EiProcess Suite

WORKFLOW • BPR

Getting Started
Version 3.4

HOLOSOFX

Part 1

Getting Started: Workflow•BPR

Welcome to Workflow•BPR, a versatile and powerful activity-based process representation tool. With Workflow•BPR, you can realistically and visually represent and analyze the way your organization performs its work. Workflow•BPR will enable you to manage, with ease, the complexity that is inherent in your business processes.

1. Installing and Starting Workflow•BPR

1.1 Minimum System Requirements:

- Windows ’95 ®, Windows ’98®, or Windows NT®
- Pentium 90 or later
- Sixteen (16) MB of memory
- Hard disk with at least 30 MB free space (15 MB for installation; 15 MB for working)
- Mouse

1.2 Recommended System Requirements:

- Windows ’95®, Windows ’98®, or Windows NT®
- Pentium 133 or later
- Thirty-two (32) MB or higher. Sixty-four (64) MB or higher if using Windows NT®
- Hard disk with at least 40 MB free space (15 MB for installation; 25 MB for working)

  ✍ **If you plan to work with large Processes, then allow 300 MB to 500 MB of free space on your hard disk.**
- Mouse

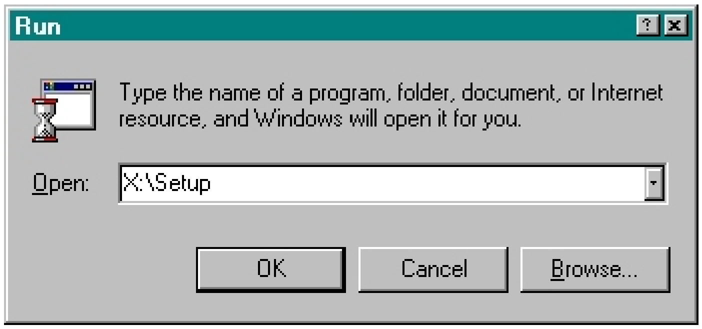
1.3 Things You Need to Know

To work with Workflow•BPR, a basic knowledge of Microsoft Windows is required. You should be familiar with mouse techniques such as pointing, clicking, double-clicking, dragging, choosing menu commands, and selecting dialog options. In addition, it is necessary to know how to use Windows Explorer. If you are unfamiliar with any of these terms or techniques, refer to Microsoft Windows documentation for instructions.

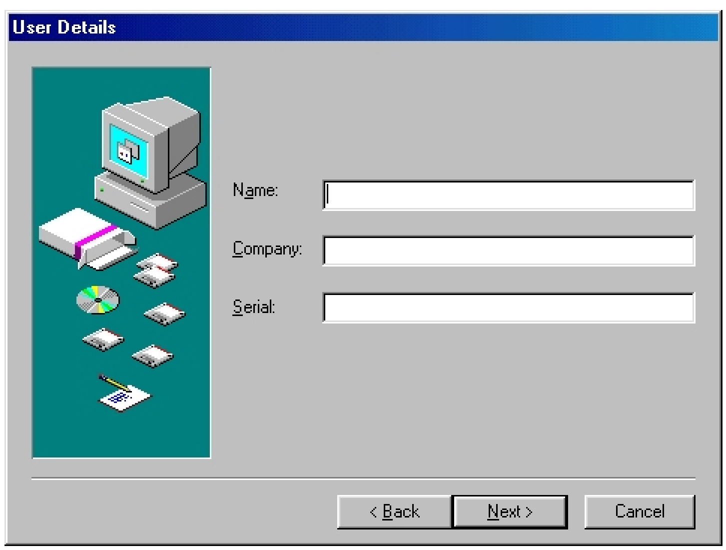
1.4 Installing Workflow•BPR

To install Workflow•BPR:

1. Insert the disk labeled **Installation CD** into your disk drive.
2. From the Windows **Start Bar**, choose **Run** from the **Start** menu (see the figure below).

