

Loan Application Processing

UiBank would handle their loan applications, these debt products can help you get over a financial hump, cover an unexpected expense, pay down debt faster or make a big-ticket purchase.

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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.

A personal loan through a traditional bank, credit union or online lender is worth considering. These unsecured debt products can help you get over a financial hump, cover an unexpected expense, pay down debt faster or make a big-ticket purchase.

There are several types of personal loans to choose from, including debt consolidation loans, home improvement loans, medical loans and wedding loans. Although the application process is relatively simple, you should know what to expect beforehand to avoid any surprises.

Before you begin the process of applying for a personal loan, gather all the documents and information you need along the way. Doing so will allow you to move through each step of the process efficiently and get your funds as quickly as possible.

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 actions, 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
Process Owner	Afzal Shah	shah976842@gmail.com	
SME	John Smith	John@abcd.com	

I.4 Minimum Pre-requisites for automation

1. A filled in Process Definition Document
2. Test Data to support development.
3. User access and creation of user accounts (licenses, permissions, restrictions to create accounts for robots).
4. Input Excel Available.
5. Proper Email Received and Downloaded

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	Loan Application Processing
2	Process Area	Banking
3	Department	Loan
4	Process short description (operation, activity, outcome)	UiBank would handle their loan applications, these debt products can help you get over a financial hump, cover an unexpected expense, pay down debt faster or make a big-ticket purchase.
5	Role(s) required for performing the process	Loan Officer
6	Process schedule and frequency	Weekly
7	# of items processed /reference period	100 - 300
8	Process execution time	15 Min Per Transaction
9	Peak period (s)	Last Working Day of Month
10	Transaction Volume During Peak period	250+
11	Total # of FTEs supporting this activity	3
12	Expected increase of volume in the next reference period	NA
13	Level of exception rate	NA
14	Input data	Email, CSV
15	Output data	Excel , Summary Email

*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.

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 actions in the flow.

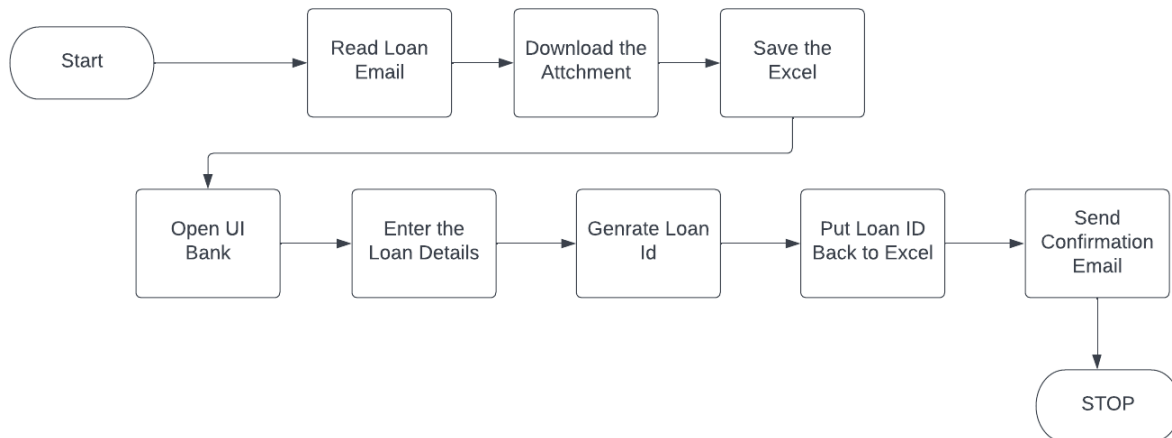
#	Application name & version	System Language	Thin/Thick Client	Environment/ Access method	Comments
1.	Microsoft Edge 107.0.1418.35 (Official build) (64-bit)	English	Thick	Read Write	
2.	Microsoft Excel Version 2210(Build 15726.20174)	English	Thick	Read Write	

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

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.4 Process statistics

High level statistics – 1 Transaction

Processes	Windows	Action s	Mouse clicks	Keys pressed	Text entries	Hotkeys used	Time
3	5	48	28	0	0	11	15 min

Detailed statistics

Window name	Mouse Clicks	Text entries	Keys pressed
LoanApplication	1	0	0
	6	0	0
LoanData.csv - Excel	8	0	0
UiBank - Personal - Microsoft Edge	12	0	0
Email	1	0	0

