**| Process Definition**

**Document**

**Rating Relevance on Stailer**

Checking emails for "Rating Relevance on Stailer," downloading Stailer data, extracting top 10 salons per location-gender-category. Retrieving and comparing Stailer and Google ratings. Generating output Excel with Salon Name, Stailer Rating Grade, Google Rating Grade, and relevance indicator (<0.4 difference), uploading to Google Drive.

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# 1. Introduction

## 1.1 Purpose

The Process Definition Document outlines the business process chosen for automation. The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation (AS IS) as well as the new sequence of actions that the process will follow as a result of preparation for automation (TO BE).

The PDD is a communication document between:

* The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
* The RPA Business Analyst and the Development team (represented by the Solution Architect and RPA Development Lead). The goal is to ensure that the process is documented appropriately and to a sufficient level of detail so that the Solution Architect can then create the solution based on the PDD content.

## 1.2 Objectives

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

* Reduce processing time
* More reliability on process

## 1.3 Key Contacts

Add here any stakeholders that need to be informed or to approve changes to the process:

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Contact Details** (email, phone number) | **Notes** |
| **Mentor** | **Darius Ionut Blaga** | **darius.blaga@tquila-automation.com** |  |
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| **Student** | Tudor Moldovan | tudor.moldovan1@stud.ubbcluj.ro |  |

## 1.4 Minimum Pre-requisites for the Automation

1. Filled in Process Definition Document
2. Test Data to support development
3. User access and user accounts creations (licenses, permissions, restrictions to create accounts for robots)
4. Credentials (user ID and password) required to logon to machines and applications
5. Applications installed on machine

# 2. AS IS Process Description

Email Check for "Rating Relevance on Stailer":

Periodically check the designated email account for messages related to "Rating Relevance on Stailer."

Download Stailer Data:

Access the Stailer platform and download the necessary salon data, ensuring it includes information such as salon names, locations, categories, and Stailer ratings.

Extract Top 10 Salons per Location-Category:

Process the downloaded Stailer data to identify and extract the top 10 salons for each location-category combination based on Stailer ratings.

Retrieve and Compare Stailer and Google Ratings:

Utilize the extracted salon information to retrieve Google ratings for the identified salons.

Compare Stailer and Google ratings for each salon to determine the rating disparity.

Generate Output Excel Sheet:

Create an Excel spreadsheet for each city containing the following columns:

Salon Name

Stailer Rating Grade

Google Rating Grade

Relevance Indicator (computed as the absolute difference between Stailer and Google ratings, indicating relevance when <0.4)

Upload to Google Drive:

Upload the generated Excel spreadsheet to a designated folder on Google Drive for accessibility and collaboration.

## 2.1 Process Overview

Section contains general information about the process before automation.

|  |  |
| --- | --- |
| **Item** | **Description/Answer** |
| **Process Full Name** | Rating Relevance on Stailer |
| **Process Area** | n/a |
| **Department** | n/a |
| **Short Description**  (operation, activity, outcome) | Checking emails for "Rating Relevance on Stailer," downloading Stailer data, extracting top 10 salons per location-category. Retrieving and comparing Stailer and Google ratings. Generating output Excel with Salon Name, Stailer Rating Grade, Google Rating Grade, and relevance indicator (<0.4 difference), uploading to Google Drive. |
| **Role(s) required in applications to perform the process** | n/a |
| **Process schedule and frequency** | n/a |
| **Number of times the process is ran by selected frequency** | n/a |
| **Process execution time** | n/a |
| **Process Restrictions** | ***n/a*** |
| **Peak Period (s)** | *n/a* |
| **Peak Volume Approximate increase** | n/a |
| **Number of persons performing the process** | ***1*** |
| **Expected Volume increase during next periods** | ***n/a*** |
| **Percentage Un-handled exceptions** | ***50%*** |
| **Input data description** | Excel file containing gender cities and the service type to be searched |
| **Output Data description** | ***Excel file containg the relevance indicator between the rating of the business providing the service on Stailer and on Google search for each city.*** |

## 2.2 Applications Used

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.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Applicatio n Name** | **Version** | **Application**  **Language** | **Thin/Thin k Client** | **Environment/ Access method** | **Comments** |
| **Outlook** | n/a | n/a | n/a | On machine |  |
| **Excel** | n/a | n/a | n/a | On machine |  |
| **Google Chrome** | n/a | n/a | n/a | On machine |  |

## 2.3 AS IS Process Map

A diagram of a company

Description automatically generated

## 2.4 Process Statistics

**High Level statistics**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Processes** | **Windows** |  | **Actions** | **Mouse**  **clicks** | **Keys pressed** | **Text entries** | **Hotkeys used** | **Time** |
| {total\_appli cations\_co unt} | {total\_win dows\_co  unt} | {total\_act  ions\_cou  nt} | | {total\_click s} | {total\_ke ys\_press ed} | {total\_text  \_entries} | {total\_hotke ys} | {process \_executio n\_time} |
| **3** | 7 | 17 | | n/a | n/a | n/a | n/a | n/a |
|  |  |  | |  |  |  |  |  |