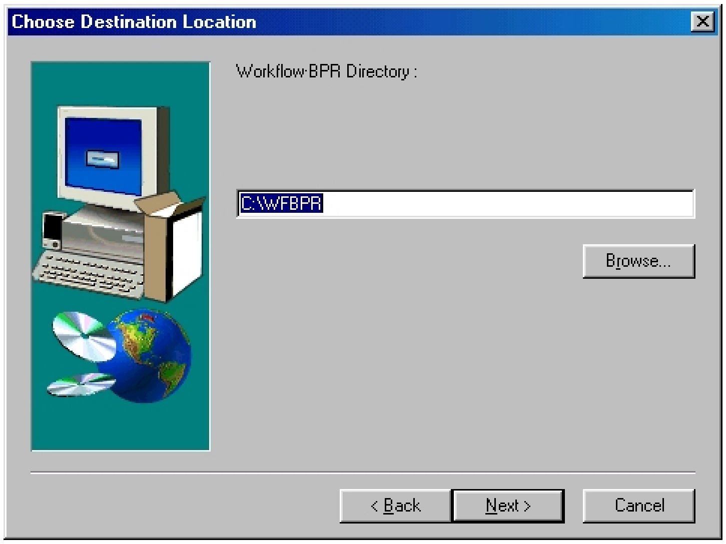


3. In the **Command Line** text box, type **X:\Setup** (X is the CD Rom drive letter).
4. Click **OK** or press **Enter**. The **User Details** dialog box appears (see the figure below).



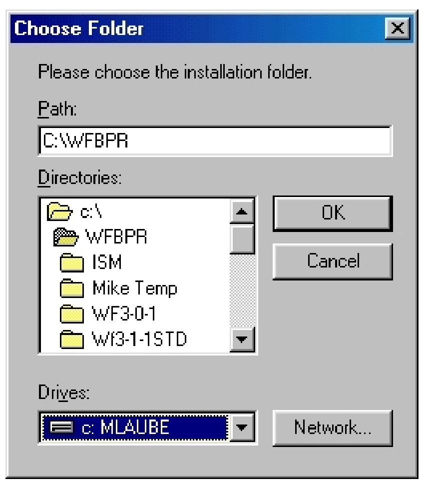
5. Type your user name, company name, and serial number in the appropriate text boxes.
   * Press the **Tab** key to move to the next field.
   * Your company name and user name can have up to 34 characters each.

6. Click **Next >** or press **Enter**. The **Choose Destination Location** dialog box appears (see the figure below).



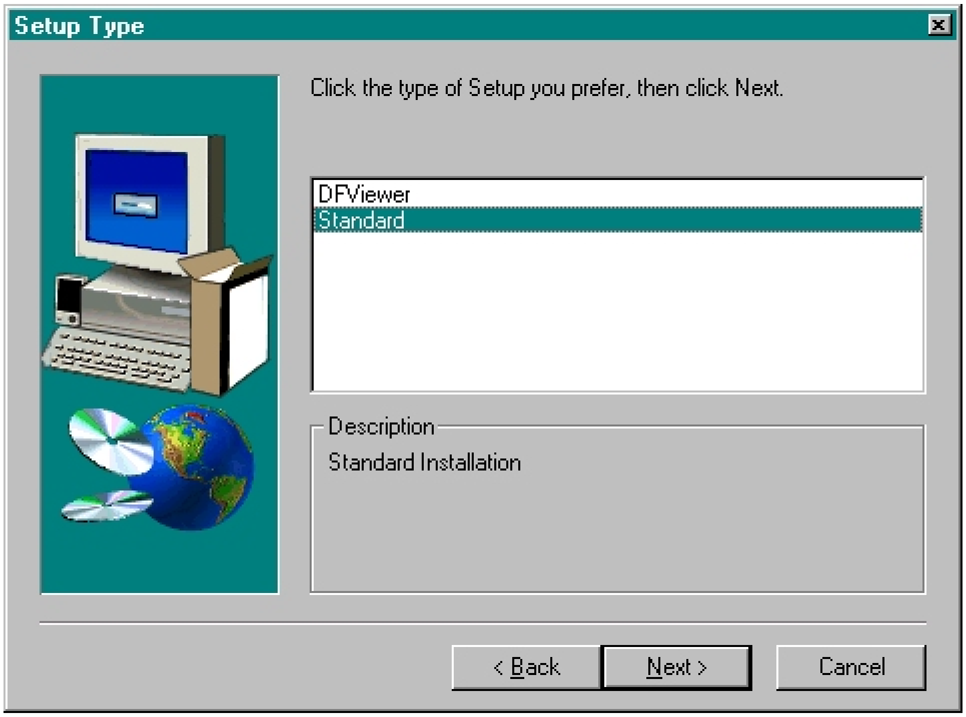
7. To change the folder where Workflow•BPR will be installed, type the desired folder in the **Workflow•BPR Directory** text box. Otherwise, Workflow•BPR will be installed in the default folder as listed.

