

BP Travel

Create Quotes

Process Definition Document

Revision 1.1

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Contributors

The content of this document has been authored with the combined input of the following group of key individuals.

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Classification	Company Confidential
Definition	Information is Group confidential and needs to be protected
Context	Where loss of information confidentiality would result in significant harm to the interests of the organisation, financial loss, embarrassment or loss of information

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1 Introduction

The Process Definition Document (PDD) captures the flow of a business process to be developed within UiPath.

The flowchart contained within the document captures, at a high level, the business process to be automated, the target systems used within the process and any assumptions that have been taken into account.

Once agreed as the basis for the automation of the target process, the flowchart and assumptions will be used as a platform from which the automated solution will be designed.

Changes to this business process may constitute a request for change and will be subject to the agreed agility program change procedures.

Note: This document must be completed in the absence of existing process documentation that provides the level of detail required for a process to be automated. If existing process documentation is to be used instead of a new PDD the following steps should still be undertaken

- Existing process documentation reviewed to ensure it is still up to date and fully captures the current manual process
- Existing process documentation provides the same level of detail that is required for automation
- Agreed by the business as an accurate description of the manual process

2 Overview

2.1 Manual Process Description

At a high level, the process involves the following steps:

- A Create Quotes report is automatically created at 9am, 12pm, and 3pm. This is downloaded by the team leader and work allocated to case handlers.
- For each row on the report, case handlers navigate to a Create Quotes screen in the BP Travel application to enter the Quote
- Quote details and price are forwarded to the customer via email

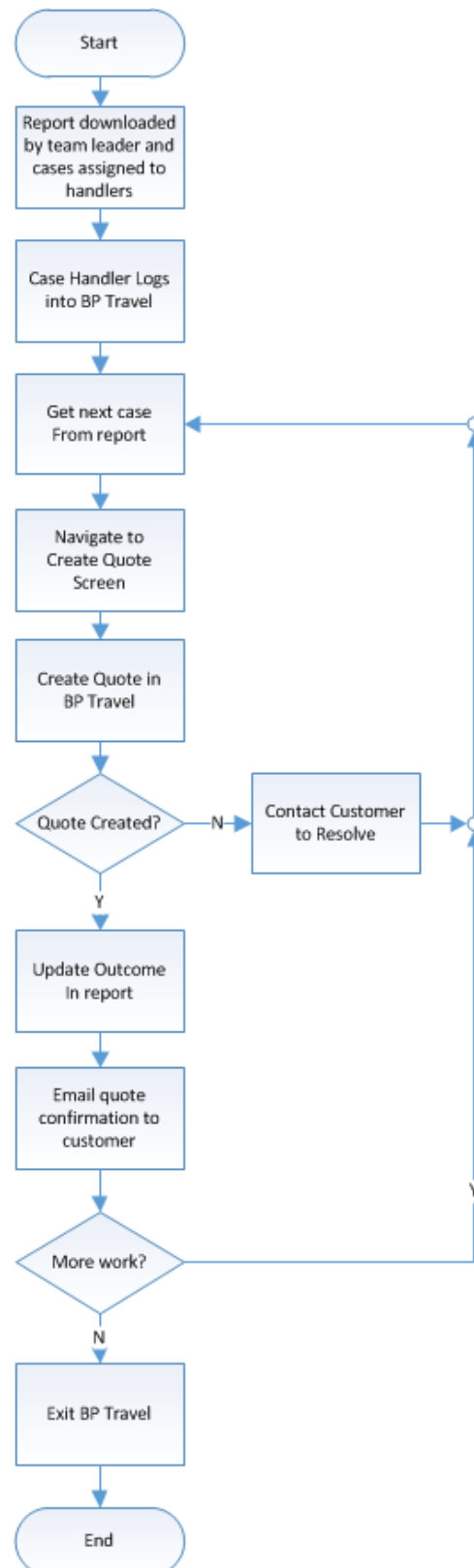
2.2 Target Systems

Name	Description
Microsoft Excel	Used for reading the report contents.
BP Travel	Internal web-based booking system used for entering and maintaining quotes and bookings.

3 Impacted Business Areas

The Operations team that currently perform the process manually need to reengineer their process to support only exception cases that cannot be processed by UiPath.

4 Process Diagram



5 Process Details

5.1 Download the Create Quotes Report

The Create Quote Reports is downloaded from the Customer Portal three times per day.