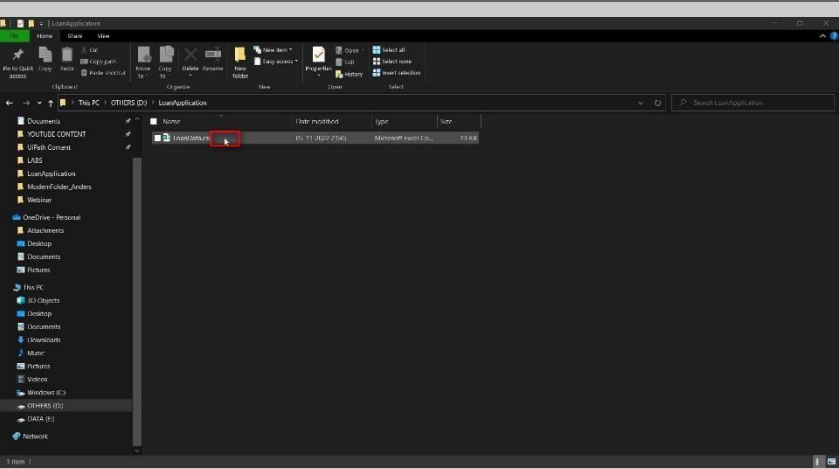
II.5 Detailed As-Is Process Actions

1. LoanApplication

1.1 Open Email

Download and Save the Attachment

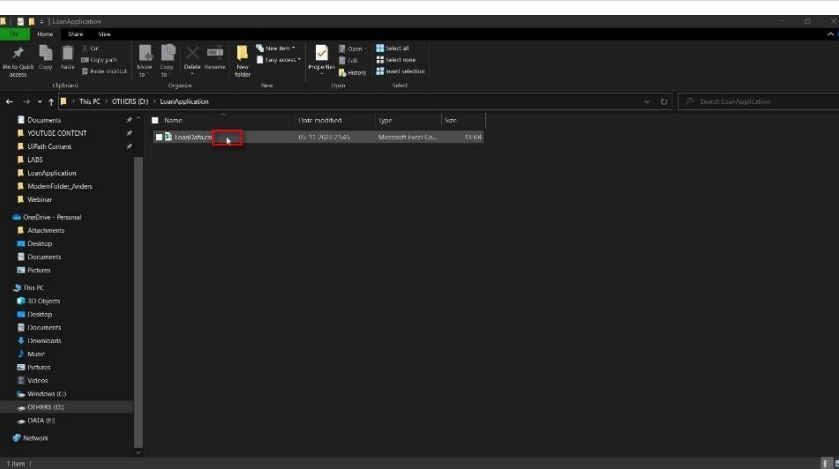
Est. time: 0.4 sec.



Action: Right Click Save

1.2 Open Excel

Est. time: 0.4 sec.



Action: Double Click

2. LoanData.csv - Excel

Est. time: 6.0 sec.

2.1

Est. time: 5.6 sec.

Action: Click

LoanData.csv										
Tell me what you want to do										
File	Home	Insert	Layout	Formulas	Data	Review	Developer	Help	Tell me what you want to do	
Clipboard	Font	Paragraph	Styles	Cells	Tables	References	Connections	Code	Tools	Help
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2.2 Press 'Ctrl+'

Est. time: 0.4 sec.

Action: Hotkey

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2.3 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key

