iGrafx® 2015

Process Automation Usage Scenario

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Usage Scenario

This section presents an example of the benefits that iGrafx Process Automation can bring to organizational process flow. Here you'll see how a hypothetical organization, Global Corp, could use iGrafx Process Automation to improve their company's job application process.

Job Application Process

This is a job application process that is launched when someone applies for a job.

On their website, Global Corp has posted a form that collects applicant information as required by their job application process, as shown in Figure 1 on the next page. Interested candidates complete the application form and upload their resume and any additional documents that may be pertinent to their application.

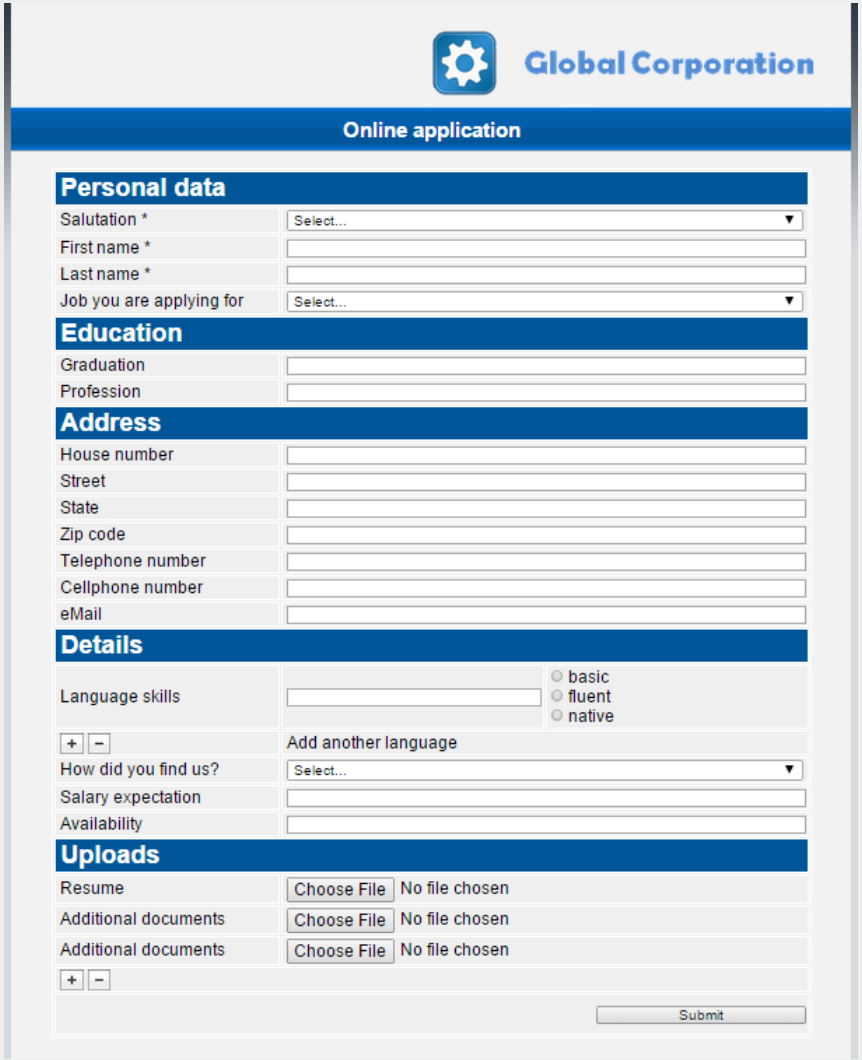

Figure 1. Global Corp. online application form

When clicking the Submit button on this form, the applicant has done three things:

1. Successfully applied for the job.
2. Created a new instance of the application process. You might think of an instance as being the form that an applicant submitted—complete with all individual information. That form and all its information initiates a single applicant's instance of the Job Application process.
3. Created a task for HR to complete.

The application experience for job candidates is largely unchanged—they still complete and submit an application. However, on the HR side, things are much improved.

ToDo Client/HR Specialist

The relative chaos of having job applications arriving in different inboxes, with little or no tracking, has compromised the effectiveness of Global Corp's HR Specialists.

The HR Director indicated that her team would be more efficient if it were guided by a standardized and automated set of steps.

ToDo Client

The iGrafx Process Automation ToDo client provides a task portal, shown in Figure 2 on the next page, that an HR Specialists can log in to and see a list of tasks required to process the job applications assigned to him—his to-do list.

