



Process Definition Document



Loan Application Processing

TABLE OF CONTENTS

I.	INTRODUCTION	4
1.1	Purpose.....	4
1.2	Objectives.....	4
1.3	Key Contacts	5
1.4	Minimum Pre-requisites for the Automation.....	5
II.	AS IS Process description	5
2.1	Process Overview	5
2.2	Applications Used.....	6
2.3	AS IS Process Map.....	7
2.3.1	High Level Process Map	7
2.3.2	Detailed Level Process Map	7
2.4	Process Statistics	8
2.5	Detailed As Is Process Actions.....	8
2.6	Exceptions Handling.....	23
2.7	Input Data Description	23
III.	TO BE Process description	24
3.1.	Detailed TO BE Process Map.....	24
3.2.	Parallel Initiatives.....	24
3.3.	In Scope For RPA.....	25
3.4.	Out Of Scope for RPA.....	25
3.5.	Exceptions Handling.....	25
3.5.1.	Known Business Exceptions.....	26

3.5.2	Unknown Business Exceptions	26
3.6.	<i>Applications Errors & Exceptions Handling</i>	26
3.6.1.	Known Applications Errors and Exceptions.....	27
3.6.2.	Unknown Applications Errors and Exceptions.....	27
3.7.	<i>Reporting</i>	27
IV.	Other	28
4.1.	<i>Additional sources of process documentation</i>	28

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**).

The PDD is a communication document between:

- The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
- The RPA Business Analyst and the Development team (represented by the Solution Architect and RPA Development Lead). 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 processing time per item by 80%.
- Better Monitoring of the overall activity by using the logs provided by the robots.

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
Process Owner	Ajay Dhamecha		

1.4 Minimum Pre-requisites for the Automation

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

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	Loan Application Processing
Process Area	Banking
Department	Loan
Short Description (operation, activity, outcome)	UI Bank receives daily or weekly emails containing customer data for loan

	applications. A member of the loan department reviews these emails to validate the attached applications. The validation process ensures that the data meets UI Bank's standards and loan requirements, including details such as annual income and requested loan amount. Valid applications are identified from Excel or CSV files, and once validated, they are forwarded to another department. This department processes the data into the system, ultimately generating a unique loan ID for approved applications.
Role(s) required in applications to perform the process	Loan Officer
Process schedule and frequency	Weekly
Number of times the process is ran by selected frequency	200-250
Process execution time	15 min per Transaction
Peak Period (s)	End of month, usually from 20th to 30th day of each month
Peak Volume Approximate increase	300+
Number of persons performing the process	3
Expected Volume increase during next periods	
Percentage Un-handled exceptions	
Input data description	Email & CSV
Output Data description	Excel, Reported 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.*

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
------------------	---------	----------------------	-------------------	----------------------------	----------

Microsoft Edge	107.0.1418.35 (Official build) (64-bit)	English	Thick	Read/Write	
Microsoft Excel	2210(Build 15726.20174)	English	Thick	Read/Write	

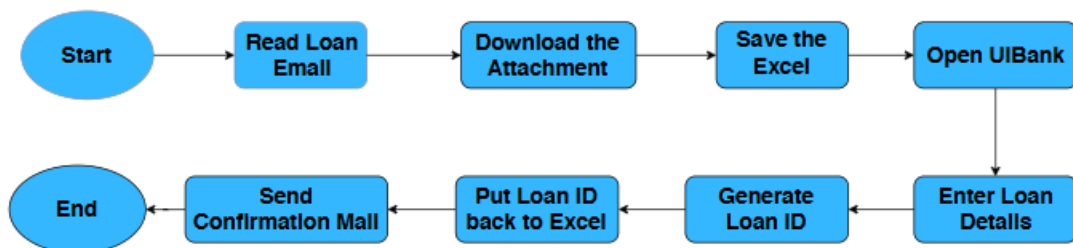
**Add more rows to the table to include the complete list of applications.*

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.