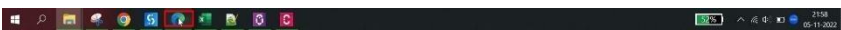
GivenName	EmailAddress	CType	CCNumber	Age	Occupation	TelephoneNumber	City	LoanAmount	Term	YearIncome
Abraham	AbrahamValverde@psn.com	MasterCard	5402433822370780	85	Operational meteorologist	07221 43 51 88	Baden-Baden	76534	3	58333
Tammy	TammyEaddy@fleckens.hu	MasterCard	518728700900070	40	Hospice nurse	08453 71 95 14	Eisenhausen	82067	8	49507
Ellert	EllertMuenning@fleckens.hu	MasterCard	528543220225080	25	Employee welfare manager	05294 57 05 11	Fuldenborn-Essen	33394	9	66525
Jerome	JeromeJ.Langham@jouraspde.com	MasterCard	5018917362867358	54	U.S. deputy marshal	0911 25 12 88	Nürnberg	90277	1	99138
Cindy	CindyLiny@jouraspde.com	MasterCard	544608090007498	77	Architect	08441 51 52 45	Schweinfeld-Lichten	35295	10	85471
Charles	CharlesLiny@jouraspde.com	MasterCard	5142628465150481	58	Embassy handling expert	0951 54 44 88	Wormburg	91845	8	15519
Theresa	TheresaNichols@dayup.com	Visa	4485088460308300	81	Head hunter	035771 50 05	Bad Muenst	2901	12	55241
James	JamesM.Moore@jouraspde.com	Visa	402924185214588	58	Pipefitter	07621 13 05 26	Lörrach-Tübingen	79541	7	89571
Elfred	ElfredSchwenning@fleckens.hu	Visa	453253678154320	62	Building inspector	07522 14 62 55	Hersau	88145	4	89788
Linda	LindaCMurphy@jouraspde.com	MasterCard	553637293195700	65	Payroll clerk	01551 28 42 82	Bad Segeberg	23785	1	25841
Francis	FrancisDewachemal@fleckens.hu	MasterCard	520889169562200	47	Immigration inspector	07211 13 47 05	Flurheim-Nordoststadt	75175	5	39515
Dylan	DylanRichter@jouraspde.com	MasterCard	521485212393270	95	Maintenance technician	031782 45 45	Mandau	6138	8	38187
Robert	RobertM.Henrich@fleckens.hu	Visa	448533508166790	40	Payroll representative	08504 31 34 87	Thallang	54424	14	40558
Blair	BlairM.Henrich@jouraspde.com	MasterCard	5117011801087720	30	Commercial photographer	03389 29 94 36	Regensburg	93192	11	43357
Richard	RichardM.Henrich@jouraspde.com	MasterCard	516448780464020	68	Personnel analyst	0481 75 36 85	Hamburg-Barmbek-Nord	77300	14	15410
John	JohnKling@jouraspde.com	Visa	456179947366890	54	Swimming and sports runner	09273 41 63 95	Kulmbach	95801	11	15114
Rhonda	RhondaL.Henrich@jouraspde.com	Visa	4485088460308300	29	Cooking and freezing equipment tender	09171 77 78 02	Rad-Königsberg	91648	2	15114
Charles	CharlesM.Henrich@jouraspde.com	Visa	453684815101070	54	Ticket clerk	05319 26 21 83	Schweinfeld-Lichten	29640	1	81381
Ronald	RonaldM.Henrich@jouraspde.com	MasterCard	547824236438360	46	Card punching machine operator	03631 53 11 55	Nordhausen	99722	12	58937
Kara	KaraL.Henrich@jouraspde.com	Visa	471685514285200	80	Owner	079 46 58 86	Hellereim-Frankfurt	74080	7	88112
Cheryl	CherylM.Henrich@jouraspde.com	Visa	692461163866220	81	Lineside equipment tender	0454 64 80 70	Kiel	24518	25	68570
Lena	LenaM.Henrich@jouraspde.com	MasterCard	525476905978070	85	Delivery service truck driver	06212 36 69 75	Schweinfeld-Lichten	76888	7	26518
Stacy	StacyM.Henrich@jouraspde.com	MasterCard	5428511801087720	78	Bakery machine tender	039 78 25 90	Berlin-Niederschönhausen	12419	12	74155
Narcissa	NarcissaM.Henrich@jouraspde.com	MasterCard	508005150780500	29	Office assistant secretary	07709 83 83 85	Wiesbaden	78878	10	59996
John	JohnM.Henrich@jouraspde.com	MasterCard	528341245120560	29	Dean	089 85 27 72	München	80798	4	54823
Conrad	ConradM.Henrich@jouraspde.com	Visa	471685514285200	46	Technical control technician	03746 26 47 19	Darmstadt	76448	14	15519
Sharon	SharonM.Henrich@jouraspde.com	MasterCard	51700 12 12 12 12	46	Technical control technician	03746 26 47 19	Darmstadt	76448	14	15519

3. Sequence

3.1

Est. time: 1.9 sec.

Action: Click



4. UiBank - Personal - Microsoft Edge

Est. time: 4.3 sec.

4.1

Est. time: 2.4 sec.

Action: Click

The screenshot shows a web browser window with the URL <https://ubankcupath.com/loans/apply>. The page title is "Loan Application" and it includes a sub-header "Hi! Enter some details below to get started!". The form contains several input fields: "Email Address of Requester" (highlighted with a red box), "Loan Amount Requested", "Loan Term", "Current Yearly Income (Before Taxes)", and "Age". The "Email Address of Requester" field is the first field in the form and is currently empty.

4.2 Press 'Ctrl+v'

Est. time: 0.3 sec.

Action: Hotkey

The screenshot shows the same "Loan Application" form as in the previous step. The "Email Address of Requester" field is now highlighted with a blue border, indicating it is selected. The other fields remain unchanged.

4.3

Est. time: 1.5 sec.

Action: Click

Loan Application

Hi! Enter some details below to get started!

Email Address of Requester
AbrahamKValverde@gustr.com

Loan Amount Requested
Enter loan amount you are looking for, no need to put commas either

Loan Term

Current Yearly Income (Before Taxes)
0

Age
How many years old are you?

4.4 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key

Loan Application

Hi! Enter some details below to get started!

Email Address of Requester
AbrahamKValverde@gustr.com

Loan Amount Requested
1000000

Loan Term

Current Yearly Income (Before Taxes)
0

Age
How many years old are you?

5. Sequence

Est. time: 1.4 sec.

5.1

Est. time: 1.4 sec.

