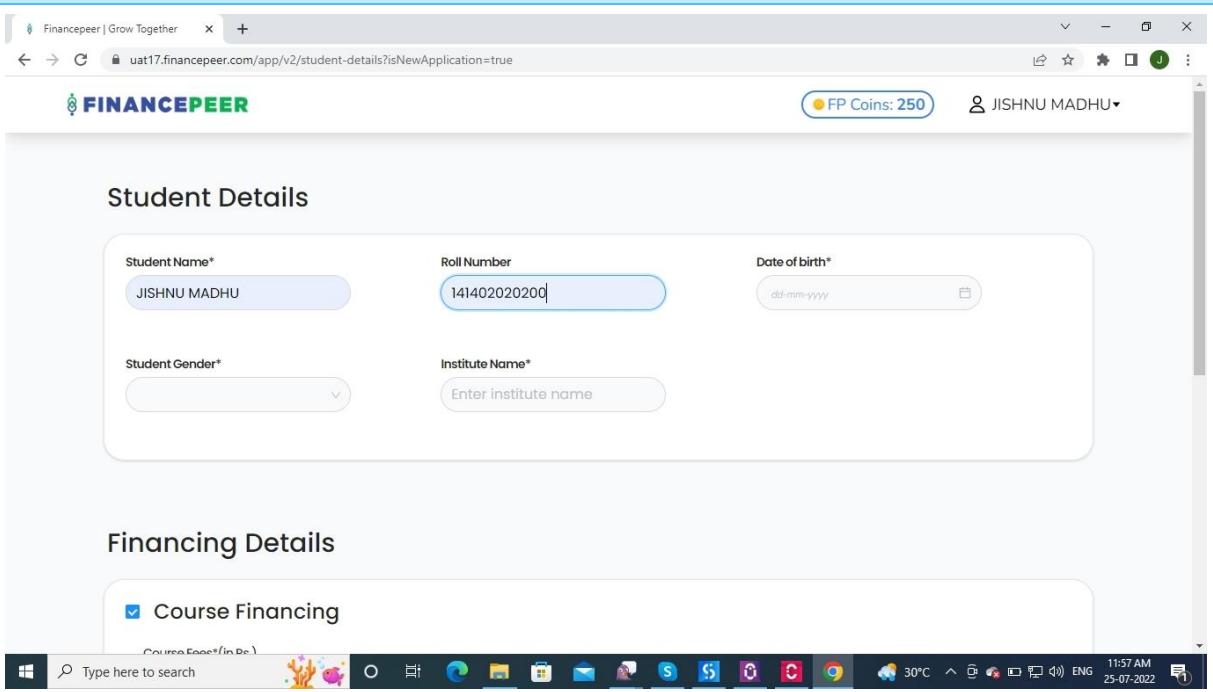
Est. time: 0.5 sec.

|   |                      |
|---|----------------------|
| 6.1   | Est. time: 0.05 sec. |
|  <p><b>Action:</b><br/>The Student name is typed into the text box</p> |                      |

## 7 Type Into - "Roll Number"

Type Into the Roll Number of the Student in the CharField

Est. time: 0.5 sec.

|   |   |
|---|---|
| <b>7.1</b>  | Est. time: 0.5 sec.   |
|  | <b>Action:</b><br><b>The Roll number is typed into the text field</b> |

|  |                     |
|--|---------------------|
| <b>8 Type Into - "Date of birth"</b>                                   | Est. time: 0.5 sec. |
| <b>Type into the Date of Birth of the Student in DD-MM-YYYY format</b> |                     |

**8.1**

|   |                        |
|---|------------------------|
|   | Est. time:<br>0.0 sec. |
| <b>Action:</b><br><b>The date of Birth of the applicant is typed into the text box.</b> |                        |

**9 Click - "Date of birth"**

|                                      |                            |
|--------------------------------------|----------------------------|
| <b>Click on the highlighted date</b> | <b>Est. time: 0.5 sec.</b> |
|--------------------------------------|----------------------------|

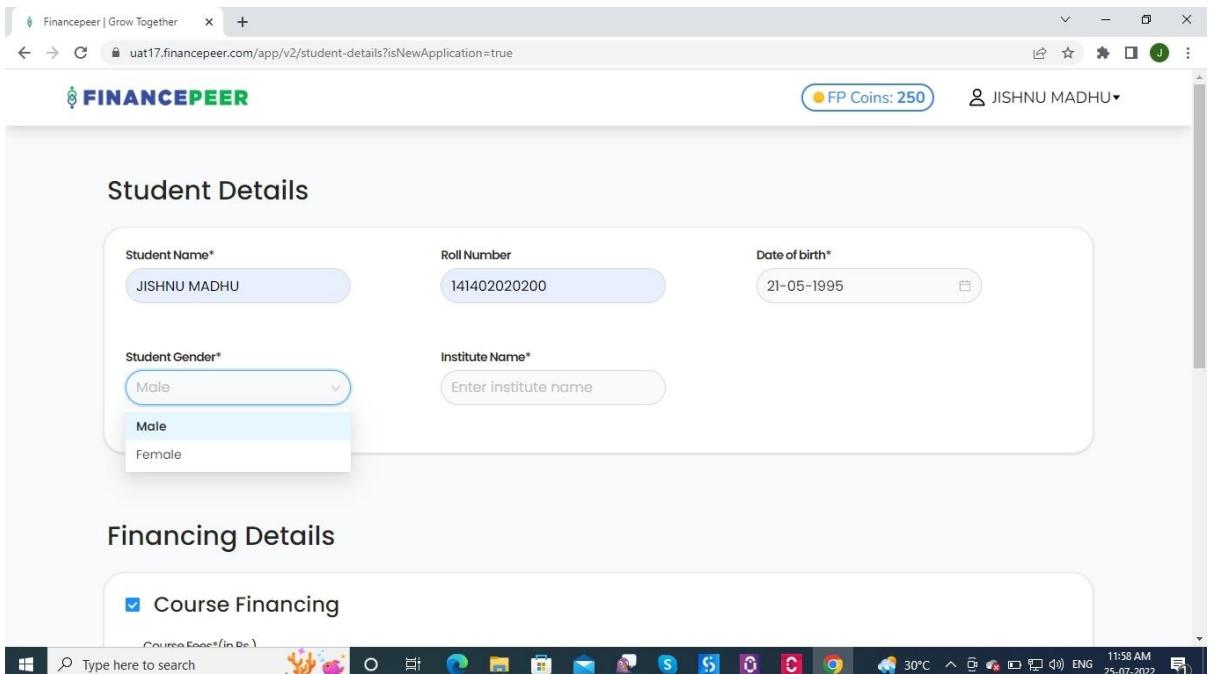
**9.1**

Est. time:  
0.5 sec.

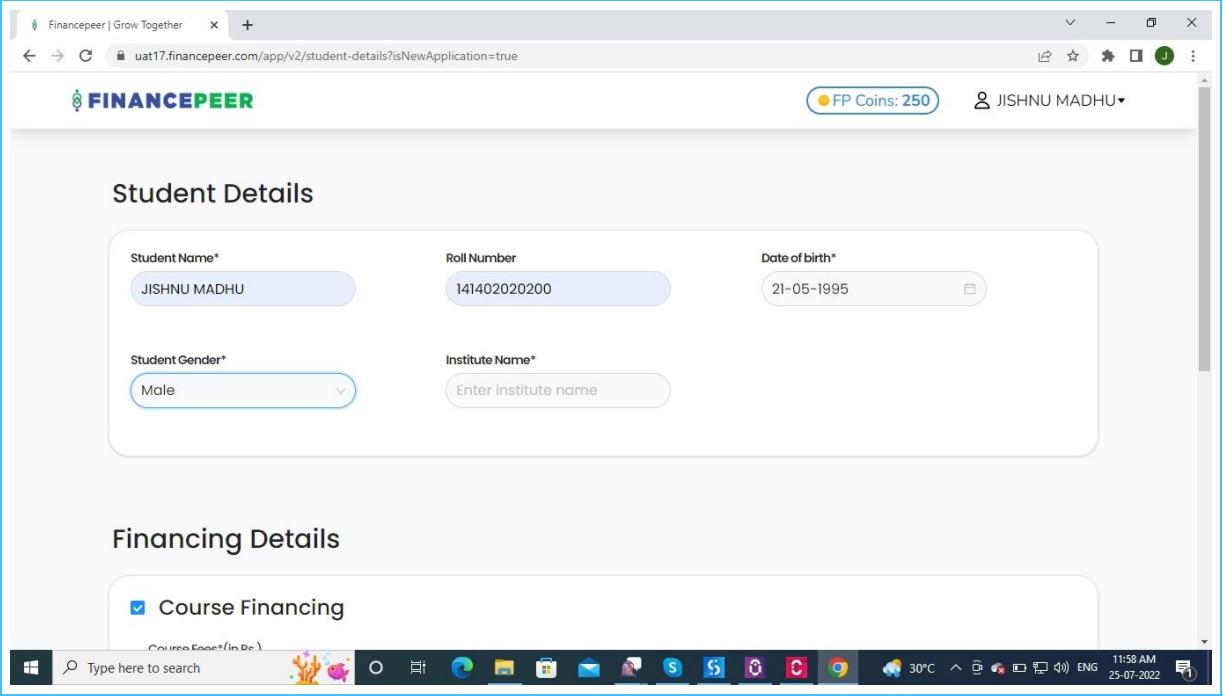
**Action:**  
The highlighted date is clicked.

**10 Click - "Student Gender"**

|  |                     |
|--|---------------------|
| <b>Click on the Gender Dropdown List</b> | Est. time: 0.5 sec. |
|--|---------------------|

|   |  |
|---|--|
| <b>10.1</b>   | Est. time: 0.5 sec.                                  |
|  | <b>Action:</b><br>The Student Gender text is clicked |

|   |                     |
|---|---------------------|
| <b>11 Click - "Male/Female"</b>   | Est. time: 0.5 sec. |
| <b>Click the Gender as per the requirement . Here Male is selected for testing.</b> |                     |

|   |  |
|---|--|
| <b>11.1</b>   | Est. time:<br>0.5 sec.   |
|  | <b>Action:</b><br><b>The gender of the applicant is clicked based on the input data set.</b> |

|  |                     |
|--|---------------------|
| <b>12 Type Into - "Institute Name"</b>   |                     |
| Type into the Institute name - CharField | Est. time: 0.5 sec. |

**12.1**

Est. time: 0.1 sec.

**Action:**  
The Institute Name is Typed into the box

**Student Details**

Student Name\*: JISHNU MADHU

Roll Number: 141402020200

Date of birth\*: 21-05-1995

Student Gender\*: Male

Institute Name\*: FRANKFINN

Institute Suggestions

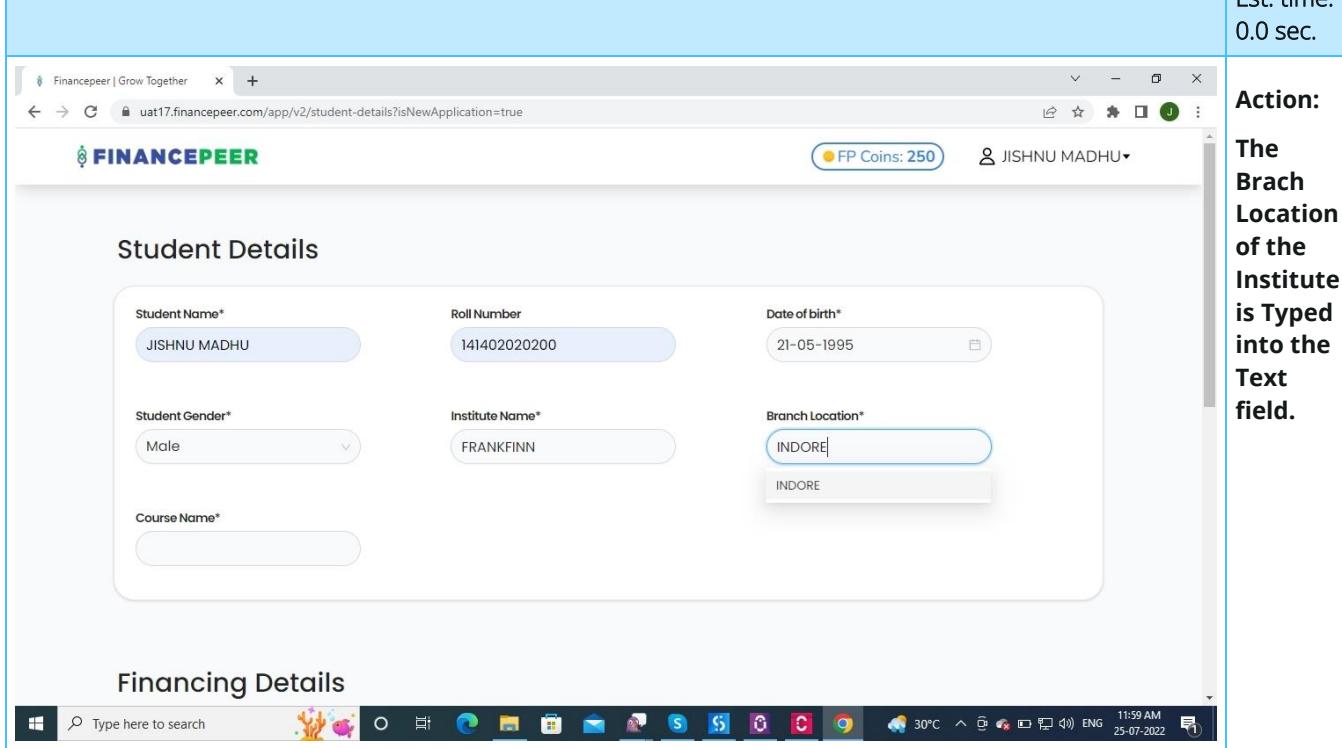
- FRANKFINN
- ST. XAVIERS COLLEGE AND ST. F...
- TUTOPIA (FRANCHISE)
- TUTOPIA FRANCHISE ONLINE APP
- FRAME INTERNATIONAL SCHOOL
- WE CARE INFRA

