PROCESS DEFINITION DOCUMENT

New Product Approval

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Document version history

Version	Author	Date
1.00		

Signed off by

Name	Function	Responsibility

Contributors

Name	Function	Responsibility

What this document is for

Before any business process can be automated, it needs to be documented carefully.

This Process Definition Document describes how a specific set of operations is currently performed in the organization, to collect all the information required in a clear, explicit, and shared way. What are the systems involved? Which steps are now performed manually to reach the end goal? What are the possible exceptions? How often is this process executed? What are the rules in place? This document aims to provide answers to these questions.

This information, once validated by all parties involved, will be used as the basis for the next phases in the automation of the process. This document needs to be kept up to date with any possible changes in the involved systems and procedures for the whole lifecycle of the automation process, and all changes need to be signed off.
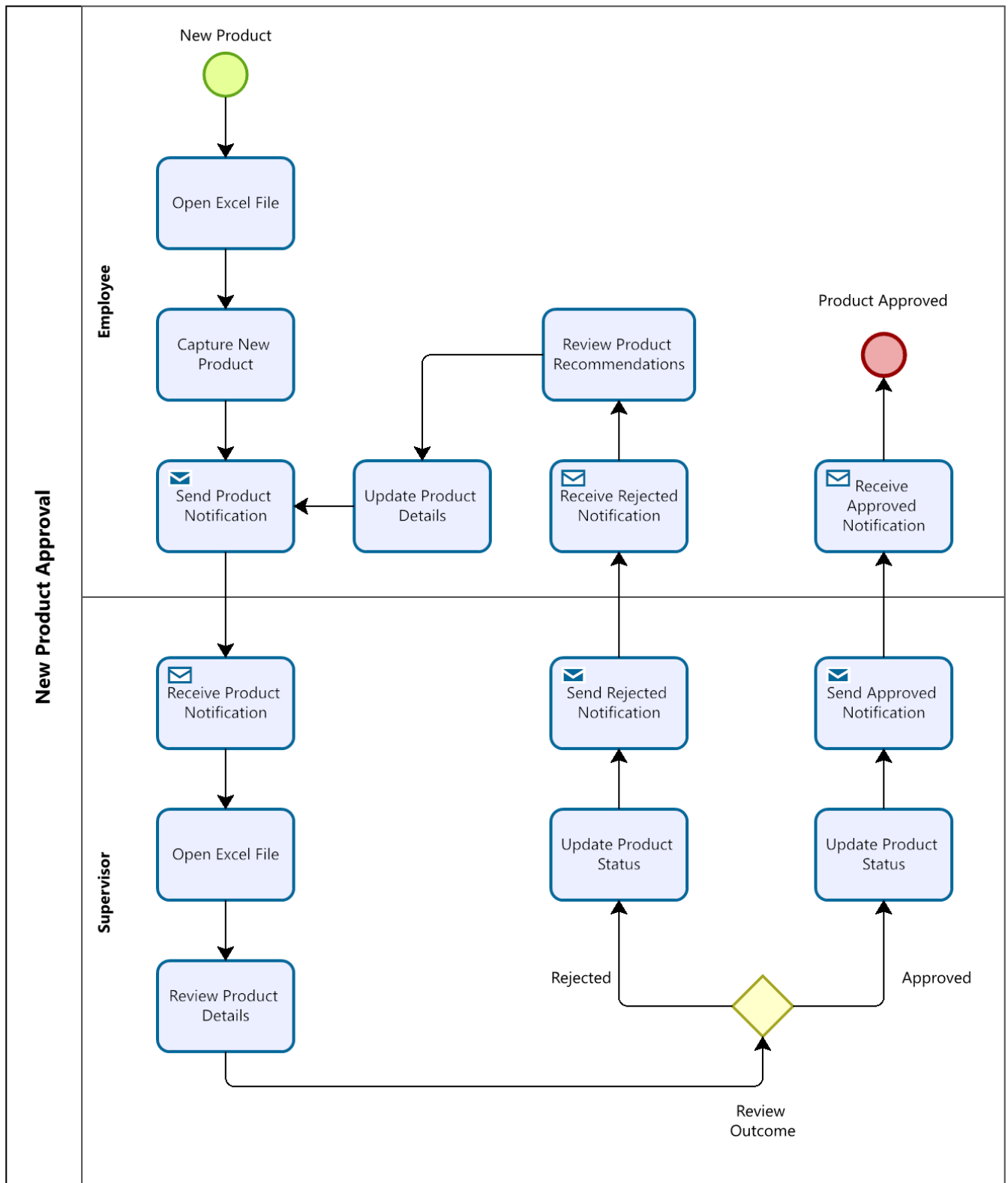
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1. High level description

The current process makes use of one Excel document with multiple tabs. All data is captured in the spreadsheets manually and sent out via email for approval. No reporting is currently done on the data.

2. Systems involved

System	Used for	User role needed
Microsoft Excel	Create, View, Update and Delete products	Employees must have access to the shared drive
Microsoft Outlook	Send approval request emails	Employees must have access to emails

3. Process flow

New Product

Open Excel File

Capture New Product

Send Product Notification

Update Product Details

Review Product Recommendations

Product Approved

Receive Rejected Notification

Receive Approved Notification

Employee

Supervisor

New Product Approval

Receive Product Notification

Send Rejected Notification

Send Approved Notification

Open Excel File

Update Product Status

Update Product Status

Review Product Details

Rejected

Approved

Review Outcome

4. Detailed steps

Trigger: New Product

Open Excel File: Employee opens the Excel file located on the company shared drive.

Capture New Product: Employee captures the new product details in the Excel file.

Send Product Notification: Employee sends email to Supervisor with new product details.

Receive Product Notification: Supervisor receives email with new product details.

Open Excel File: Supervisor opens the Excel file located on the company shared drive.

Review Product Details: Supervisor reviews the new product details.

Review Outcome: Supervisor decides the outcome based on the new product details.

Update Product Status: Supervisor updates the product status according to review outcome.

Send Rejected Notification: Supervisor sends email to Employee with rejected outcome containing product recommendations.

Receive Rejected Notification: Employee receives email with rejected outcome and Supervisor recommendations.

Review Product Recommendations: Employee reviews product recommendations.

Update Product Details: Employee updates product details according to recommendations from Supervisor.

Send Approved Notification: Supervisor sends email with approved outcome.

Receive Approved Notification: Employee receives email with approved outcome.

End: Product Approved

5. Possible exceptions

Logic Exceptions

- Missing Data
- Human Error

System Exceptions

- Shared Drive not available
- Email Server not available
- Excel File deleted or corrupted