Action: Click

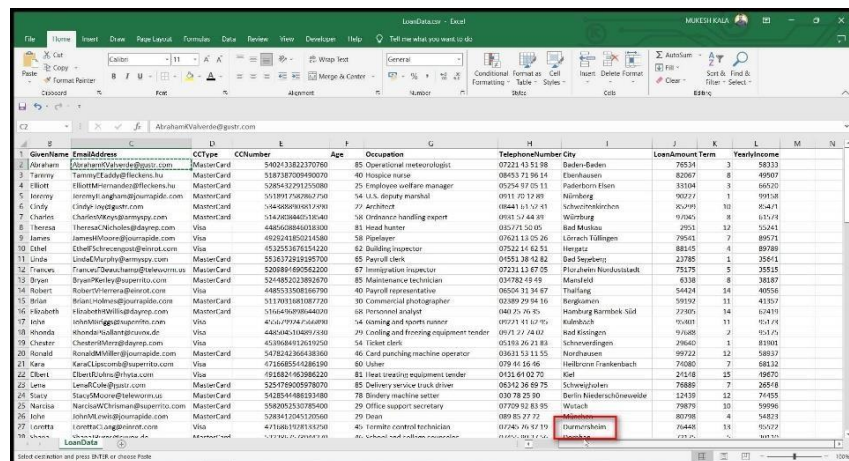
6. LoanData.csv - Excel

Est. time: 1.2 sec.

6.1

Est. time: 1.2 sec.

Action: Click

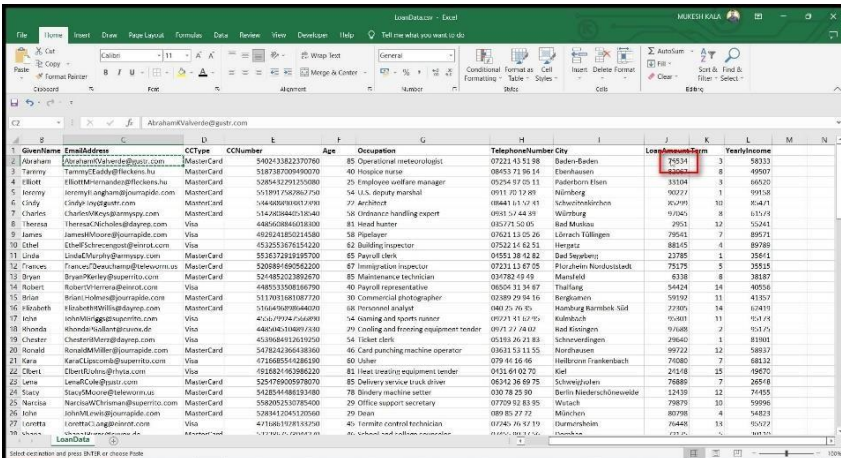


	GivenName	EmailAddress	CCType	CCNumber	Age	Occupation	TelephoneNumber	City	LoanAmount	Term	YearlyIncome
1	Alan	Alan@domain.com	MasterCard	540013822270780	85	Operational meteorologist	07221 43 51 98	Duisen-Essen	78531	3	58333
2	Terry	Terry@domain.com	MasterCard	518738700900070	40	Hospital nurse	08453 71 96 14	Eisenhausen	82067	8	49087
3	Elliot	Elliot@domain.com	MasterCard	52854 52 91 25 080	25	Employee welfare manager	05254 57 05 11	Paderborn-Essen	33104	3	66520
4	Henry	Henry@domain.com	MasterCard	51191 75 08 26 250	54	U.S. deputy marshal	0911 05 13 88	Nürnberg	90211	1	99108
5	Cindy	Cindy@domain.com	MasterCard	544608968174990	27	Architect	08441 61 52 41	Schwenhofen	90499	10	80471
6	Charles	Charles@domain.com	MasterCard	542408440510040	58	Orderer handling export	09181 52 44 89	Wormburg	91040	8	65174
7	Thomas	Thomas@domain.com	Visa	4480508840018300	81	Head hunter	035775 50 05	Bad Münst.	2951	12	15343
8	James	James@domain.com	Visa	4529241852214580	58	Pipefitter	07621 13 05 26	Lörsch-Tübingen	79543	7	89571
9	Chel	Chel@domain.com	Visa	452253167151220	62	Building inspector	07522 14 62 51	Hersau	88145	4	89789
10	Linda	Linda@domain.com	MasterCard	553637293495700	65	Payroll clerk	04551 28 42 82	Bad Seppert	21785	1	25611
11	Frances	Frances@domain.com	MasterCard	520891690562200	67	Immigration inspector	07221 13 67 05	Flurheim-Nordhausen	75175	5	29515
12	Dylan	Dylan@domain.com	MasterCard	521485222892870	85	Maintenance technician	034782 49 49	Manfeld	6338	8	38187
13	Robert	Robert@domain.com	Visa	448553508266290	40	Payroll representative	06504 31 34 67	Thulking	54424	14	80555
14	Brian	Brian@domain.com	MasterCard	511783180387720	30	Commercial photographer	02389 29 94 16	Bergheim	59192	11	41357
15	Elizabeth	Elizabeth@domain.com	MasterCard	516449078944800	68	Personnel analyst	040 25 26 55	Hamburg-Rambok-Süd	22305	14	62419
16	John	John@domain.com	Visa	460407916454890	54	Coating and sports runner	07271 61 67 05	Kulmbach	95401	11	91476
17	Cherrie	Cherrie@domain.com	Visa	448483404891580	29	Cooling and freezing equipment tender	09171 22 74 02	Kad-Kissingen	91688	2	91476
18	Ronald	Ronald@domain.com	MasterCard	4519084152610250	54	Ticket clerk	05281 26 21 83	Schwenningen	29640	1	83985
19	Kara	Kara@domain.com	Visa	478242364418080	46	Card punching machine operator	03631 51 11 55	Neustetten	99722	12	58837
20	Cherrie	Cherrie@domain.com	Visa	475685544286190	60	Usher	079 41 56 96	Hellborn-Frankfurt	76080	7	68132
21	Lena	Lena@domain.com	MasterCard	4518821 96386220	81	Hair streaking equipment tender	031 64 62 70	Kiel	24118	15	48670
22	Stacy	Stacy@domain.com	MasterCard	525476050978870	85	Delivery service truck driver	06112 26 89 75	Schwenningen	74889	7	28918
23	Narcissa	Narcissa@domain.com	MasterCard	542854148819380	78	Bindery machine setter	030 78 25 90	Berlin-Niederschönhausen	12419	12	74455
24	John	John@domain.com	MasterCard	528095153078900	29	Office support secretary	07709 23 83 85	Wulst	79879	10	59996
25	John	John@domain.com	MasterCard	5381412045120680	79	Driver	089 85 27 72	Wulst	80798	4	54821
26	Loreta	Loreta@domain.com	Visa	471681928153750	40	Female control technician	03740 26 42 79	Darmstadt	76448	18	50072
27	John	John@domain.com	MasterCard	51781 101 11 54	81	Female control technician	03740 26 42 79	Darmstadt	76448	18	50072