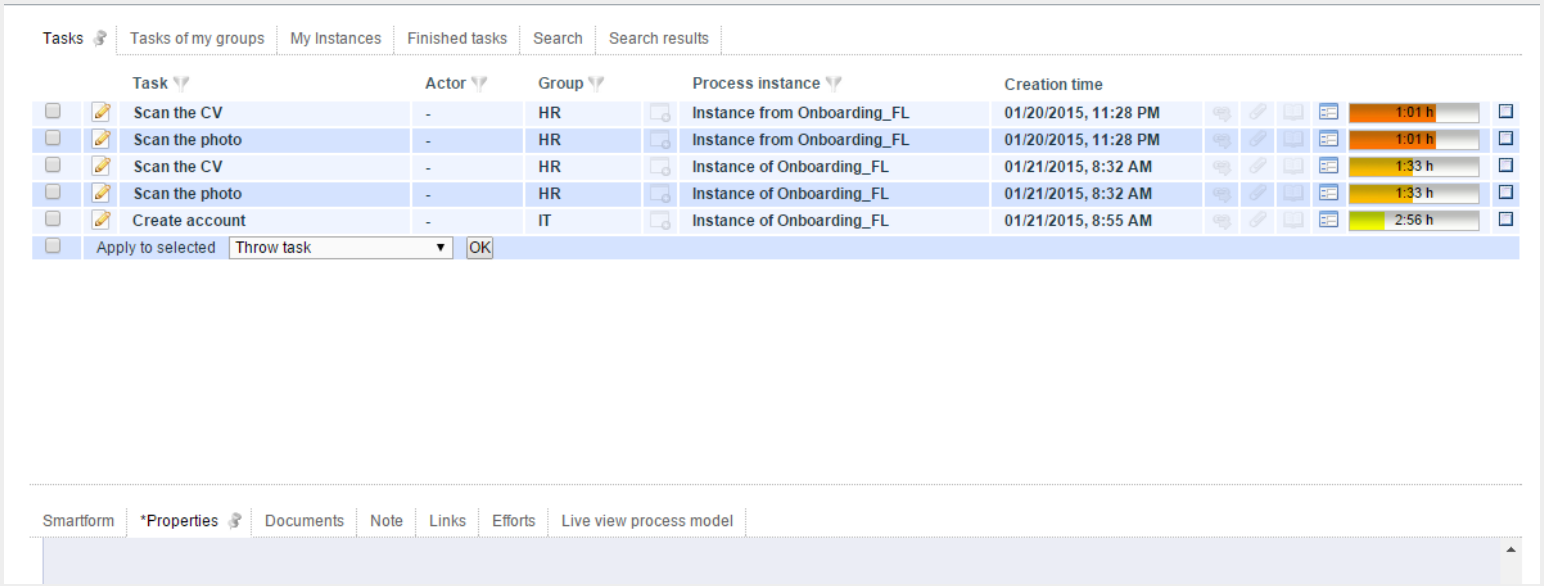

Figure 2. Global Corp. job application task instance

These are tasks assigned to him, or to his group within HR. He can see key information for each of his tasks: the task name, task assignment, instance name, start time, and time remaining before expected completion of the task.

Because it is often important to understand where the current tasks fits in the overall process, the ToDo Client provides additional information about the task in the row of tabs at the bottom of the page:

- The Smartform tab, in this case, shows an internal version of the Job Application web form. The fields at the bottom are for HR use. See Figure 3 on the next page. They are important for routing and determining next steps. The information in this instance of the job application process contains information and fields that the HR Specialist interacts with to step through and streamline the process.

