SUPPORTING DOCUMENTATION FOR EXERCISES 1 AND 2

Contents

Exercise 1 – Draw a process flow diagram

Objective

Read the scenario on page 5 and, using the materials supplied, draw a process flow diagram.

Notes for candidates

There is no definitive right or wrong answer to this exercise; we are looking mainly for how you interpret source data.

Before you start, we recommend you take some time to read the key concepts on page 3 and to review the example diagram (figure 1) and its explanation.

Draw the shapes shown in this example diagram to represent your process flow.

Your diagram must obviously be legible, but you are not being tested here on your aesthetic prowess; therefore, do not get bogged down in how the diagram looks. More importantly, we are looked for accurate and appropriate naming conventions and sequence and logic.

As in the example diagram, use swim lanes. The swim lanes you will need are: "Management System Support Team", "Project Team", and "Process Owner", laid out like figure 1 (horizontally) or vertically (as illustrated below), with your Activities placed inside them:

Management System Support Team	Project Team	Process Owner

Example diagram

The diagram on the next page is based on a generic best practice process for information design. It models the "design" phase for producing accessible information (e.g. documents, web sites, or other media).

Explanation

The horizontal elongated boxes are known as "swim lanes"; they represent *who* does what. Note how the process flow is initiated by an Event, "Project starts". We then have a sequence of activities that eventually end with either the "project being referred" (i.e. more thought necessary) or the design being properly "researched and designed" (which is the desired result of this stage).

Notice the naming conventions; to enforce the sense of *activity*, each of the Activity boxes uses a naming convention that is "Active verb-Noun Phrase". There is no right or wrong answer to deciding what an activity is; use your judgement to model what is meaningful within the overall context of what is happening (e.g. the Activity "Initiate review" could, arguably, have been dropped because this step is self-evident within the overall process flow).

Note also the two examples of "branching", represented by a diamond shape with a cross in it. This is known as an Exclusive Or (XOR) Set and indicates that the flow must follow one and only one of the available routes. Which route it follows depends on the condition (so, *if the design is of sufficient complexity, create a prototype, otherwise, go straight to initiate review)*.

Key concepts

- A *process map* (also known as a "process flow") is always triggered by an Event (i.e. something that has happened).

- A process then unfolds through a sequence of steps, i.e. sequentially connected Activities. It ends in a Result, which effectively shows that the process objective has been met.

- A process maybe triggered by one or more Events and can have one or more Results.

- A process flow, however, is not always that straightforward. Often, we need to show decisions and branching. For example, if condition X applies, then do Y; otherwise do Z.

- Draw only simple process flows comprising of Events, Activities, Results, XOR sets, and swim lanes. Do not be tempted to add non-standard symbols to represent other things (such as data inputs and outputs).

