



Robotic process automation for data scraping

Law Firm

Created an RPA process to automate the data download process of sales reports from two portals for multiple brands and set up data validation checks

Law firm needs to outlaw their data download process

Picture this...

You're looking for automating the data download process of sales reports from two portals for multiple brands and set up data validation checks. However, each brand has reports specific to a region (US, Canada, EU, etc.) which creates over 250 combinations of brands and regions, and the current data download process is manual and requires a lot of time and effort.

You turn to Accordion.

We partner with your team to help automate the data download process in a robust and reliable way utilizing UiPath for the RPA process, including:

- 1) Implementing scraping of the brand-region combination before the report download process begins, which will enable the system to scale up automatically when new brands are onboarded.
- 2) Removing the cause of most common errors in manual processes, e.g., mismatching the downloaded report to other brands by programmatically handling the downloaded report naming conventions.
- 3) Building a robust system to mine the data everyday with the capability to handle common changes in website UI. Automating the system to run behind a locked screen without any necessity of human intervention.

Your value is enhanced.

- You have automated data fetch process using RPA to increase the efficiency by scraping the data every day (smallest time range of data available), reduced errors like data contamination, and increased security by curtailing the number of people with access to the portals.
- You will have increased frequency to download more granular data from the websites by selecting shorter time duration (1 day) for the aggregated report compared to the earlier manual process (1 week).
- The scraping process would have saved over 150 hours of manual effort needed every month. This process could be setup to function over the weekends and other nonworking days as well with an equivalent to 0.9 FTE (effort put in by a full-time employee).

KEY RESULT

- >150 hours of manual effort saved

VALUE LEVERS PULLED

- Robotic Process Automation using UiPath

Robotic Process Automation for a Law Firm

Situation

- Client fetches sales data from two portals for brands with which they collaborate. Each brand has reports specific to a region (US, Canada, EU, etc.) which creates over 250 combinations of brands and regions. This data download process is manual and requires a lot of time and effort.
- Partnered with the client to help automate the data download process in a robust and reliable way utilizing UiPath for the RPA process.

Accordion Value Add

- Implemented scraping of the brand-region combination before the report download process begins, which enables the system to scale up automatically when the client onboards new brands onto their platform.
- Removed the cause of most common errors in manual processes, e.g., mismatching the downloaded report to other brands by programmatically handling the downloaded report naming conventions.
- Built a robust system to mine the data everyday with the capability to handle common changes in website UI. The system is built to run behind a locked screen without any necessity of human intervention.

Impact

- Automated data fetch process using RPA has increased the efficiency by scraping the data every day (smallest time range of data available), reduced errors like data contamination, and increased security by curtailing the number of people with access to the portals.
- Increased frequency helped the client to download more granular data from the websites by selecting shorter time duration (1 day) for the aggregated report compared to the earlier manual process (1 week).
- The scraping process saves over 150 hours of manual effort needed every month. This process is setup to function over the weekends and other nonworking days. This is equivalent to 0.9 FTE (effort put in by a full-time employee).

Methodology/ Approach

Approach

The process to automate the **extraction of sales data for over 250 combinations of brands and regions from 3rd party portals using UiPath** involved the following phases:

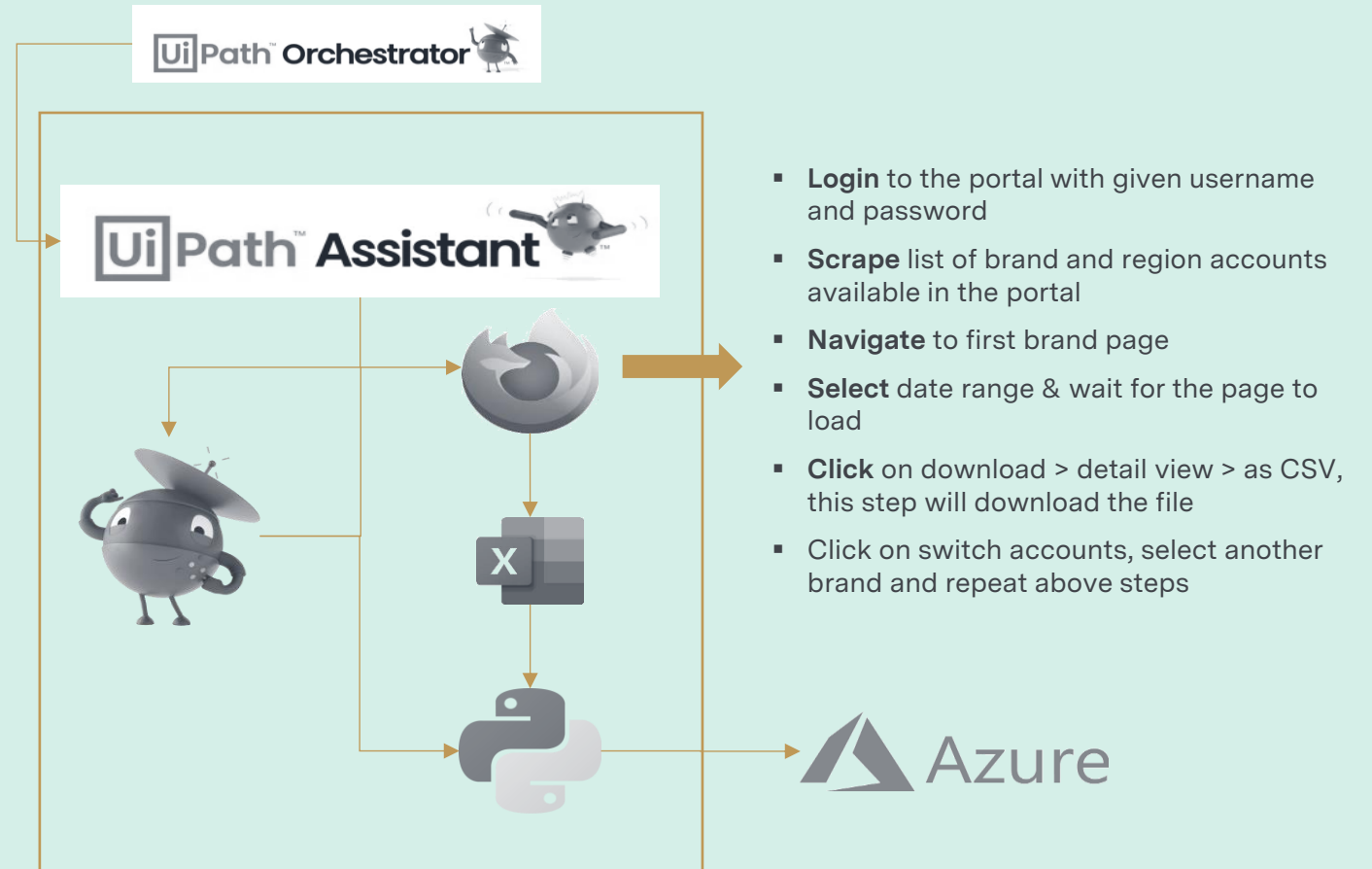
Solution Designing:

First step is to understand all the tools that are required to solve the requirement. This step involved design decisions like browser selection, data storage mechanism, etc.

RPA Implementation:

- All the steps that a user takes in manual approach are listed down
- **UiPath Studio** is used to implement the steps and to build a process
- Robot is created and process to the robot is published using **Orchestrator**
- Process is scheduled with a robot on a system using Orchestrator

System Architecture



Data scraping

Tables can be scraped from different types of web interfaces using UiPath and saved to excel

Switch regional accounts

Enter regional account name

- ☒ US - Kwikset Corporation (current account)
- ☐ CA - Otterbox CA
- ☐ CA - Startech.com
- ☐ US - APC
- ☐ US - Apothecary Products, Inc.
- ☐ US - Barlean's Organic Oils, LLC
- ☐ US - Bausch Health US, LLC.
- ☐ US - Bayer HealthCare LLC
- ☐ US - Corentium
- ☐ US - Diversey, INC.

i Any unsaved changes will be lost when you switch to a different regional account.