2.4 Process Statistics

High Level statistics

Processes	Windows	Actions	Mouse clicks	Keys pressed	Text entries	Hotkeys used	Time
4	6	33	14	0	0	10	15 min

Detailed statistics

Window name	Mouse clicks	Text entries	Key pressed
Mail - Outlook	1	0	0
Input - File Explorer	1	0	0
LoanData1.csv - Excel (5	0	0
UiBank-Loan Apply - Personal - Microsoft Edge	5	0	0
UiBank-Loan result - Personal - Microsoft Edge	1	0	0
	1	0	0

2.5 Detailed As Is Process Actions

#Action	Input	Description	Details (Screen/Video Recording Index)	Exceptions Handling	Possible Actions

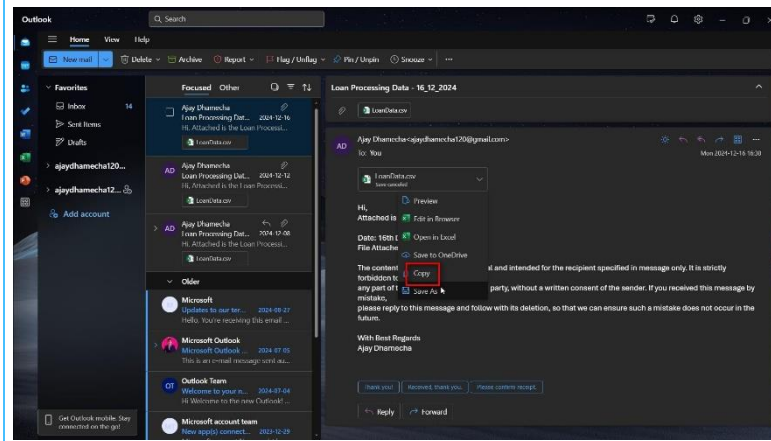
1 Outlook

Est. time: 8.7 sec.

1.1 Download and save the csv file

Est. time: 8.7 sec.

Action: Click



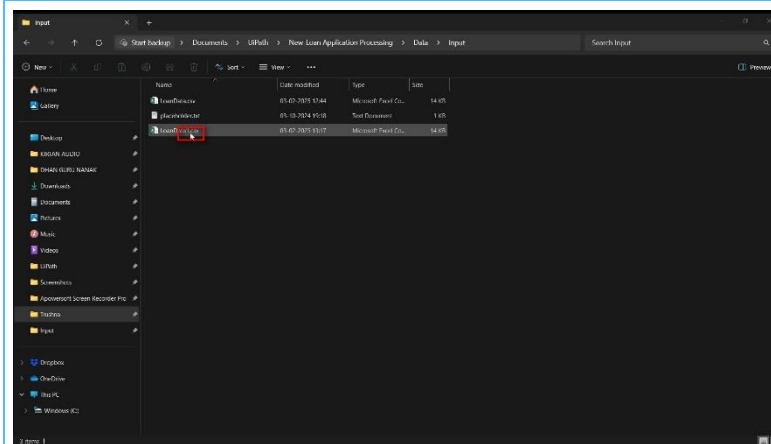
2 Open the File

Est. time: 1.9 sec.

2.1 Double Click to open

Est. time: 1.9 sec.

Action: Double Click



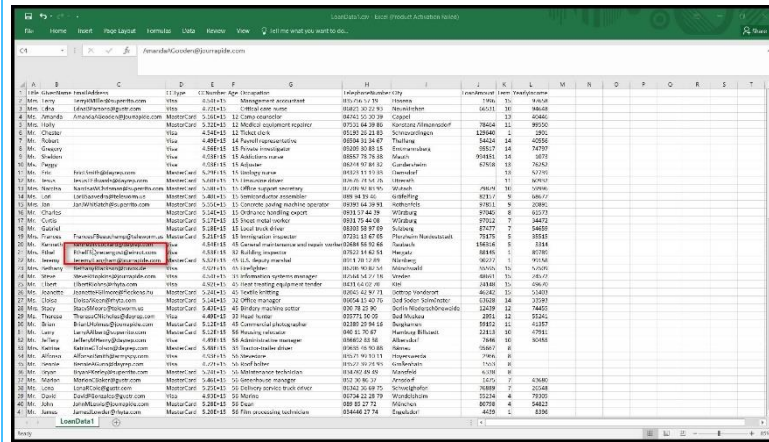
3 Select and Copy Email

Est. time: 3.4 sec.

