

Insurance - Policy/Quote Creation

Enter the insurance details in the application

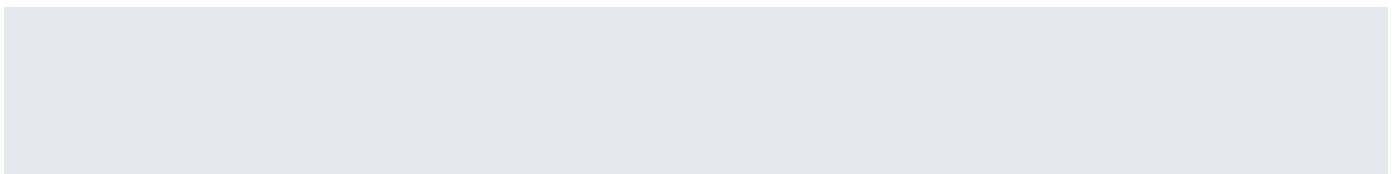


Table of Contents

I. Introduction.....	2
I.1 Purpose of the document.....	2
I.2 Objectives.....	2
I.3 Process key contact.....	2
I.4 Minimum Pre-requisites for automation.....	2
II. As-Is process description.....	3
II.1 Process Overview.....	3
II.2. Applications used in the process.....	4
II.3 As-Is Process map.....	5
II.4 Process statistics.....	Error! Bookmark not defined.
II.5 Detailed As-Is Process Steps.....	6

I. Introduction

I.1 Purpose of the document

The Process Definition Document outlines the business process chosen for automation using UiPath Robotic Process Automation (RPA) technology.

The document describes the sequence of steps performed as part of the business process, the conditions and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them with the details required for applying robotic process automation to the selected business process.

I.2 Objectives

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

- Reduce processing time per item by 80%
- Better Monitoring of the overall activity by using the logs provided by the robots.

I.3 Process key contact

The specifications document includes concise and complete requirements of the business process and it is built based on the inputs provided by the **process Subject Matter Expert (SME)/ Process Owner**.

The **Process Owner** is expected to **review it and provide signoff for accuracy** and completion of the steps, context, impact and a set of process exceptions. The details are to be included in the table below.

Role	Name	Contact details (email, phone number)	Notes
	Sumanth Veeravelli		

I.4 Minimum Pre-requisites for automation

- Input details list for creating the quote/policies
- Insurance windows application

II. As-Is process description

II.1 Process Overview

General information about the process selected for RPA prior to automation.

#	Item	Description
1	Process full name	Policy/Quote creation
2	Process Area	Insurance
3	Department	Insurance
4	Process short description (operation, activity, outcome)	Policy/Quote creation using input details
5	Role(s) required for performing the process	Broker
6	Process schedule and frequency	Daily schedule
7	# of items processed /reference period	20
8	Process execution time	1 Min.
9	Peak period (s)	April/May
10	Transaction Volume During Peak period	100
11	Total # of FTEs supporting this activity	1
12	Expected increase of volume in the next reference period	200
13	Level of exception rate	0
14	Input data	Input excel file
15	Output data	Reference number