**Financing Details**

Type here to search

11:59 AM 25-07-2022

**13 Type Into - "Branch Location"****Type Into Branch Location of the Institute****Est. time: 0.5 sec.**

|   |   |
|---|---|
| <b>13.1</b>   | <b>Est. time:<br/>0.0 sec.</b>  |
|  | <b>Action:</b><br><b>The Branch Location of the Institute is Typed into the Text field.</b> |

|                                     |   |                            |
|-------------------------------------|---|----------------------------|
| <b>14 Click - "Branch Location"</b> | <b>Select the Branch Location from the Drop Down List</b> | <b>Est. time: 0.5 sec.</b> |
|-------------------------------------|---|----------------------------|

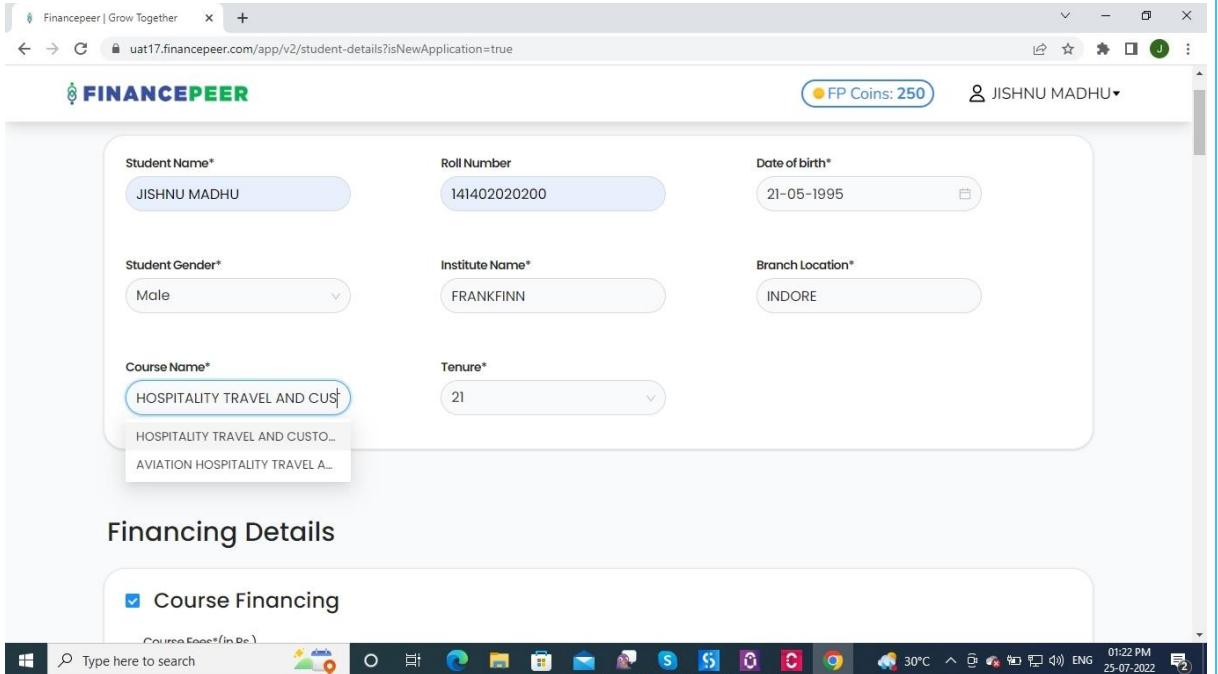
**14.1**

|   |                                 |
|---|---------------------------------|
|   | <b>Est. time:<br/>0.05 sec.</b> |
| <b>Action:</b><br><b>The location is selected from the dropdown list.</b> |                                 |

**15 Type Into - "Course Name"**

|   |                            |
|---|----------------------------|
| <b>Type into the Desired Course name in the selected Institute and the Centre Location -CharField</b> | <b>Est. time: 0.5 sec.</b> |
|---|----------------------------|

**15.1**

|   |                        |
|---|------------------------|
|  | Est. time:<br>0.5 sec. |
| <b>Action:</b><br><b>The Course Name is typed into the text field provided.</b>     |                        |

**16 Click - "Course Name"**

|  |                     |
|--|---------------------|
| Select the Course Name from the Drop Down List | Est. time: 0.5 sec. |
|--|---------------------|

**16.1**

Est. time:  
0.5 sec.
Action:  
**The Course name is selected from the dropdown list.**

**Student Details**

|                             |                 |                  |
|-----------------------------|-----------------|------------------|
| Student Name*               | Roll Number     | Date of birth*   |
| JISHNU MADHU                | 141402020200    | 21-05-1995       |
| Student Gender*             | Institute Name* | Branch Location* |
| Male                        | FRANKFINN       | INDORE           |
| Course Name*                | Tenure*         |                  |
| HOSPITALITY TRAVEL AND CUS. | 21              |                  |

**Financing Details**

**17 If Pincode Field Exists**

If 'True' then go to '18. Type Into - "Pincode"'  
If 'False' then go to '19. Continue'
Est. time: 0.5 sec.

**18 Type Into - "Pincode"**

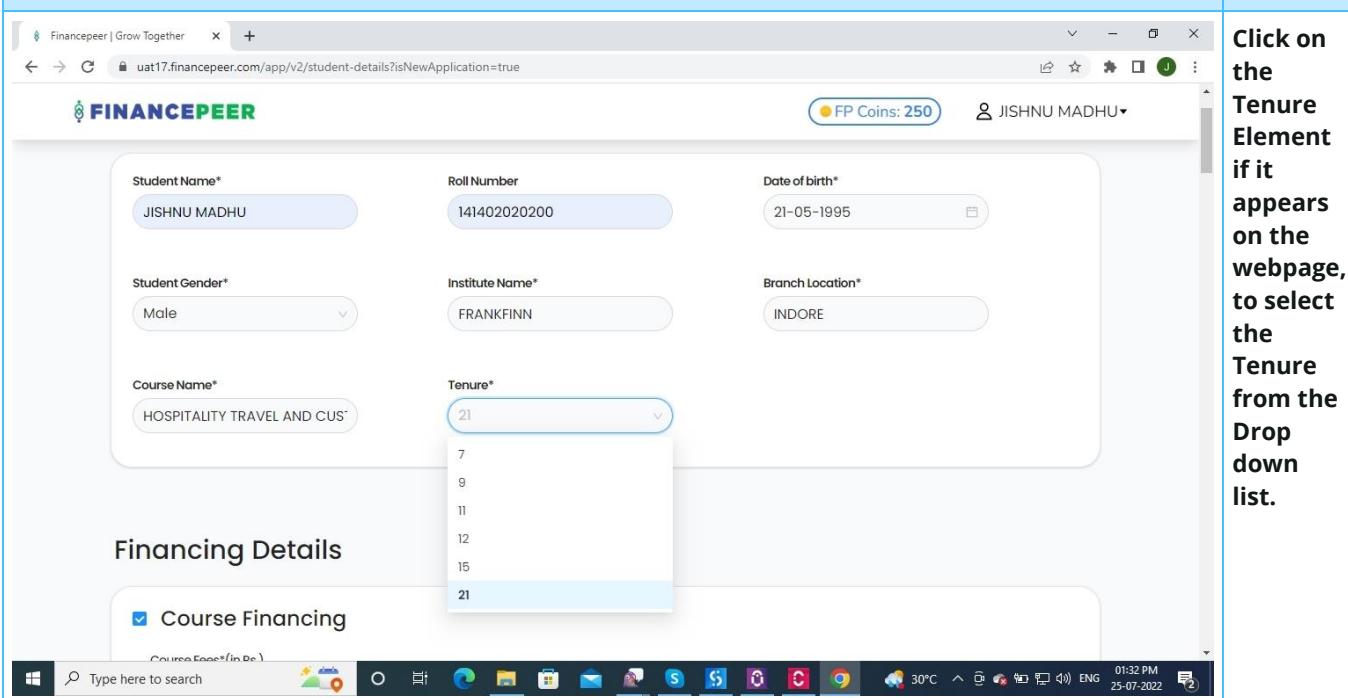
Type into the Pincode of the Place where the Institute Branch that was selected is located.
Est. time: 0.5 sec.

|      |   |
|------|---|
| 18.1 | Est. time:<br>0.0 sec.  |
|      | <b>Action:</b><br><b>Type into the Pincode field the pincode if the UI element appears on the page.</b> |

|                              |   |
|------------------------------|---|
| 18.2 Go to: Click - "Tenure" | Est. time: 0.0 sec.   |
|                              | <b>Action: On the UI Element Tenure appears, click the Tenure</b> |

|   |                     |
|---|---------------------|
| 19 Continue – If Tenure Element does not appear on the screen | Est. time: 0.5 sec. |
|---|---------------------|

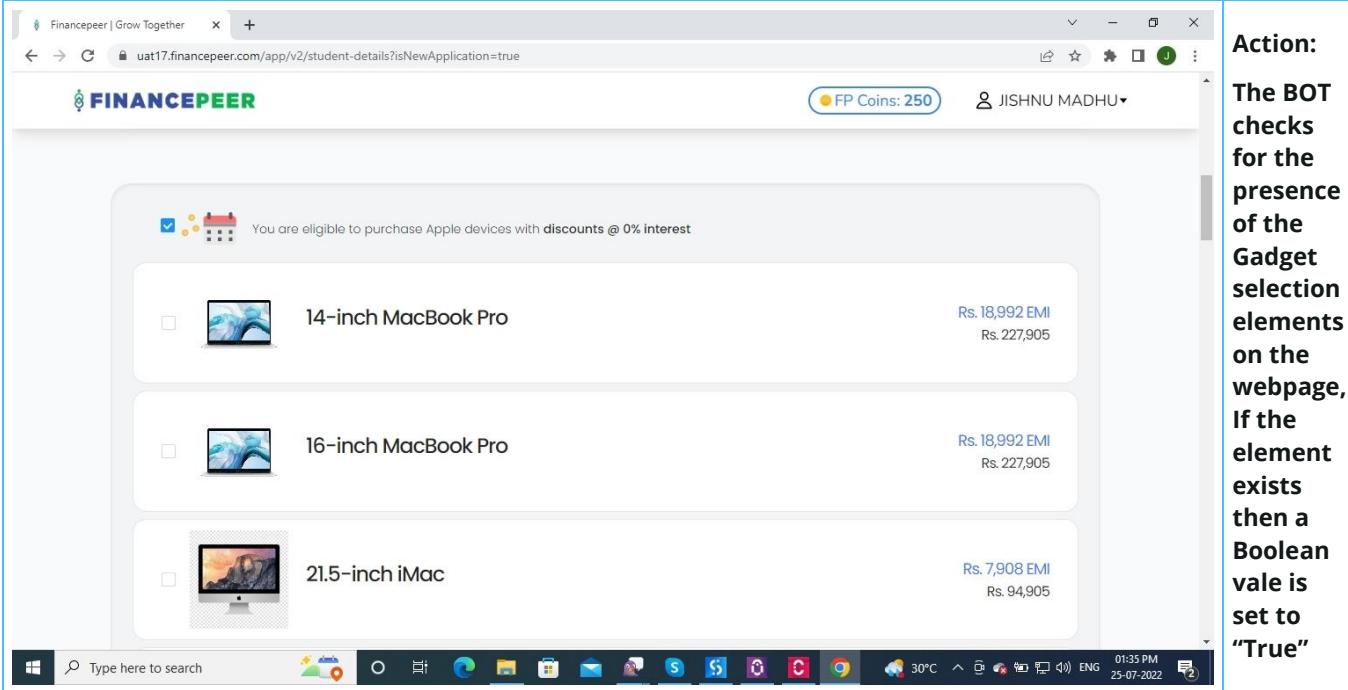
|  |                            |
|--|----------------------------|
| 20 Click - "Tenure"  |                            |
| <b>Click on the Tenure and select the required Tenure from the Drop Down</b> | <b>Est. time: 0.5 sec.</b> |

|   |  |
|---|--|
| <b>20.1</b>   | Est. time:<br>0.5 sec.   |
|  A screenshot of a web browser displaying the 'Financepeer' application. The page shows student details: Student Name (JISHNU MADHU), Roll Number (141402020200), Date of birth (21-05-1995). Below these are fields for Student Gender (Male), Institute Name (FRANKFINN), and Branch Location (INDORE). A 'Tenure*' dropdown menu is open, showing options 7, 9, 11, 12, 15, and 21, with '21' selected. Under 'Financing Details', there is a checked checkbox for 'Course Financing'. The browser's taskbar at the bottom shows various pinned icons and the date/time as 25-07-2022 01:32 PM. | <b>Click on the Tenure Element if it appears on the webpage, to select the Tenure from the Drop down list.</b> |

|  |                     |
|--|---------------------|
| <b>21 Click - Select Tenure</b>                      |                     |
| <b>Choose the Required Tenure from the drop down</b> | Est. time: 0.5 sec. |

|      |   |
|------|---|
| 21.1 | Est. time: 0.5 sec.   |
|      | <b>Action:</b><br><b>Select the Tenure based on the input data using a click activity</b> |

|   |                            |
|---|----------------------------|
| <b>22 Element Exists - Check Box- "You are eligible to purchase Apple devices with discounts @ 0% interest"</b> |                            |
| <b>If the pop with a checkbox for additional gadgets element occurs</b>   | <b>Est. time: 0.5 sec.</b> |

|  |                                |
|--|--------------------------------|
| <b>22.1</b><br>   | <b>Est. time:<br/>0.5 sec.</b> |
| <b>Action:</b><br><b>The BOT checks for the presence of the Gadget selection elements on the webpage, If the element exists then a Boolean vale is set to "True"</b> |                                |

| <b>23 If Element Exists</b>  |                            |
|--|----------------------------|
| <b>If 'False' then go to '24. Click - Check Box '<br/>If 'True' then go to '25. Countinue'</b> | <b>Est. time: 0.5 sec.</b> |

| <b>24 Click - Check Box</b>  |                            |
|--|----------------------------|
| <b>If the UI element exists- Then click the checkbox to Uncheck It</b> | <b>Est. time: 0.5 sec.</b> |

|             |  |
|-------------|--|
| <b>24.1</b> | Est. time:<br>0.5 sec.   |
|             | <b>Action:</b><br><b>Click the check box , to get rid of the Gadget selection Div.</b> |

|                                      |  |
|--------------------------------------|--|
| <b>24.2 Go to: Click - "Proceed"</b> | Est. time: 0.5 sec.  |
| <b>Click "Proceed Button"</b>        | <b>Action:</b> Click the Proceed Button, to move on the next page. |

|  |                     |
|--|---------------------|
| <b>25 Countinue</b>  |                     |
| <b>If the UI element for Gadget Selection does not appear, then continue the process and click Proceed</b> | Est. time: 0.5 sec. |

|  |                     |
|--|---------------------|
| <b>26 Click - "Proceed"</b>  |                     |
| <b>Click on the Proceed Button after the application is complete to Redirect to the Final Page of the application.</b> | Est. time: 0.5 sec. |

**26.1**

Est. time:  
0.5 sec.