3.1 click

Est. time: 3.4 sec.

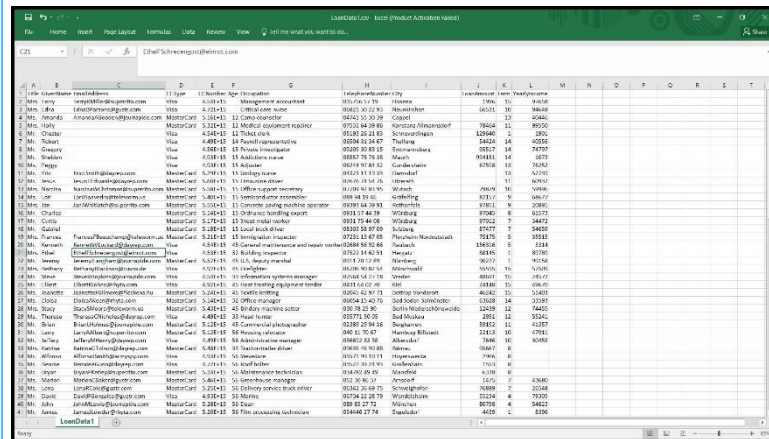
Action: Click



3.2 Press 'Ctrl+c'

Est. time: 0.0 sec.

Action: Hotkey



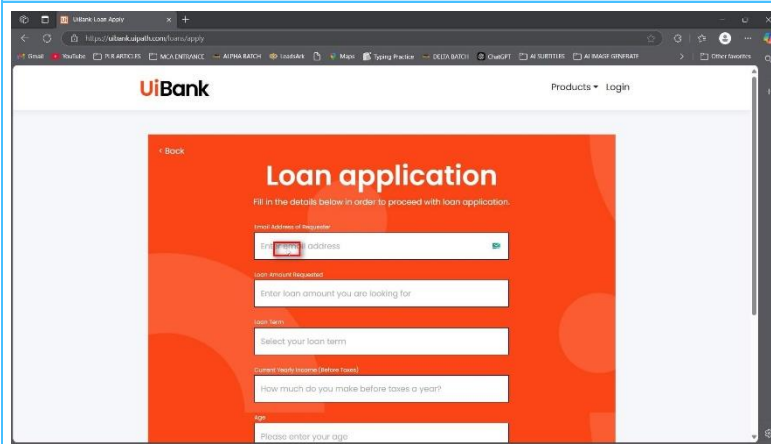
4 Put it in Uibank Website

Est. time: 2.8 sec.

4.1 Click

Est. time: 2.7 sec.

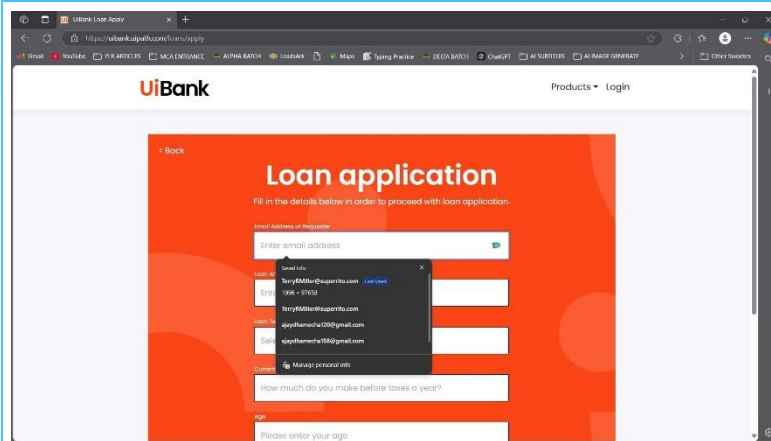
Action: Click



4.2 Press 'Ctrl+v'

Est. time: 0.0 sec.