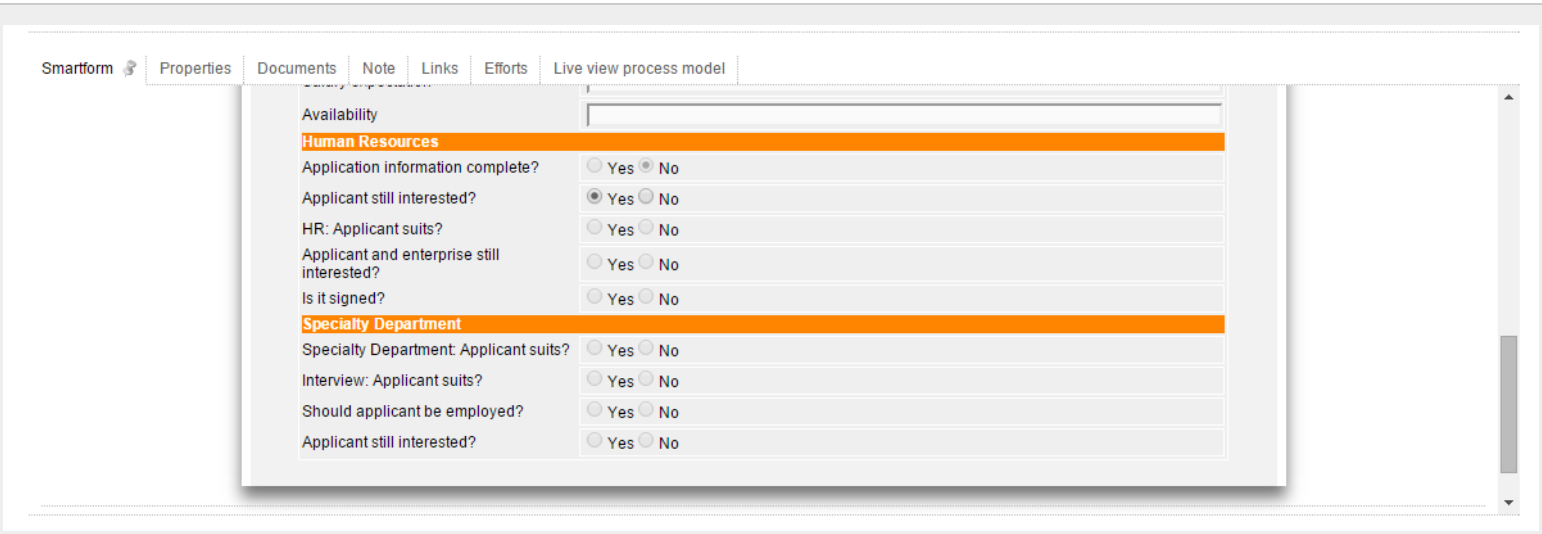

Figure 3. Global Corp. job application Smartform

- The Properties tab can include an in-depth description of the task or any supporting information required to complete it.
- The Documents tab, in this case, holds the documents uploaded by the applicant. Additionally, other supporting files can be uploaded by the task assignee as part of the task.
- The Note tab lets the task assignee provide ad-hoc text that's relevant to the completion of the task.
- The Live view process model tab provides real-time context of this task's place in the currently-running process, as shown in Figure 4 on the next page.

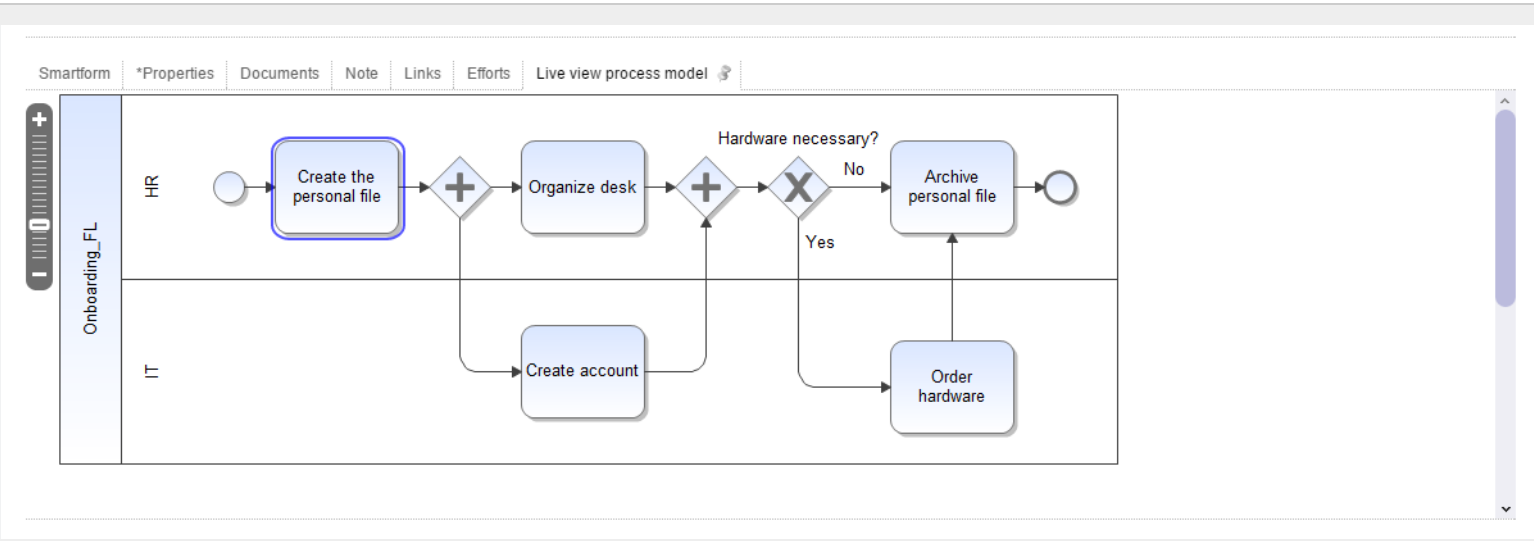

Figure 4. Global Corp. job application process model map

Ad-hoc Tasks

In the course of completing a task within the process, the HR Specialist may encounter the need for an additional task that has not been included in the current process. For our example, suppose that the applicant works for a competitor, and that HR needs to determine whether there is a binding non-compete clause in the applicant's current or former employment contract. In this case, the HR Specialist can create an ad-hoc task to request and review the applicant's employment contract to see if there is such a conflict, by clicking the Create AdHoc Task button at the bottom of the Properties tab (see Figure 5 on the next page). The new task is added to the Tasks list and assigned, by default, to the user that created it.