Figure 1 – an example process flow
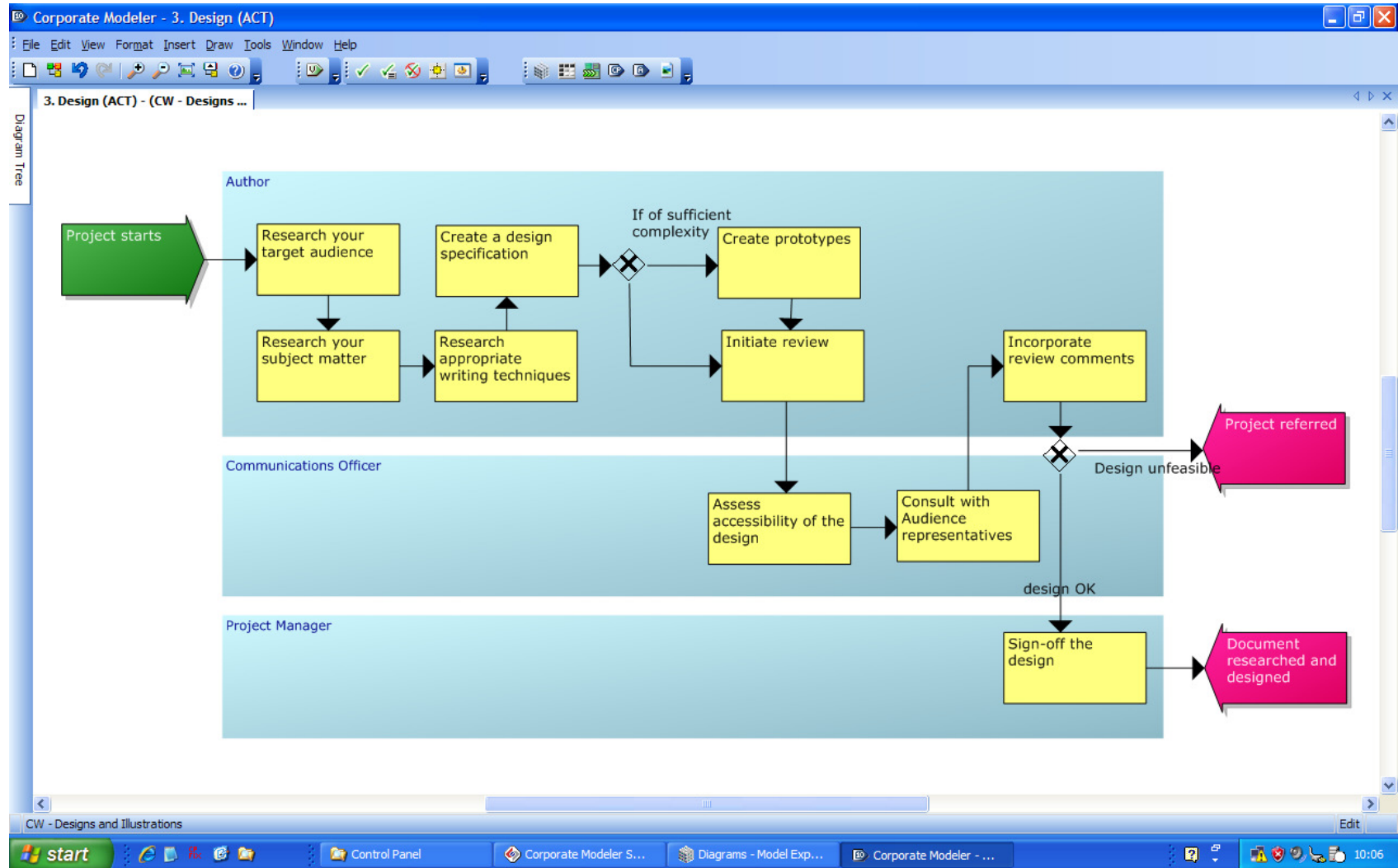
Your exercise scenario

When a Project has been agreed, this sometimes involves the Project Team designing their process improvements using the modeling tool, Casewise Corporate Modeler. If such a situation arises, one of your jobs will be to create a sub-model for use by the Project Team and to merge their work back into the master Management System model.

Draw the process involved:

Following the initiation of a process improvement project, the Technical Advisor from Management System Support identifies the diagrams needed to do the project, creates a sub-model. Access rights are assigned to this model and the passed to the Project Team for them to do their development work.

When the project is complete, the Process Owner checks it and if it is OK, the updated sub-model is sent back to Management System Support, who check that it accords with the modeling standards and guidelines (e.g. diagrams makes sense and use the correct notation). If there are problems, they might:

- *Reject the model and refer back to the Project team*

- *Make minor changes so the diagram accords with our modeling Standards*

If there are no problems, then the model is accepted and merged back into the master model.

Thus, once approved by the Process Owner and declared fit for purpose by Management System Support, the model can be merged back into the master model, which results in the updated process now being a part of the Management System master model.

Tip

The main thing to do here is identify what the main activities are.

Exercise 1 debrief

There will be a 10-minute discussion on what you learned in Exercise 1. You might want to think about whether any of the following were relevant to your experience of doing this task:

- What, if any, obstacles did you encounter in doing this exercise?

- Was there enough information? If not, what was missing?

- How would you expect to gather the source data?

- After drawing the diagram, what would you do next?

- What, if any, are the benefits of representing information in this format?

- What, if any, are the problems in presenting information in this format?

