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PROCESS DEFINITION DOCUMENT

RobotSpareBin Industries Inc.

Weekly sales report creation

DOCUMENT VERSION HISTORY

Version	Author	Date
1.x		

SIGNED OFF BY

Name	Function	Responsibility
Maria	Intranet Administrator	Process information

CONTRIBUTORS

Name	Function	Responsibility
You!	Software Robot Developer	Process automation

Current process analysis

High-level description

The process is used once a week to manually insert sales performance data for all Sales Representatives into the intranet, and to generate a PDF report.

The company sets weekly sales goals for each sales representative. At the end of the week, their results are exported from an existing system (not included in this process) into an Excel spreadsheet.

Currently, the intranet administrator manually executes these operations:

1. Each week a Microsoft Excel spreadsheet is exported and uploaded to the intranet webserver.
2. The employee downloads the exported spreadsheet from the intranet webserver.
3. The employee manually logs into the intranet website.
4. The employee inserts the information for each sales representative.
5. Data is collected in a table on the site, which also adds up the sales goal and the actual sales for the week.
6. The employee selects the table in the browser, pastes the code into Microsoft Word, and prints the resulting document as a PDF.
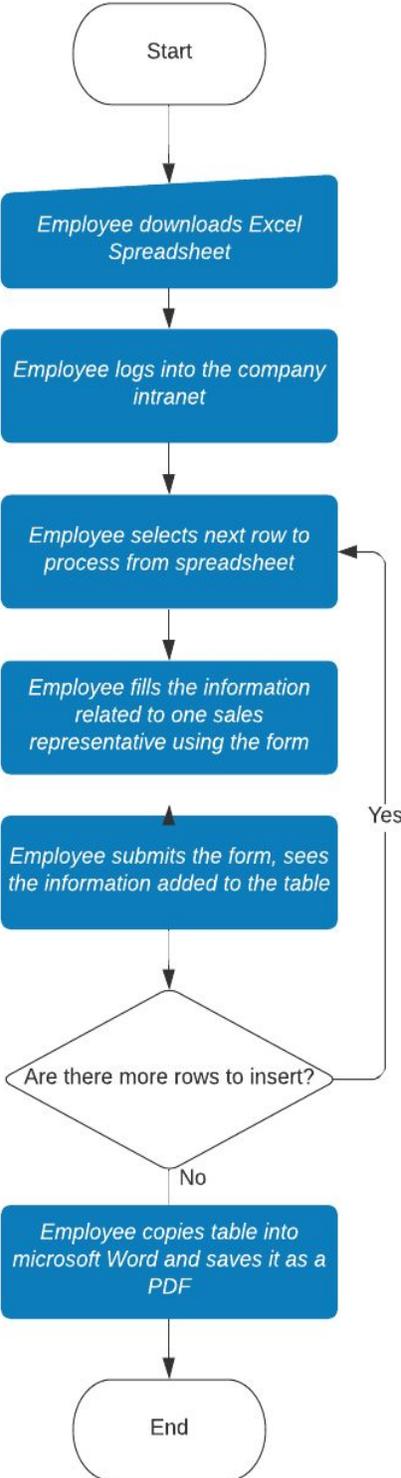
Systems involved

System	Used for	User role needed
Microsoft Excel	Collecting the sales data, used manually by the employee as the source of data which is manually copied and pasted into the intranet.	The employee must have access to the intranet.
Company intranet (https://robotsparebinindustries.com/)	Displaying the sales data for all employees to see, tallying the sales data.	The employee must have an administrative account for the intranet that allows inserting data.

Microsoft Word	Formatting the sales data taken from the website into a PDF document.	

Process flow

Here is a description of the process in the form of a flow chart:

Detailed steps

1. Employee downloads the Excel file

The Excel file can be found on the intranet website. It follows this structure:

First Name	Last Name	Sales	Sales Target
David	Heazel	80193	30000

2. Employee logs into the site

The URL used by employees is: https://robotsparebinindustries.com/

This is how the login interface looks like:

Employees are provided with personal credentials (a username and a password).

3. Employee inputs information of one sales representative

After logging into the site, the employee inserts the data for the first sales representative:

Note: The "Sales target ($)" form field is a <select> element, and allows you to choose from $5,000 to $100,000, in increments of $5,000.

When the form is submitted, the data shows on a table on the right:

The same process is repeated for each of the sales representatives.

After all the data has been inserted, the employee selects and copies the area of the page that contains the table, and pastes the result into a Word document:

The document is then formatted, saved, and sent manually in an email to all sales representatives in the company.

Possible exceptions

Exceptions are special cases and rules that can influence and even stop the smooth running of the process.

Logic Exceptions

Missing data

First name, last name, sales and sales target are all required: in case some of this information is missing, the sales representative's performance will not be evaluated for the current week.

System Exceptions

Invalid credentials

If the user provides invalid credentials, the login is not successful and the process stops.

Unexplained errors

Sometimes the intranet goes into an error state. When the error is displayed, it is apparently enough to refresh the page and resume normal operations. Affected operations seem to be logging in, logging out and deleting all existing sales data.