Action: Click the "Proceed" Button

**27 End of Page 2**

**End of Page 2- Redirect to Page 3(Final Page of Application)**

Est. time: 0.0 sec.

**28 Select - Salaried (OR) Self Employed**

**Select the occupation type based on the Input data**

Est. time: 0.5 sec.

**29 OR**

If "Salaried" then go to '3. Click - "Salaried"  
If "Self Employed" then go to '4. Click - Self Employed'  
Click any one of the two radio buttons either salaried or self employed as per the choice

Est. time: 0.5 sec.

**30 Click - "Salaried"**

**Click on the Salaried Radio Button if it is the preference**

Est. time: 0.5 sec.

30.1

Est. time:  
0.5 sec.

**Action:**  
**If the occupation type as per the input is salaried, then click on Salaried Radio Button.**

### 31 Click - Self Employed

**Click on the Self Employed Radio Button if that is the preference**

Est. time: 0.5 sec.

**31.1**

Est. time:  
0.5 sec.
Action:  
**If the occupation type is Self Employed, then click the "Self employed" Radio Button.**

Choose current occupation type

Salaried  
(Upload only photos of PAN and AADHAR to get instant approval)

Self employed

2 of 3

Provide Aadhar and PAN Details

DigiLocker Document Wallet to Empower Citizens

OR

Upload Image or scanned files

Proceed for quick authentication

Provide documents

\* Latest Applicant colour photo or selfie  
Please upload latest colour photo or selfie of the applicant

Choose file

Type here to search

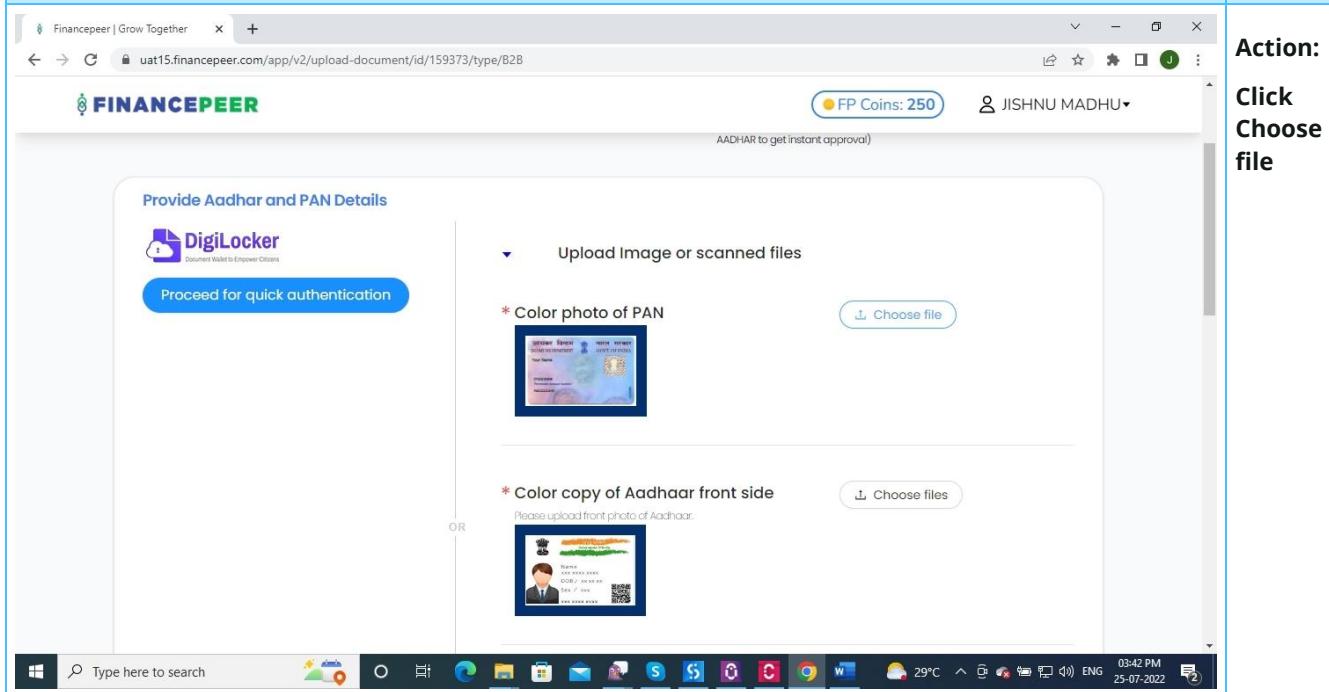
30°C 02:14 PM 25-07-2022

### 32 Click - "Upload Image or scanned files"

|  |                     |
|--|---------------------|
| Click the “Upload Image or scanned files” UI Element | Est. time: 0.5 sec. |
|--|---------------------|

### 33 Color photo of PAN Click - "Choose File"

|  |                     |
|--|---------------------|
| Click on Choose File for uploading the PAN Card photo. Post the click, The File Explorer will open for selecting the File. | Est. time: 0.5 sec. |
|--|---------------------|

|   |  |
|---|--|
| 33.1  | Est. time: 0.0 sec.                        |
|  | <b>Action:</b><br><b>Click Choose file</b> |

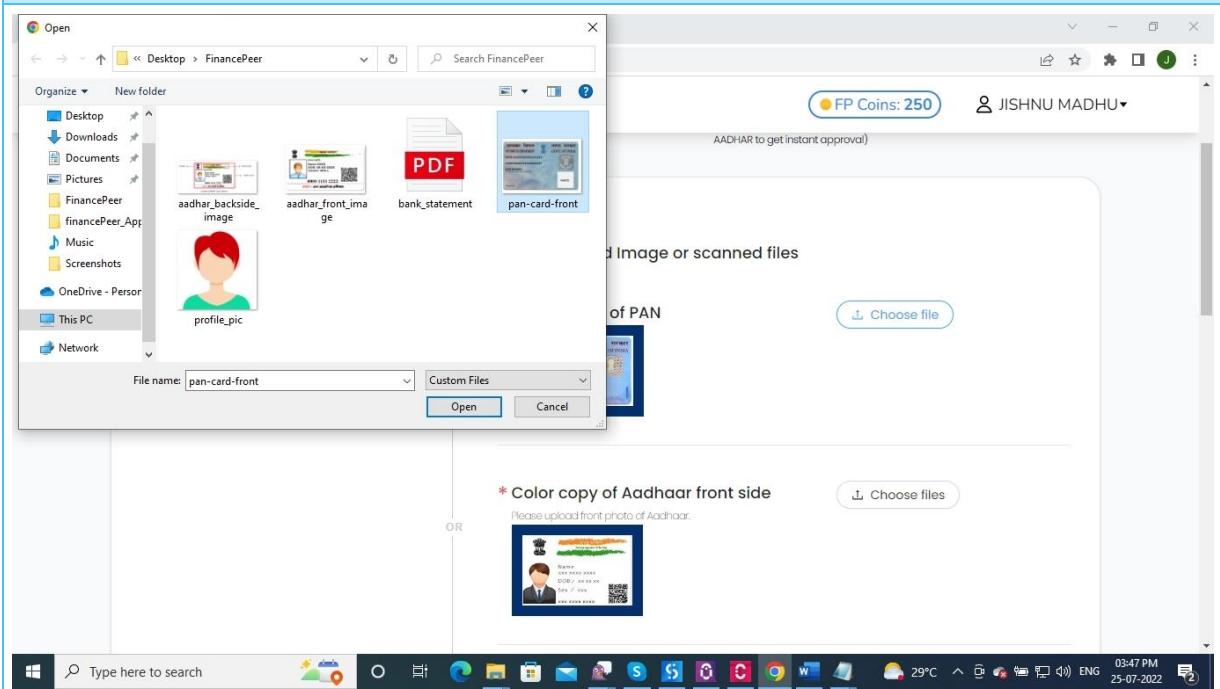
#### 34 Type Into - PAN Card Image Path

Type into the path of the pan card image file

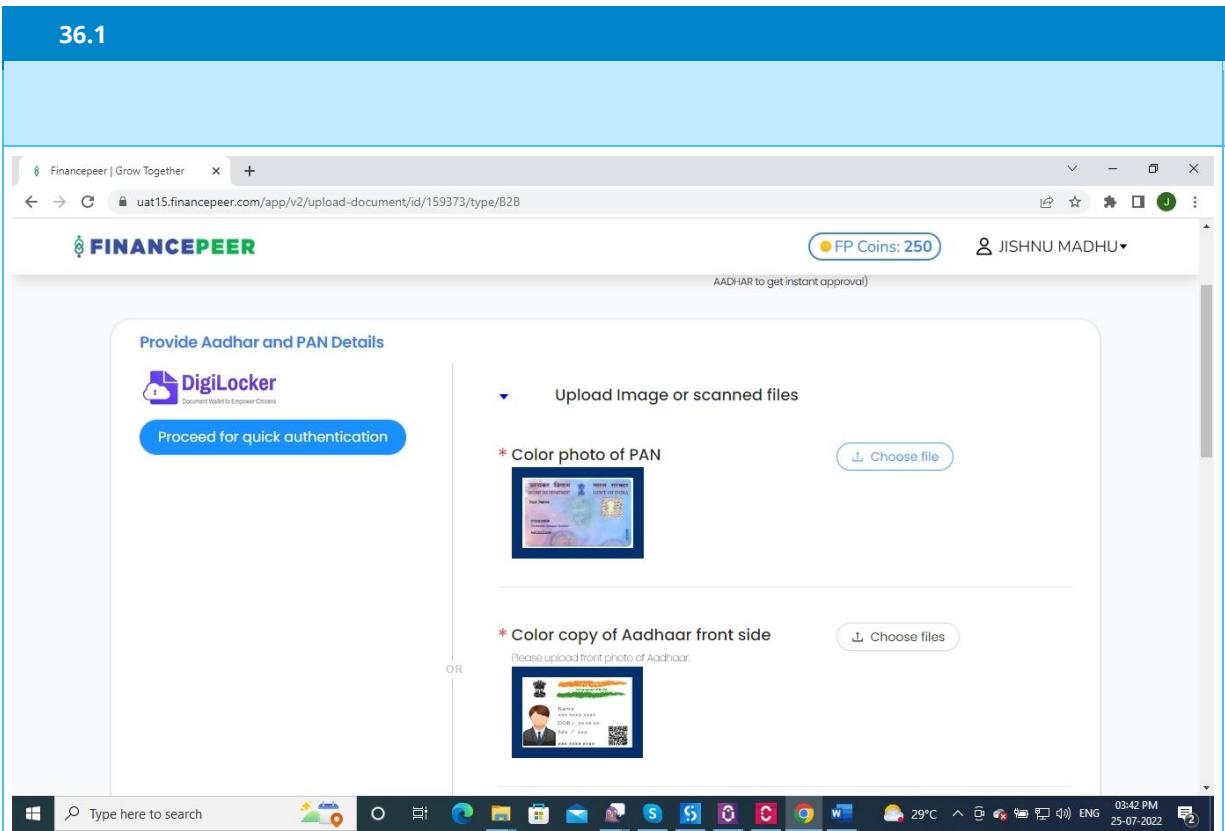
Est. time: 0.5 sec.

**34.1**

 Est. time:  
0.5 sec.