*

II.2. Applications used in the process

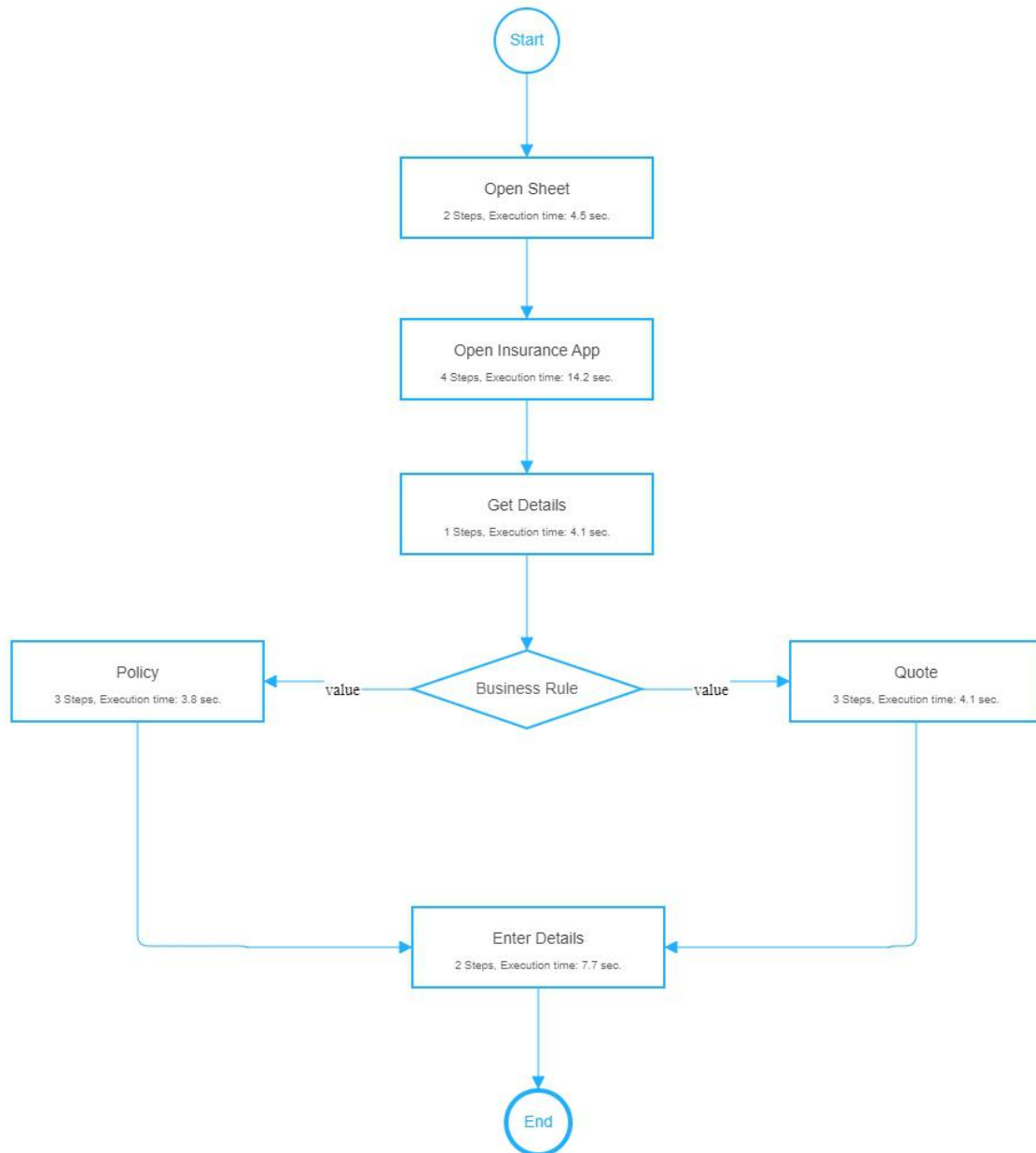
The table includes a comprehensive list of all the applications that are used as part of the process to be automated to perform the given steps in the flow.

#	Application name & version	System Language	Thin/Thick Client	Environment/ Access method	Comments
1	Excult Insurance	C#	NA	NA	NA
2	MS Excel	NA	NA	NA	NA

II.3 As-Is Process map

High Level As-Is Process Map:

This chapter depicts the As-Is business process at a High Level to enable developers to have a high-level understanding of the current process.