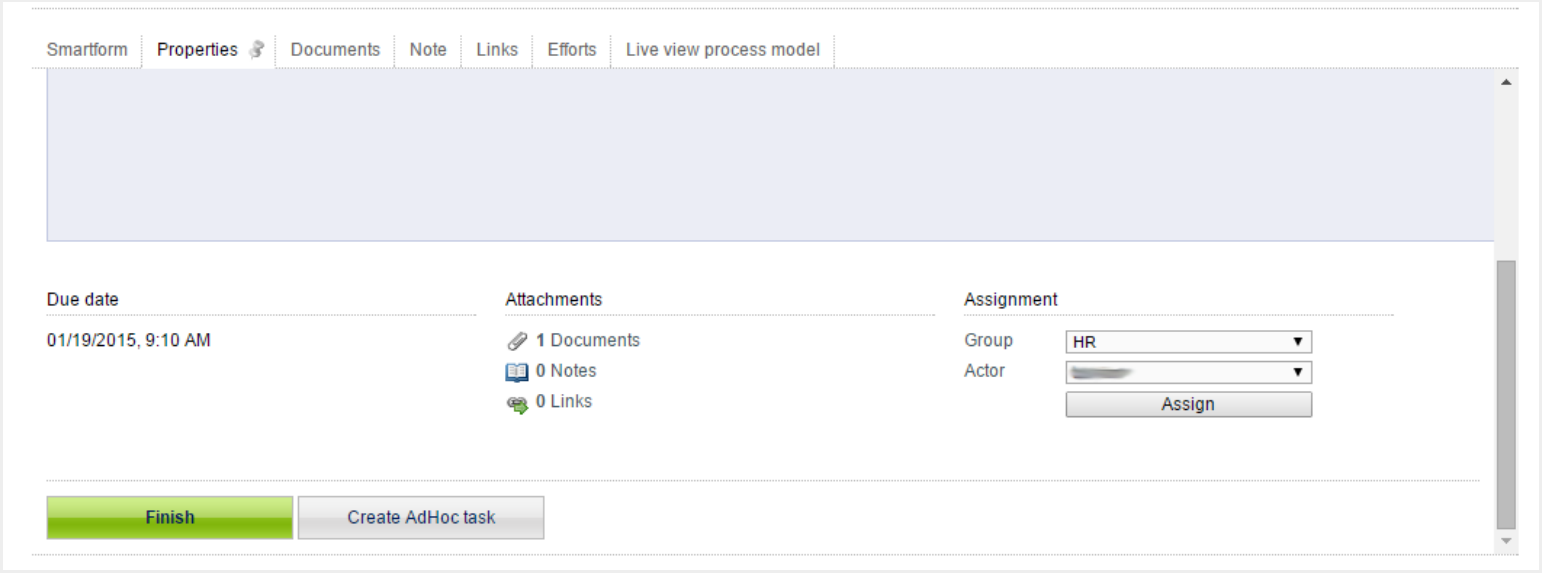

Figure 5. Bottom of the Properties tab

Changing Task Assignments

It's possible for a task assignee to reassign a task to another group member. As in the case above, this could be because an ad-hoc task that he created, which was assigned to him by default, would be more appropriately performed by a different team member. Or, it could simply be because he is not available to complete the task on time and needs someone else to assist.

To reassign a task, in the bottom of the Properties tab, he would choose another team member from the Actor drop-down list, and then click the Assign button, as shown in Figure 5 above.

Completing Tasks and Moving Forward

Because the HR specialist must enter required information, the HR Director can be assured that details like previous work experience, residency requirements, EEOC information—all of the relevant compliance requirements—have been covered before moving to the next step.

Our HR specialist knows his next assigned task, and how long he has to complete it.

This enables him to work quickly, confidently, and to handle more job applications in less time.

Process Flow

As our HR department moves through the application process flow, they are generating tasks and being routed based on input, logic and task completion. This is how iGrafx Process Automation ensures that work is done according to defined and deployed processes, with clear, required, gated steps that drive approved paths of action.

Process Manager Client – HR Director

The HR Director is concerned with optimizing the application process while maintaining compliance. We've seen how that's accomplished in the work of the HR Specialist. The Director also needs to gain visibility into the process, to view and track work in progress, and to take action when she notices issues. To do this, she uses the Process Manager client.

Here are all the processes in her domain, shown in Figure 6 on the next page.