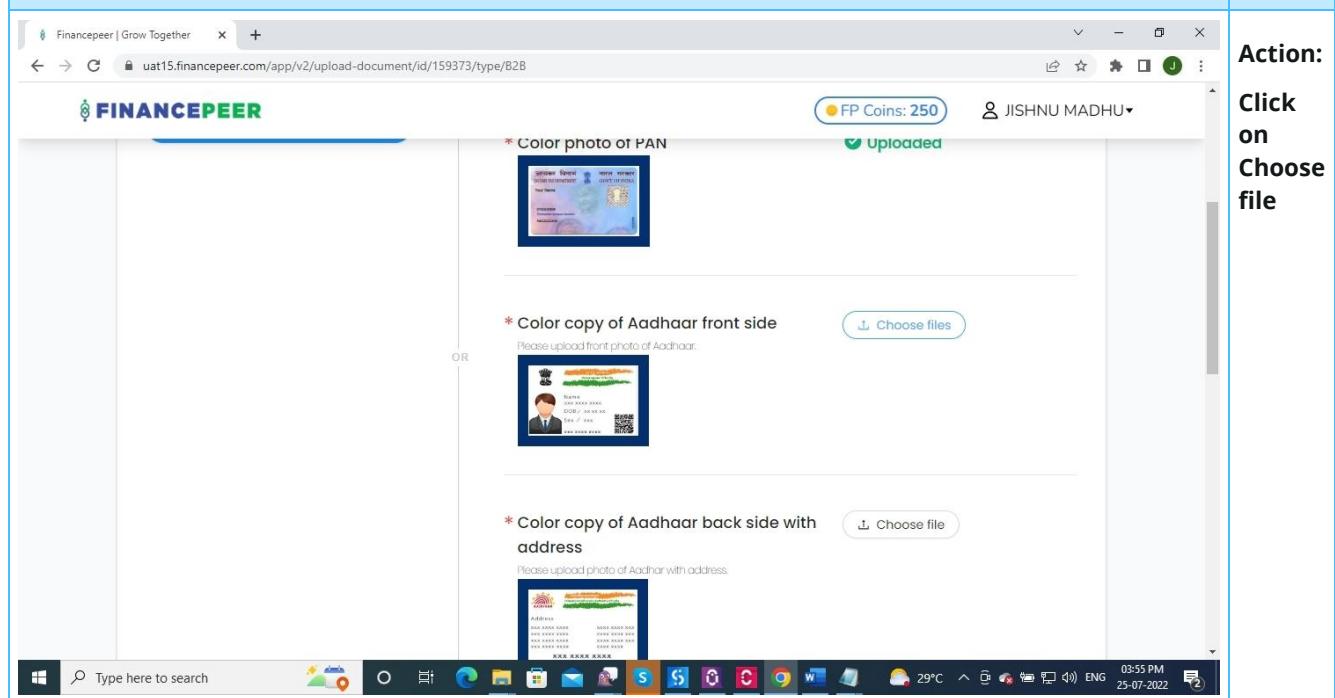
**Action:**  
**Type Into the path of the file to be uploaded.**

**35 Hot Key \_ ENTER**
**Click the Enter Key after typing in the file path**
**Est. time: 0.5 sec.**
**36 Click - "Upload documents"**
**Click on the "Upload documents" to upload the Image of the Pan Card**
**Est. time: 0.5 sec.**

**36.1**

|   |                        |
|---|------------------------|
|  | Est. time:<br>0.5 sec. |
| <b>Action:</b><br><b>Click on Upload Document</b>                                   |                        |

**37 Color copy of Aadhaar front side Click - "Choose File"**

|  |                            |
|--|----------------------------|
| <b>Click on the "Choose File" to select the Aadhar front side image. Post the Click the File Explorer is opened to select the image.</b> | <b>Est. time: 0.5 sec.</b> |
|--|----------------------------|

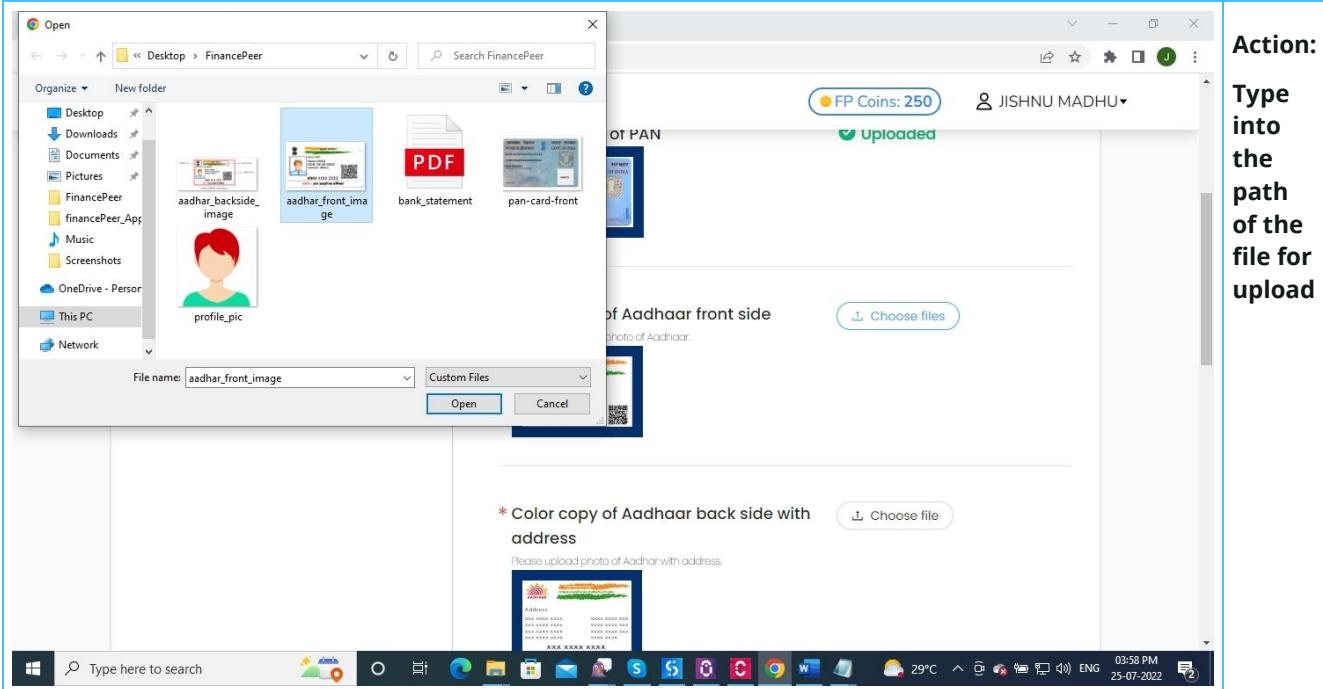
|   |  |
|---|--|
| 37.1  | <p>Est. time: 0.5 sec.</p>  |
| <p><b>Action:</b><br/><b>Click on Choose file</b></p> |  |

### 38 Type Into - Aadhar Front Side Image Path

Type into the path of the aadhar front side image that needs to be uploaded.

Est. time: 0.5 sec.

**38.1**

 Est. time:  
0.5 sec.

**39 Hot Key \_ ENTER**

Click the Enter Key after typing in the file path

Est. time: 0.5 sec.

**40 Click - "Upload documents"**

Click - "Upload documents" do upload the Aadhar front side image

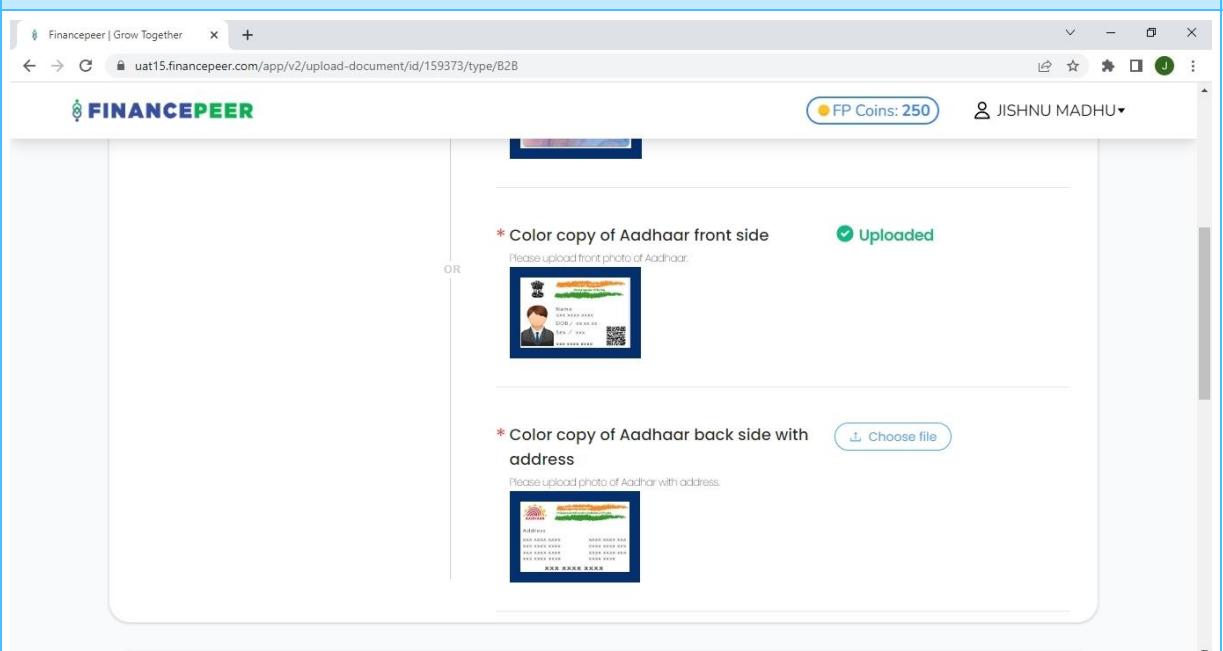
Est. time: 0.5 sec.

|             |                     |
|-------------|---------------------|
| <b>40.1</b> | Est. time: 0.0 sec. |
|             | <b>Action:</b>      |

#### 41 Color copy of Aadhaar back side with address Click - "Choose file"

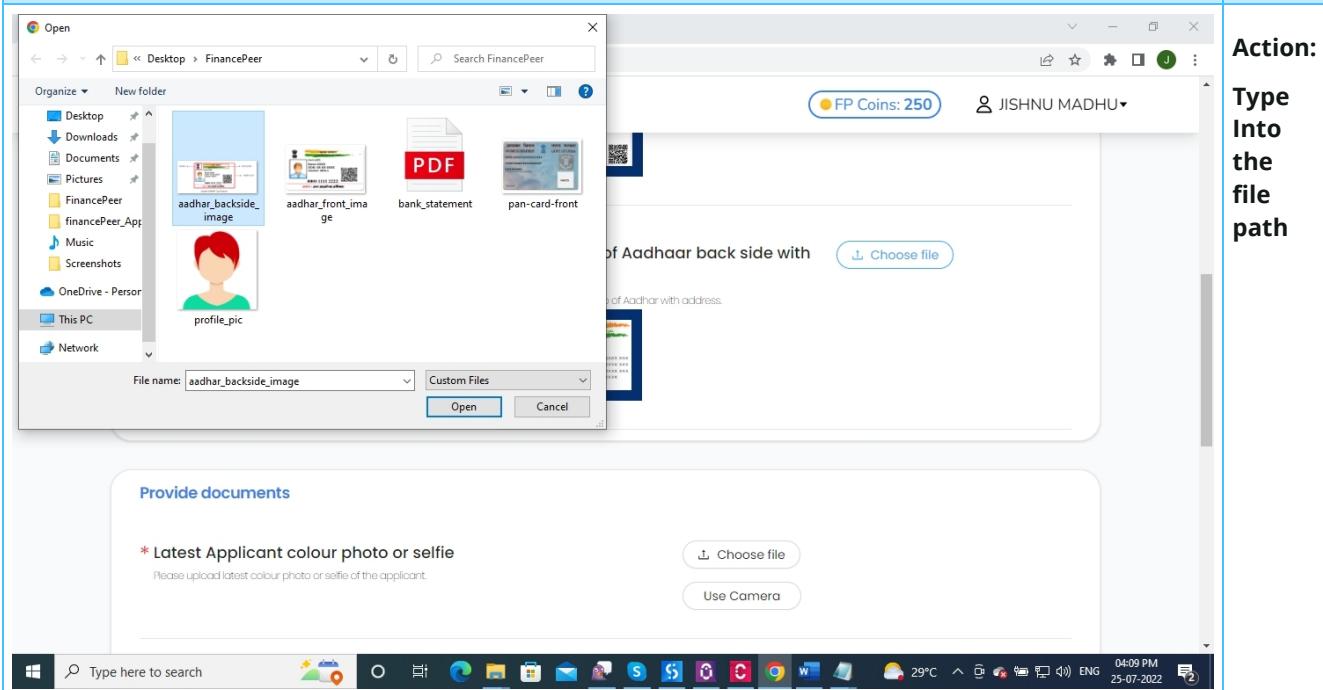
**Color copy of Aadhaar back side with address - Click on "choose file" to select the image of the aadhar card backside image to be uploaded. Post the click, The file explorer**

Est. time: 0.5 sec.

|   |   |
|---|---|
| 41.1  | Est. time: 0.5 sec.                         |
|  | <b>Action:</b><br><b>Click Choose files</b> |

|  |                     |
|--|---------------------|
| 42 Type Into - Aadhar Backside Image Path  | Est. time: 0.5 sec. |
| <b>Type in the aadhar backside path of the file that is selected for Upload.</b> |                     |

