nintex Process Manager

Quick reference guide.

Process information hierarchy.

What is a policy?

A guiding rule used to set direction in an organization in specific areas like HR, IT, health and safety, etc.

A policy often determines required actions, will guide decisions and may govern multiple processes.
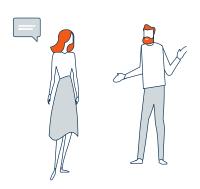
What is a process?

A sequence of **activities** that define what must happen, in what order and who is responsible for transforming an input into an output. Information should be brief and concise, but still instructional.

What is a procedure?

The sequence of more detailed **Tasks** that describe and instruct how each Activity in the process is completed.

What is a work instruction?

Written, pictorial or multi-media material that is linked to activities to provide more detailed instruction on how to perform a Task. This can include screenshots, short videos, forms, guides, detailed manuals or training material.

Key process elements.

Process group Where a process lives within Nintex Process Manager

Process title Clear and specific, so it is easy to find. Should start with a verb.

Process owner Responsible for the quality of the process and will approve any major changes to the process

Process expert As the SME, will do the largest share of the edits and reviews in Nintex Process Manager

Process objective A brief statement defining what the process is intended to deliver, and how

Process background (optional) Enables capture

Quick tips.

Move Simply drag & drop
Delete Click on the rubbish bin
Shift + enter To add additional lines within a particular Task, if required

Keyboard shortcuts.

ALT-A Add an Activity
ALT-T Add Task
ALT-N Add a Note
ALT-S Save
ALT-Z Undo
ALT-Y Redo
Save options:
Save or **Save with comment**

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How to get started?

Ask the right questions.

1.	Who is your audience?	
2.	What's the process title and objective?	**Define the process boundaries**
3.	What triggers the process?	
4.	Any inputs to perform the process?	
5.	What outputs are produced?	

6.	What are the activities and Tasks?	**Define the process details**
7.	Which role performs them?	
8.	Are there known variations?	

Techniques for creating engaging processes.

1. Simplify process maps by applying the 80-20 rule
2. Don't ignore the exceptions and variations, instead use:
   - Notes
   - "If" statements
   - Parallel activities/processes
   - Multiple processes for greater clarity
   - The process variation management add-on
3. Group common Tasks into Activities to help with usability – try sticking to between 3 and 10 activities
4. Use verbs when naming processes, Activities and Tasks
5. Create sub-processes, if needed, and make sure to link processes together to show the flow
6. Include linked supporting material, particularly multimedia to simplify, clarify or provide detail

Process boundaries.

Triggers

What situation or event causes the process to start? The frequency and volume of the trigger event might also be identified/estimated.

Inputs

- Process components that must be in place prior to the first Activity commencing?
- Does another process provide these inputs?

Outputs

- What is produced by completing the process?
- Is there another process using these as inputs?

Performance measures

Have key performance indicators/measures been set that define whether the process is operating effectively and meeting its objective?

Process details.

Activity What are the key steps in the process and who carries them out?

Task Defines with granularity **how** an Activity is performed

Note Worded as a question and describes the **'what if's'.** Use these for exceptions, scenarios, variations, business rules and background information.