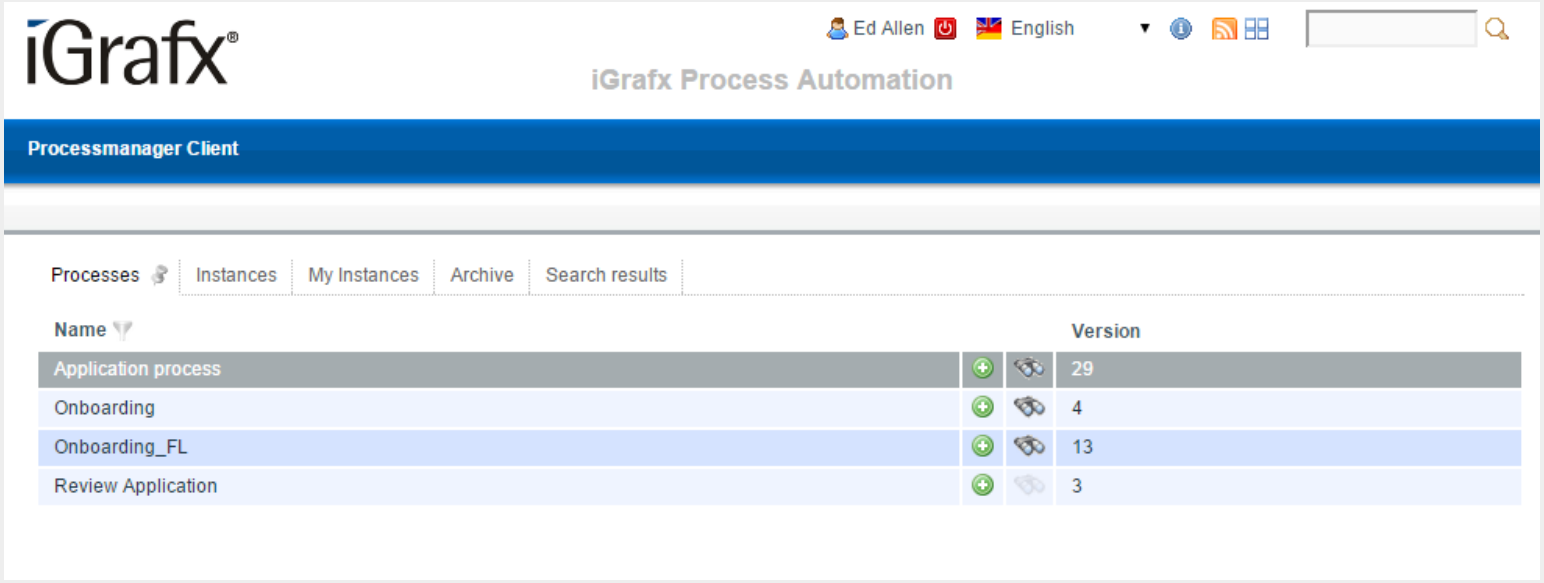

Figure 6. Process Manager Processes tab

She can look at the Application Process and see how the hiring instances are going, as shown in Figure 7 on the next page.

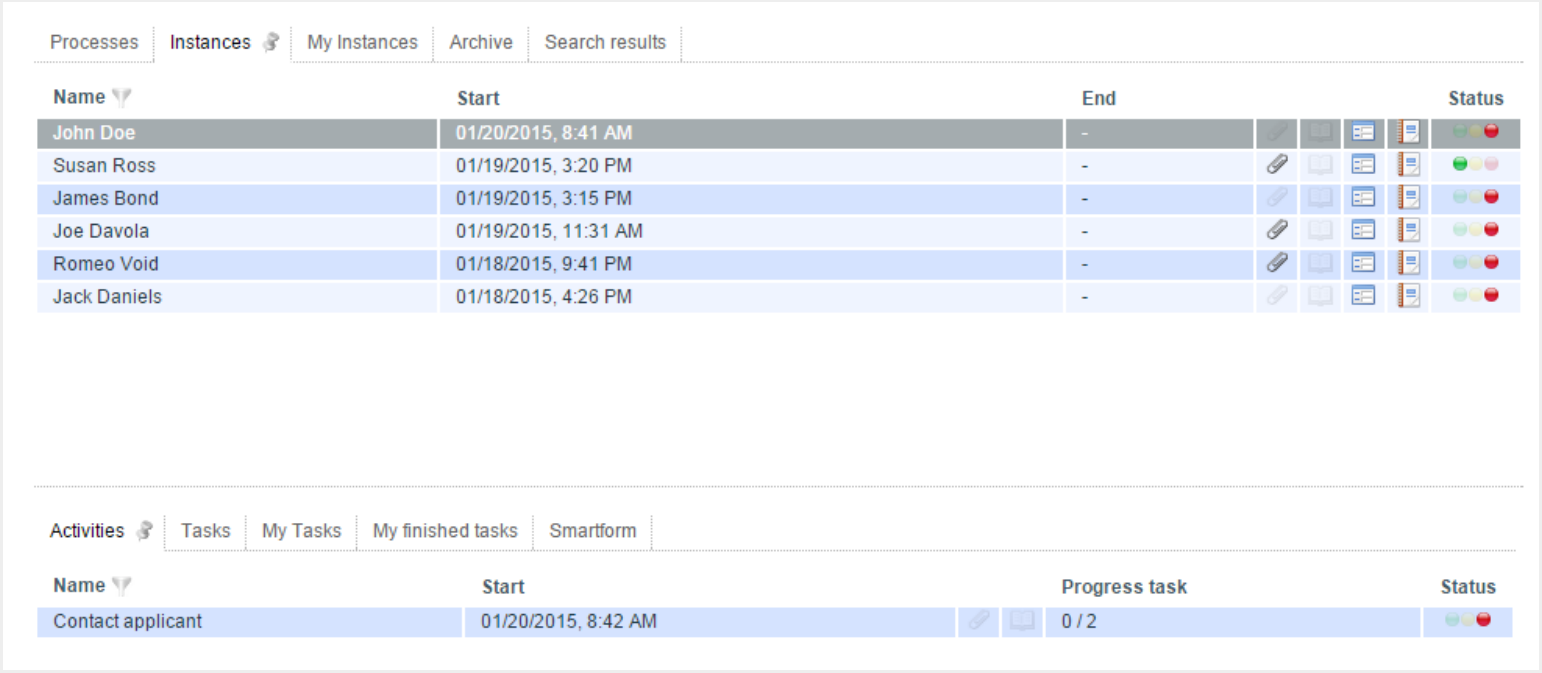

Figure 7. Process Manager Instabces tab

These are applicants who've completed the form so far. Each one clicked Submit, and by doing so created their own instance of the Application Process.