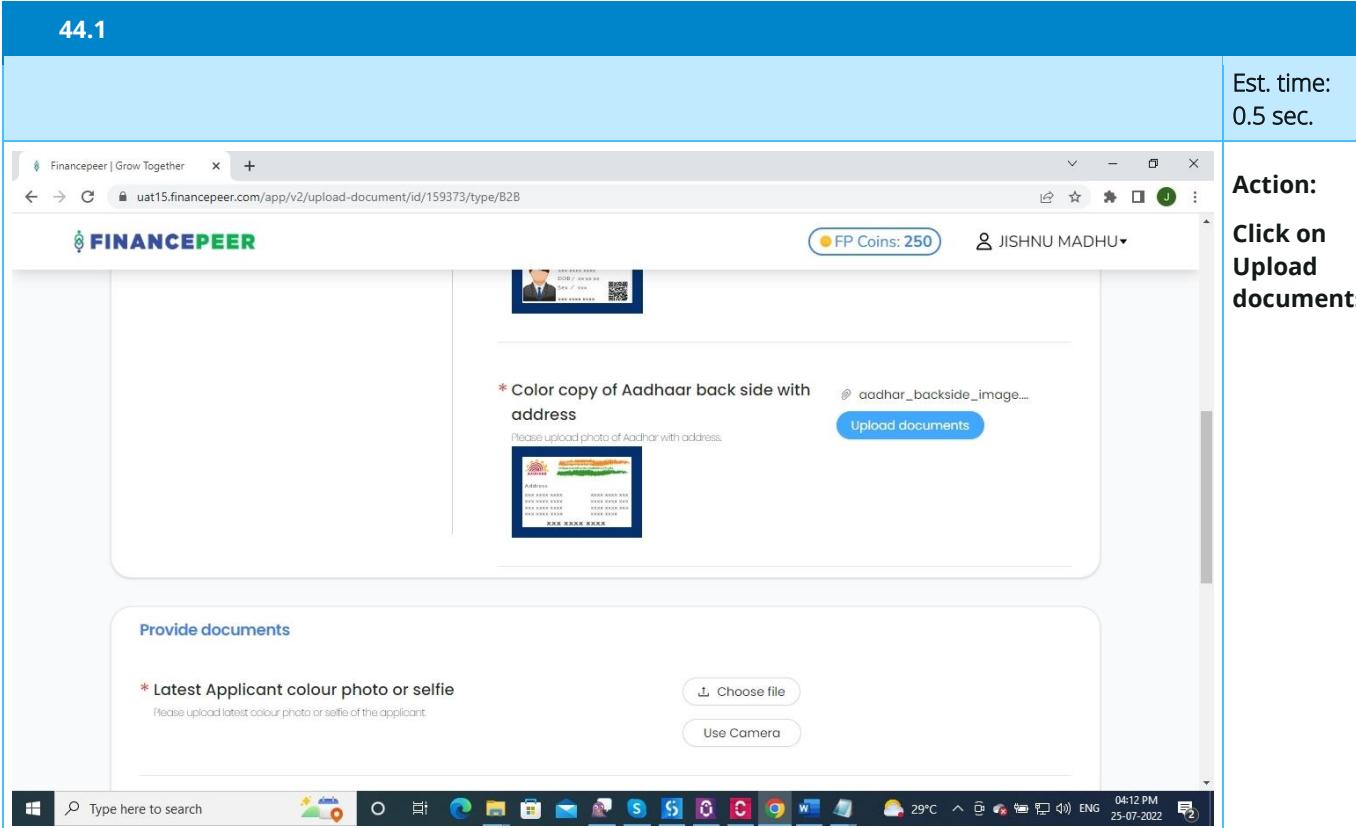
**42.1**

 Est.  
time:  
0.5 sec.

**43 Hot Key \_ ENTER**
**Click the Enter Key after typing in the file path**
**Est. time: 0.5 sec.**
**44 Click - "Upload documents"**
**Click on the "upload document" to upload the selected file to the website**
**Est. time: 0.5 sec.**

44.1

Est. time:  
0.5 sec.

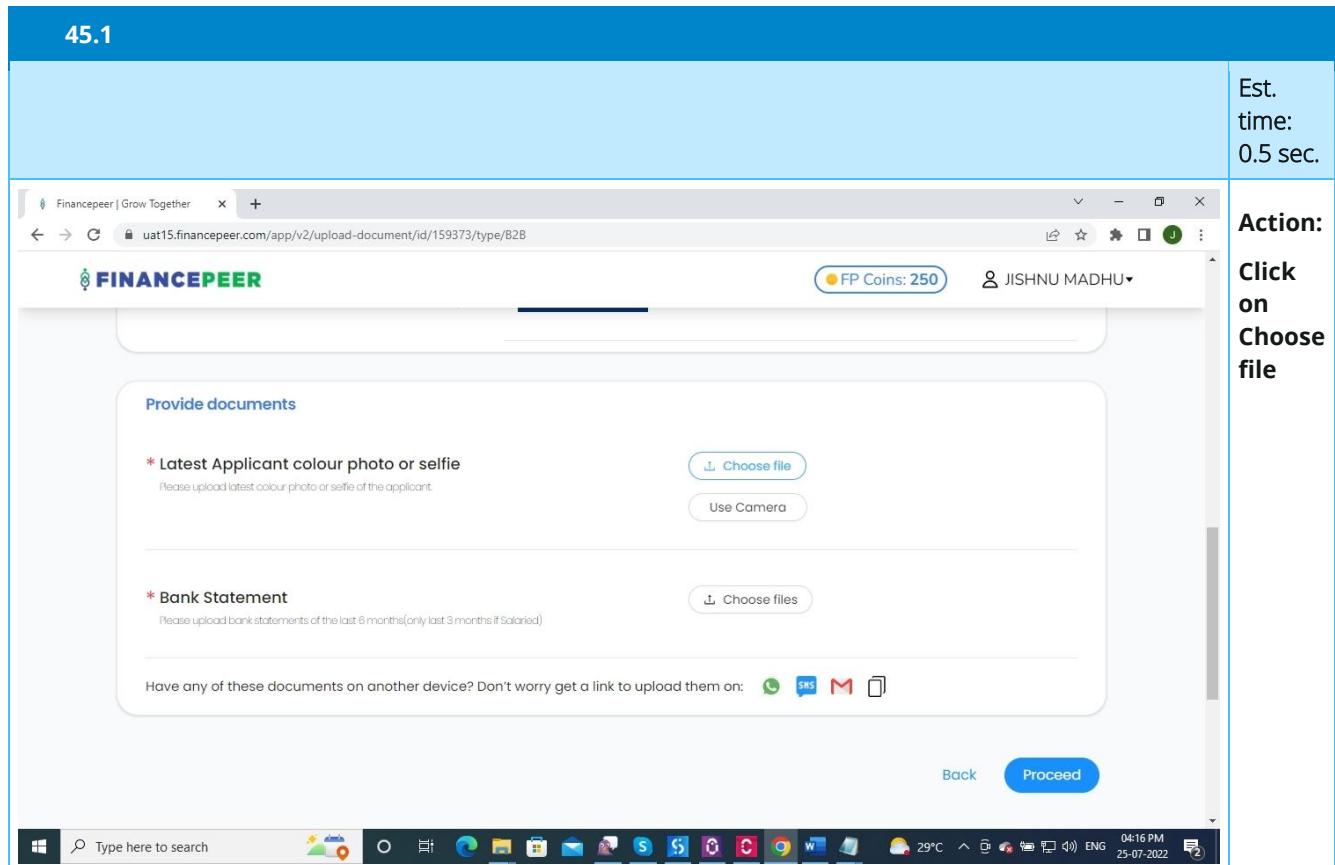
**Action:**  
**Click on  
Upload  
documents**



The screenshot shows a web browser window with a blue header bar containing the number '44.1'. The main content area is a form from 'Financepeer | Grow Together' at the URL 'uat15.financepeer.com/app/v2/upload-document/id/159373/type/B2B'. The form includes a placeholder image of a person in a suit, a file input field with the placeholder 'aadhar\_backside\_image...', and a 'Upload documents' button. Below this, there's a section titled 'Provide documents' with a placeholder for 'Latest Applicant colour photo or selfie' and buttons for 'Choose file' and 'Use Camera'. The browser's address bar shows the URL, and the taskbar at the bottom includes the Windows logo, a search bar, and various pinned application icons.

#### 45 Latest Applicant colour photo or selfie Click - "Choose File"

**Click on "Choose file " under the Latest Applicant colour photo or selfie, to upload the latest pic**      Est. time: 0.5 sec.

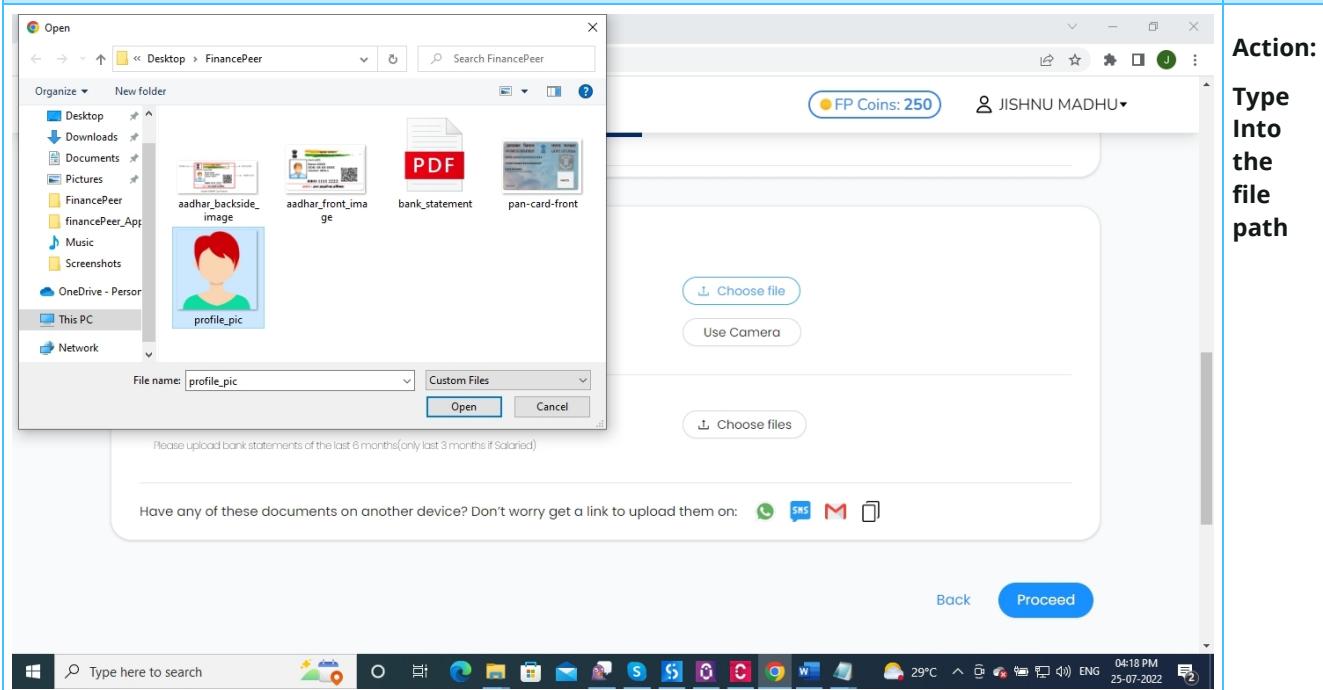
|  |  |
|--|--|
| <p><b>45.1</b></p>  | <p>Est. time:<br/>0.5 sec.</p> <p><b>Action:</b><br/><b>Click on Choose file</b></p> |
|--|--|

**46 Type Into - Latest Applicant colour photo or selfie File Path**

Type into the file path to the Photograph in the File explorer      Est. time: 0.5 sec.

**46.1**

Est.  
time:  
0.0 sec.



**47 Hot Key \_ ENTER**

**Click the Enter Key after typing in the file path**

Est. time: 0.5 sec.

**48 Latest Applicant colour photo or selfie Click - "Upload documents"**

**Click on the "Upload documents" to Upload the Profile picture to the website**

Est. time: 0.5 sec.

48.1

Est. time:  
0.5 sec.

**Action:**  
**Click on the upload documents**

Financepeer | Grow Together

uat15.financepeer.com/app/v2/upload-document/id/159373/type/B2B

FP Coins: 250 JISHNU MADHU

Provide documents

\* Latest Applicant colour photo or selfie  
Please upload latest colour photo or selfie of the applicant.

profile\_pic.png

Upload documents

Use Camera

\* Bank Statement  
Please upload bank statements of the last 6 months (only last 3 months if Salaried).

Choose files

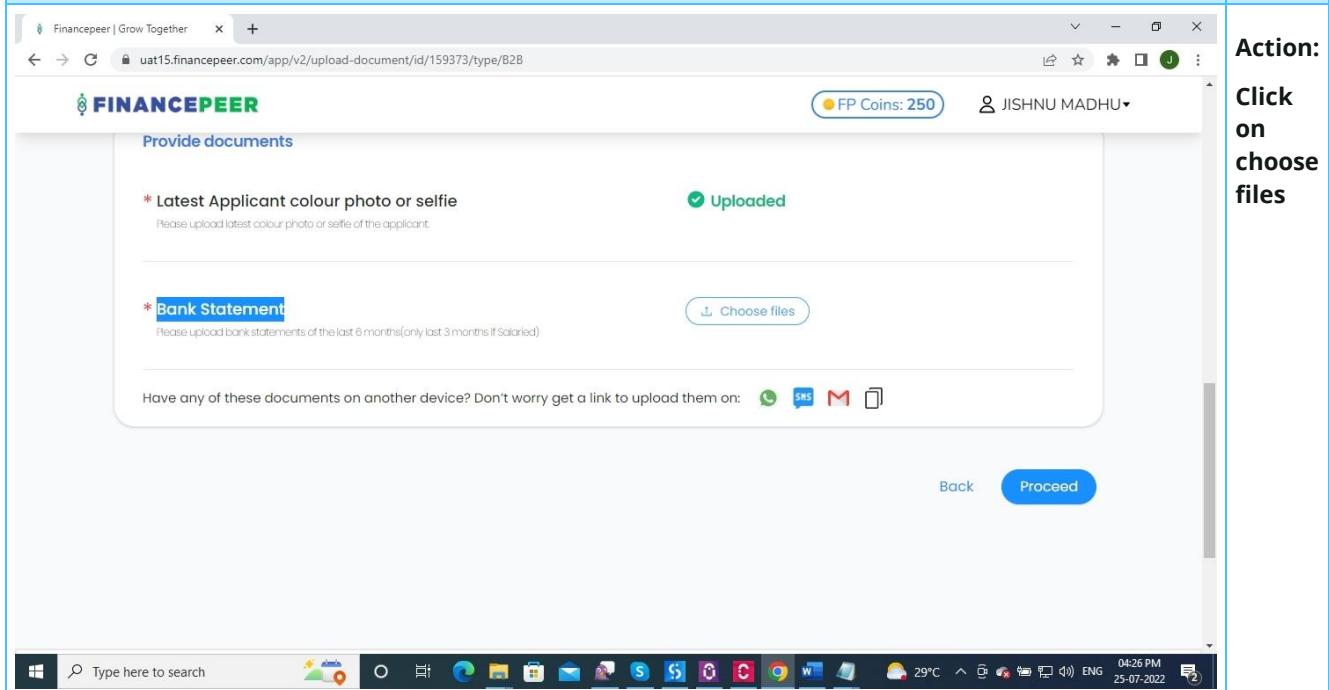
Have any of these documents on another device? Don't worry get a link to upload them on:

Back Proceed

49 Bank Statement Click - "Choose Files"

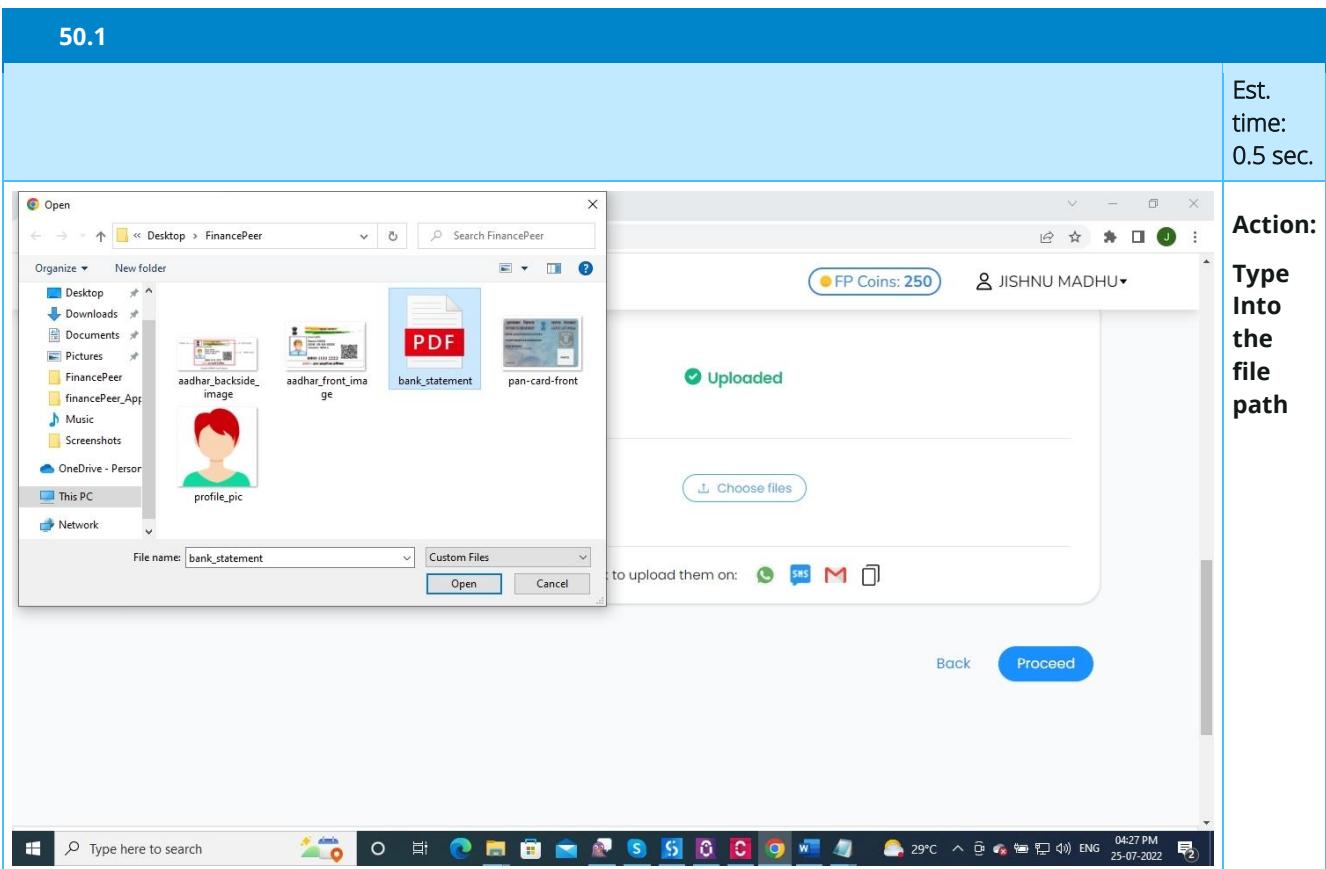
Click the Choose Files to select the PDF Document to uploaded as Bank Statement

Est. time: 0.5 sec.

|   |  |
|---|--|
| 49.1  | Est. time: 0.5 sec.                            |
|  | <b>Action:</b><br><b>Click on choose files</b> |

**50 Type Into - Bank Statement file path****Type in the path of the pdf bank statement document from the file explorer**

Est. time: 0.5 sec.



### 51 Hot Key \_ ENTER

**Click the Enter Key after typing in the file path**

Est. time: 0.5 sec.

### 52 Click - "Upload documents"

**Click on "Upload documents" to upload the selected Bank Statement pdf to the website**

Est. time: 0.5 sec.

52.1

Est. time: 0.0 sec.

Action: Click on Upload documents

Financepeer | Grow Together

uat15.financepeer.com/app/v2/upload-document/id/159373/type/B2B

**FINANCEPEER**

Provide documents

\* Latest Applicant colour photo or selfie  
Please upload latest colour photo or selfie of the applicant.

\* Bank Statement  
Please upload bank statements of the last 6 months(only last 3 months if salaried)

FP Coins: 250 JISHNU MADHU

Uploaded

Choose files  
bank\_statement.pdf

Upload documents

Have any of these documents on another device? Don't worry get a link to upload them on:

Back Proceed

Type here to search 29°C ENG 04:30 PM 25-07-2022

**53 Click - "Proceed"**

Finally click on the "Proceed" Button to Submit the Application

Est. time: 0.5 sec.

**53.1**

|   |                     |
|---|---------------------|
|   | Est. time: 0.5 sec. |
| <b>Action:</b><br><b>Click on Proceed to redirect to the next page.</b> |                     |

**54 End of Page 3**

|  |                            |
|--|----------------------------|
| <b>End of Page 3, website redirects to final page after clicking "Proceed"</b> | <b>Est. time: 0.5 sec.</b> |
|--|----------------------------|

**55 Full name - "AutoFill"**
**Full name - CharField - Auto Filled Value**
**Est. time: 0.5 sec.**
**Est. time:  
0.5 sec.**

|   |  |
|---|--|
| <p>The screenshot shows a web browser window for 'Financepeer   Grow Together' at the URL 'uat15.financepeer.com/app/v2/applicant-details/id/159373/type/B2B'. The page displays applicant details. A green message box at the top states 'Auto filled using information from your pan card and aadhar card'. Below this, there are several input fields: 'Full name*' containing 'JISHNU MADHU', 'Date of birth*' containing '21-03-2015', 'Father's name*' containing 'MADHU SOODHANAN PILLAI', 'Aadhaar number*' containing '000011112222', 'PAN number*' containing 'DYAPM522A', 'Aadhaar address*' containing 'KAVERI, VILANGANTHUNDIL, KURAMPALA, PANDALAM, PATHANAMTHITTA', 'Relation with student*' (a dropdown menu), and 'Email address*' containing 'jishnum7@gmail.com'. The status bar at the bottom of the browser shows the date as 25-07-2022 and the time as 04:35 PM.</p> | <b>Action:</b><br><b>Full name field is auto filled.</b> |
|---|--|

**56 Date of birth - "AutoFill"**
**Date of birth - CharField - The value is autofilled.**
**Est. time: 0.5 sec.**

|      |  |
|------|--|
| 56.1 | Est. time: 0.5 sec.  |
|      | <b>Action:</b><br><b>Date of Birth field is auto filled.</b> |

|   |                            |
|---|----------------------------|
| 57 Father's name - "AutoFill"                               |                            |
| <b>Father's name - CharField - The Value is autofilled.</b> | <b>Est. time: 0.5 sec.</b> |

**57.1**

Est. time: 0.5 sec.

The screenshot shows a web application interface for 'Financepeer | Grow Together'. At the top, there is a header with the logo and navigation links. Below the header, a message box says 'Auto filled using information from your pan card and aadhar card'. The main form contains several input fields:

- Full name\*: JISHNU MADHU
- Date of birth\*: 21-03-2015
- Father's name\*: MADHU SOODHANAN PILLAI
- Aadhaar number\*: 000011112222
- PAN number\*: DYAPM522A
- Aadhaar address\*: KAVERI, VILANGANTHUNDIL, KURAMPALA, PANDALAM, PATHANAMTHITTA
- Relation with student\*: (dropdown menu)
- Email address\*: jishnum7@gmail.com

On the right side of the interface, there is a sidebar with the text 'Action: Father's name field is auto filled.' and a timestamp '04:35 PM 25-07-2022'.

**58 Aadhaar number - "AutoFill"**

**Aadhaar number - CharField - The Value is autofilled.**

**Est. time: 0.5 sec.**

**58.1**

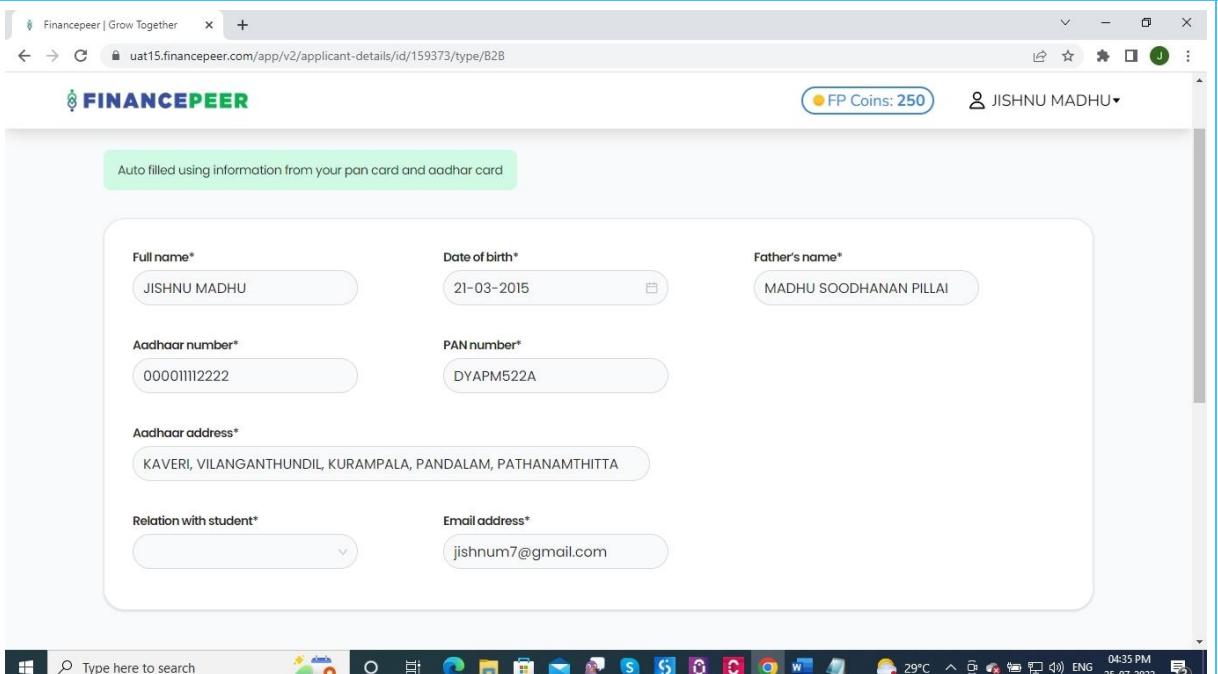
Est. time: 0.5 sec.

**Action:**  
Aadhar number field is auto filled.

**59 PAN number - "AutoFill"**

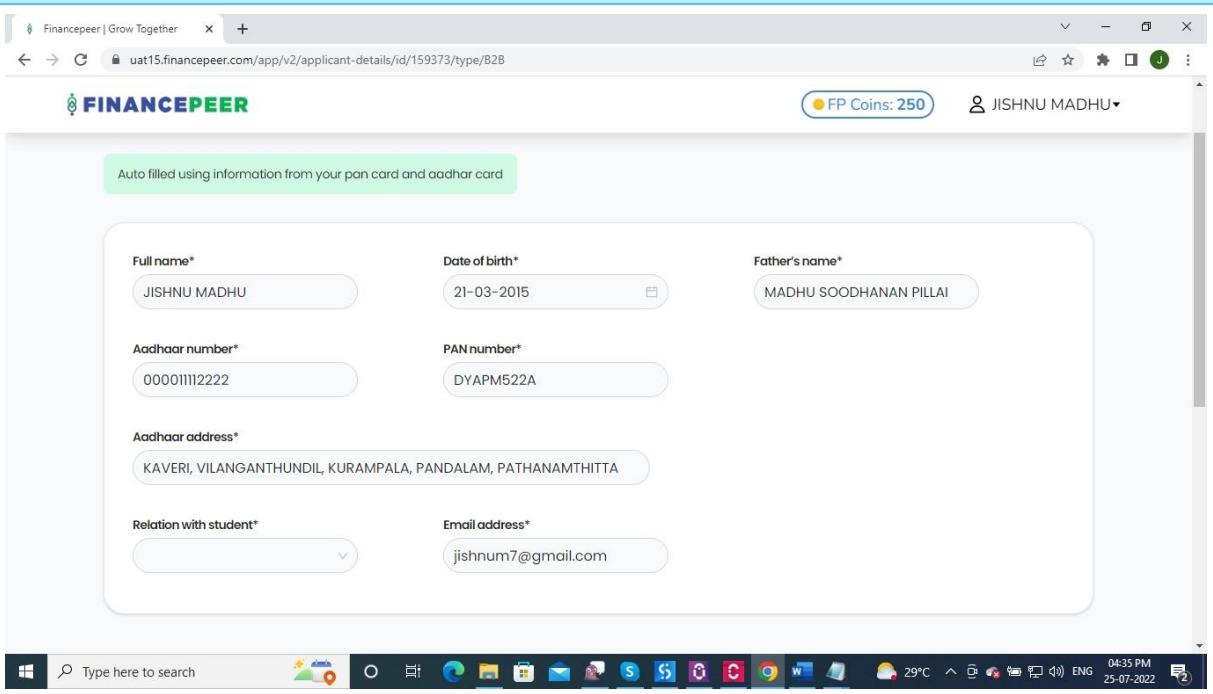
PAN number - CharField - The Value is autofilled. | Est. time: 0.5 sec.

