# UiPath Project Documentation - UnbilledInvoicesReport

## 1. Project Overview

This document provides an overview of the UiPath project 'UnbilledInvoicesReport'.

The project is designed to automate the generation of reports for unbilled invoices.

It includes workflows for data manipulation, report generation, email notifications, and error handling (via hms template).

The system ensures accuracy and efficiency in tracking pending invoices.

## 2. Key Workflows

### 2.1 Transaction Processing Workflows

These workflows handle the core transaction processing, ensuring proper data handling, error management, and efficient processing of invoices.

- 70\_ExecuteTransaction.xaml - Responsible for processing each transaction.

- 80\_TransactionBusinessException.xaml - Handles business-related exceptions.

- 75\_TransactionSystemException.xaml - Manages system errors such as connectivity failures or missing files.

- 90\_BeforeSetTransactionStatus.xaml - Executes required actions before updating transaction status.

- 91\_AfterSetTransactionStatus.xaml - Executes additional actions after updating the transaction status.

### 2.2 Utility and Support Workflows

These workflows provide auxiliary functions such as report generation, data processing, and email notifications:

- **Generate\_Excel\_And\_PDF**.xaml - Creates reports in Excel and PDF formats.

- **Send\_Report\_Via\_Mail**.xaml - Sends generated reports via email to predefined recipients.

- **Generate\_HTML**.xaml - Generates an HTML version of the report for web-based viewing.

- **Data\_Manipulation**.xaml - Handles various data transformations such as formatting, filtering, and conversions.

- **Delete\_Temporary\_Sheets**.xaml - Cleans up temporary sheets from Excel files used in the process.

## 3. Dependencies & Configuration

The project relies on various dependencies, including data connections, file management, and email servers for notifications.

Ensure that all necessary configurations are properly set before execution.

## 4. Input & Output Data

The project processes invoice-related data, sourced from external systems such as databases or Excel files.

The outputs include structured reports in Excel, PDF, and HTML formats, which are then sent via email or stored for further use.

## 5. Error Handling & Logging

The project implements robust error-handling mechanisms to manage failures effectively. Business and system exceptions are logged and handled through specific workflows, ensuring reliable execution and troubleshooting.

Every Process execution saves**?** minutes of manual work for the finance team.