**Detailed statistics**

|  |  |  |  |
| --- | --- | --- | --- |
| **Window name** | **Mouse clicks** | **Text entries** | **Key pressed** |
| {#windows}{name} | {total\_clicks} | {total\_text\_entries} | {total\_keys\_pressed}  {/windows} |
| **Excel** | n/a | 4\*10\*nr\_input\_servici | n/a |
| **Outlook** | n/a | 0 | n/a |
| **Google Chrome/Stailer** | n/a | Nr\_input\_servicii | n/a |
| **Google Chrome/Google Search** | n/a | Nr\_input\_servicii\*10 |  |

## 2.5 Detailed AS IS Process Actions

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#Action** | **Input** | **Description** | **Details (Screen/Video**  **Recording Index** | **Exception Handling** | **Possible Actions** |
| Open Outlook | n/a | *Open outlook where the mail will be recieved* | n/a | Outlook does not open | n/a |
| **Get last unread emails with subject “Rating relevance on Stailer”** | n/a | n/a | n/a | Not done on mail not found | n/a |
| **Extract the excel with input data from attachments** | n/a | n/a | n/a | n/a | n/a |
| **Get the location with service type and gender from the input excel file** | n/a | n/a | n/a | n/a | n/a |
| **Open browser on Stailer page and search for each entry in the input file** | Text input Each entry from the input file of type gender-location-service type | n/a | n/a | No businesses found on Stailer throw exception | n/a |
| **Press radio button to sort after rating** | Press radio button | n/a | n/a | n/a | n/a |
| **Extract top 10 items and ignore recommended ones** | Web text Extraction | **go to next**  **page until 10 items are extracted** | n/a | n/a | n/a |
| **Open browser**  **And search on Google the name of the salon** | Text input Name of the salon | **n/a** | n/a | n/a | n/a |
| **Extract number of reviews and the review score** | Web text extraction | **n/a** | n/a | No rating found handled | n/a |
| **Create a sheet for every location in the excel output** | n/a | **n/a** | n/a | n/a | n/a |
| **Append in the output excel sheet the input salon and score with the google maps salon and score** | n/a | **n/a** | n/a | n/a | n/a |
| **Compute the absolute difference between the scores print YES if difference < 0.4 else NO** | n/a | **n/a** | n/a | n/a | n/a |
| **Upload the output file in Google Drive** | Upload file | **n/a** | n/a | n/a | n/a |

## 2.6 Input Data Description

The following table should contain details regarding the inputs that every action of the process takes.

|  |  |  |  |
| --- | --- | --- | --- |
| **#Action** | **Sample** | **Input**  **Type** | **Location** |
| **Open browser on Stailer page and search for each entry in the input file** | “Gender-location-service type” | *Text input*  *Dropdown Selection* | Stailer Home page on Google Chrome |
| **Press radio button to sort after rating** | n/a | Press radio button | Stailer search results on Google Chrome |
| **Extract top 10 items and ignore recommended ones** | “Location-The name of the salon-Rating Stailer” | Web data extraction | Stailer search results on Google Chrome |
| **Open browser**  **And search on Google the name of the salon** | “The name of the salon” | Text Input  Press button | Google search bar on Google Chrome |
| **Extract number of reviews and the review score** | “The number of reviews-Google score” | Web data extraction | Google results on search  On Google Chrome |
| **Upload the output file in Google Drive** | Upload “output.xlsx”  file | Upload file | Google drive page on Google Chrome |

# 3 TO BE Process Description

In this section the proposed improvements to the process, actions to the process will be outlined as well as the actions proposed for automation and the type of robot required. **This will be crosschecked by the Solution Architect.**

A diagram of a flowchart

Description automatically generated

## 3.5 Exception Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. Exceptions are of 2 types and both need to be addressed:

**Known exceptions** = previously encountered. A scenario is defined with clear actions and workarounds for each case.

**Unknown** = New situation that was not encountered before. It cannot be predicted and in case it happens it needs to be flagged and communicated to an authorized person for evaluation.

### 3.5.1 Known Business Exceptions

Details regarding how the robot should handle the exceptions.

|  |  |  |  |
| --- | --- | --- | --- |
| **Exception Name** | **Action** | **Parameters** | **Actions to be taken** |
| No salon found on Stailer | **Open browser on Stailer page and search for each entry in the input file** | *Input data* | *Throws business exception and writes "no data found on stailer" in the excel files* |

### 3.5.2 Unknown Business Exceptions

System exceptions send screenshot to expections file

## 3.6 Applications Errors & Exceptions Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here together with the action to be taken for each by the Robot. There are 2 types of exceptions/errors:

**Known** = Previously encountered and action plan or workaround available for it (e.g. SAP unresponsive during peak times)

**Unknown** = these are exceptions and errors that cannot be anticipated but for which the robot needs to have a rule so that the RPA solution is sustainable.

### 3.6.1 Known Applications Errors and Exceptions

Details regarding how the robot should handle the exceptions.

|  |  |  |  |
| --- | --- | --- | --- |
| **Error/Exceptio n Name** | **Action** | **Parameters** | **Actions to be taken** |
| *Application Crash* | *Any action* | n/a | *System exception raised* |
| *Web page modifications* | *Actions on Google Chrome* | n/a | *No action taken* |

### 3.5.2 Unknown Applications Errors and Exceptions

System exceptions send screenshot to expections file