**59.1**

|   |                                |
|---|--------------------------------|
|  | <b>Est. time:<br/>0.5 sec.</b> |
| <b>Action:</b><br><b>PAN<br/>Number<br/>field is<br/>auto<br/>filled.</b>           |                                |

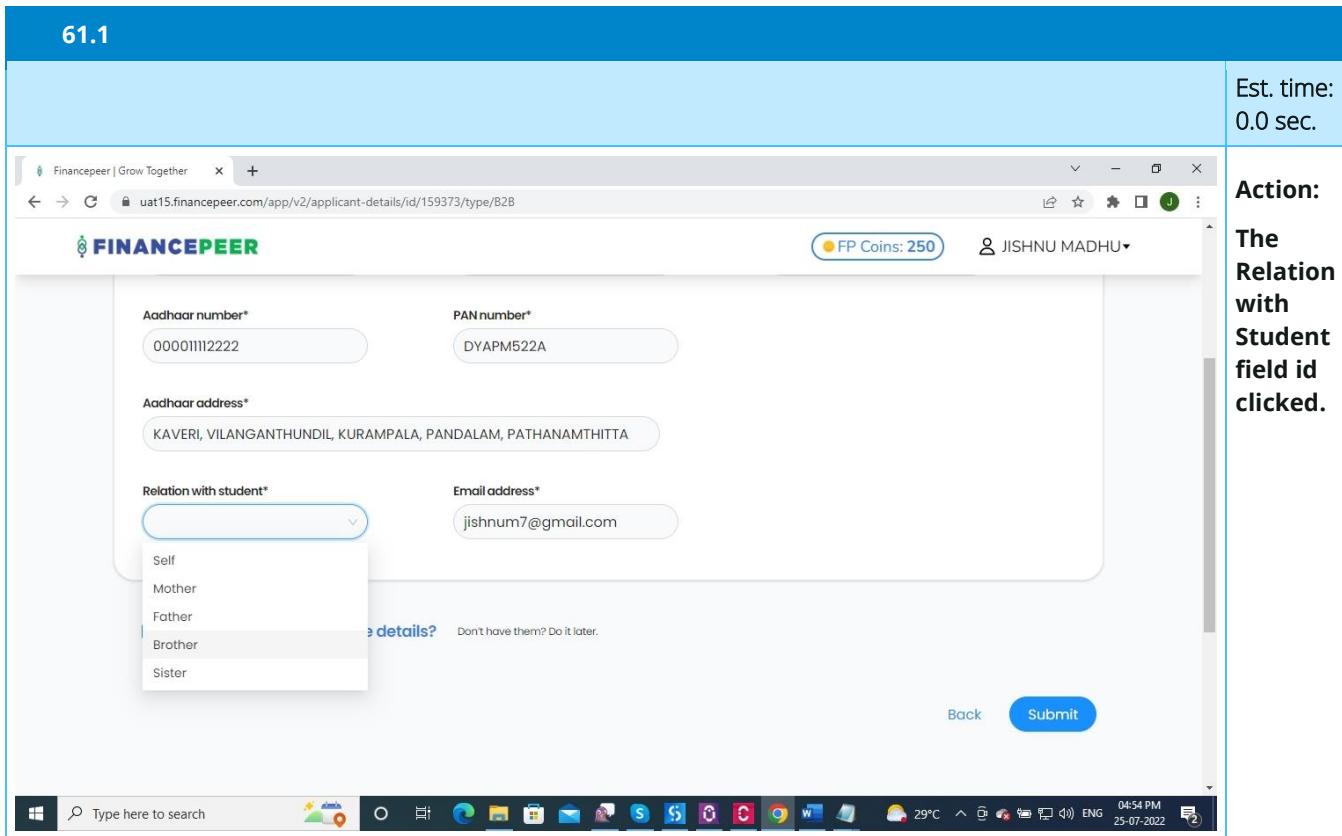
**60 Aadhaar address - "AutoFill"**

|   |                            |
|---|----------------------------|
| <b>Aadhaar address : Address Field - The value is autofilled.</b> | <b>Est. time: 0.5 sec.</b> |
|---|----------------------------|

|   |   |
|---|---|
| <b>60.1</b>   | Est. time: 0.0 sec.   |
|  A screenshot of a web browser window titled "Financepeer   Grow Together". The URL is "uat15.financepeer.com/app/v2/applicant-details/id/159373/type/B2B". The page displays a form for applicant details. A green message bar at the top says "Auto filled using information from your pan card and aadhar card". The form fields include: <ul style="list-style-type: none"><li>Full name*: JISHNU MADHU</li><li>Date of birth*: 21-03-2015</li><li>Father's name*: MADHU SOODHANAN PILLAI</li><li>Aadhaar number*: 000011112222</li><li>PAN number*: DYAPM522A</li><li>Aadhaar address*: KAVERI, VILANGANTHUNDIL, KURAMPALA, PANDALAM, PATHANAMTHITTA</li><li>Relation with student*: (dropdown menu)</li><li>Email address*: jishnum7@gmail.com</li></ul> The status bar at the bottom shows "04:35 PM 25-07-2022". | <b>Action:</b><br><b>Aadhar address field is auto filled.</b> |

|  |                     |
|--|---------------------|
| <b>61 Click - "Relation with student"</b>            |                     |
| <b>Click - Relation with student - Dropdown List</b> | Est. time: 0.5 sec. |

**61.1**

|   |                        |
|---|------------------------|
|  | Est. time:<br>0.0 sec. |
| <b>Action:</b><br><b>The Relation with Student field id clicked.</b>                |                        |

**62 Click - Select the Relation with student from the dropdown List**

|  |                     |
|--|---------------------|
| <b>Select the Relation with student from the dropdown list</b> | Est. time: 0.5 sec. |
|--|---------------------|

**62.1**

Est. time: 0.0 sec.

Financepeer | Grow Together

uat15.financepeer.com/app/v2/applicant-details/id/159373/type/B2B

**FINANCEPEER**

FP Coins: 250 JISHNU MADHU

Aadhaar number\* 00001112222

PAN number\* DYAPM522A

Aadhaar address\* KAVERI, VILANGANTHUNDIL, KURAMPALA, PANDALAM, PATHANAMTHITTA

Relation with student\* Self

Email address\* jishnum7@gmail.com

Would you like to add more details? Don't have them? Do it later.

Back Submit

Type here to search

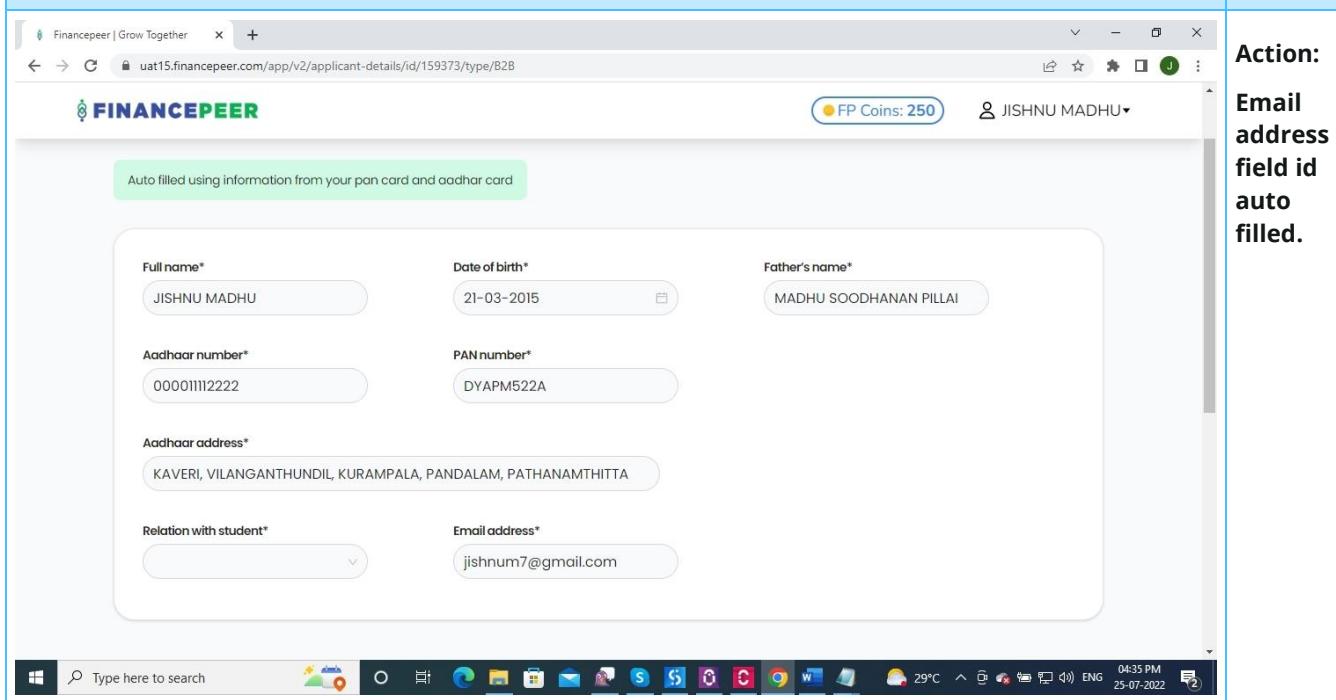
29°C 04:54 PM 25-07-2022

**Action:**

The desired Relation w  
student is selected  
based on t  
Input data  
and  
accordingly  
implement  
through a  
click activi

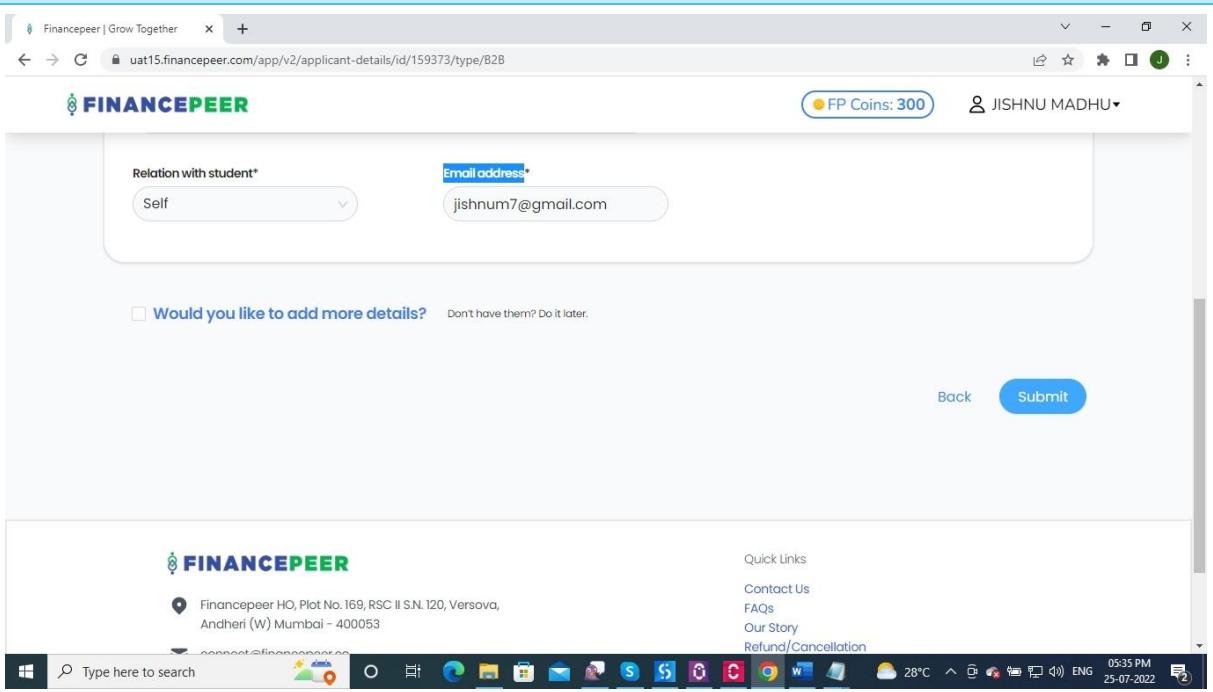
**63 Email address - "AutoFill"****Email address - CharField - Autofill**

Est. time: 0.5 sec.

|  |  |
|--|--|
| <b>63.1</b>  | Est. time: 0.5 sec.  |
|  A screenshot of a web browser window displaying a form from 'FINANCEPEER'. The URL is 'uat15.financepeer.com/app/v2/applicant-details/id/159373/type/B2B'. The page shows fields auto-filled with information from a PAN card and Aadhar card. The fields include: Full name* (JISHNU MADHU), Date of birth* (21-03-2015), Father's name* (MADHU SOODHANAN PILLAI); Aadhaar number* (000011112222), PAN number* (DYAPM522A); Aadhaar address* (KAVERI, VILANGANTHUNDIL, KURAMPALA, PANDALAM, PATHANAMTHITTA); Relation with student* (dropdown menu); Email address* (jishnum7@gmail.com). The browser taskbar at the bottom shows various pinned icons and the date/time as 25-07-2022, 04:35 PM. <p>Auto filled using information from your pan card and aadhar card</p> <p>Full name* JISHNU MADHU</p> <p>Date of birth* 21-03-2015</p> <p>Father's name* MADHU SOODHANAN PILLAI</p> <p>Aadhaar number* 000011112222</p> <p>PAN number* DYAPM522A</p> <p>Aadhaar address* KAVERI, VILANGANTHUNDIL, KURAMPALA, PANDALAM, PATHANAMTHITTA</p> <p>Relation with student*</p> <p>Email address* jishnum7@gmail.com</p> | <b>Action:</b><br><b>Email address field id auto filled.</b> |

|   |                     |
|---|---------------------|
| <b>64 Click - "Submit"</b>                        |                     |
| <b>Click - "Submit" to submit the application</b> | Est. time: 0.5 sec. |

**64.1**

|   |   |
|---|---|
|  | <p>Est. time: 0.5 sec.</p> <p><b>Action:</b><br/>The Submit button is clicked</p> |
|---|---|

**65 Redirect**

|   |                     |
|---|---------------------|
| The page is redirected to the final page with the application status and application ID | Est. time: 0.5 sec. |
|---|---------------------|

**66 Data Scrapping - "Application ID"**

|  |                     |
|--|---------------------|
| Scrap the Application ID from the last page. | Est. time: 0.5 sec. |
|--|---------------------|

|   |                        |
|---|------------------------|
| <b>66.1</b>   | Est. time:<br>0.0 sec. |
| <b>Action:</b><br><b>If the Application ID is shown, then the Application ID is saved</b> |                        |

## 2.6 Exceptions Handling

The Exception Handling is handled by Try-Catch Blocks.

