Invoices Processing Application

UiPath would handle invoices generated by large buisnesses,this can be very helpful in businesses cost cutting and saves a lot of time.

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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 unic   ~nline lender is worth considering. These unsecured debt products can help you get over a financial hump, co   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	. Animesh Singh	rpaanimesh@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. email must be received

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**	Invoice Processing application
2	**Process Area**	buisness
3	**Department**	accounting
4	**Process short description (operation, activity, outcome)**	process is about extract specific data from Invoices generated by business and store them in file by using various OCR if needed
5	**Role(s) required for performing the process**	Accountant
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**	pdf
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.
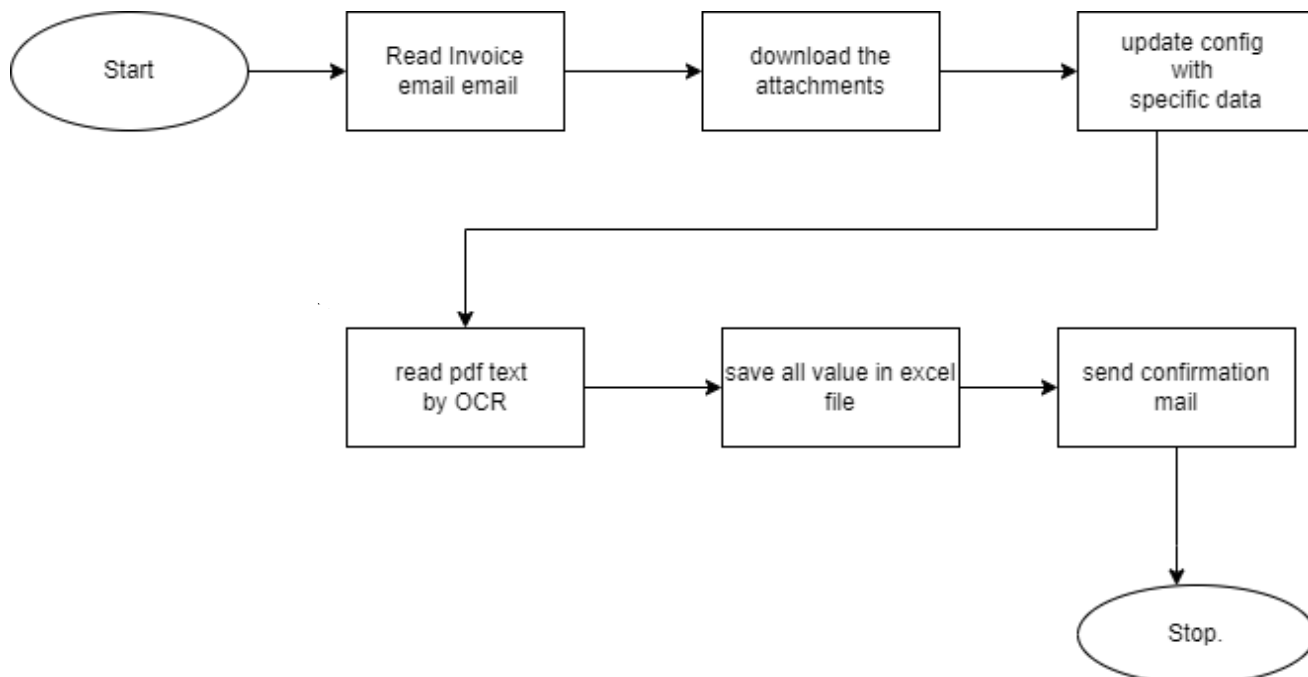
#	Application name & version	System Language	Thin/Thick Client	Environment/ Access method	Comments
1.	Microsoft Edge 107.0.1418.35 (Official build) (64-bit)	English	Thick	Read Write	
2.	Microsoft Excel Version 2210(Build 15726.20174)	English	Thick	Read Write	