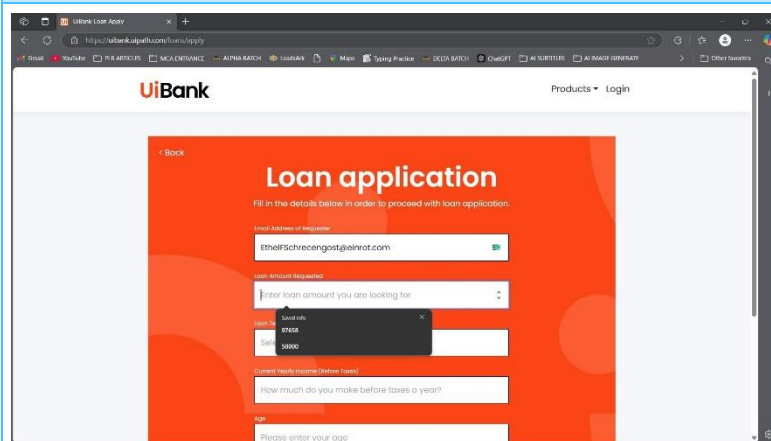
Action: Hotkey



4.3 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key



5 Copy Loan Amount

Est. time: 7.2 sec.

5.1 Click

Est. time: 7.1 sec.

Action: Click

[illegible]

5.2 Press 'Ctrl+c'

Est. time: 0.0 sec.

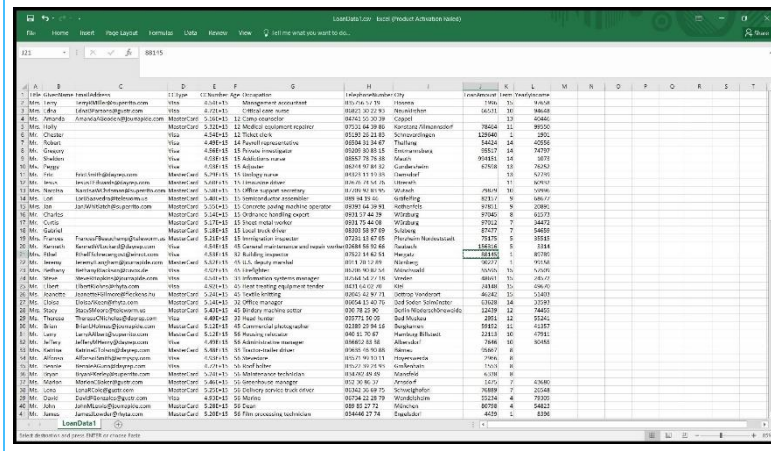
Action: Hotkey

LORDS & LADIES (Last Product Activated: 1/1/2017)																									
File	Home	Insert	Page Layout	Formulas	Data	Review	View	Send me what you want to do...	Help	Window	Help	File	Home	Insert	Page Layout	Formulas	Data	Review	View	Send me what you want to do...	Help	Window	Help	File	
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88115																									
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Insertion																									
1	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
2	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
3	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
4	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
5	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
6	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
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11	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
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70	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
71	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
72	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
73	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
74	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
75	Mr.	James	James@james.com	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
76	Mr.	James	James@james.com	1	1	1	1	1	1	1															

5.3 Press 'Alt+Tab'

Est. time: 0.0 sec.

Action: Special Key



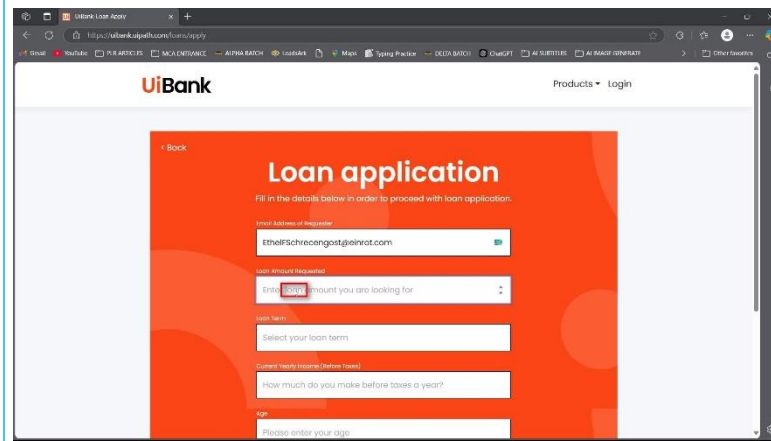
6 Paste - Loan Amount

Est. time: 1.1 sec.