II.5 Detailed As-Is Process Steps

1. Open Sheet

1.1 Input Details

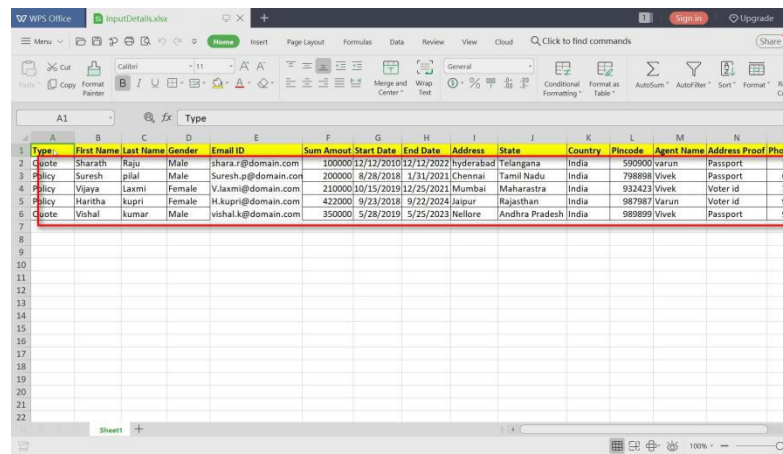
Open Input Details Form



Open the input excel sheet which has the data for policy/Quote creation

1.2 Input Sheet

Details of quote and Policy



Type	First Name	Last Name	Gender	Email ID	Sum Amount	Start Date	End Date	Address	State	Country	Pincode	Agent Name	Address Proof	Phone
Quote	Sharath	Raju	Male	shara.r@domain.com	100000	12/12/2010	12/12/2022	Hyderabad	Telangana	India	500900	varun	Passport	76
Policy	Suresh	pilal	Male	Suresh.p@domain.com	200000	8/28/2018	1/31/2021	Chennai	Tamil Nadu	India	798898	Vivek	Passport	66
Policy	Vijaya	Laxmi	Female	Vjaxmi@domain.com	210000	10/15/2019	12/25/2021	Mumbai	Maharashtra	India	932423	Vivek	Voter id	77
Policy	Haritha	kupri	Female	H.kupri@domain.com	422000	9/23/2018	9/22/2024	Jaipur	Rajasthan	India	987987	Varun	Voter id	96
Quote	Vishal	kumar	Male	vishal.k@domain.com	350000	5/28/2019	5/25/2023	Nellore	Andhra Pradesh	India	989899	Vivek	Passport	97

Find the details of the policy/quote in the sheet

2. Open Insurance App

2.1 Insurance App

Open the Insurance Application

Action: Open the Insurance application

2.2 Click on 'Username'

ExcelCult

ExcelCult

Please login here

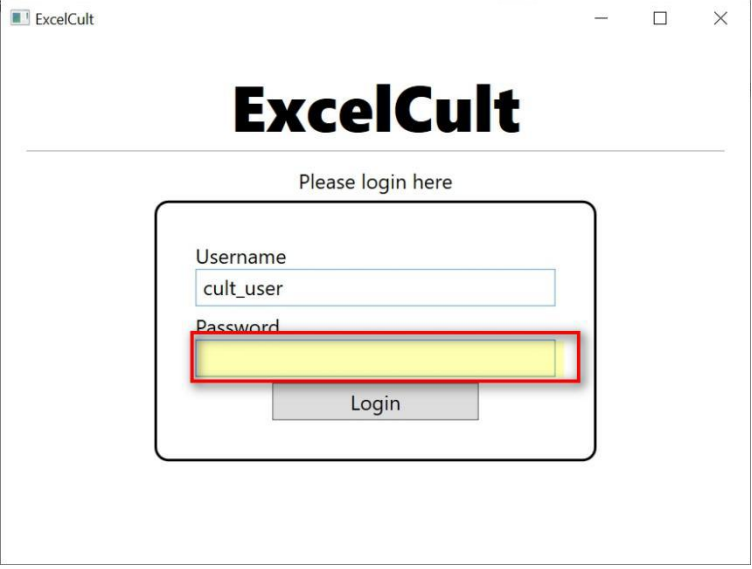
Username

Password

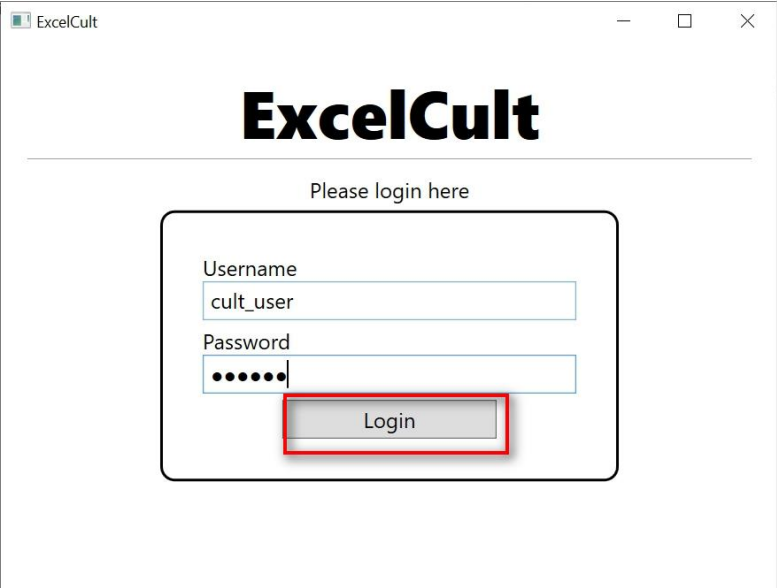
Login

Action: Enter the username

2.3 Password

 <p>The screenshot shows a window titled "ExcelCult" with a login form. The form has a title "ExcelCult" and a subtitle "Please login here". It contains two input fields: "Username" with the value "cult_user" and "Password" which is highlighted with a red border and a yellow background. Below the fields is a "Login" button.</p>	<p>Action: Enter Password</p> <p>Username: cult_user</p> <p>Password: cult_password</p>
--	---