6.2

Est. time: 1.4 sec.

Action: Click

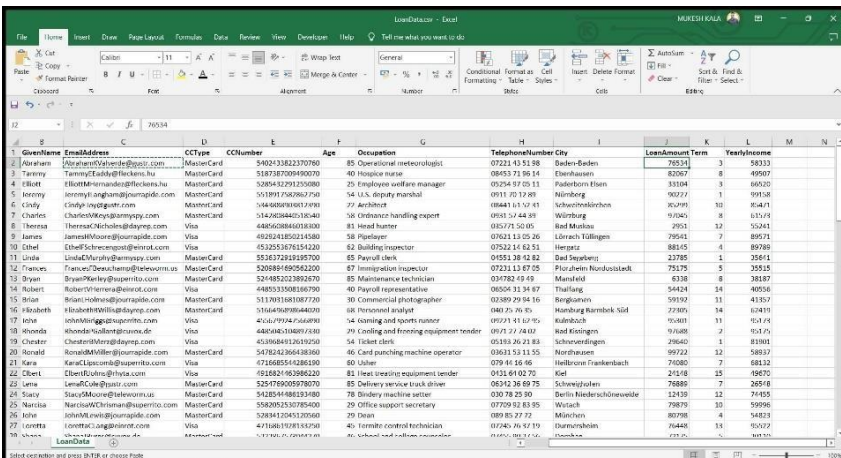


S	EmailAddress	CcType	CCNumber	Age	Occupation	Telephone	Number	City	LoanAmount	Term	Year	Income
1	Abraham	MasterCard	5402432822370780	85	Operational meteorologist	07221 43 51 88		Baden-Baden	76534	3		58333
2	Tammy	MasterCard	518787009090070	40	Hospice nurse	08453 71 95 14		Eisenhausen	82067	8		49507
4	Elliot	MasterCard	528543220225080	25	Employee welfare manager	0254 57 02 11		Friedenau Eisen	33194	9		66020
5	Jerome	MasterCard	501891736286750	54	U.S. deputy marshal	0911 05 12 88		Nürnberg	90277	1		99138
6	Cindy	MasterCard	544408081067498	77	Architect	08441 11 10 41		Schweinselndorfen	35795	10		85471
7	Charles	MasterCard	5142428460150480	56	Crisis-center handling expert	0951 54 44 88		Wörnitz	91240	8		10519
8	Theresa	MasterCard	4480508846038000	81	Head hunter	035771 50 05		Bad Munkács	2903	12		55241
9	James	MasterCard	4629241850214580	58	Pipefitter	07621 11 05 26		Lörrach Tüllingen	79541	7		89571
10	Elfred	MasterCard	4532531075154330	62	Building inspector	07522 11 62 51		Hersau	88145	4		89788
11	Linda	MasterCard	5836372931957700	65	Payroll clerk	03551 28 42 82		Bad Segeberg	23785	1		25841
12	Francis	MasterCard	5208891690562200	67	Immigration inspector	07211 13 47 05		Flitzheim Nordoststadt	79175	5		39515
13	Dylan	MasterCard	5244850223932870	85	Maintenance technician	031782 19 43		Mandfeld	6138	8		38187
14	Robert	MasterCard	4485335081867900	40	Payroll representative	06064 31 34 87		Thallang	54424	14		40558
15	Brigit	MasterCard	5117031801087720	30	Commercial photographer	03389 29 94 16		Rengsdorfen	59192	11		43357
16	Hilkebeth	MasterCard	5164484978464020	68	Personnel analyst	0487 75 48 89		Hausberg Barmbek Süd	77300	14		10410
17	John	MasterCard	4761479147564890	54	Coaching and sports runner	092731 41 67 95		Kulmbach	91081	11		10147
18	Rhonda	MasterCard	4480463160917100	29	Cooling and freezing equipment tender	0917 77 74 02		Rad Klingingen	91648	2		10147
19	Charles	MasterCard	4539684151019500	54	Ticket clerk	05315 26 21 83		Schweinselndorfen	29640	1		81381
20	Ronald	MasterCard	5478242364383600	46	Card punching machine operator	036313 53 11 55		Nordhausen	99722	12		58837
21	Kara	MasterCard	4716685514286200	60	User	079 41 66 46		Hellborn Frankentbach	74080	7		68112
22	Elfred	MasterCard	6248411602862200	81	Heat-insulating equipment tender	0451 64 02 70		Kel	24518	12		68572
23	Lena	MasterCard	5254769005780700	85	Delivery service truck driver	06312 36 69 75		Schweinselndorfen	78888	7		26518
24	Stacy	MasterCard	5412854186231900	78	Bindery machine setter	038 78 25 90		Berlin Niederschneeweide	12139	12		74155
25	Narcissa	MasterCard	5060053107890400	29	Office support secretary	07709 83 83 85		Wiesack	79879	10		59996
26	John	MasterCard	5288411045120560	29	Dean	089 85 27 77		Münchberg	80798	4		54823
27	Conetta	MasterCard	47166817018116750	46	Technical control technician	03746 76 57 19		Darmstadt	76448	16		10577
28	Sherry	MasterCard	517106 75 05 88 45	46	School and college coordinator	01470 11 02 14		Ulm	77575	5		68101

