Project Plan
Secretary of State (SoS) Software Robot
The Capstone Experience
Team Auto-Owners
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Functional Specifications

• Expedite Worker’s Compensation Insurance Claims Submissions
• Reconcile Business Name against Secretary of State websites
• Utilize Software Robots
• Provide Reporting Dashboard with Metrics
Design Specifications

- Agent page
  - Form for data entry on an application
- Underwriter page
  - Menu to select applications that need to be reviewed
  - Once application selected, show form of data provided
  - Button to initiate software robot
  - Form to show suggested names returned by softbot
- Dashboard page
  - Report statistics on softbot search results
  - Charts and graphs to represent robot metrics
Screen Mockup: Agent Page
# Screen Mockup: Underwriter Page

![Screen Mockup](image)

## Recent Applications

<table>
<thead>
<tr>
<th>ID#</th>
<th>Business Name</th>
<th>State</th>
<th>Other Info</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mark’s Business</td>
<td>Michigan</td>
<td>Other Info</td>
<td>Small button</td>
</tr>
<tr>
<td>2</td>
<td>Jacob’s Business</td>
<td>Alabama</td>
<td>Other Info</td>
<td>Small button</td>
</tr>
<tr>
<td>3</td>
<td>Larry’s Business</td>
<td>Texas</td>
<td>Other Info</td>
<td>Small button</td>
</tr>
<tr>
<td>1</td>
<td>Joey’s Business</td>
<td>Michigan</td>
<td>Other Info</td>
<td>Small button</td>
</tr>
<tr>
<td>2</td>
<td>Jacob’s Business</td>
<td>Alabama</td>
<td>Other Info</td>
<td>Small button</td>
</tr>
</tbody>
</table>

Search

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Team Auto-Owners Project Plan Presentation
Screen Mockup: Application View

### Application Information

- **Business State:** Select A State
- **Named Insured:** Name Insured
- **Doing Business As:** Doing Business As
- **Doing Business As:** Doing Business As
- **Doing Business As:** Doing Business As

**Add Another DBA**

- **Suggested Name:** Suggested Business Name
- **Agent Name:** Agent Name
- **Suggested Name:** Suggested Business Name
- **Agent Name:** Agent Name
Screen Mockup: Application View
Screen Mockup: Dashboard
Technical Specifications

- Webpages built with a Model-View-Controller system
- Webpage forms implemented with Ajax calls using jQuery and buttons implemented with JavaScript to prevent page reloads
- Softbot built in UiPath using a conditional series of modular workflows, organized by state
- MySQL database to store application information and softbot search results
System Architecture

Users

Auto-Owners

Insurance

Employees

Agents

Back-End / Database

php

MySQL

N

SoS Websites

http://www

UiPath Process

Ui

Front-End

Login

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Database Architecture
System Components

- **Hardware Platforms**
  - CentOS Linux server running NGINX
  - MySQL database

- **Software Platforms / Technologies**
  - UiPath for softbot
  - PHP
    - PhpStorm IDE connected to GitLab repo
  - JavaScript, Node.js, jQuery
    - Grunt/Less
  - HTML/CSS via Bootstrap
Risks

• Risk 1
  ▪ Click trigger does not work (across any of our devices) – high
  ▪ Continue to use other working triggers while scouring the forums and reaching out to developers for a potential cause and fix.

• Risk 2
  ▪ “I’m not a robot” buttons - high
  ▪ Re-work UiPath workflow for the SoS sites that have robot checks so that the robot is invoked after the user is already on the website

• Risk 3
  ▪ UiPath takes over users’ screens - medium
  ▪ Create documentation so that the user is aware of what is happening and why. We can also add a manual verification option to avoid using bot

• Risk 4
  ▪ SoS website changes - low
  ▪ Modularization makes fixing softbot easy. We will document and teach client how to adjust to changes in a SoS website.
Questions?