6.1 Click

Est. time: 1.0 sec.

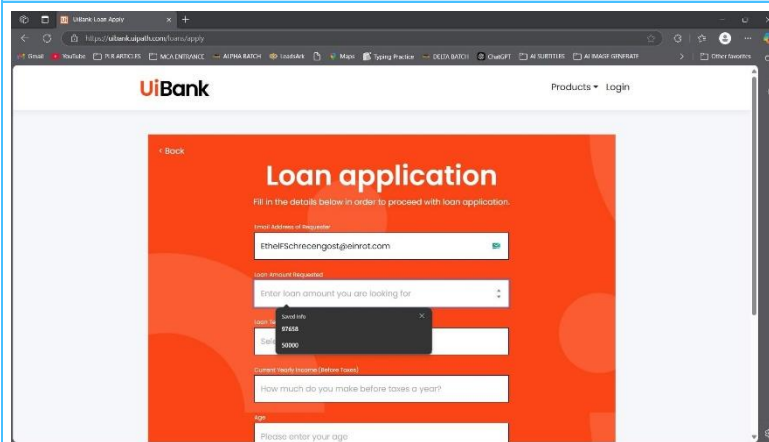
Action: Click



6.2 Press 'Ctrl+v'

Est. time: 0.0 sec.

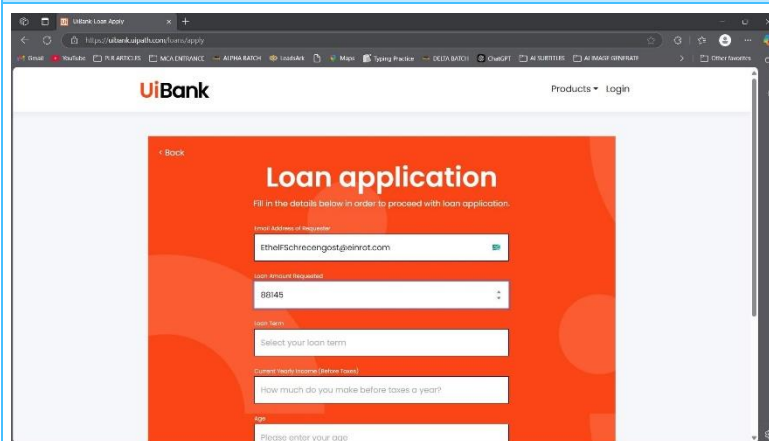
Action: Hotkey



6.3 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key

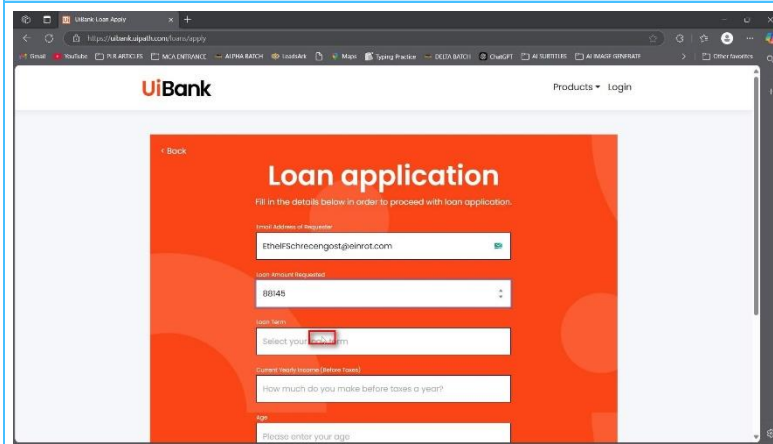


7 Select Loan Term if Available

Est. time: 2.9 sec.

