User Guide for Business Process Mapping and Reengineering Project

Welcome to the Business Process Mapping and Reengineering App! This guide will walk you through the features and functionalities of the application

INDEX IT

Contents

User Guide for Business Process Mapping and Reengineering Project

Welcome to the Business Process Mapping and Reengineering App! This guide will walk you through the features and functionalities of the application. Please ensure that you have a Microsoft account to log in.

Roles:

- **Editor:** Add, Edit, View
- **Reviewer:** Add, Edit, View, Approve
- **Viewer:** View
- **Management / Admin:** Add, Edit, View, Approve, Back to Draft, Change Department, View Logs, Export

Login

- To access the web app, log in with your Microsoft account credentials.
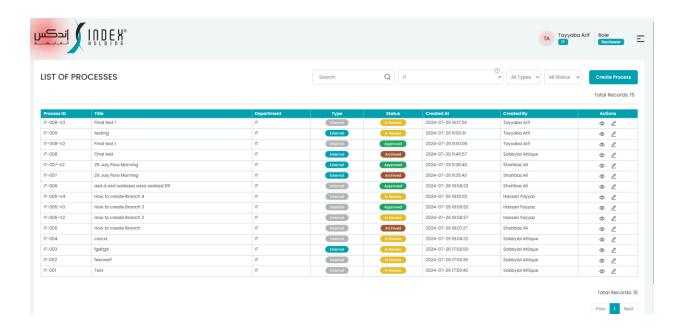- After successful login, you will be redirected to the Dashboard.
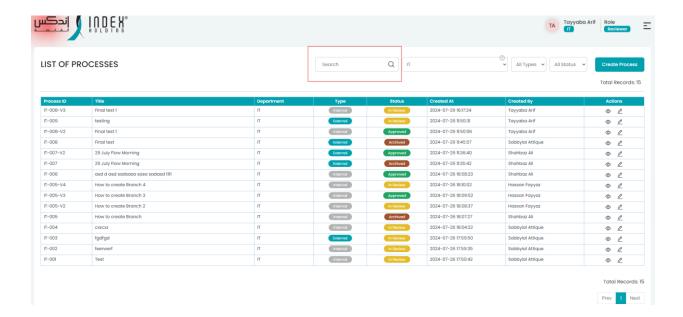
Dashboard - List of Processes

- The Dashboard provides an organized view of essential process details in a table format.
- Columns include Process ID, Title, Department, Type (Internal/External), Status (In Review/Approved), Created At, Created By, and Actions.
- Actions available depend on user role:
  - **Editor:** Add new processes, edit existing processes, and view process details.
  - **Reviewer:** Same as Editor, plus approve processes.
  - **Viewer:** View process details only.
  - **Management/Admin:** All actions available.

Search Processes

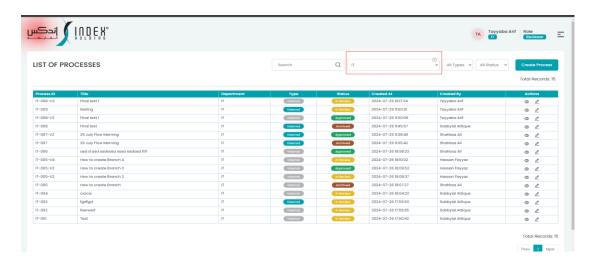- Utilize the search bar to find specific processes by entering keywords.
- The list will dynamically update as you type, making it easy to locate the desired process.
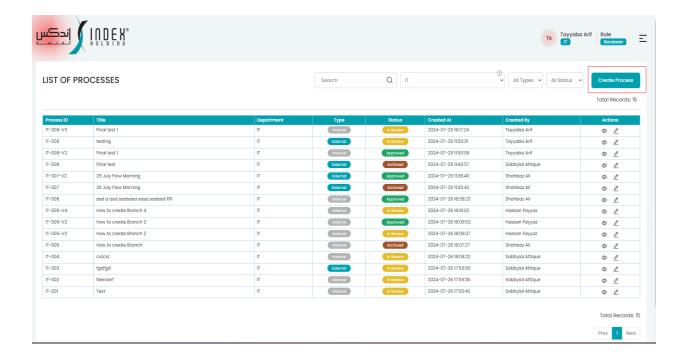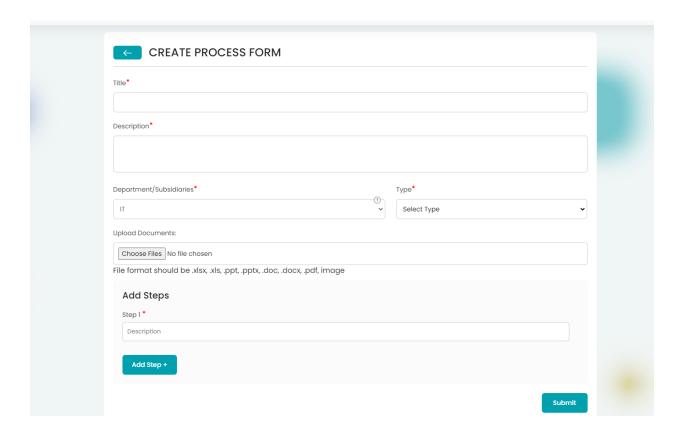
Filter by Department