6.3 Press 'Ctrl+C'

Est. time: 0.3 sec.

Action: Hotkey



S	EmailAddress	CcType	CCNumber	Age	Occupation	Telephone	Number	City	LoanAmount	Term	Year	Income
1	Abraham	MasterCard	5402432822370780	85	Operational meteorologist	07221 43 51 88		Baden-Baden	76534	3		58333
2	Tammy	MasterCard	518787009090070	40	Hospice nurse	08453 71 95 14		Eisenhausen	82067	8		49507
4	Elliot	MasterCard	528543220225080	25	Employee welfare manager	0254 57 02 11		Friedenau Eisen	33194	9		66020
5	Jerome	MasterCard	501891736286750	54	U.S. deputy marshal	0911 05 12 88		Nürnberg	90277	1		99138
6	Cindy	MasterCard	544408081067498	77	Architect	08441 11 10 41		Schweinselndorfen	35795	10		85471
7	Charles	MasterCard	5142428460150480	56	Crisis-center handling expert	0951 54 44 88		Wörnitz	91240	8		10519
8	Theresa	MasterCard	4480508846038000	81	Head hunter	035771 50 05		Bad Munkács	2903	12		55241
9	James	MasterCard	4629241850214580	58	Pipefitter	07621 11 05 26		Lörrach Tüllingen	79541	7		89571
10	Elfred	MasterCard	4532531075154330	62	Building inspector	07522 11 62 51		Hersau	88145	4		89788
11	Linda	MasterCard	5836372931957700	65	Payroll clerk	03551 28 42 82		Bad Segeberg	23785	1		25841
12	Francis	MasterCard	5208891690562200	67	Immigration inspector	07211 13 47 05		Flitzheim Nordoststadt	79175	5		39515
13	Dylan	MasterCard	5244850223932870	85	Maintenance technician	031782 19 43		Mandfeld	6138	8		38187
14	Robert	MasterCard	4485335081867900	40	Payroll representative	06064 31 34 87		Thallang	54424	14		40558
15	Brigit	MasterCard	5117031801087720	30	Commercial photographer	03389 29 94 16		Rengsdorfen	59192	11		43357
16	Hilkebeth	MasterCard	5164484978464020	68	Personnel analyst	0487 75 48 89		Hausberg Barmbek Süd	77300	14		10410
17	John	MasterCard	4761479147564890	54	Coaching and sports runner	092731 41 67 95		Kulmbach	91081	11		10147
18	Rhonda	MasterCard	4480463160917100	29	Cooling and freezing equipment tender	0917 77 74 02		Rad Klingingen	91648	2		10147
19	Charles	MasterCard	4539684151019500	54	Ticket clerk	05315 26 21 83		Schweinselndorfen	29640	1		81381
20	Ronald	MasterCard	5478242364383600	46	Card punching machine operator	036313 53 11 55		Nordhausen	99722	12		58837
21	Kara	MasterCard	4716685514286200	60	User	079 41 66 46		Hellborn Frankentbach	74080	7		68112
22	Elfred	MasterCard	6248411602862200	81	Heat-insulating equipment tender	0451 64 02 70		Kel	24518	12		68572
23	Lena	MasterCard	5254769005780700	85	Delivery service truck driver	06312 36 69 75		Schweinselndorfen	78888	7		26518
24	Stacy	MasterCard	5412854186231900	78	Bindery machine setter	038 78 25 90		Berlin Niederschneeweide	12139	12		74155
25	Narcissa	MasterCard	5060053107890400	29	Office support secretary	07709 83 83 85		Wiesack	79879	10		59996
26	John	MasterCard	5288411045120560	29	Dean	089 85 27 77		Münchberg	80798	4		54823
27	Conetta	MasterCard	47166817018116750	46	Technical control technician	03746 76 57 19		Darmstadt	76448	16		10577
28	Sherry	MasterCard	517106 75 05 88 45	46	School and college coordinator	01470 11 02 14		Ulm	77575	5		68101