## 2.7 Input Data Description

The following table should contain details regarding the inputs that every action of the process takes.

| #Action              | Sample            | Input Type    | Location                  | Are inputs Natively Digital? | Are the Inputs Structured? |
|----------------------|-------------------|---------------|---------------------------|------------------------------|----------------------------|
| <b>Student Name</b>  | <b>Roy Mathew</b> | <b>String</b> | <b>Financepeer Webapp</b> | <b>No</b>                    | <b>No</b>                  |
| <b>Roll Number</b>   | <b>1414025035</b> | <b>String</b> | <b>Financepeer Webapp</b> | <b>No</b>                    | <b>No</b>                  |
| <b>Date of birth</b> | <b>21-09-1995</b> | <b>Date</b>   | <b>Financepeer Webapp</b> | <b>No</b>                    | <b>No</b>                  |

|  |  |                     |                    |    |    |
|--|--|---------------------|--------------------|----|----|
| Student Gender                               | Male   | Drop Down Selection | Financepeer Webapp | No | No |
| Institute Name                               | FRANKFINN  | String              | Financepeer Webapp | No | No |
| Branch Location                              | INDORE   | String              | Financepeer Webapp | No | No |
| Pincode                                      | 689508   | String              | Financepeer Webapp | No | No |
| Course Name                                  | BCom   | String              | Financepeer Webapp | No | No |
| Tenure                                       | 12   | Drop Down Selection | Financepeer Webapp | No | No |
| Course fees                                  | 50,000   | String              | Financepeer Webapp | No | No |
| Choose current occupation type               | Salaried/ Self Employed                            | Radio Button        | Financepeer Webapp | No | No |
| Color photo of PAN                           | C:\Users\Desktop\FinancePeer\pan-card-front        | Image               | Financepeer Webapp | No | No |
| Color copy of Aadhaar front side             | C:\Users\Desktop\FinancePeer\aadhar_front_image    | Image               | Financepeer Webapp | No | No |
| Color copy of Aadhaar back side with address | C:\Users\Desktop\FinancePeer\aadhar_backside_image | Image               | Financepeer Webapp | No | No |
| Latest Applicant colour photo or selfie      | C:\Users\Desktop\FinancePeer\profile_pic           | Image               | Financepeer Webapp | No | No |
| ITR_V  | C:\Users\Desktop\FinancePeer\itr-v                 | PDF                 | Financepeer Webapp | No | No |
| Bank Statement                               | C:\Users\Desktop\FinancePeer\bank_statement        | PDF                 | Financepeer Webapp | No | No |
| Full name                                    | Roy Mathew   | String (Autofill)   | Financepeer Webapp | No | No |
| Date of birth                                | 21-09-1995   | Date (Autofill)     | Financepeer Webapp | No | No |

|                       |  |                     |                    |    |    |
|-----------------------|--|---------------------|--------------------|----|----|
| Aadhaar number        | 5895 6598 1589   | String (Autofill)   | Financepeer Webapp | No | No |
| PAN number            | DYAPM2103A   | String (Autofill)   | Financepeer Webapp | No | No |
| Aadhaar address       | House No.45, Olive Apartments, HSR Layout, Bangalore, Karnataka - 659201 | String (Autofill)   | Financepeer Webapp | No | No |
| Relation with student | Self   | Drop Down Selection | Financepeer Webapp | No | No |
| Email address         | roymathew@mail.com   | String (Autofill)   | Financepeer Webapp | No | No |

\* *Native Digital:* This is data that was originally created digitally e.g. excel, database or application reports etc. The non-native digital inputs are usually scanned images.

\* *Structured Data:* has a predictable format and exists in fixed fields (e.g. an excel cell or a field in a form) and is easily detectable via search algorithms.

## 2.8 Variables Used

Following is the list of Variables used in this xaml file.

| Sr No. | Name                               | DataType  |
|--------|------------------------------------|-----------|
| 1      | bool_ifCreateNewApplication_Exists | x:Boolean |
| 2      | bool_ifGadgetSelection_Exists      | x:Boolean |
| 3      | str_applicationID                  | x:String  |
| 4      | str_Serial_Number                  | x:String  |
| 5      | str_Student_Name                   | x:String  |
| 6      | str_Roll_Number                    | x:String  |
| 7      | str_Date_of_birth                  | x:String  |
| 8      | str_Student_Gender                 | x:String  |
| 9      | str_Institute_Name                 | x:String  |
| 10     | str_Branch_Location                | x:String  |
| 11     | str_Course_Name                    | x:String  |

|    |                             |             |
|----|-----------------------------|-------------|
| 12 | str_Pincode                 | x:String    |
| 13 | str_Tenure                  | x:String    |
| 14 | str_coursefees              | x:String    |
| 15 | str_declaredCoursefees      | x:String    |
| 16 | str_current_occupation_type | x:String    |
| 17 | str_photo_of_PAN            | x:String    |
| 18 | str_Aadhaar_front_side      | x:String    |
| 19 | str_Aadhaar_back_side       | x:String    |
| 20 | str_colour_photo            | x:String    |
| 21 | str_itr-v                   | x:String    |
| 22 | str_Bank_Statement          | x:String    |
| 23 | str_Relation_with_student   | x:String    |
| 24 | TransactionItem             | X:QueueItem |

### III. TO BE PROCESS DESCRIPTION

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In this section the proposed improvements to the process, actions to the process will be outlined as well as the actions proposed for automation and the type of robot required. **This will be cross-checked by the Solution Architect.**

## 3.1. Detailed TO BE Process Map

A detailed process map of the process as it will look like post-automation will be outlined here.

*Highlight Bot interventions/ To-Be automated actions with different legend/ icon (purple).*

*Mention below if process improvements were performed on the To-Be design and provide details.*

| Legend | Description  |
|--------|--|
| 1      | Action number in the process. Referred to in details or Exceptions and Errors table. |
|        | This process action is proposed for automation.                                      |
|        | This process action remains manual (to be performed by a human agent).               |

## 3.2. Parallel Initiatives

The table below will capture the proposed Business, Process or Application changes to be made in the near future that would impact the process at hand (if any).

| Initiative Name                               | Process Action(s) where it is identified   | Impact on current Automation Request   | Expected Completion Date | Contact Person |
|---|--|--|--------------------------|----------------|
| New User Registration Automation              | The New user registration part of the financepeer webapp will be automated using auto OTP flow | The Current Process may also be integrated to this model to create a unified BOT |                          |                |
| Automatic User Login using automated OTP flow | The User login using the registered mobile number and OTP will                                 | The Current process requires a manual User login using the password and          |                          |                |

|  |                       |  |  |  |
|--|-----------------------|--|--|--|
|  | be handled by the BOT | OTP, which can be eliminated and new process can be integrated to the current flow to make it a stand alone BOT. |  |  |
|--|-----------------------|--|--|--|

### 3.3. In Scope For RPA

- The Entire New Application Creation can be completed through Automation.
- The uploading of images, documents can also be performed.

### 3.4. Out Of Scope for RPA

The actions **out of scope** for RPA should be listed in the table below together with the reasoning.

| Activity/Action*                              | Reason for out of scope   | Impact on the TO BE  | Possible measures to be taken into consideration for future automation |
|---|---|--|--|
| <i>First Time Registration of &amp; Login</i> | <i>Major reason is OTP Requirement which cannot be automated.</i> | <i>Major impact would be automation can be done only for creating new applications and post processes.</i> | <i>Integrating the Production database may resolve the issue</i>       |

\*Add more rows to the table to reflect the complete documentation provided to support the RPA process.

### 3.5. Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. Exceptions are of 2 types and both need to be addressed:

**Known exceptions** = previously encountered. A scenario is defined with clear actions and workarounds for each case.

**Unknown** = New situation that was not encountered before. It cannot be predicted and in case it happens it needs to be flagged and communicated to an authorized person for evaluation.

### 3.5.1. Known Business Exceptions

Details regarding how the robot should handle the exceptions.

| Exception Name   | Action   | Parameters                 | Action to be taken  |
|--|--|----------------------------|---|
| <i>e.g. The Course fees for some Institute-course combination appears to be 0.</i> | <i>e.g. Manually A fee is added to that Text Field if the course fee is zero</i> | <i>e.g. str_coursefees</i> | <i>e.g. check if the course fee is 0, If it is 0, then add the desired course fees.</i> |

### 3.5.2 Unknown Business Exceptions

An umbrella rule that includes a notification needs to be designed for all other exceptions that could happen and cannot be anticipated.

*e.g.: Uninformed website changes, New releases, Unexpected behavior of the website, website server issues. Application Issues, Infrastructure issues*

## 3.6. Applications Errors & Exceptions Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here together with the action to be taken for each by the Robot. There are 2 types of exceptions/errors:

**Known** = Previously encountered and action plan or workaround available for it (e.g. SAP unresponsive during peak times)

**Unknown** = these are exceptions and errors that cannot be anticipated but for which the robot needs to have a rule so that the RPA solution is sustainable.

### 3.6.1. Known Applications Errors and Exceptions

Details regarding how the robot should handle the exceptions.

| Error/Exception Name   | Action   | Parameters                    | Action to be taken               |
|--|--|-------------------------------|----------------------------------|
| <i>Application Issues</i>                                      | <i>BOT terminates after 3 retries.</i>                                     | <i>Error message</i>          | <i>recover and retry 3 times</i> |
| <i>Course fee for some Institute - course combination is 0</i> | <i>BOT Inserts the value from the data set and replaces the course fee</i> | <i>"The course fees is 0"</i> | <i>Add course fees</i>           |

### 3.6.2. Unknown Applications Errors and Exceptions

An umbrella rule that includes a notification needs to be designed for all other exceptions that could happen and cannot be anticipated.

*e.g. BOT saves the Error message and exits the process.*

## 3.7. Reporting

In this section all the reporting requirements of the business should be detailed so that when the RPA solution is moved to production the administrators can track the performance of the solution.

| Report Type                  | Update frequency                    | Details  | Monitoring Tool to visualize the data |
|------------------------------|-------------------------------------|--|---------------------------------------|
| <i>e.g. Process logs</i>     | <i>e.g. As per Execution cycles</i> | <i>e.g. How many times was this process run since the beginning of the month and what was the average run duration?</i>                    |                                       |
| <i>e.g. Process logs</i>     | <i>e.g. As per Execution cycles</i> | <i>e.g. How many robots worked on this process per each month?</i>   |                                       |
| <i>e.g. Transaction logs</i> | <i>e.g. As per Execution cycles</i> | <i>e.g. How many transactions were run by this process since the beginning of the month and what was the average transaction duration?</i> |                                       |
| <i>e.g. Error logs</i>       | <i>e.g. As per Execution cycles</i> | <i>e.g. Average number of errors by type per day</i>   |                                       |
| <i>e.g. Error logs</i>       | <i>e.g. As per Execution cycles</i> | <i>e.g. All errors per month grouped by type</i>   |                                       |

\* For complex reporting requirements, include them into a separate document and attach it to the present documentation

# IV. OTHER

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## 4.1. Additional sources of process documentation

If there is additional material created to support the process automation please mention it here, along with the supported documentation provided.

| Additional Process Documentation                  |  |   |
|---|--|---|
| <b>Video Recording of the process (Optional)</b>  | <b>Acme-System1-Process-WI5-Manual-Walkthrough</b>   |   |
| <b>Business Rules Library (Optional)</b>          | <b>Insert link to Business rules library</b>   |   |
| <b>Other documentation (Optional)</b>             | <b>Insert link to any other relevant process documentation (L4, L5 process description, fields mapping files etc.)</b> |   |
| <b>Standard Operating Procedure(s) (Optional)</b> |  |   |
| <b>High Level Process Map (Optional)</b>          | <b>Zip files are added along with this documentation</b>   |   |
| <b>Detailed level process map (Optional)</b>      | <b>Github links have been attached</b>   |   |
| <b>Work Instructions (Optional)</b>               | <b>Make sure the customer login has been done on the automation Integrated browser before starting the performer</b>   | <b>Login using Customer's registered Mobile Number and OTP</b>                      |
| <b>Input Files (Optional)</b>                     | <b>Csv file with the Input Data set</b>  | <b>Csv file is used only by the Dispatcher</b>                                      |
| <b>Output Files (Optional)</b>                    | <b>An output csv file will be generated with all the data</b>  | <b>This file will be generated after the execution of the performer is complete</b> |

\*Add more rows to the table to reflect the complete documentation provided to support the RPA process.