- Use the "Select Department" dropdown to filter processes based on specific departments.
- The list will automatically refresh to display processes associated with the selected department.
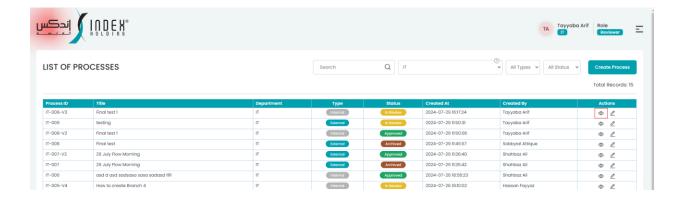
Create a New Process

- Click on the "Create Process" button to initiate the process creation form.
- Mandatory fields include:
    - Title
    - Description
    - Department/Subsidiaries
    - Type
- Upload supporting documents in Word, PPTX, PPT, XLSX, IMAGE or PDF format.
- Add steps by clicking on the "Add Steps" button and provide additional descriptions.
- Click on the help sign to view a visual representation of the process and associated roles.
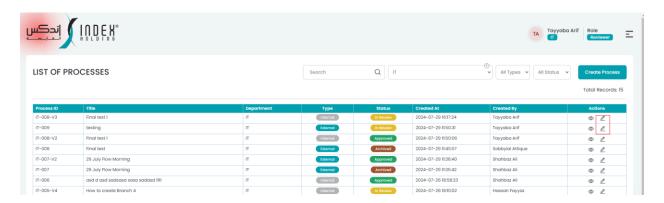- Once complete, click "Submit" to create the new process.

LIST OF PROCESSES

Total Records: 15

Process ID	Title	Department	Type	Status	Created At	Created By	Actions
IT-008-V3	Final test 1	IT	Internal	In Review	2024-07-29 16:17:24	Tayyaba Arif	👁 ✏
IT-009	testing	IT	External	In Review	2024-07-29 11:50:31	Tayyaba Arif	👁 ✏
IT-008-V2	Final test 1	IT	Internal	Approved	2024-07-29 11:50:06	Tayyaba Arif	👁 ✏
IT-008	Final test	IT	External	Archived	2024-07-29 11:45:57	Sobbyial Attique	👁 ✏
IT-007-V2	29 July Flow Morning	IT	External	Approved	2024-07-29 11:36:40	Shahbaz Ali	👁 ✏
IT-007	29 July Flow Morning	IT	External	Archived	2024-07-29 11:35:42	Shahbaz Ali	👁 ✏
IT-006	asd d asd sadsasa sasa sadasd 1111	IT	Internal	Approved	2024-07-26 18:58:23	Shahbaz Ali	👁 ✏
IT-005-V4	How to create Branch 4	IT	Internal	In Review	2024-07-26 18:10:02	Hassan Fayyaz	👁 ✏
IT-005-V3	How to create Branch 3	IT	Internal	Approved	2024-07-26 18:09:52	Hassan Fayyaz	👁 ✏
IT-005-V2	How to create Branch 2	IT	Internal	In Review	2024-07-26 18:08:37	Hassan Fayyaz	👁 ✏
IT-005	How to create Branch	IT	Internal	Archived	2024-07-26 18:07:27	Shahbaz Ali	👁 ✏
IT-004	cxzcxz	IT	Internal	In Review	2024-07-26 18:04:22	Sobbyial Attique	👁 ✏
IT-003	fgdfgd	IT	External	In Review	2024-07-26 17:59:50	Sobbyial Attique	👁 ✏
IT-002	feerwerf	IT	Internal	In Review	2024-07-26 17:59:35	Sobbyial Attique	👁 ✏
IT-001	Test	IT	Internal	In Review	2024-07-26 17:50:42	Sobbyial Attique	👁 ✏

Total Records: 15

Prev 1 Next

← **CREATE PROCESS FORM**

Title*

Description*

Department/Subsidiaries*   Type*

IT   ⓘ   Select Type

Upload Documents:

Choose Files No file chosen

File format should be .xlsx, .xls, .ppt, .pptx, .doc, .docx, .pdf, image

Add Steps

Step 1 *

Description

Add Step +

Submit

View Process Details

- Click on the Process ID or Title in the list to view detailed information about a specific process.
- This view includes all relevant details about the process, including steps, attachments, and roles.
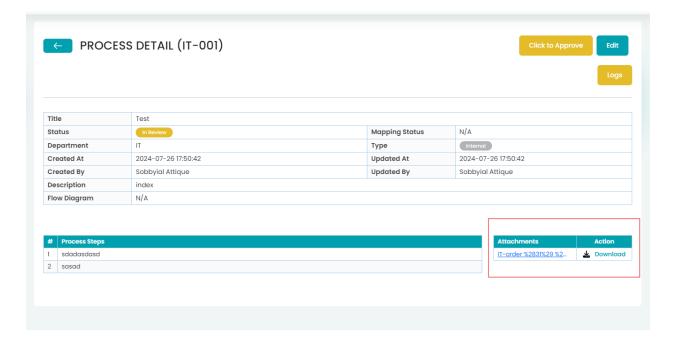
Edit Process

- Navigate to the process details page and click on the "Edit" button.
- Modify the necessary fields and click "Save" to update the process information.
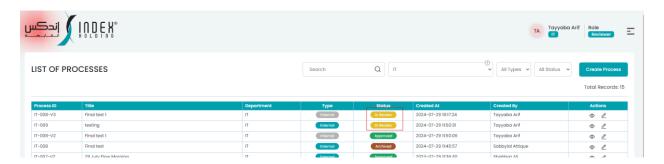- Editing capabilities vary based on user roles.

Download Attachments

- Within the process details, locate the attachments section.
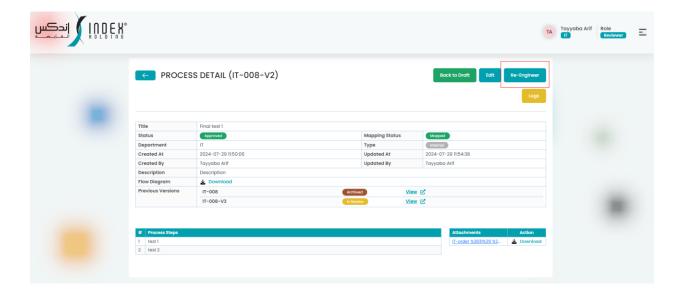- Click on the attachment's download button to download the file.

Review and Approve a Process

- In the process details, thoroughly review the information provided.
- Use the details to make an informed decision.
- If satisfied, click the "Approve" button to signify your approval.
- Confirm your decision when prompted.
- Reviewing and approving actions are available for users with Reviewer and Management/Admin roles.
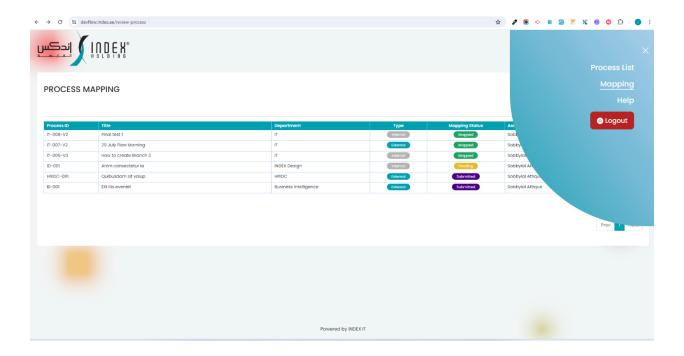
Re-Engineering

- Users with the necessary permissions can edit the current approved process through re-engineering.
- Click the "Re-engineer" button to initiate the editing process.
- After making the necessary edits, save the changes.
- A new version of the process will be created, retaining all modifications.
- Once the new version is approved, it becomes the current approved process.
- The previous version will be automatically archived.
- If the previous version is re-approved, the newer version will be archived.
- This ensures that only one version is active at any given time, with all previous versions securely archived for reference.
- Only users with Reviewer or Management/Admin roles can perform re-engineering and approve changes.
- This ensures that the re-engineering process is controlled and authorized.

Mapping

- The admin assigns permissions to users, allowing them to connect or disconnect items.

- Only users with these permissions can proceed with the mapping process.

- Users with the required permissions can edit the items and upload relevant images.

- After editing and uploading images, submit the changes.

- The status of the item will change to "Submitted" once the user submits the modifications.

- The admin reviews the submitted changes.

- Upon approval by the admin, the status of the item changes to "Mapped," indicating the item is now properly connected.

Logout

- Click on the "Logout" option to securely log out of the web app