

User agreement

- Promapp is a University licensed product intended for business use only. By using the software, you are engaging as a University employee representing yourself and your unit. Any actions deemed to be in violation of UC Principles of Community will be addressed according to policy and your supervisor notified.
- All content is expected to be professional. Your content is viewable by internal Promapp administrators and potentially the University administration.
- In addition to the above, you are agreeing to adhere to process creation best practices at all times. If you are unsure as to where a process sits in the folder structure, email promapp-support@ucsd.edu

Process maps created must:

- Be created using Promapp software and housed in the correct location within the Process Groups
- Be created through a collaborative process that must include:
 - Process Owner
 - Process Expert
 - Stakeholders
 - Additional SMEs as needed
- Be produced using process creation guidelines
- Clearly link in supporting documentation through URL links or through uploading the documents directly into Promapp Library
- Identify outcome and process metrics / Identify process boundaries (Title, Objective, Triggers/Inputs, Outputs / Measures) / RACI
- Creation and edits must be approved by the process owner/expert and any other named approvers for the group/process
- Process publishers will review the approved process prior to publishing the new/revised version

It is important to note that Promapp cannot be used for the creation of:

- Value Stream Transformation (VST) maps
- Organisational charts
- Network diagrams
- System diagrams
- Conceptual solution diagrams

Appointing Process Owners and Experts

A Process Owner and a Process Expert must be appointed for all processes, best practice is that these 2 roles should not be the same person. A Process Champion or other with creation right in the group can create a new blank process and assign the Process Owner and Process Expert.

Process Owner:

- Responsible for ensuring process is effective & easy to understand
- Maintains awareness of wider end to end process changes
- Authority to approve process changes and regular review of the process
- Respond to improvement ideas and feedback

Process Expert:

- Subject matter expert
- Respond to improvement ideas and feedback
- Update process for changes
- Perform process reviews (with process owner)

Process Creation Guidelines

The key steps in a process are defined as Activities, which describes **what** the process is doing. Within an Activity are Tasks which describes **how** to carry out the Activity. Also outlined within an Activity are Notes, these are used to document exceptions to a process and capture additional background. Notes (What If?) are best used when poised as a question followed by an answer.

The position/role accountable for carrying out an Activity is to be assigned and can be assigned to more than one person (when assigned to more than one person, you may want to provide additional clarification of responsibilities at the task level). Best practice is to have one role assigned to an activity.

Outside of documented activities, process maps should also identify:

- Process triggers and inputs
- Process outputs and measures
- Process stakeholders

The following guidelines are to be referred to when using Promapp software:

- The title of the process must start with a verb
- There should be no more than ten (10) activities within one process – anymore and the process should be split into sub or linked processes
- The primary objectives of the process must be identified

- Maps are to be written so the intended audience can easily comprehend
- Text within a process map must be clear, simple, written in plain English and to the point
- Correct sentence case should be used e.g. "Apply for annual leave"
- Ensure full names are used opposed to abbreviations. When abbreviations are used, it has to be defined in the Promapp glossary. If an abbreviation could be a word (e.g. IT or it), use a full stop in the glossary (e.g. "IT.")
- Activity names should start with a verb and be 3-6 words
- Hyphenated words within an Activity title should start with a capital for the first word followed by lower case for the second word
- Use the 80:20 rule (create the process for activities that occur 80% of the time – the other 20% can be explained using Notes within an Activity)

Linking in Supporting Material

Documents can be linked within process maps to provide ease of access and information for end users. Physical documents can be uploaded to the Promapp system.

Documents must first be created then uploaded to the library. The document can then be linked to individual process maps. This ensures that documents remain controlled and centralized to the database. Documents can be uploaded within process maps to provide ease of access and information for end users.

URL links can be used to refer to materials published to websites, this can be especially useful linking to policies and access pages for systems used in a process.

Access Levels

Specific access levels within Promapp are:

System Wide Roles

Promaster	Promasters have full administration access to the Promapp system and the same create and edit rights as a Business Analyst.
Business Analyst	Business Analysts have access to create and edit Promapp process maps. Process Owners, Process Experts, and Stakeholders have these access rights for groups/processes they are assigned to.
User	Users have access to view published Promapp process maps. They CANNOT create and edit Promapp process maps.

Group Roles (Within folders and sub folders)

Process Group Champion	Has the same access rights as the Business Analyst within folder(s) and sub folders they are assigned to
Process Group Editor	Has similar access rights as the Business Analyst (not copy, create, rename or move) within folder and sub folders they are assigned to
Process Approver	Has similar access right as the Business Analyst (not move or create) within folder(s) and sub folders they are assigned to
Process Publisher	Has similar access rights as the Business Analyst (not move or create) within folder(s) and sub folders they are assigned to

Process Review

Necessary stakeholder feedback is to be considered in the final version of the process map. All process changes must be reviewed and approved by the Process Owner/ Process Expert and any other named approvers prior to publishing. The final version of the process, after approvals, can be published by any of the named publishers in the group following approval.

Creating a new process

Key to the success of any process map creation is communication and consultation. The below outlines the communication and consultation that must occur during the process map creation:

- The process editor drafting the process should drive the communication and consultation process, with guidance from the direct manager / process owner
- Perform a stakeholder analysis:
 - Identify key stakeholders who are involved or affected by the new process map
 - Stakeholders may include other departments or branches
 - Consult with key stakeholders during the drafting stage of the process map
 - As required incorporate comments and agree on content from all stakeholders

When documenting a process in Promapp from existing process documentation (Visio, PDFs, Word Docs, ect.):

- Transfer the content into Promapp as a draft
- Share and review the draft with identified stakeholders and make edits as required
- When final version is agreed upon, publish the new process

Naming Conventions for Roles and Documents

- When adding new roles and documents, use a departmental prefix in the naming **after** the role
 - Example Role: Human Resources Generalist BFS
 - Example Document: HCM Entry Job Aid BFS
- Departments should decide on a departmental prefix and use it consistently in the naming of all roles and documents
- Process name will **not** include department code. Instead, include department code in the “Reference Number” field

Example process naming convention

When documenting a process for the OSI department which captures the student intern onboarding.

- Folder to save process: Human Resources → Recruitment → Offer & Onboard
- Process Name: Onboarding student intern
- Reference Number: OSI
- Role within map: Student Intern OSI

Requests that need to be routed to Promaster

- Adding users to the system and assigning roles
- Adding global process variations
- Creation of new roles

- Creation of new folders (groups)