   * You can also click the Browse button to open the **Choose Folder** dialog box (see the figure below).



   - Type the desired folder in the **Path** text box or navigate through the folder tree structure in the **Directories** box.
   - Click **OK** or press **Enter**. You will be returned to the **Choose Destination Location** dialog box.

8. 🖰 Click **Next >** or 🖮 press **Enter**. The Setup Type dialog box appears (see the figure below).



9. 🖰 Select **Standard** (default) or **DFViewer**.

   * The **DFViewer** option is for users of the DesignFlow methodology. A Folder and Application (the DesignFlow Viewer) will be installed in addition to the standard installation of Workflow•BPR.

10. 🖰 Click **Next >** or 🖮 press **Enter**. Workflow•BPR will be installed in the selected location.

1.4.1 The WFBPR Folder

By default, Workflow•BPR is installed on the C Drive in a folder named "WFBPR" unless you change the name and/or folder. In this folder you will find the Workflow•BPR application file and its required files. In addition, there are three sub-folders included with Workflow•BPR:

- **Help**: Contains the html files that are used for the Help system.
- **Icons**: Contains icon files (.ico) that are used for bitmaps for the display of Phis in Activity Decision Flow Diagrams.
- **Samples**: Contains the following sub-folders:

  * **Abbott**: A sample Organization File that can be opened by Workflow•BPR. The processes are modeled in the Line of Visibility Activity Decision Flow Diagrams.

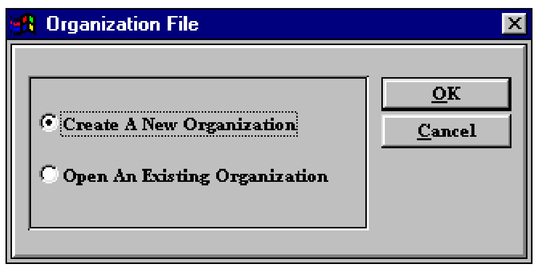
* **AutoClm**: A sample Organization File that can be opened by Workflow•BPR. These Processes feature an integration with FileNet Visual WorkFlo.
* **Componex**: A sample Organization File that can be opened by Workflow•BPR.
* **Insnotes**: A sample Organization File that can be opened by Workflow•BPR. These Processes feature an integration with IBM FlowMark.
* **Quote**: A sample Organization File that can be opened by Workflow•BPR.
  - **Output**: Sample Analysis Reports (e.g., the Process Summary Report, Process Comparison Report, and the Process Redesign Report).
  - **Reports1**: Exported Weighted Average Reports for a As-Is Process.
  - **Reports2**: Exported Weighted Average Reports for a To-Be Process.
* **MiniTtrl**: A sample Organization File that is the basis for the Mini Tutorial that is documented in the second part of "Getting Started."
* **Sbac**: A sample Organization File that can be opened by Workflow•BPR. These Processes provide an example of the Process Redesign Report.
* **SoftOrd**: A sample Organization File that can be opened by Workflow•BPR. These Processes feature an integration with IBM FlowMark.
* **Tutorial**: contains the following sub-folders:
  - **Complete**: A sample Organization File that demonstrates the completed Organization File that is created by following the Tutorial (refer to the "Tutorial" document).
  - **Herorg**: An Organization File that is used during the performance of the Tutorial (refer to the "Tutorial" document).
  - **Hisorg**: An Organization File that is used during the performance of the Tutorial (refer to the "Tutorial" document).

1.5 Opening Workflow•BPR

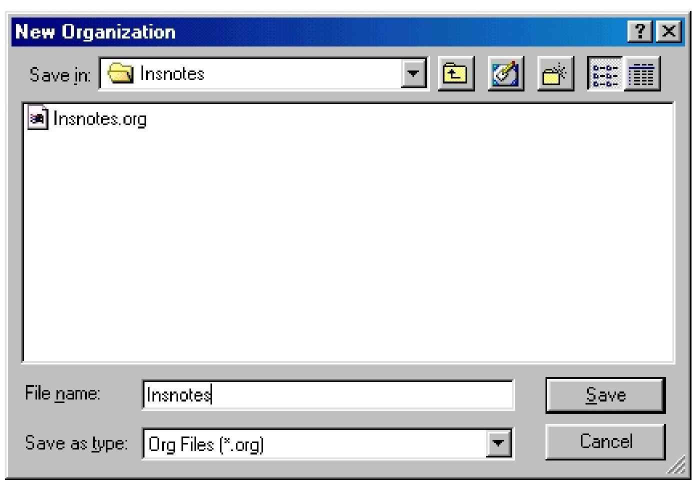
To work in Workflow•BPR, it will be necessary to create an Organization File. If an Organization File has already been created, or if you want to open one of the sample organizations provided by Workflow•BPR, then you can select the Organization File and a Process to open.

