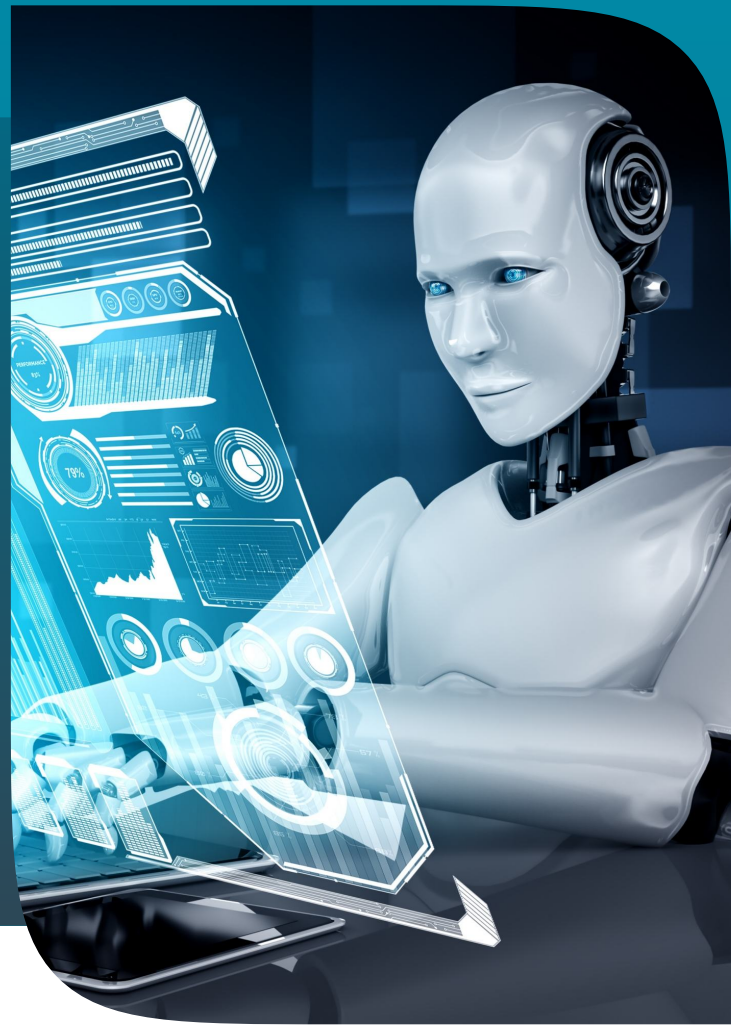# ROBOTIC PROCESS AUTOMATION

CASE STUDY

MUTUAL FUND DATA HANDLING – OPERATION AUTOMATION

OVERVIEW

The manual process for handling MF data involves several interconnected stages—each prone to delays and errors. Automation through UiPath bots has been implemented to address these inefficiencies and improve workflow consistency.

PROBLEM

1 **Delays in Team Response:** Manual email communication introduces delays based on team availability.

2 **Late Data Arrival:** Data delivery often takes 3-4 hours, causing bottlenecks.

3 **Data Processing Time:** Data cleaning and trimming require an additional 20-30 minutes.

4 **Human Errors:** Manual interventions result in miscalculations or data inconsistencies.

SOLUTION

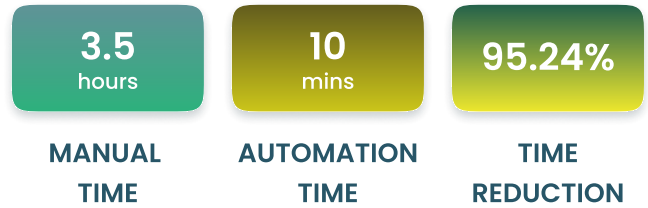The adoption of UiPath RPA (Robotic Process Automation) streamlines the entire process:

1. **Database Automation:** Executes queries and retrieves data automatically.

2. **Excel Automation:** Filters and trims data to retain only the relevant entries.

3. **Folder Automation:** Ensures organized file storage and facilitates file comparisons.

4. **Email Automation:** Sends success or failure notifications based on the process outcome.

5. **Reduced Human Dependency:** Automating MF data handling removes reliance on manual intervention.

ACTION

- Connects to the database to execute queries and fetch data.
- Transfers the data to Excel for filtering, trimming, and retaining relevant entries.
- Saves the processed file to a predefined path.
- Sends a success email with file path details (or a failure email in case of exceptions).

RESULTS

1. Enhanced Efficiency :

3.5 hours	10 mins	95.24%
MANUAL TIME	AUTOMATION TIME	TIME REDUCTION

2. Improved Accuracy:

- Error Reduction : **98%**

3. Timely Delivery : System - generated data is consistently delivered by 10 a.m. daily.

4. Optimized Workflow : Automation eliminates delays, improves productivity, and enhances data reliability.

FUTURE PLANS

1. Intelligent Exception Handling: Enhance the bot with AI/ML to autonomously resolve exceptions, reducing manual intervention.

2. Process Optimization and Expansion: Expand the bot's capabilities to automate more tasks and integrate additional systems for broader automation.