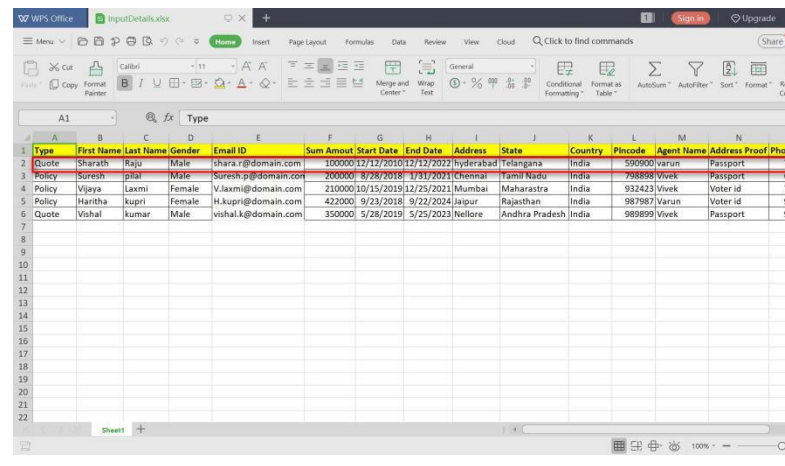
2.4 Login

 <p>The screenshot shows the same "ExcelCult" login window. The "Username" field contains "cult_user" and the "Password" field contains masked characters (dots). The "Login" button is highlighted with a red border.</p>	<p>Action: Click on Login</p>
---	-------------------------------

3. Get Details

3.1 Get Details

Get details from Sheet



Type	First Name	Last Name	Gender	Email ID	Sum Amount	Start Date	End Date	Address	State	Country	Pincode	Agent Name	Address Proof	Phone
Quote	Sharath	Raju	Male	shara.r@domain.com	100000	12/12/2010	12/12/2022	Hyderabad	Telangana	India	500900	varun	Passport	76
Policy	Suresh	pai	Male	Suresh.p@domain.com	200000	8/26/2018	3/31/2021	Chennai	Tamil Nadu	India	798898	Vivek	Passport	68
Policy	Vijaya	Laxmi	Female	V.laxmi@domain.com	210000	10/15/2019	12/25/2021	Mumbai	Maharashtra	India	932423	Vivek	Voter id	77
Policy	Haritha	kugri	Female	H.kugri@domain.com	422000	9/23/2018	9/22/2024	Jaipur	Rajasthan	India	987987	Varun	Voter id	96
Quote	Vishal	kumar	Male	vishal.k@domain.com	350000	5/28/2019	5/25/2023	Nellore	Andhra Pradesh	India	989899	Vivek	Passport	97

Get one after other details from the sheet

4. Business Rule

If type is policy then go to '5. Policy'

If type is Quote then go to '6. Quote'

5. Policy

5.1 Type = Policy

Policy

Type	First Name	Last Name	Gender	Email ID	Sum Amount	Start Date	End Date	Address	State	Country	Pincode	Agent Name	Address Proof	Phone Number
Quote	Sharath	Raju	Male	shara.r@domain.com	100000	12/12/2010	12/12/2022	Hyderabad	Telangana	India	500000	varun	Passport	7687642423
Policy	Suresh	jial	Male	Suresh.p@domain.com	200000	8/28/2018	1/31/2021	Chennai	Tamil Nadu	India	798898	Vivek	Passport	6932432423
Policy	Vijaya	Lawmi	Female	V.lawmi@domain.com	210000	10/15/2019	12/25/2021	Mumbai	Maharashtra	India	932423	Vivek	Voter id	7799434324
Policy	Haritha	kuprt	Female	H.kuprt@domain.com	420000	9/23/2018	9/22/2024	Jajpur	Rajasthan	India	987987	Varun	Voter id	9679679687
Quote	Vishal	kumar	Male	vishal.k@domain.com	350000	5/28/2019	5/25/2023	Nellore	Andhra Pradesh	India	989899	Vivek	Passport	9789898768

Get the details of policy

5.2 Policy

select policy from the drop down

Select Division: ---All---

Data To View: Quote, Policy (highlighted), Quote

Quote Id	Insurer Firstname	Insurer Lastname	Quote Amount	Start Date	End Date	View	Edit	Delete
100001	Sharath	Raju	100000	12-12-2010	12-12-2022	View	Edit	Delete
100002	sumanth	veeravelli	100000	16-04-2020	15-06-2021	View	Edit	Delete

Add Quote

Action: If the value under 'Type' in sheet is Policy then, Select the Policy from drop down

5.3 Click on 'Add Policy'

click on add policy

The screenshot shows the ExcelCult application window. At the top, there are dropdown menus for 'Select Division' (set to '---All---') and 'Data To View' (set to 'Policy'). Below these is a 'Search' button. A table displays the following data:

Policy Id	Insurer Firstname	Insurer Lastname	Plicy Amount	Start Date	End Date			
100001	ds	sds	23	12-02-2020	14-02-2020	View	Edit	Delete

Below the table is a blue button labeled 'Add Policy', which is highlighted with a red rectangle.