Webpage with list of brands

Cancel Switch accounts

Screenshot of brand & region combination from the website that needs to be scraped

List of names scraped by UiPath to an Excel file from the table above

AutoSave Off VendorCentral_AccountNames Search Meritytics M

File Home Insert Page Layout Formulas Data Review View Help Share Comments

A2 US - Kwikset Corporation (current account)

	A	B	C	D	E	F	G	H	I	J	K
1	Column1	Column2									
2	US - Kwikset Corporation (current account)										
3	CA - Otterbox CA										
4	CA - Startech.com										
5	US - APC										
6	US - Apothecary Products, Inc.										
7	US - Barlean's Organic Oils, LLC										
8	US - Bausch Health US, LLC.										
9	US - Bayer HealthCare LLC										
10	US - Corentium										
11	US - Diversey, INC.										
12	US - Edwards Signaling										
13	US - FLIR Systems, Inc.										
14	US - G-Form LLC										
15	US - GE Security										
16	US - Gaia Herbs-GENFD										
17	US - Havaianas footwear										
18	US - Hormel Grocery										
19	US - KAO Brands										
20	US - Kellogg Company NA - Kellogg										
21	US - Kidde										

Sheet2 Sheet1

Ready

UiPath orchestrator (1/2)

The screenshot shows the 'Processes' tab in the UiPath Orchestrator interface. The left sidebar contains navigation options: Home, Orchestrator, Actions, Apps, Processes, and Admin. The main content area has tabs for Processes, Jobs, Triggers, and Logs. A search bar and filters for 'Job priority' and 'Scope' are present. A table lists five processes:

Name	Version	Job pr...	Execution type	Compatibility	Entry point	Description
SC_account_scrape_unattended	1.0.15	Normal	Unspecified	Windows (.net4...	getSC_account...	Blank Pr...
SC_data_download_unattended	1.0.14	Normal	Unspecified	Windows (.net4...	getSCData_v0.3...	Blank Pr...
VC_account_scrape_unattended	1.0.21	Normal	Unspecified	Windows (.net4...	getAccNames_...	Blank Pr...
VC_data_download_unattended	1.0.18	Normal	Unspecified	Windows (.net4...	getVCData_v0.3...	Blank Pr...
VC_unattended_shared	1.0.17	Normal	Unspecified	Windows (.net4...	getVCData - Co...	Blank Pr...

UiPath Orchestrator is a tool used to manage the robots. Here we can see a list of different automation processes created