An example of the report is shown below:

Request_Date	Title	First_Nam	Last_Nam	Email	Contact_Number	Postcode	Flying_Frc	Flying_To	Departure_Date	Return_Date	Adults	Children
18/03/2015 17:35							MAN	BRU	05/04/2015	10/04/2015	1	1
18/03/2015 16:23							LPL	PRG	28/03/2015	11/04/2015	1	3
18/03/2015 16:12							LGW	TIA	17/04/2015	07/05/2015	1	3
18/03/2015 16:16							LHR	EBJ	08/04/2015	27/04/2015	2	2
18/03/2015 17:17							LHR	MSQ	13/04/2015		1	4
18/03/2015 16:44							LPL	VIE	24/03/2015	03/04/2015	1	3
18/03/2015 15:07							BHX	ANR	09/04/2015		2	4
18/03/2015 16:12							LGW	HEL	15/04/2015		2	2
18/03/2015 16:10							LHR	FLR	17/04/2015		2	1
18/03/2015 17:25							GLA	MIL	14/04/2015	21/04/2015	2	4

The report is split up by the team leader into rows of approximately 50 to be allocated to staff.

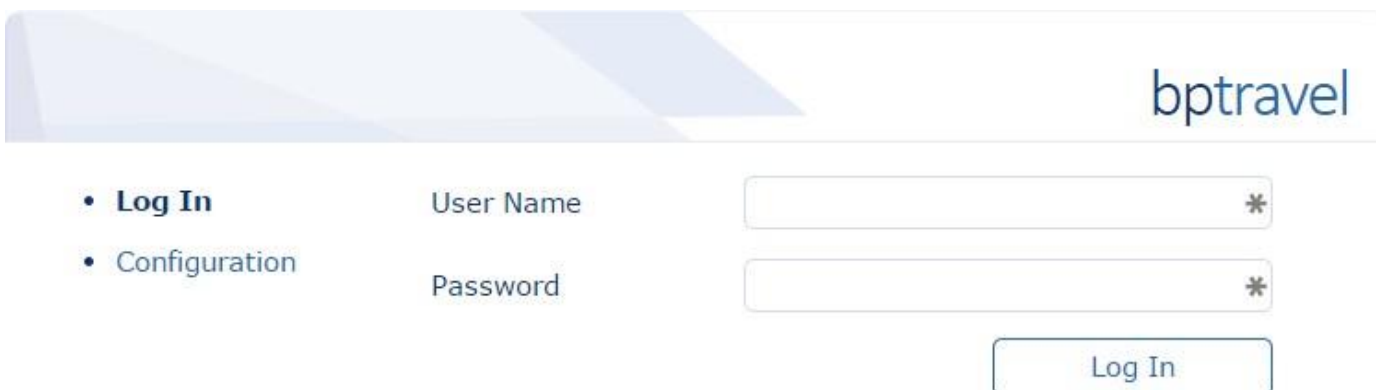
Whilst working the process, handlers add two new columns to the report called 'Quote Number' and 'Total Price' where they record Quote Number and Total Price from BP Travel (see the Create Quote in BP Travel section below).

5.2 Case Handler logs into BP Travel

Most staff have the BP Travel website as a Favourites link in Internet Explorer.

The URL for the website is: **<http://bptravel.blueprism.com/login.html>**

When you first navigate to the BP Travel website you will be shown the login page:



- **Log In**
- Configuration

User Name *

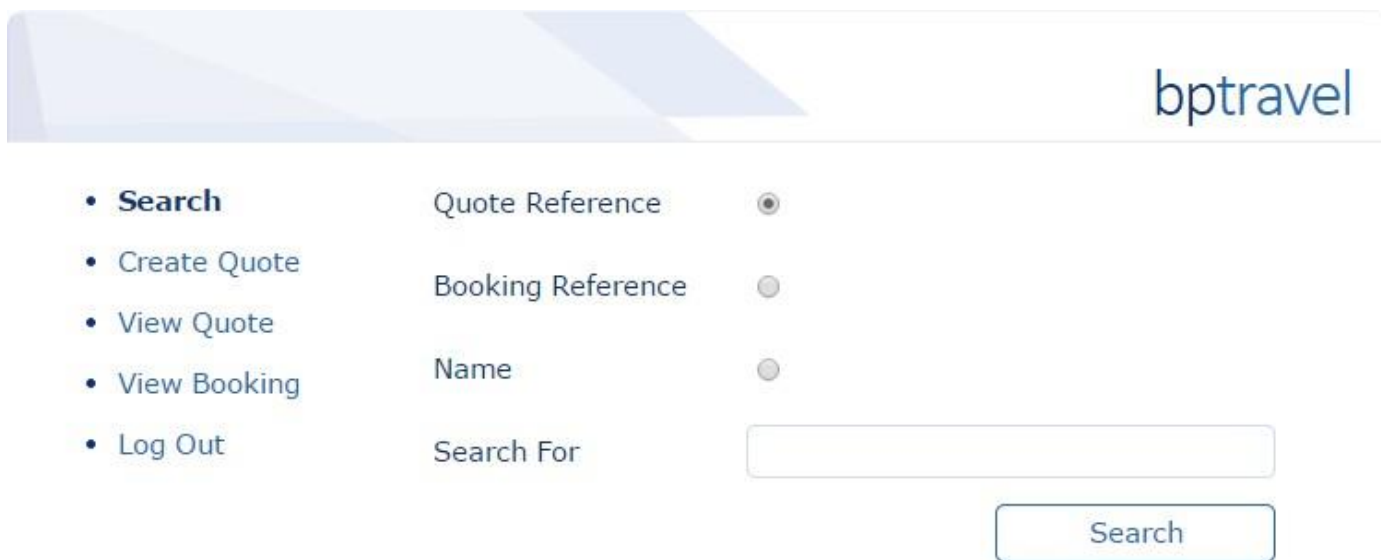
Password *

Log In

To Login perform the following steps:

- A. Enter your User Name
- B. Enter your Password
- C. Click the Log In button

If you successfully log into the BP Travel system you will be on the Search screen:



bptravel

- **Search**
- Create Quote
- View Quote
- View Booking
- Log Out

Quote Reference ☒

Booking Reference ☐

Name ☐

Search For

Search

5.3 Navigate to Quotes Screen

All navigation between screens in the BP Travel system is done via the Navigation menu at the left hand side of the screen. The navigation menu is available on all screens.

- **Search**
- Create Quote
- View Quote
- View Booking
- Log Out

Click the Create Quote link to navigate to the Create Quote screen.

5.4 Create Quote in BP Travel

The Create Quote screen is displayed as below:

From	<input type="text"/>
To	<input type="text"/>
Departing	<input type="text"/>
One Way	<input type="checkbox"/>
Returning	<input type="text"/>
Adults	<input type="text"/>
Children	<input type="text"/>
Name	<input type="text"/>
Postcode	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>
<input type="button" value="Create Quote"/>	

There is a one-to-one relationship between the fields in the supplied data file and the fields on the Create Quote screen.

Complete all the fields on the screen and click Create Quote

5.5 Update Report

If the quote has been entered successfully a Quote Number and a total price will be displayed on the screen

Quote Reference	10299	← Quote Number
From	Berlin (BER)	
To	Turin (TRN)	
Departing	09/05/2015	
Returning	26/10/2015	
Adults	2	
Children	2	
Total	462.00	← Total Price
Name	[REDACTED]	
Postcode	[REDACTED]	
Telephone	[REDACTED]	
Email	[REDACTED]	
<input type="button" value="Cancel Quote"/>		<input type="button" value="Create Booking"/>

Record the quote number and the total price in the worksheet.

If the entered quote has not been accepted by the system for any reason, an error message will be shown under the Create Quote button as in the example below:

Create Quote

Please enter a departure date less than 90 days from today.

5.6 Email quote confirmation to customer

The handler sends the following email to the customer confirming the quote:

To:
 Subject: Your requested quote for air travel
 Hi {first name},

In response to your request, we are pleased to present you with the following quote for air travel:

From:
To:
Departing:
Returning: {remove if one-way}

Adults:
Children:

Quote number:
Price:

Please contact us when you are ready to make your flight reservations. We look forward to serving you.

Sincerely,

BP Travel

5.7 Contact Customer to Resolve

Quote details provided to BP Travel may not be sufficient to create a quote (see Business Exceptions). In these cases the case handler must contact the customer by telephone and attempt to resolve the error by arranging alternative flights and/or dates.

Following this the case handler should update the worksheet with the outcome.

5.8 Exit BP Travel

Click Log Out on the navigation menu and close the browser.

6 Exceptions

6.1 Business Exceptions

Due to lack of validation on the customer portal the following known business exceptions can occur:

- Incompatible flight origin and destination. No flight is available between these two locations that can satisfy the requested departure and arrival date/times.
- Insufficient seats available. A flight exists, but not enough seats are available to satisfy the quote request.
- Invalid travel dates/times. Departure date/time is in the past, or requested arrival is before departure.
- Pricing information unavailable. A flight exists, but the Booking System has insufficient data to generate a price.