To open Workflow•BPR:

1. From the Windows **Start Bar**, choose **Programs** from the **Start** menu. Choose **Workflow BPR Folder** from the Programs sub-menu, and then choose **WFBPR 3.4** from the **Workflow BPR** Folder sub-menu.
2. The **Organization File** dialog box appears (see the figure below). The **Organization File** dialog box offers two selection buttons: **Create A New Organization** or **Open An Existing Organization**.



3. To create a new Organization File, click the **Create A New Organization** radio button. Click **OK** or press **Enter**. The **New Organization** dialog box appears (see the figure below).

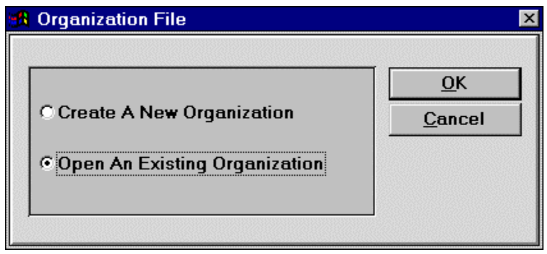


* Select the appropriate drive and/or folder where you want to save your Organization File.

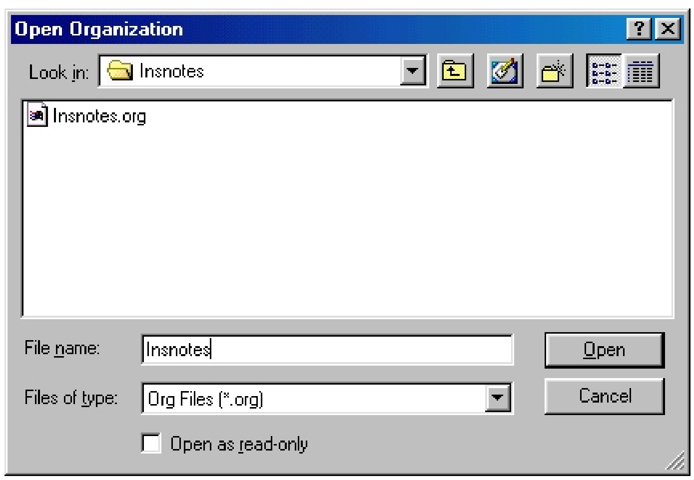
- Double-click a folder in the large box to go down the tree.
- Click the **Up One Level** button to go up the tree.

- Type the name of your Organization File in the **File Name** text box.
  - If you do not include the .org extension, Workflow•BPR will add it for you.
- Click **Save** or press **Enter**. Workflow•BPR creates an Organization File and an Organization Folder in which to place the Organization File. Then, an untitled Process is created and displayed in an Activity Decision Flow Diagram.

4. To open an existing Organization File, click the **Open an Existing Organization** radio button (the default option – see the figure below).

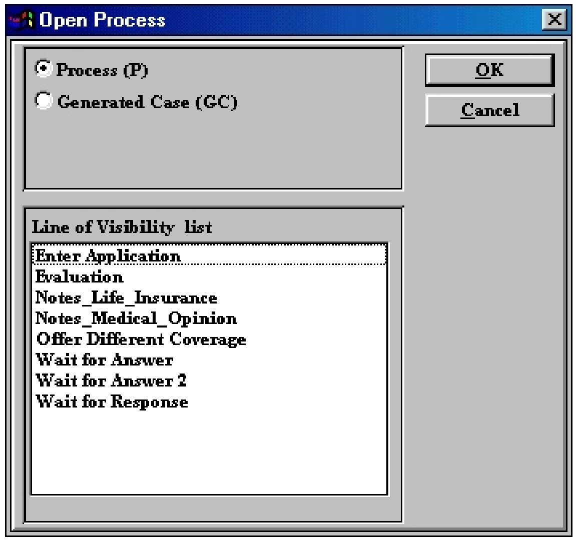


5. Click **OK** or press **Enter**. The **Open Organization** dialog box appears (see the figure below).



- Select the drive and/or folder (where you saved your Organization File).
  - Double-click on a folder in the large box to go down the tree.
  - Click the **Up One Level**  button to go up the tree.
- Select the Organization File from the files in the large box, or type the name of your Organization File in the **File Name** text box.
  - If you do not include the .org extension, Workflow•BPR will add it for you.