For each instance, the HR Director can see

- When the instance started
- How the team is tracking for each instance, by color (on track, at risk, late)

When she clicks on an instance, she can see the following in the tabs at the bottom of the page:

- The activity in progress, and where it fits in the process.
- Information about the current activity, including status (on-time, at-risk, late).
- Active instances categorized by activity, so she can see if things are stacking up at a certain point, which might indicate a bottleneck.

So for the HR Director responsible for job applications, and for the HR Specialist doing the work, iGrafx Process Automation provides a view into everything that's going on. Everyone on the team can monitor status, recognize issues or problems, and take swift corrective action when needed.

iGrafx Client – Process Owner/Author/Creator

So the benefits of the automated process seem clear compared to Global Corp's current situation.

But how did they get here? Where does all this start? How does the Director of Operational Excellence help the HR department design and implement something like this?

It all begins with a process model.

Figure 8 on the next page shows a BPMN diagram of Global Corp's job application process.

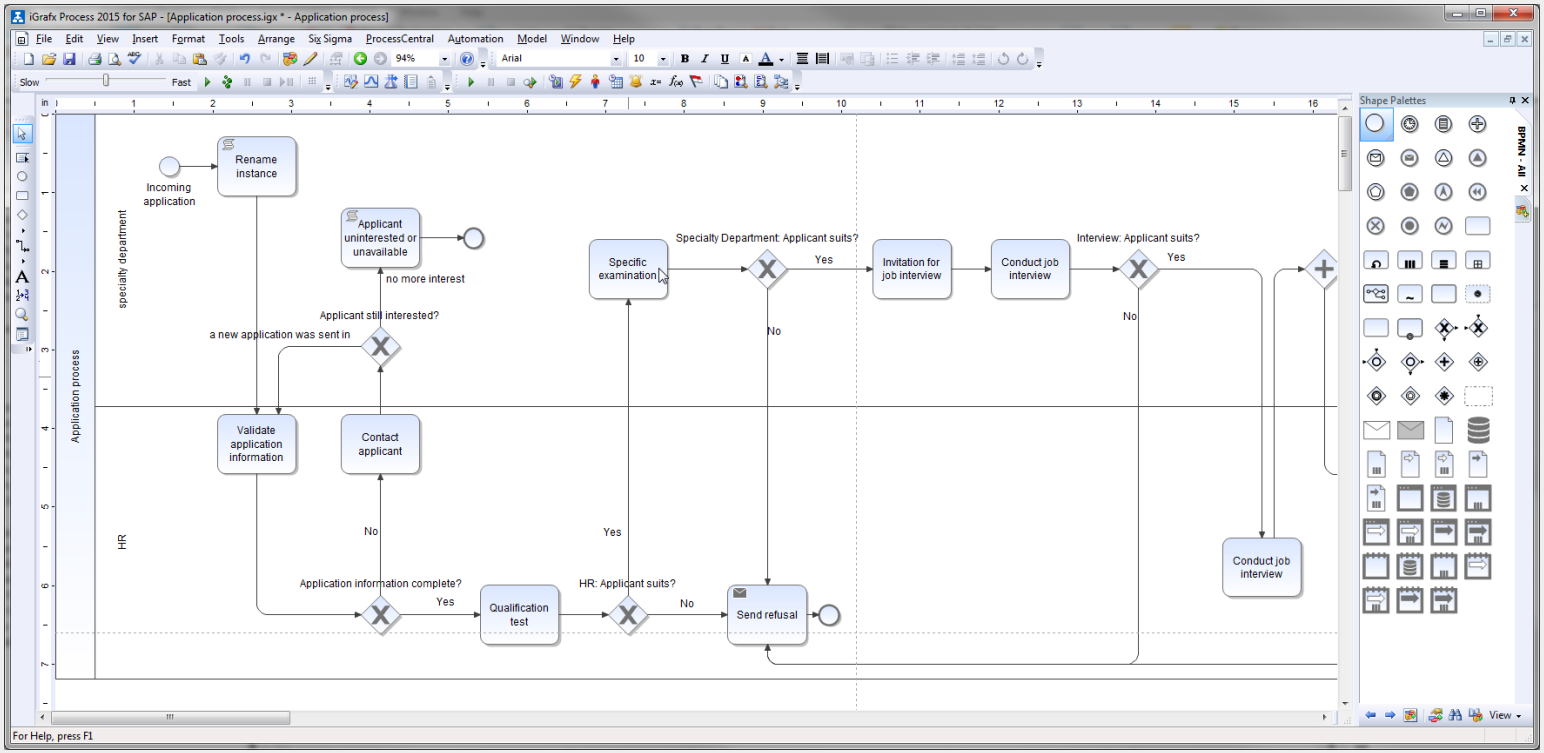

Figure 8. Application process diagram

This is just the type of process model that business analysts around the world create with iGrafx every day. They design the process, make sure it is optimal, and now, with iGrafx Process Automation, have the opportunity to deploy it into production.