Action: Click on add policy to open the new Policy window

6. Quote

6.1 Type

Quote

The screenshot shows a WPS Office spreadsheet titled 'InputDetails.xlsx'. The table contains the following data:

Type	First Name	Last Name	Gender	Email ID	Sum Amount	Start Date	End Date	Address	State	Country	Pincode	Agent Name	Address Proof	Phone
Quote	Sharath	Raju	Male	shara.r@domain.com	100000	12/12/2010	12/12/2022	hyderabad	Telangana	India	590900	varun	Passport	76
Policy	Suresh	gital	Male	Suresh.p@domain.com	200000	8/28/2018	1/31/2021	Chennai	Tamil Nadu	India	798898	Vivek	Passport	65
Policy	Vijaya	Laxmi	Female	VJaxmi@domain.com	210000	10/15/2019	12/25/2021	Mumbai	Maharashtra	India	932423	Vivek	Voter id	77
Policy	Maritha	kupri	Female	H.kupri@domain.com	422000	9/23/2018	9/22/2024	Jaipur	Rajasthan	India	987987	Varun	Voter id	96
Quote	Vishal	kumar	Male	vishal.k@domain.com	350000	5/28/2019	5/25/2023	Nellore	Andhra Pradesh	India	989899	Vivek	Passport	97

Action: Get the details of the quote

6.2 Quote

select quote drop down

The screenshot shows the ExcelCult application interface. At the top, there is a 'Select Division' dropdown set to '---All---' and a 'Data To View' dropdown set to 'Policy'. Below these is a search bar. The main table displays policy information with columns: Policy Id, Insurer Firstname, Insurer Lastname, Policy Amount, Start Date, and End Date. A single row is visible with Policy Id 100001, Insurer Firstname 'ds', Insurer Lastname 'sds', Policy Amount 23, Start Date 12-02-2020, and End Date 14-02-2020. To the right of the table are 'View', 'Edit', and 'Delete' buttons. Below the table is an 'Add Policy' button. The 'Data To View' dropdown is open, showing 'Policy' and 'Quote' options, with 'Quote' highlighted by a red box.

Policy Id	Insurer Firstname	Insurer Lastname	Policy Amount	Start Date	End Date
100001	ds	sds	23	12-02-2020	14-02-2020

Action: If the value under 'Type' in sheet is Quote then, Select the Quote from drop down

6.3 Click on 'Add Quote'

click on add quote

The screenshot shows the ExcelCult application interface. At the top, there is a 'Select Division' dropdown set to '---All---' and a 'Data To View' dropdown set to 'Quote'. Below these is a search bar. The main table displays quote information with columns: Quote Id, Insurer Firstname, Insurer Lastname, Quote Amount, Start Date, and End Date. Two rows are visible: Quote Id 100001 with Insurer Firstname 'Sharath', Insurer Lastname 'Raju', Quote Amount 100000, Start Date 12-12-2010, and End Date 12-12-2022; and Quote Id 100002 with Insurer Firstname 'sumanth', Insurer Lastname 'veeravelli', Quote Amount 100000, Start Date 16-04-2020, and End Date 15-06-2021. To the right of the table are 'View', 'Edit', and 'Delete' buttons for each row. Below the table is an 'Add Quote' button, which is highlighted by a red box.

Quote Id	Insurer Firstname	Insurer Lastname	Quote Amount	Start Date	End Date
100001	Sharath	Raju	100000	12-12-2010	12-12-2022
100002	sumanth	veeravelli	100000	16-04-2020	15-06-2021

Action: Click on Add quote to open new quote details window form

7. Enter Details

7.1 Details

Enter the details of type policy and Quote

Est. time: 3.7 sec.

ExcelCult

Insurer Firstname

Insurer Lastname

Gender ☐ Male ☐ Female ☐ Others

Email Id

Sum Amount

Start Date

End Date

Address

State

Country

Pin Code

Agent Name

Address Proof Type

Phone Number

Action: Enter details the details in the corresponding text boxes, dropdown and radio buttons

7.2 Save

Click on save

Action: after entering all details click on save and get the corresponding Policy/Quote reference Number

ExcelCult

Start Date

End Date

Address

State

Country

Pin Code

Agent Name

Address Proof Type

Phone Number

Nominee

Relation

Department

7.3 Send Mail

Send Email



Send the reference number In the email.

NOTE: Use your credentials to send the mail.