



Laserfiche[®]
Enterprise Document Management

Defining and Diagramming Business Processes

Hosted by Laserfiche



Presented by Elizabeth Cunningham
District Manager- Texas
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Agenda

Elizabeth Cunningham

- Introduction
- Needs Analysis
- Desired Outcome
- Start and End Points
- Activities Performed
- What If
- Order of Activities
- People Involved
- Translate
- Adapt to Change



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Introduction

Elizabeth Cunningham

- Business Processes
- Business Process Modeling
- Language and Accuracy



Needs Analysis

Elizabeth Cunningham

- Necessary elements of your business process
 - What do you need your business process to accomplish?
 - What essential tasks must be completed?
- Keep this short and focused



Desired Outcome

Elizabeth Cunningham

- Expand on the Needs Analysis
- Set concrete goals
 - What would you like to accomplish?
 - What is the purpose of your business process?
- Create efficiencies
 - Which other goals do you have?



Start and End Points

Elizabeth Cunningham

- **Define your starting point**
 - What event(s) start the process?
 - What other objects, information, and/or people are necessary to start the process?
- **Define your end point**
 - How do you know when the process has finished?



Activities Performed

Elizabeth Cunningham

- **Assess how your business process runs currently**
 - What happens at each step in the business process?
 - What information is needed?
 - Who is involved?
- **Ask why**
 - Why is each action performed?
- **Heart of the business process**

Person	Action (verb)	How	Object	Other People	Information	Reason
Daniel	Marks	With a stamp	PO		Date and Serial Number	To categorize
Daniel	Sorts	Into piles	POs		Exception? Priority?	To find exceptions and priority POs
Daniel	Puts in interoffice mail	By hand	POs		Person to send to	To send to receiving managers



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What If...

Elizabeth Cunningham

- **Uncover exceptions**
 - What if someone fails to meet a deadline or is out of the office?
 - What if someone is missing key information?
 - What if people disagree whether to approve the document or not?
- **Map out backup plans**

Person	Action (verb)	How	Object	Other People	Information	Reason	What if ...
Daniel	Marks	With a stamp	PO		Date and Serial Number	To categorize	What if Daniel is out of the office? What if he can't find the serial number? What if he loses the stamp?
Daniel	Sorts	Into piles	POs		Exception? Priority?	To find exceptions and priority POs	What if Daniel doesn't know if a PO is a priority or exception? What if he sorts wrong?

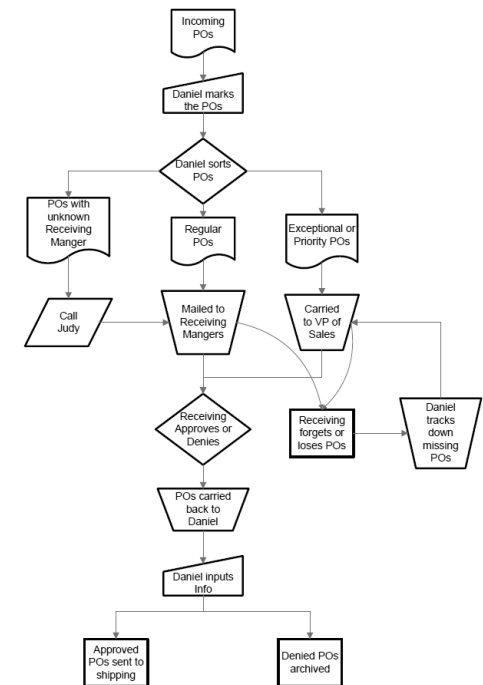


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Order of Activities

Elizabeth Cunningham

- Put your activities in order
 - What happens first, second, third, etc.?
 - What steps can occur simultaneously?
 - What happens if some aspect of a step fails?
- Flow chart



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People Involved

Elizabeth Cunningham

- List out individuals involved
- Define their role
 - Who plays central role in the process?
 - Who is duplicating work?
 - Who does the workflow bottleneck with?



Translate

Elizabeth Cunningham

- Out with the old, in with the new
- Map it out in Laserfiche Workflow



Adapting to Change

Elizabeth Cunningham

- Revisit and update