7.1 Click

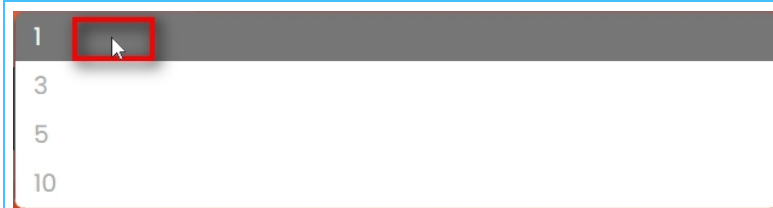
Est. time: 0.10 sec.



Action: Click

7.2 Select

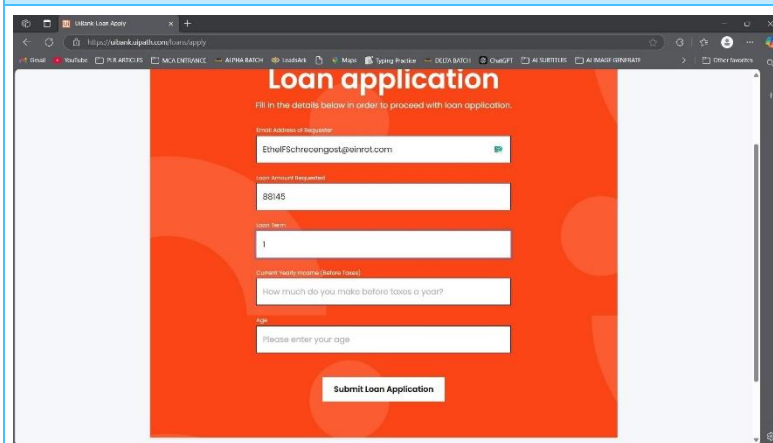
Est. time: 1.7 sec.



Action: Click

7.3 Press 'Alt+Tab'

Est. time: 0.2 sec.



Action: Special Key

8 Copy - Yearly Income

Est. time: 2.6 sec.

9 Paste - Yearly income

Est. time: 1.4 sec.

9.1 Click

Est. time: 1.2 sec.

Action: Click

9.2 Press 'Ctrl+v'

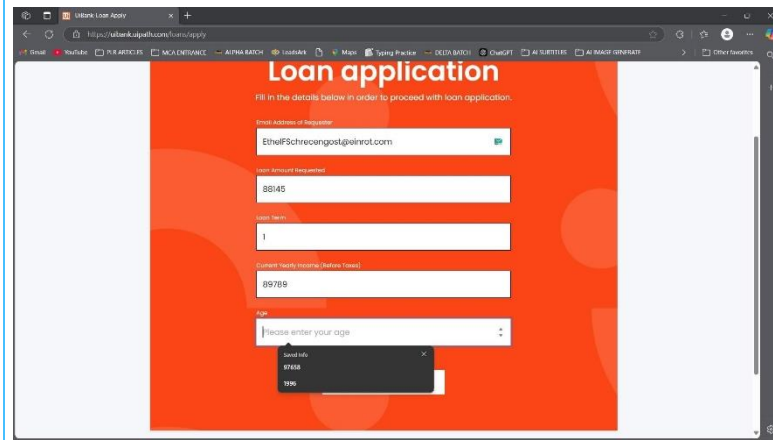
Est. time: 0.0 sec.

Action: Hotkey

9.3 Press 'Alt+Tab'

Est. time: 0.2 sec.

Action: Special Key



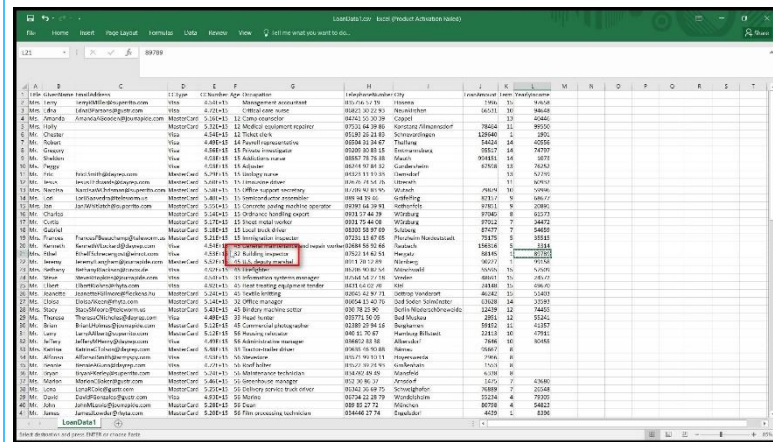
10 Copy - Age

Est. time: 6.9 sec.