* Click **Open** or press **Enter**. Workflow•BPR opens the Organization File and displays the **Open Process** dialog box, enabling you to open a Process Diagram (see the figure below).



6. Select a Process from the **Process List** box. Click **OK** or press **Enter**. Workflow•BPR will open the Activity Decision Flow Diagram for the selected Process.

2. Tour of Workflow•BPR

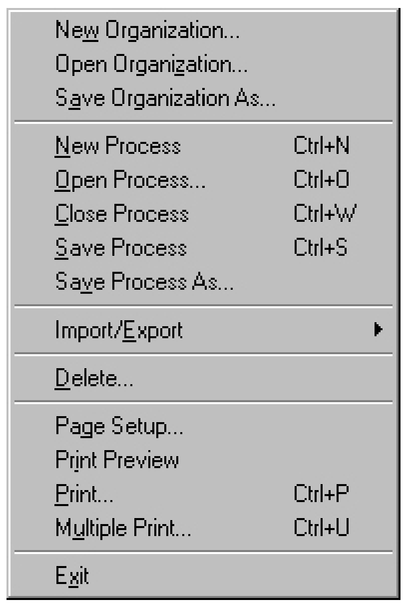
A brief description of the main menu options and windows of Workflow•BPR follows.

2.1 Touring Workflow•BPR Menus

Workflow•BPR has 10 main menu items that control the different aspects of creating and analyzing Process models. The menus and their commands are briefly described in the following section texts.

2.1.1 File Menu

The **File Menu** contains the commands required to manage the Workflow•BPR Files contained in the Organization Folder (see the figure below).



You can open, create, import, export, print drawings and views, and define preferences. The **File** menu commands are:

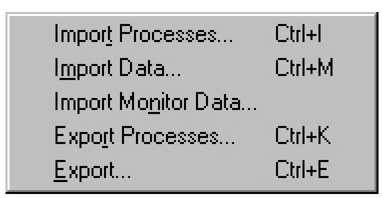
- **New Organization -** Creates a new Organization File. Only one Organization File can be opened at a time. This command will automatically close any other Organization File that is open.
- **Open Organization -** Opens an existing Organization File. Only one Organization File can be opened at a time. This command will automatically close any other Organization File that is open.
- **Save Organization As -** Creates a copy of the Organization File under a different name.
- **New Process -** Creates a new, untitled Process File.

  ✍ **You can access this command by typing Ctrl+N.**
- **Open Process -** Opens an existing Process File.

  ✍ **You can access this command by typing Ctrl+O.**
- **Close Process -** Closes the active Process File.

  ✍ **You can access this command by typing Ctrl+W.**
- **Save Process -** Saves the active Process File.

  ✍ **You can access this command by typing Ctrl+S.**
- **Save Process As -** Creates a copy of the active Process File under a different name.
- **Import/Export -** Accesses a group of sub-menu commands that allow you to access the Workflow•BPR importing and exporting functions (see the figure below).



- Each one of the sub-menu commands opens a dialog box with a name that matches the sub-menu command. The **Import/Export** sub-menu commands include:

  * **Import Processes** - Imports Process Files that were created in other Organization Files. The Repository that is associated with the Process Files is also imported.

    ✍ **You can access this command by typing Ctrl+I.**
  * **Import Data** - Imports database and spreadsheet files into Workflow•BPR.

✍ **You can access this command by typing Ctrl+M.**

* **Import FDL** – Imports FDL created by FlowMark 2.3.4 and creates a new Organization File with Processes based on the data in the FDL.
  - **This item is only available in the IBM FlowMark and the IBM MQ Workflow Editing Modes.**
* **Import Monitor Data** – Imports Elapsed Durations and Working Durations that were captured by the Workflow Monitor. A copy of the Processes are created with the new duration information replacing the estimates entered into the Processes.
* **Export Processes** - Exports a selected set of processes to a newly created Organization File.

  ✍ **You can access this command by typing Ctrl+K.**
* **Export** - Exports a selected table to another application.

  ✍ **You can access this command by typing Ctrl+E.**

- **Delete -** Deletes a Process File, a Generated Case File, a Report File, and/or a Documentation file.
- **Page Setup -** Changes the page layout format before printing selected diagrams, tables, and/or charts.
- **Print Preview -** Opens the **Print Preview** window that allows for previewing diagrams, tables, and/or charts before printing.
- **Print -** Prints a selected diagram, table, and/or chart.