7. UiBank - Personal - Microsoft Edge

Est. time: 2.4 sec.

7.1

Est. time: 1.1 sec.

7.2

Est. time: 0.7 sec.

Action: Click

8. LoanData.csv - Excel

Est. time: 7.9 sec.

8.1

Est. time: 2.2 sec.

Action: Click

	GivenName	EmailAddress	CCTYPE	CCNumber	Age	Occupation	TelephoneNumber	City	LoanAmount	Term	YearlyIncome
1	Abraham	AbrahamVahedi@psa.com	MasterCard	5402433822307060	45	Operational meteorologist	07221 43 51 88	Baden-Baden	78534	3	58333
2	Tammy	TammyTzafiri@fleckens.hu	MasterCard	518732700900070	40	Hospice nurse	08453 71 86 14	Chemnitz	82067	8	49067
3	Elliot	ElliotMeyers@fleckens.hu	MasterCard	520543295230080	25	Employee welfare manager	05254 57 05 11	Friedberg-Eisen	33104	3	66020
4	Jeremy	jeremytangan@journapde.com	MasterCard	5539917400627450	54	U.S. deputy marshal	0911 70 17 89	Nürnberg	90217	1	99138
5	Cindy	CindyVogel@psa.com	MasterCard	5484080800374980	77	Architect	08441 53 52 43	Schweinfurt	96491	10	65471
6	Charles	CharlesVogel@psa.com	MasterCard	514260840330480	58	Ordinance handling expert	09181 54 44 89	Würzburg	97045	8	63741
7	Theresa	TheresaNicolini@psa.com	Visa	4885608846030000	83	Head hunter	01671 71 50 05	Bad Münst.	2951	12	55241
8	Janeen	JaneenHuang@journapde.com	Visa	462934350214380	58	Reporter	03621 13 05 36	Lörrach-Tübingen	79543	7	89071
9	Cheryl	CherylSchrempf@psa.com	Visa	453253676154220	62	Building inspector	07522 14 62 51	Hergatz	88145	4	89789
10	Uriah	UriahCurtis@psa.com	MasterCard	5536272924959700	85	Payroll clerk	04951 28 12 82	Dad Siegen	22785	1	25611
11	Thomas	ThomasChen@psa.com	MasterCard	520586160562200	67	Inspection supervisor	07311 13 67 05	Plüschow-Nordostadt	75175	5	29515
12	Dylan	DylanKerley@psa.com	MasterCard	524852023892670	85	Maintenance technician	03782 49 49	Mandfeld	6338	8	38187
13	Robert	RobertCurtis@psa.com	Visa	448033308166790	40	Payroll representative	06024 31 34 87	Thalburg	54424	14	40556
14	Brian	BrianVogel@psa.com	MasterCard	511305180187770	30	Commercial photographer	03389 29 64 16	Regensburg	59192	11	43527
15	Elizabeth	ElizabethVogel@psa.com	MasterCard	51646508046000	68	Personnel analyst	040 75 76 90	Homburg-Barmbek-Süd	22805	14	62410
16	John	JohnHuang@psa.com	Visa	426467914644990	54	Examining and sports runner	09121 51 67 75	Kübelbach	95801	11	55145
17	Shonda	ShondaNicolini@psa.com	Visa	480460136074380	29	Cooling and freezing equipment tender	09171 21 48 69	Bad Kissingen	91608	7	15175
18	Chester	ChesterHuang@psa.com	Visa	4539684912630250	54	Ticket clerk	05183 26 21 83	Schweinfurt	29640	1	81880
19	Ronald	RonaldMiller@psa.com	MasterCard	5476242364380000	46	Card punching machine operator	03811 51 11 55	Nordhausen	99722	12	58817
20	Ken	KenLewin@psa.com	MasterCard	671668514286190	60	Usher	079 86 56 86	Hellborn-Truckenbach	74080	7	68132
21	Elliot	ElliotVogel@psa.com	Visa	451821623866220	81	Heavy construction equipment tender	0121 61 02 70	Kiel	24148	15	19670
22	Lena	LenaCurtis@psa.com	MasterCard	525791009378670	85	Delivery service truck driver	08712 36 89 78	Schneitzheim	78889	7	26518
23	Stanley	StanleyVogel@psa.com	MasterCard	512824186337480	78	Brake machine setter	030 78 23 90	Berlin-Medien-Straßen	12119	12	71455
24	Narcissa	NarcissaCurtis@psa.com	MasterCard	568092530785000	29	Office support secretary	07709 92 83 95	Wustack	79879	10	59996
25	John	JohnHuang@psa.com	MasterCard	5284127451375000	29	Driver	089 85 92 77	Münch.	80798	4	54823
26	Conetta	ConettaLewin@psa.com	Visa	47166819038135790	40	Technical control technician	07400 46 52 19	Darmstadt	76448	14	95027
27	Shonda	ShondaNicolini@psa.com	MasterCard	51770013038135790	40	Technical control technician	07400 46 52 19	Darmstadt	76448	14	95027

Est. time: 0.4 sec.