Just like you can define simulation model characteristics such as Duration, Cost, Value Classification, and Resources Required, you can also define automation characteristics such as tasks associated with activities, roles/people assigned to tasks, time allowed for task completion, forms/fields associated with the process, etc. See Figure 9 on the next page.

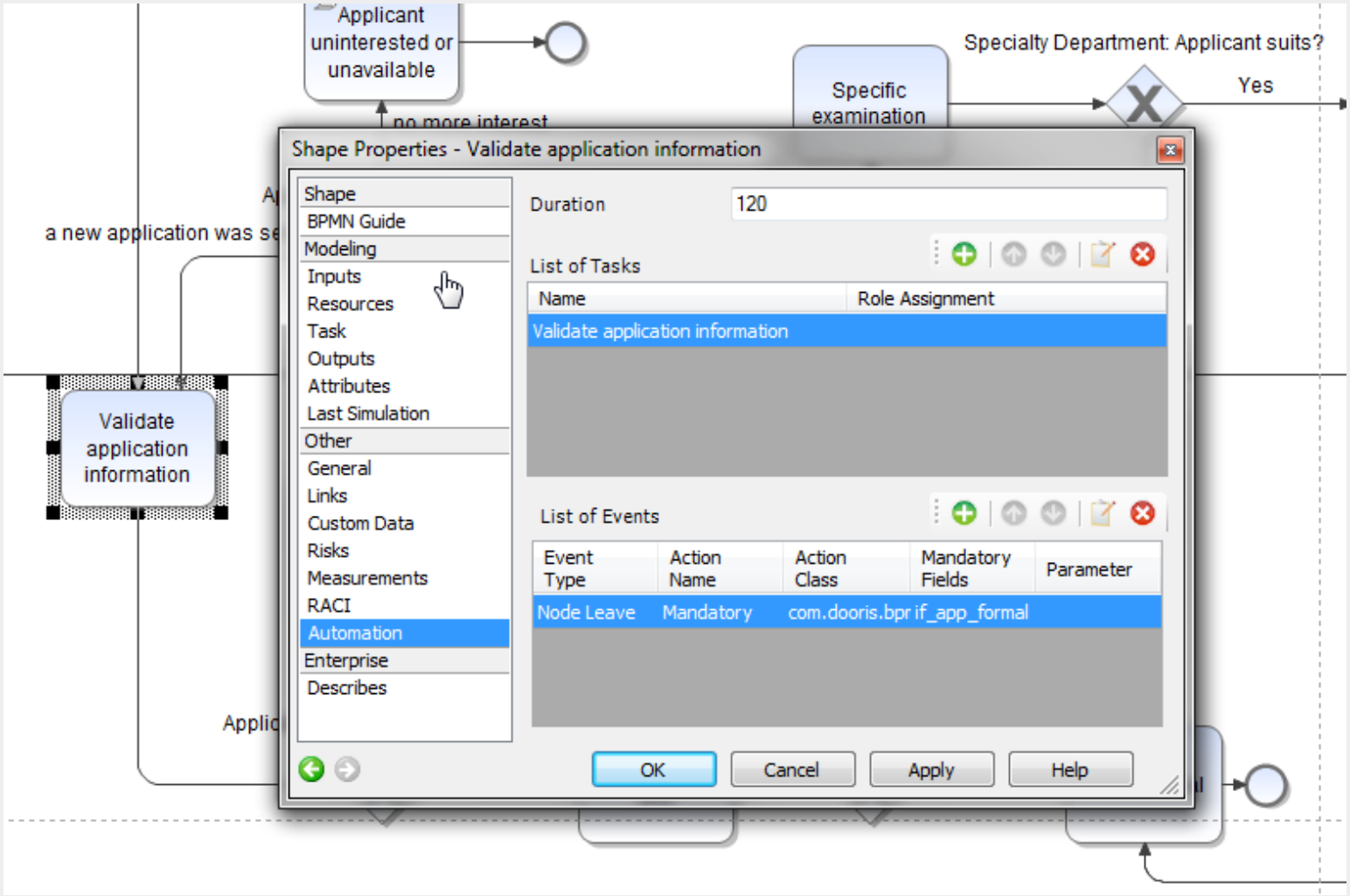

Figure 9. Automation shape properties

By doing this, you are designing the process that will run in production. When you are ready for people to actually perform these activities/steps/tasks as part of their day-to-day work, you can deploy the process into the runtime environment.