  ✍ **You can access this command by typing Ctrl+P.**
- **Multiple Print -** Prints a set of selected diagrams.

  ✍ **You can access this command by typing Ctrl+U.**
- **Exit -** Exits Workflow•BPR.

2.1.2 Edit Menu

The **Edit Menu** contains commands to undo your last action and to copy, paste, find, or delete Activity Decision Flow Diagram objects (see the figure below).

Workflow•BPR allows for copying and pasting objects inside the same diagram or from one diagram to another. The **Edit** menu commands are:

- **Undo -** Reverses your most recent action.

  ✍ **You can access this command by typing Ctrl+Z.**

- **Copy -** Copies Activity Decision Flow Diagram objects and their related data to the clipboard.

  ✍ **You can access this command by typing Ctrl+C.**

- **Paste -** Pastes only the shape of Activity Decision Flow Diagram objects from the clipboard.

  ✍ **You can access this command by typing Ctrl+V.**

- **Paste Special -** Pastes Activity Decision Flow Diagram objects and their related data from the clipboard.

  ✍ **You can access this command by typing Ctrl+T.**

- **Find -** Opens the Find dialog box that can be used to locate an object in an active Activity Decision Flow Diagram.

  ✍ **You can access this command by typing Ctrl+F.**

- **Replace -** Opens the Replace dialog box that can be used to locate an object in an active Activity Decision Flow Diagram and replace any attribute of that object.

  ✍ **You can access this command by typing Ctrl+R.**

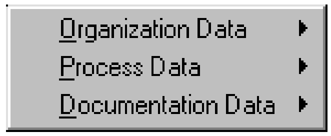
- **Select All –** Selects all the graphical objects in a Process by placing a marquee box around them.

  ✍ **You can access this command by typing Ctrl+A.**

- **Delete -** Removes a selected object or a group of objects from an Activity Decision Flow Diagram.

2.1.3 Repository Menu

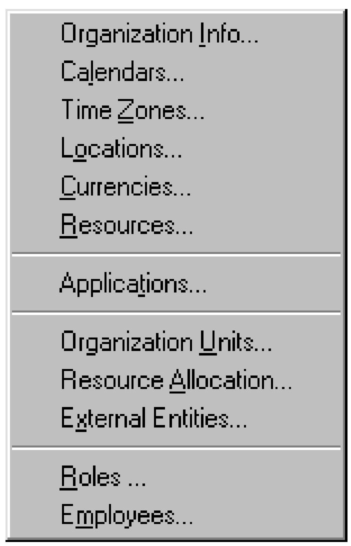
The commands from the **Repository** Menu are used to create or update the Repository of your Organization File (see the figure below, from the Basic Editing Mode).



The Repository contains data that can be used in and shared by multiple Activity Decision Flow Diagrams. Basically, there are two categories of data: Organization Data and Process Data. The **Repository** Menu commands are:

2.1.3.1 Organization Data

This sub-menu item accesses a group of sub-menu commands that allow you to create, update, and/or delete records pertaining to information regarding the core organization (see the figure below, from the Basic Editing Mode).



The requirements for using Workflow•BPR will vary depending on the purpose for modeling them. The Editing Modes feature was designed because Process Modeling can be performed for many purposes. Therefore, the selected Editing Mode will affect the appearance of the Organization Data sub-menu of the Repository Menu. The items that are available will vary from one Editing Mode to another. The following table shows the items of the Organization Data sub-menu and in which Editing Modes the items will appear.

Editing Mode: *Menu Item:*	*Basic*	*IBM FlowMark*	*IBM MQ Workflow*	*FileNet Visual WorkFlo*	*Line of Visibility*	*E Comm.*	*Advanced*
Organization Info	✓	✓	✓	✓	✓	✓	✓
Calendars	✓			✓	✓	✓	✓
Time Zones	✓			✓	✓	✓	✓
Locations	✓			✓	✓	✓	✓
Currencies	✓			✓	✓	✓	✓
Resources	✓	✓	✓	✓	✓	✓	✓
Applications	✓	✓	✓		✓	✓	✓
Servers		✓					✓
Domain			✓				
System Group			✓				
System			✓				
Node			✓				
Queue			✓				
Operations				✓			
Work Performer Classes				✓			
Organization Units	✓	✓	✓	✓	✓	✓	✓
Resource Allocation	✓			✓	✓	✓	✓
External Entities	✓			✓	✓	✓	✓
Chart of Accounts				✓	✓	✓	✓
Roles	✓	✓	✓	✓	✓	✓	✓
Employees	✓	✓	✓	✓	✓	✓	✓
Levels		✓	✓	✓	✓	✓	✓
Functions		✓	✓				
Partner Roles						✓	
Databases					✓		✓
Operating Systems					✓		✓
Skills					✓		✓
Skill Types					✓		✓