10.1 Click

Est. time: 6.4 sec.

Action: Click



10.2 Press 'Ctrl+c'

Est. time: 0.4 sec.

Action: Hotkey

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10.3 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key

[illegible]

11 Paste - Age

Est. time: 0.3 sec.

11.1 Press 'Ctrl+v'

Est. time: 0.3 sec.

Action: Hotkey

12 Submit the Application

Est. time: 1.6 sec.

12.1 Click

Est. time: 1.6 sec.

Action: Click

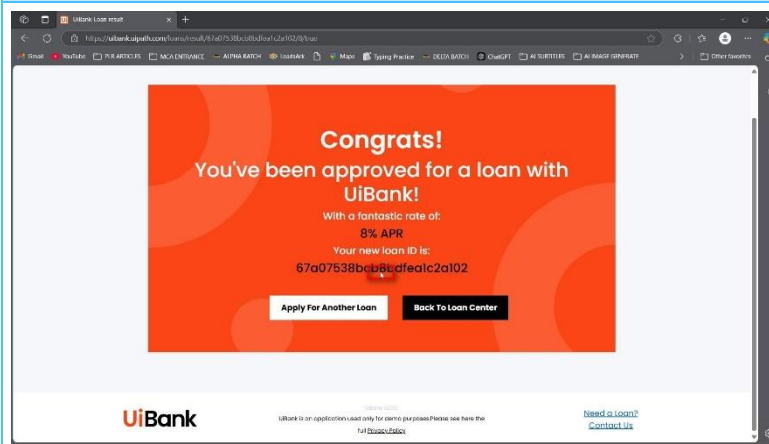
13 Copy Loan ID

Est. time: 4.8 sec.

13.1 Double Click

Est. time: 4.7 sec.

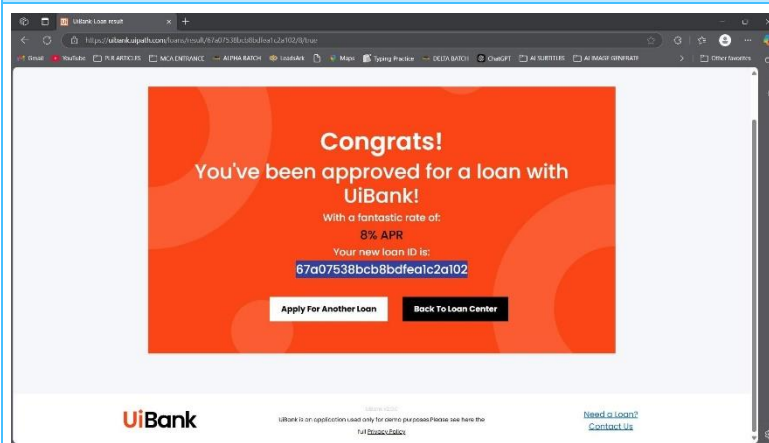
Action: Double Click



13.2 Press 'Ctrl+c'

Est. time: 0.0 sec.

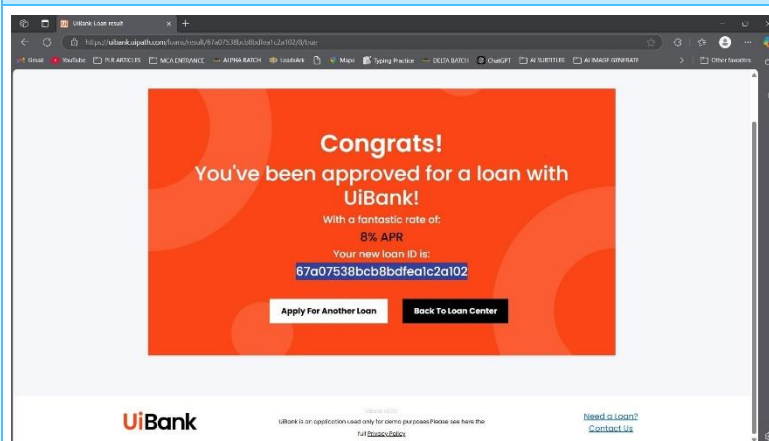
Action: Hotkey



13.3 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key



14 Put Loan ID in the File

Est. time: 12.4 sec.

