



## ⚙️ Configurations

# Digital Process Handbook

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### Introduction

The Engage Process Suite is used by organisations for many different themes and management goals. They include Continuous Improvement, Risk management/ FMEA, digital and organisational transformation etc. Our consultants have a lot of experience in configuring the settings of the Suite for these different purposes. All their experiences and a lot of wonderful input from many customers, has now been bundled in Standard Configurations. With these configurations our customers' key users can manage the settings of the Suite in an effective and efficient way aimed at these themes. Where needed, our consultants can provide guidance or help to complete the configuration.

### General

This configuration is aimed at sharing processes to the rest of the organisation

### Engage Process Suite Modules needed (x) or preferred (\*):

Name	Needed/Preferred
Modeler	x
Viewer	x
Authorization	x
Tables	x
Publisher	x
Teamboard	
Feedback	
Brainstorm	
Upload	x

## For which subscriptions?

- Suite Silver, with Publisher
- Suite Gold
- Suite Platinum
- Suite Enterprise

## Creating the configuration per Module

Engage Process Setting:

- Go in 'Tables' to the Table 'Documents' and create the following tables:
  - '**Instructions**' for referring to Work Instructions and other manuals;
  - '**IT Systems**' for referring to the systems in use in your organisation;
  - '**Other Resources**' for referring to checklists, templates, databases etc.
- Create a generic 'User' for the potential users of the Digital Process Handbook. Something like viewer@..... ; Assign a Viewer license to this User and make the User a member of the Group 'Viewers'. Create the user group Viewers if this was not done previously.
- Turn off the possibility to change Password for this User.

## Engage Process Publisher

- Create a folder structure that is logical for your organisation. For example, you can use departmental folders, or Operational Processes / Support Processes etc.
- Create an '**Overview**' with the name '**Landing Page**'. It is nice to put the company's logo on this landing page and to use colors and blocks that fit your company's house style. Add the first couple of navigation blocks to the landing page, like '**Management Processes**', '**Operational Processes**' and '**Support Processes**'. You can add the functions of your organisation to these blocks. You can find an example in the Knowledgebase of Engage Process.
- Create a separate '**Overview**' for each individual organisational function in which you link to the processes of this function. Alternatively, you link to the '**Folders**' that contain the processes for the functions. When doing so, the User will be given a list of processes to choose from.
- Create a '**Viewer-link**' to the '**Landing Page**' that you have created. The link should contain the login details for the anonymous Viewer user.
- Place the Viewer link on your Intranet.

## Engage Process Viewer

Change the layout of your Viewer (the Viewer as the viewer@..... User would see after login in).

- Set the '**Publication**' window as a Tab on the left side;
- Close the '**Helicopter View**' window;
- Place the '**Description**' window in the upper right corner;
- Place the '**Comments**' window on the right side, below the Description window;  
**Note:** if you are sure that the Comments window has not been used in the processes of your organisation, than close this window.
- Set the '**Properties**' window as a Tab on the right side.
- Place the '**Documents**' window also on the right side;

## Engage Process Modeler

Create an example process.

- Create a process and call this Example or Template
- Use the Layout and Design functions to show the process in line with your organisation's guidelines. You'll find examples in our knowledge base as well.
- Add a process step to the process.
- Now, add any '**Guidelines for mapping processes**' that your company has in the 'Description' fields of the Start, the Stop and the one process step that you've added.
- Copy and rename this process any time that new processes are being mapped. This way you ensure consistency and adhering to your standards in your organisation.

### Example of instructions:

- Put the scaling to 80% (see scale in the lower right corner);
- Put the font size to 8 in the Tab '**Layout**';
- Turn of '**Connections**' in the Tab **Layout** | Show / Hide
- In the Tab **Layout** | Show / Hide | All options, select to show the indicators for '**Document**', '**Description**' and '**Remarks**'.
- Also, deselect to show (so you hide) '**Branches: Frequencies**';
- In the Tab '**Analysis**' | Measures | Select, deselect all indicators that are not been used.
- Zet de volgende indicator uit: '**Procestak: Aantallen**'.

Again, this is just an example. But by defining these standards you will ensure that Users of the Viewer are not surprised and understand the processes easier.

## Procedural approach

Make guidelines for your organisation on the following topics:

### Process

#### Definition

Make a distinction between Internal Processes and Primary Processes.

- An internal process is a logical group of activities based on an internal or external trigger. Sometimes the process is dealt with within 1 single department and executed as 1 immediate flow. Internal processes can be part of one or more Primary processes as well.
- A primary process is a process that is often client focussed, producing a service or product. Often primary processes include or refer to multiple internal processes.

#### **Names of processes**

- Define a guideline for naming processes. Distinguish between Internal and Primary processes.

### Process step

#### **Definition**

A process step is a summary of activities done by one role in an immediate sequence.

**Tip:** If it is better for whatever reason to split up a task / process step, then don't hesitate to do so. Please be careful that the visibility of the process remains good when modelling the process; Change the zoom if/ when needed.

### Name of a process step and add one or more roles

- Always use a '**Verb**' and a '**Noun**' for each process step. For example: Call Customer or Make Booking. This will make your processes consistent and action oriented. The name of the process step tells you what is done at that moment.
- Rename the start and the stop of the process, reflecting the trigger and the result. For example: '**From Inquiry**' for the Start and '**To Mortgage**' for the Stop.
- Add the '**Role**' to the Process step.

### Activity

- Put a short description of how the task is done in the 'Description' field. It is helpful to use bullets where each bullet refers to a new activity (so it is not needed to create a process step for each activity, if done by the same Role and at the same moment).

### View

- Decide whether the initial view is that of the Value stream or a Swim Lane.
- Decide whether showing the Connections between goto's and their landing point. Use the Tab 'Layout' to switch Connections on or off.
- Decide whether to turn on 'Notes' or other detail of your process.
- If the process is long (like in many consecutive steps), you'll have several options
  - Group logical process steps into sub-processes, or;
  - Go to the 'Design' Tab to alter the design, for example by Wrapping the process. Here you can also add text Blocks or Annotations.

### **Communication**

- Create a 'Quick reference card' with instructions for the Viewer for users of your digital process handbook.
  - Include a short instruction on how to read processes;
  - Explain how they can switch the view of the processes and how to show/hide certain detail

The more your users learn to study their processes from different angles and with different detail, the more they will become "owners" of their own process. There are often important reasons for looking at a process with different detail.

Warning: Be careful not to try to show all detail automatically; Users will not understand!

- Create an instruction video about the digital process handbook and an instruction video on how to use it.

## Alternatives:

- The Suite includes the Viewer (viewer.engageprocess.com) and also a viewer App. The viewer app can be found in the App stores. You can also use the App in regular browser on a PC via viewerapp.engageprocess.com.
- For using the 'Feedback' module, you need to define for each process the 'Feedback notification list' in the Publisher. We suggest you enter the names of the process owner and the process manager.
- You can use the 'Upload' module as an alternative for a Document Management System (DMS) for showing documents that are connected to process steps.
- You can choose to already Publish processes that have not be mapped. Creating the process with a Start and a Stop is enough. You can then link relevant information about compliance, GDPR, risk, owners. By defining and adding non-mapped processes you can create a complete overview of processes and already include all that information in reports that you create, for example a Privacy Register or Risk analysis.

## Additional information

The 'Configuration – Knowledge Management' gives guidelines for keeping your digital process handbook up to date.