Each one of the sub-menu commands opens a dialog box with a name that matches the sub-menu command. The **Organization Data** sub-menu commands include:

- **Organization Info**
- **Calendars**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes
- **Time Zones**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.
- **Locations**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.
- **Currencies**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.
- **Resources**
- **Applications**

  * This item is not available in the FileNet Visual WorkFlo Editing Mode; it is available in all other Editing Modes.
- **Servers**

  * This item is available only in the IBM FlowMark, Line of Visibility, and Advanced Editing Modes; it is not available in any other Editing Mode.
- **Domain**

  * This item is available only in the IBM MQ Workflow Editing Mode; it is not available in any other Editing Mode.
- **System Group**

  * This item is available only in the IBM MQ Workflow Editing Mode; it is not available in any other Editing Mode.
- **System**

  * This item is available only in the IBM MQ Workflow Editing Mode; it is not available in any other Editing Mode.

- **Node**

  * This item is available only in the IBM MQ Workflow Editing Mode; it is not available in any other Editing Mode.

- **Queue**

  * This item is available only in the IBM MQ Workflow Editing Mode; it is not available in any other Editing Mode.

- **Operations**

  * This item is available only in the FileNet Visual WorkFlo Editing Mode; it is not available in any other Editing Mode.

- **Work Performer Classes**

  * This item is available only in the FileNet Visual WorkFlo Editing Mode; it is not available in any other Editing Mode.

- **Organization Units**
- **Resource Allocation**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **External Entities**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Chart of Accounts**

  * This item is not available in the Basic, IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Roles**
- **Employees**
- **Levels**

  * This item is not available in the Basic Editing Mode; it is available in all other Editing Modes

- **Functions**

  * This item is only available in the Organization Data sub-menu for the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in the Documentation Data sub-menu for all other Editing Modes.

- **Partner Roles**

  * This item is available only in the E-Commerce Editing Mode; it is not available in any other Editing Mode.

- **Databases**

  * This item is available only in the Line of Visibility and Advanced Editing Modes; it is not available in any other Editing Mode.

- **Operating Systems**

  * This item is available only in the Line of Visibility and Advanced Editing Modes; it is not available in any other Editing Mode.

- **Skills**

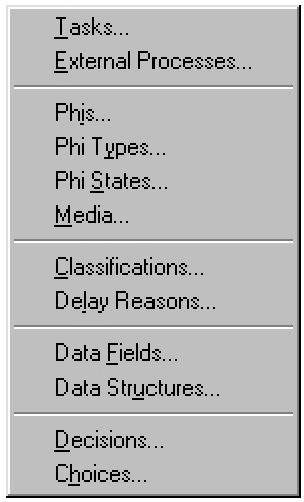
  * This item is available only in the Line of Visibility and Advanced Editing Modes; it is not available in any other Editing Mode.

- **Skill Types**

  * This item is available only in the Line of Visibility and Advanced Editing Modes; it is not available in any other Editing Mode.

2.1.3.2 Process Data

This sub-menu accesses a group of sub-menu commands that allow you to create, update, and/or delete the elements making up the actual work your Organization performs within its Processes (see the figure below).



The requirements for using Workflow•BPR will vary depending on the purpose for modeling them. The Editing Modes feature was designed because Process Modeling can be performed for many purposes. Therefore, the selected Editing Mode will affect the appearance of the Process Data sub-menu of the Repository Menu. The items that are available will vary from one Editing Mode to another. The following table shows the items of the Process Data sub-menu and in which Editing Modes the items will appear.