14.1 Click

Est. time: 12.2 sec.

Action: Click

[illegible]

14.2 Press 'Ctrl+v'

Est. time: 0.0 sec.

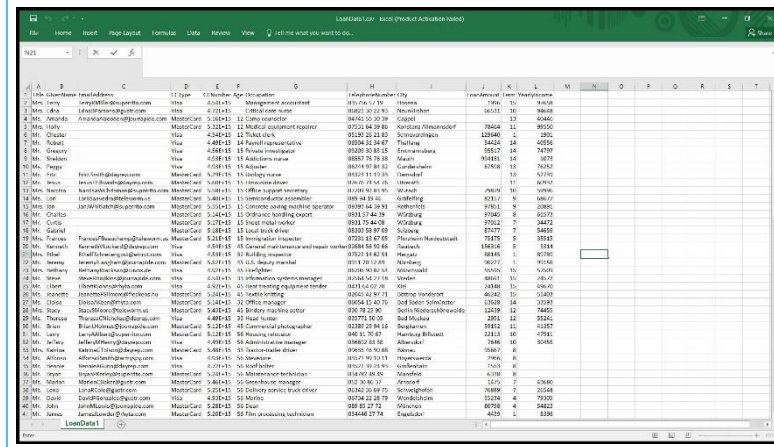
Action: Hotkey

[illegible]

14.3 Press 'Alt+Tab'

Est. time: 0.1 sec.

Action: Special Key



15 End

Est. time: 0.0 sec.

2.6 Exceptions Handling

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*?

* **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.




III. TO BE PROCESS DESCRIPTION

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
	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
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3.3. In Scope For RPA

The actions in scope for RPA should be listed below:

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

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

**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.

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

3.5.1. Known Business Exceptions

Details regarding how the robot should handle the exceptions.

Exception Name	Action	Parameters	Action to be taken
Browser Not Responding			Restart the browser
Email not sent/recieved			Contact the Mail Server Team info@mailserver.team
Office not installed			Contact the Admin Team admin@outlook.manage
Browser Extension Missing			Contact the UiPath Admin admin@uipath.manage

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.

Send mail to the Admin Team admin@outlook.manage

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
Application Crash	Any action	Error message	recover and retry 3 times

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.

robot should attempt to access the application 3 times then it should terminate thread.

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. Daily</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. Kibana</i>
<i>e.g Process logs</i>	<i>e.g. Monthly</i>	<i>e.g. How many robots worked on this process per each month?</i>	<i>e.g. Csv file posted daily on share drive</i>
<i>e.g Transaction logs</i>	<i>e.g. Daily</i>	<i>e.g. How many transactions were run by this process since the beginning of the month and what was</i>	<i>e.g. Kibana</i>

		<i>the average transaction duration?</i>	
<i>e.g. Error logs</i>	<i>e.g. Daily</i>	<i>e.g. Average number of errors by type per day</i>	<i>e.g. Kibana</i>
<i>e.g. Error logs</i>	<i>e.g. Daily</i>	<i>e.g. All errors per month grouped by type</i>	<i>e.g. Csv file posted daily on share drive</i>

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

IV. OTHER

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		
Video Recording of the process (Optional)	Acme-System1-Process-WI5-Manual-Walkthrough	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
Standard Operating Procedure(s) (Optional)		Insert any relevant comments
High Level Process Map (Optional)		Insert any relevant comments
Detailed level process map (Optional)		Insert any relevant comments
Work Instructions (Optional)		Insert any relevant comments
Input Files (Optional)		Insert any relevant comments
Output Files (Optional)		Insert any relevant comments

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