UiPath Orchestrator Process List

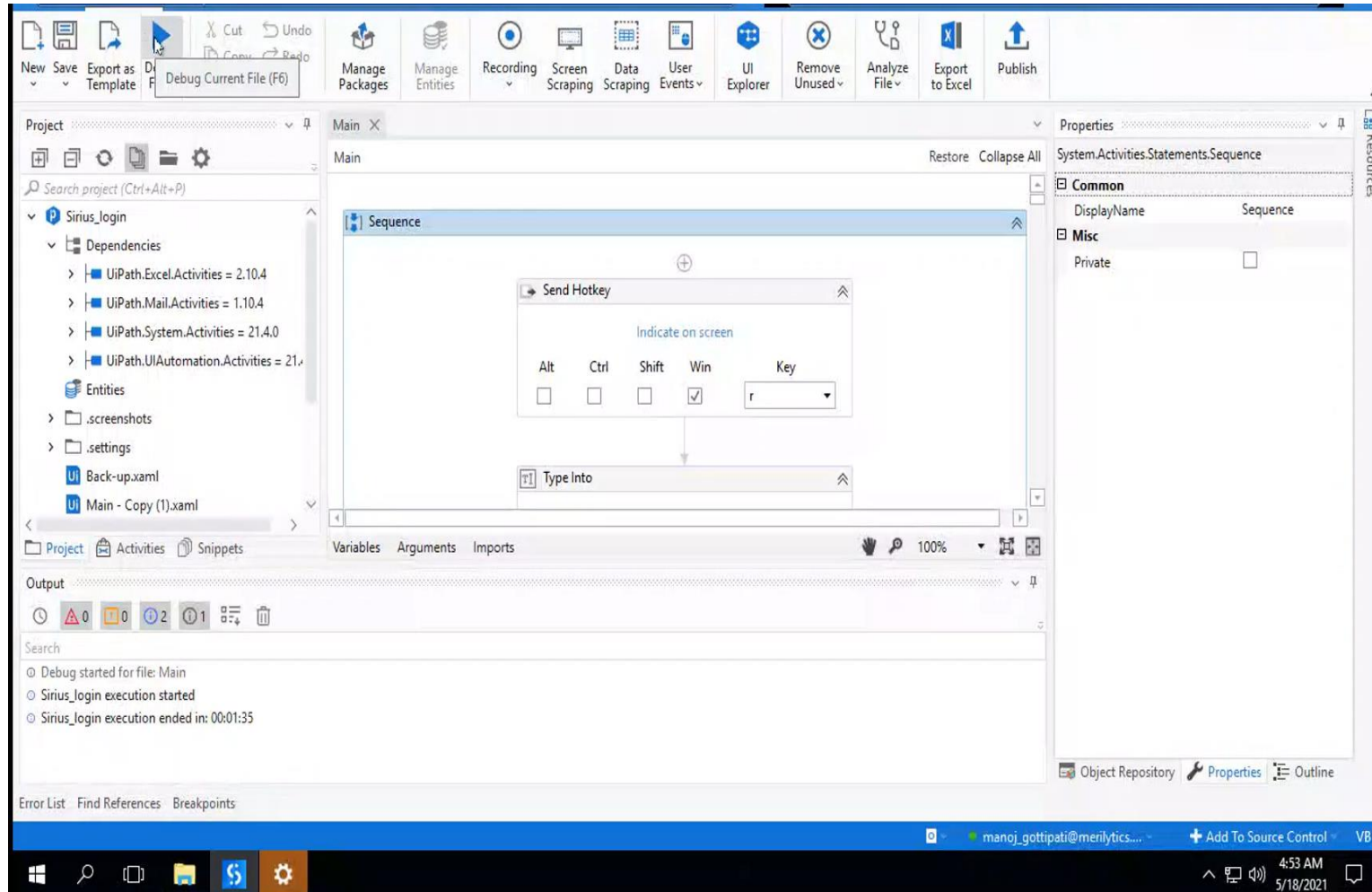
Created processes can be scheduled to be triggered at any interval using the orchestrator

The screenshot shows the 'Triggers' tab in the UiPath Orchestrator interface. The left sidebar is the same as the previous screenshot. The main content area has tabs for Processes, Jobs, Triggers, and Logs. A search bar and filters for 'State', 'Type', and 'Job priority' are present. A table lists four triggers:

Name	Process	Type	Trigger D...	Job...	Next Run Time	Stop After
SC_account_scrape	SC_account_scrape_unattended	Time	At 10:50 AM	Inherit Disabled		
SC_data_download	SC_data_download_unattended	Time	At 02:44 PM	Inherit Disabled		
VC_account_scrape	VC_account_scrape_unattended	Time	At 11:04 AM	Inherit Disabled		
VC_data_download	VC_data_download_unattended	Time	At 03:43 PM	Inherit Disabled		

UiPath Orchestrator (2/2)

UiPath RPA Process



Use Case:

The need is to place order of SKUs on a software called Siriusware which is a native windows application. This is a **manual intensive process** where an individual needs to input data of multiple SKUs from excel.

The process involves the following steps:

- Launch the application using windows run command.
- Wait for application launch and login using the credentials.
- **Select the required functionality** from activities drop down and select purchase order.
- **Fill the purchase order details** in the subsequent data entry fields. This is complex data entry step which loops through the data available in an input excel sheet and fills the parameters.

The video demonstrates a **UiPath RPA process** which performs the above steps in a windows machine.