Action: Hotkey

[illegible]

Est. time: 5.3 sec.

Action: Click

Excel - MURSH KALA

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III. To-Be Process Description

This chapter highlights the expected design of the business process after automation.

III.1 To-Be Detailed Process Map

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
	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)

III.2 Parallel Initiatives/ Overlap (if applicable)

This chapter covers the proposed Business, Process & System changes to be made in the near future and their impact.

S.No	Initiative Name	Process Acion(s) where it is identified	Impact on current automation request? How?	Expected Completion Date	Contact person for more details
	n/a				

III.3 In Scope of RPA

The activities **In scope of RPA**, are listed here:

1. Receive the email Sent from the Business Team
2. Download the Email Attachment with loan Application Details
3. Read the CSV File
4. Open the UI Bank Application and Key in the Loan Data

5. Generate the Loan ID
6. Revert with Loan Ids and Email back to business

III.4 Out of Scope of RPA

The activities **Out of scope of RPA**, are listed here:

Sub-process (if applicable)	Activity (action)	Reasons for Out of scope*	Impact on the To-Be	Possible measures to be taken into consideration for future automation
1.1	1.1.1	Input: Any other Format apart from Csv	After processing action 1.1.2, an email is sent to the user to perform action 1.1.3 in a csv file In order to go to action 1.1.4, the robot will read the csv file	Perform the Process Manually

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

III.5 Business Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. These can be classified as:

Scenarios to be Handled	
1.	No Email
2.	Email without attachment
3.	Csv Having No Data
4.	Loan Term Should be 1 3 5 and 10
5.	Age Should be less than 18
6.	Loan Amount < 3 *Yearly Income

Known Exceptions

The table below reflects all the business process exceptions encountered during the process evaluation and documentation. These are **known exceptions** that occurred before. For each of these exceptions, define a corresponding expected action that the robot should complete if it encounters the exception.

BE #	Exception name	Action	Parameters	Action to be taken
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1.	Browser Not Responding		NA	Restart the Browser
2.	Email Not Sent / Received		NA	Contact the Mail Server Team info@mailserver.team
3.	Office not installed		NA	Contact the Admin Team admin@outlook.manage
4.	Browser Extension Missing		NA	Contact the UiPath Admin admin@uipath.manage

Unknown Exceptions

For all other unanticipated or unknown business (process) exceptions, the robot should:

III.6 Application Error and Exception Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here with the description and action to be taken, for each, by the robot.

Errors identified in the automation process can be classified as:

Area	Known	Unknown
Technology/Applications	Experienced previously, an action plan or a workaround available.	Never encountered before, or may happen independently of the applications used in the process.

Known Errors or Exceptions

The table below reflects all the errors identified in the process evaluation and documentation.

For each of these errors or exceptions, define a corresponding expected action that the robot should complete if it is encountered.

#	Error name	Action	Parameters	Action to be taken
1	Application Crash / Internal Server Error	Any action	Error message	Recover & retry for maximum 3 times. Close the applications and run the sequence again

Unknown Errors and Exceptions

For all the other unanticipated or unknown application exceptions/errors, the robot should:

III.7 Reporting

#	Report type	Update frequency	Details	Monitoring Tool to visualise the data
1	Process logs	Daily	How many times was this process run since the beginning of the month and what was the average run duration?	Kibana
2	Process logs	Monthly	How many robots worked on this process per each month?	Csv file posted daily on share drive
3	Transaction logs	Daily	How many transactions were run by this process since the beginning of the month and what was the average transaction duration?	Kibana
4	Error logs	Daily	Average number of errors by type per day	Kibana
5	Error logs	Daily	All errors per month grouped by type	Csv file posted daily on drive

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

IV. Other Observations

Include below any other relevant observations you consider needed to be documented here.

Example: Specific Business monitoring requirements (audit and reporting) etc.

V. 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		
Video Recording of the process (Optional)	ACME-System1 -Process-WI5-Manual-Walkthrough	Insert any relevant comments
Standard Operating Procedure (s) (Optional)		Insert any relevant comments
Business Rules Library (Optional)	Insert link to Business rules library	Insert any relevant comments
Other documentation (Optional)	Insert link to any other relevant process documentation (L4, L5 process description, fields mapping files etc.)	Insert any relevant comments

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