Exercise 2 – draw a diagram using Casewise Corporate Modeler
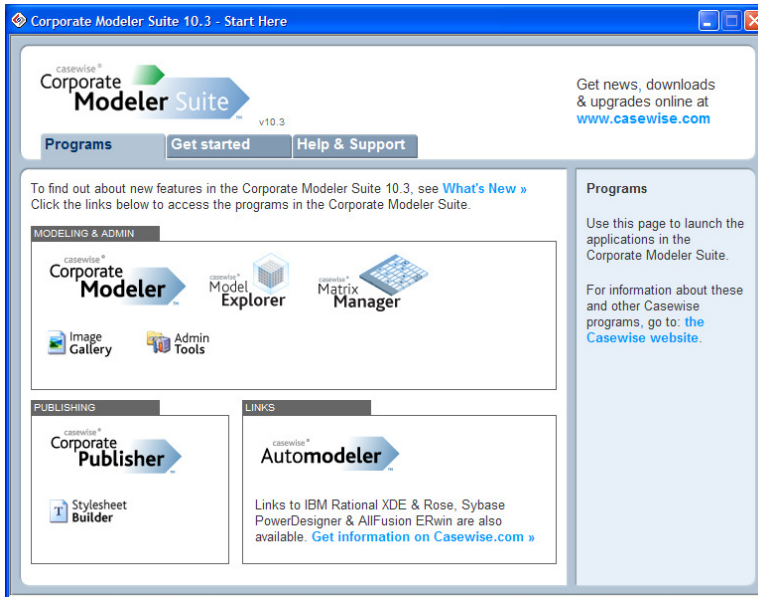
Objective

Following the instructions below, re-draw the example diagram shown in figure 1 (page 4).
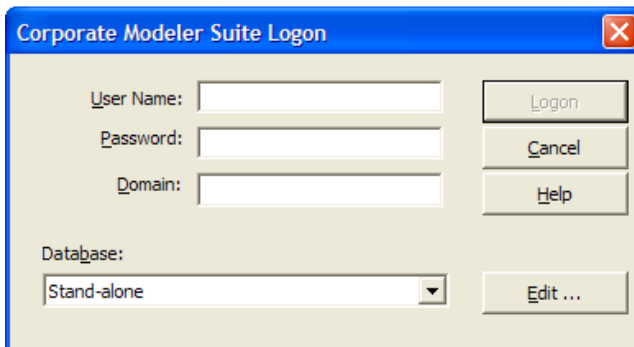
You have 20 minutes.

Log-on

1. Double-click the Corporate Modeler icon.

2. From the screen below, click the Model Explorer icon.

A Log-on dialog opens:

3. Your User Name is _____.

Leave the Password and Domain boxes empty.

Create a new diagram

In Model Explorer (see Figure 3):

1. Select the Diagram Node (1) in the Tree window, and choose File > New > Diagram > New Activity Diagram.

2. In the dialog that opens, give the diagram the name "Manage project sub-models" (2) and choose the Template "New Activity Diagram" (3).

Figure 3 – create a new diagram
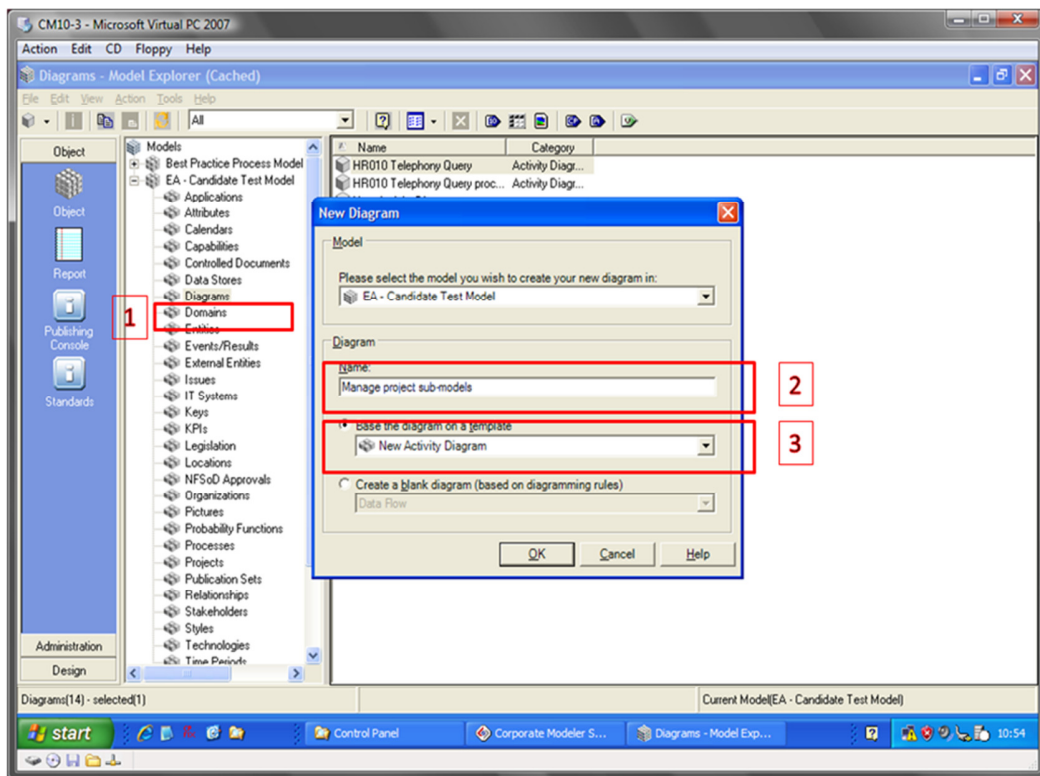
An empty diagram opens, which should look something like this:

Figure 4 – an empty diagram
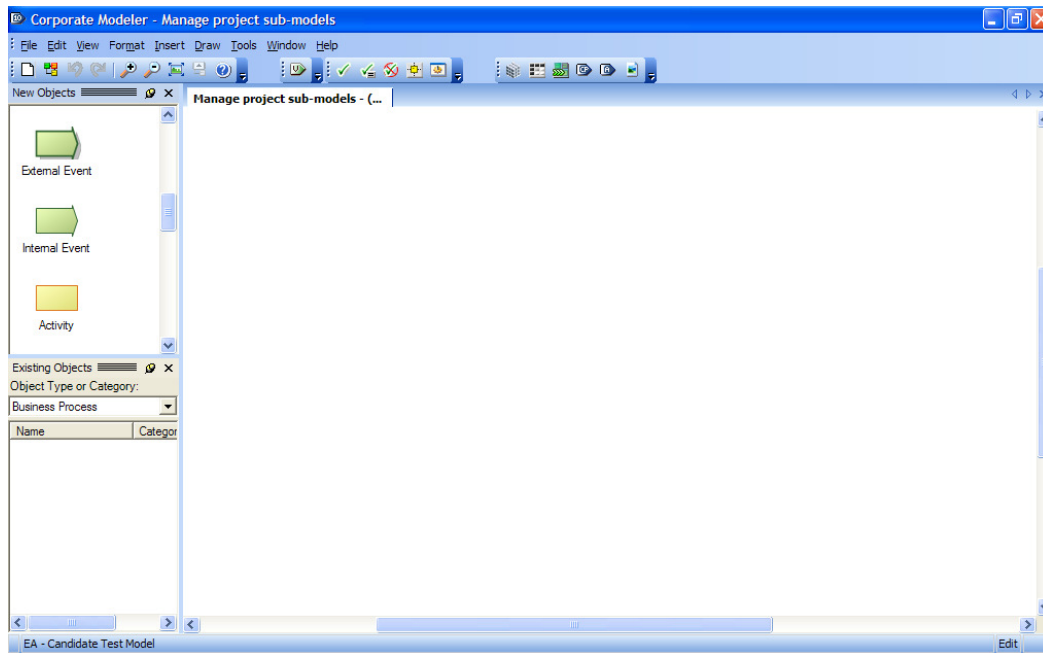
Populate the diagram

To get started, drag objects from the New Objects Palette. Remember, you need:

- Swim lanes (which are Organization objects) with connected Activities inside them.

- A triggering Event and two end Results.

- XOR sets.

Tip: it is probably easier to connect your objects after you have laid them out on the diagram.

The table on the next page summarizes the main tasks you might need to do.

Quick Reference table

Connectors, add conditions	Double-click the line and enter a name in the dialog that opens
Connectors, draw lines between objects	Select the source (or upstream) object, then use your mouse to drag a Connector to the centre of the target object (and then release the mouse button).
Connectors, route lines automatically	Press F11
Diagram, change name	Double-click an empty part of the diagram and enter a name in the dialog that opens
Fit to screen	Press F4
Move objects	Select the object and drag it to a new location
Objects, add existing (cleared) objects back to a diagram	Drag them from the Existing Objects Palette after first selecting the appropriate Object Type (e.g. Activity, Organization). *Note:* if an object already exists in the database, you will not be able to create another one with the same name.
Objects, add new ones to a diagram	Drag them from the New Objects Palette
Objects, change name	Double-click the object and enter a name in the dialog that opens
Objects, remove from a diagram	Select it, right-click > Clear.
Objects, send to font or back (i.e. hide/reveal objects that are hidden behind other objects)	Select the object (e.g. a swim lane), right-click > Draw > Move to Back
Undo	Edit > Undo
Zoom in / out	View menu