*Add more rows to the table to include the complete list of applications.
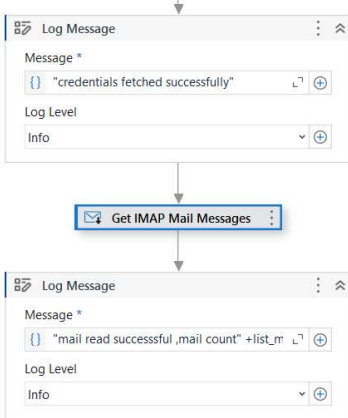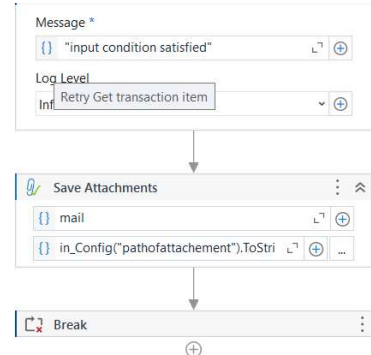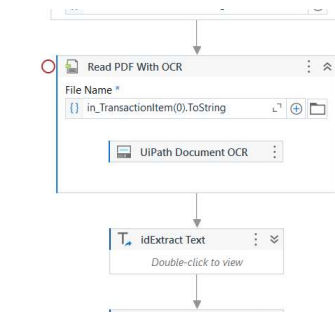
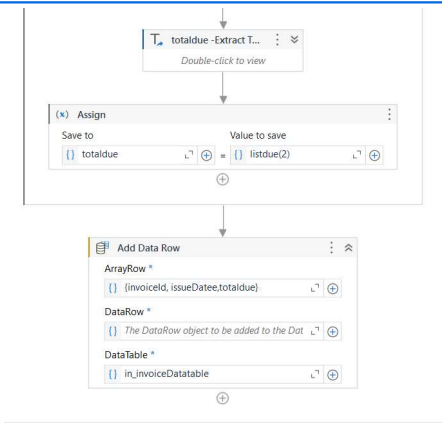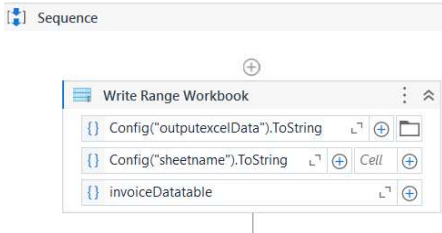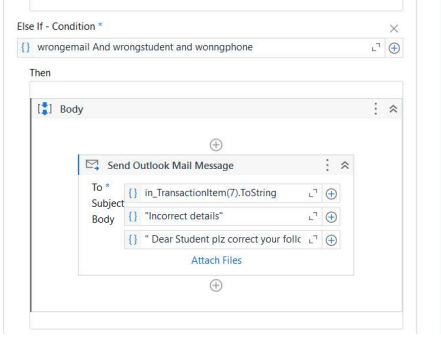## II.3 As-Is Process map   animesh

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.

3. Detailed Process Steps

The complete set of steps in the process, including keystrokes and clicks, are to be defined with screenshots.

#	Step action description	Screenshot	Expected result	Remarks
1.1	Retrieve the email using get imap		connection successful	Possible exception : - Handle exception if mail not received
1.2	Save attachment of the email		successful downloaded to specific folder	Possible exception : - Handl exception if there is no attachment
1.3	Read the pdf with the help of OCR if non text file		ocr engine run success	handle exception: if there is no data in file

1.4	extraction of data to be save in excel workbook		datatable stores all invoice info	
1.4.A	write all extracted data from datatable to excel file		all invoice info should be now in excel	
1.4.B	using send outlook activity to send invoice reports via mail		mail successfully sent	
1.5	Run the process main.xaml			

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
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)

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:

1. Receive the email from buisness team.
2. download the attachments of email
3. Read the Pdf file by using OCR
4 extract the desired details
5. output the details in excel file
6. loop runs until end file item
7.send back the report of Invoice

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	any other input apart from pdf		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. pdf with no data 4. should contain required data

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

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