Deployed Processes

Once deployed, the process is pushed out to the automation server and is available for use.

The components of this model not only graphically represent the process, but also truly *are* the process.

There are no gaps, and nothing is lost in translation when you convert the model into an IT requirements document. See Figure 10 on the next page.

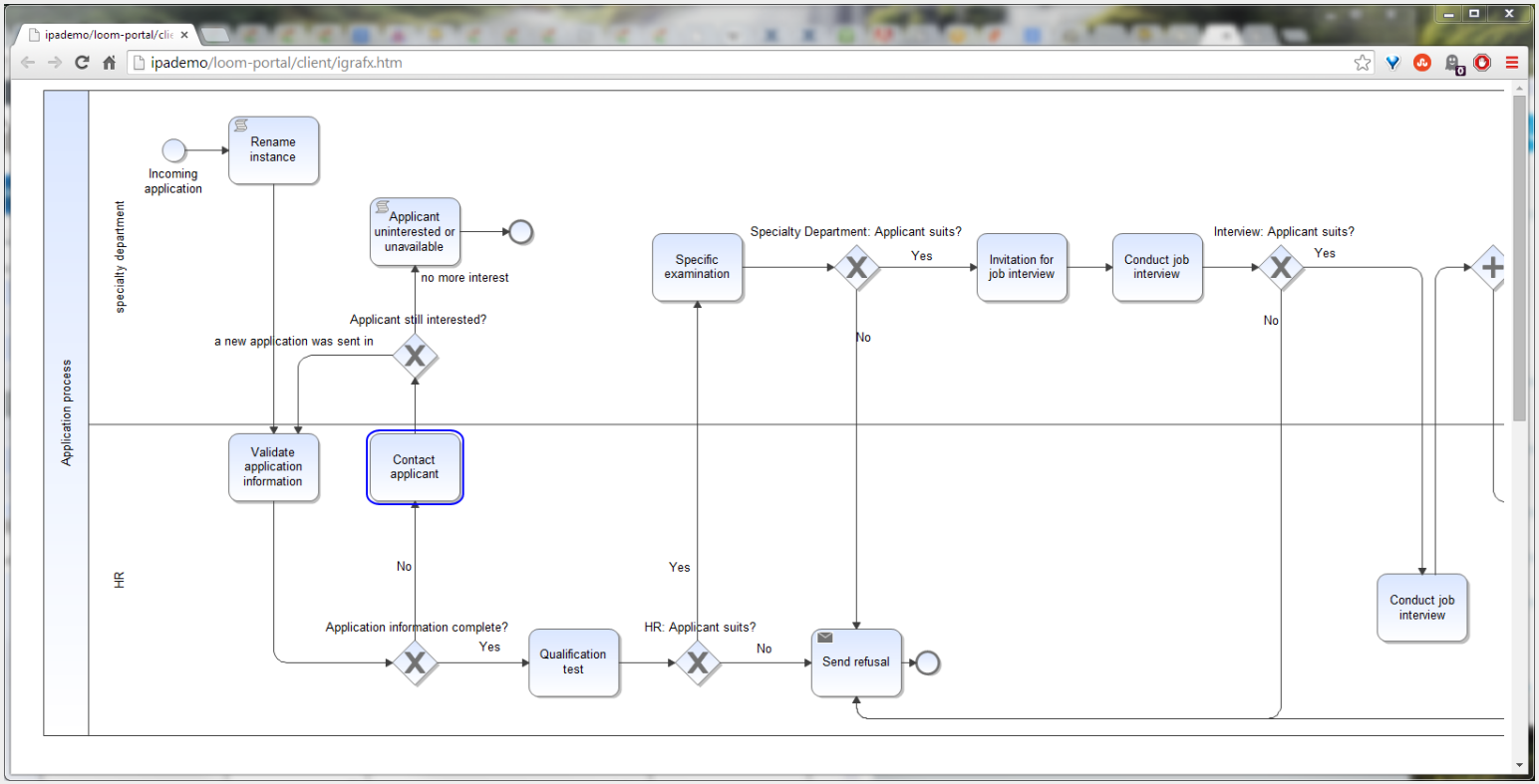

Figure 10. Application process in Process Automation client

Global Corp has now gained great efficiencies between the process definition and its execution within their business.

Benefits

iGrafx Process Automation allows customers to define real-life behaviors for their processes and ensure that people are actually following the process.

Advantages to having processes be model-driven include

- Ease of creation and understanding
- Minimal IT involvement required
- Speed of implementation
- Facilitation of model-driven monitoring
- Greater accessibility, to more people

As iGrafx Process Automation drives your business process over time, it collects valuable, true-life data that you can use to fine-tune your models for simulation and process improvement. You won't have to guess how long certain tasks take, because iGrafx Process Automation contains the exact duration of tasks. You won't have to guess how many times one path out of a decision shape is taken versus another, because iGrafx Process Automation contains precisely that information. This will make your simulation models even more accurate and your process improvement initiatives more impactful. In this way, you can create a nicely-closed BPM cycle.