Process information hierarchy.

What is a policy?
A guiding rule used to set direction in an organization in specific areas – HR, IT, health and safety etc.
A policy often determines required actions, will guide decisions and may govern multiple processes.

What is a process?
A sequence of activities that define what must happen, in what order and who is responsible for transforming an input into an output. Information should be brief and concise – but still instructional.

What is a procedure?
The sequence of more-detailed tasks that describe and instruct how each activity in the process is completed.

What is a work instruction?
Written, pictorial or multi-media material that is linked to activities to provide more detailed instruction on how to perform a task. This can include, screenshots, short videos, forms, guides, detailed manuals or training material.

Key process elements.

Process group Where a process lives within Promapp
Process title Clear and specific so it is easy to find.
Should start with a verb
Process owner Responsible for the quality of the process and will approve any major changes to the process
Process expert SME and will do the largest share of the edits and reviews in Promapp
Process objective A brief statement defining what the process is intended to deliver, and how
Process background (optional) Enables capture of additional context or background information

Quick tips.
Move Simply drag & drop
Delete Click on the rubbish bin
CTRL + enter To add additional lines within a particular task, if required

Keyboard shortcuts.
ALT-A Add an activity
ALT-T Add task
ALT-N Add a note
ALT-S Save
ALT-Z Undo
ALT-Y Redo

Save options:
Save or Save with comment
How to get started?

Ask the right questions.

1. Who is your audience?
2. What’s the process title and objective?
3. What triggers the process?
4. Any inputs to perform the process?
5. What outputs are produced?
6. What are the activities and tasks?
7. Which role performs them?
8. What are the known variations?

Process boundaries.

Triggers
What situation or event causes the process to start? The frequency and volume of the trigger event might also be identified/estimated.

Inputs
- What is needed to carry out the process?
- Does another process provide these inputs?

Outputs
- What is produced by completing the process?
- Is there another process using these as inputs?

Performance measures
Have key performance indicators/measures been set that define whether the process is operating effectively and meeting its objective?

Process details.

Activity
What are the key steps in the process and who carries them out

Task
Exactly how an activity is performed

Notes
Describes the ‘what ifs’. Use these for exceptions, variations, business rules and background information. Ensure a note title is a question!

Techniques for creating engaging processes.

1. Simplify process maps by applying the 80-20 rule
2. Don’t ignore the exceptions and variations, instead consider using:
   - Notes
   - “If” statements
   - Parallel activities/processes
   - Multiple processes for greater clarity
   - The Process Variation Management add-on
3. Group common Tasks into Activities to help with usability – try sticking to between 3 and 10 activities
4. Use verbs when naming Processes, Activities and Tasks
5. Create sub-processes, if needed, and make sure to link processes together to show the flow
6. Include linked supporting material, particularly multimedia to simplify, clarify or provide detail