Editing Mode: *Menu Item:*	*Basic*	*IBM FlowMark*	*IBM MQ Workflow*	*FileNet Visual WorkFlo*	*Line of Visibility*	*E Comm.*	*Advanced*
Tasks	✓	✓	✓	✓	✓	✓	✓
External Processes	✓			✓	✓	✓	✓
Phis	✓	✓	✓	✓	✓	✓	✓
Partner Interactions						✓	
Phi Types	✓	✓	✓	✓	✓	✓	✓
Phi States	✓			✓	✓	✓	✓
Media	✓			✓	✓	✓	✓
Classifications	✓			✓	✓	✓	✓
Delay Reasons	✓			✓	✓	✓	✓
Groups					✓		✓
Authorizations					✓		✓
Data Fields	✓	✓	✓	✓	✓	✓	✓
Data Structures	✓	✓	✓	✓	✓	✓	✓
Decisions	✓	✓	✓	✓	✓	✓	✓
Choices	✓	✓	✓	✓	✓	✓	✓

Each one of the sub-menu commands opens a dialog box with a name that matches the sub-menu command. The **Process Data** sub-menu commands include:

- **Tasks**
- **External Processes**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Phis**
- **Partner Interactions**

  * This item is available only in the E-Commerce Editing Mode; it is not available in any other Editing Mode.

- **Phi Types**
- **Phi States**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Media**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Classifications**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Delay Reasons**

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Groups**

  * This item is available only in the Line of Visibility and Advanced Editing Modes; it is not available in any other Editing Mode.

- **Authorizations**

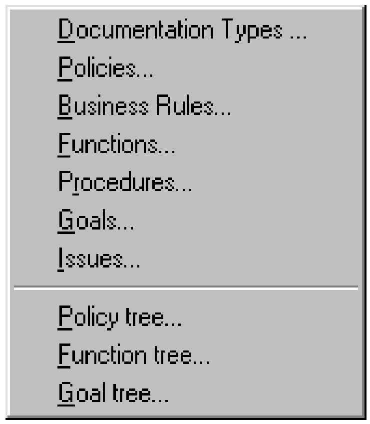
  * This item is available only in the Line of Visibility and Advanced Editing Modes; it is not available in any other Editing Mode.

- **Data Fields**
- **Data Structures**
- **Decisions**
- **Choices**

2.1.3.3 Documentation Data

This sub-menu accesses a group of sub-menu commands that allow you to create, update, and/or delete the elements that support the documentation of your Processes (see the figure below).

✍ **This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.**



Each one of the sub-menu commands opens a dialog box with a name that matches the sub-menu command. The **Documentation Data** sub-menu commands include:

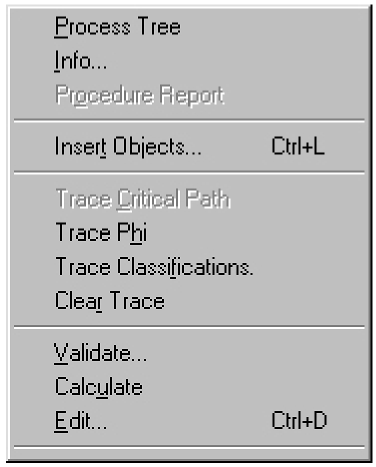
- **Documentation Types**
- **Policies**
- **Business Rules**
- **Functions**

  * This item is also available in the Organization Data sub-menu for the IBM FlowMark and IBM MQ Workflow Editing Modes; these modes do not have the Documentation Data sub-menu.

- **Procedures**
- **Goals**
- **Issues**
- **Policy Tree**
- **Function Tree**
- **Goal Tree**

2.1.4 Process Menu

The **Process** menu contains commands to view the Process Tree or to modify a Process (see the figure below).



The **Process** menu commands are:

- **Process Tree -** Opens the **Process Tree** window, which displays the hierarchical structure of the Processes within the Organization File.

- **Info -** Opens the **Info** dialog box which, displays general information about your selected Diagram, including **Object** Statistics, Schedule, Duration, Variables, and Decisions.

- **Procedure Report –** If the active Process has a single Procedure assigned, then this menu item will be active. This will open a dialog box for you to save the Procedure Report as an RTF file.

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes

- **Insert Objects –** Opens the **Insert Objects** dialog box, which allows you to select Repository items of a particular drawing object (e.g., Tasks) and insert them in the open Process. All the default attributes of the Repository items are automatically included in the object.

  ✍ **You can access this command by typing Ctrl+L.**

- **Trace Critical Path -** Draws all the connectors and borders of objects that lie in the Critical Path with a marked (red) line.

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

  * This item is only available for Generated Cases.

- **Trace Phi -** Draws all the connectors and borders of objects that are connected to a select Phi with a marked (red) line.

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Trace Classifications -** Draws the borders of tasks that are associated with the selected classification item with a marked (red) line.

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Clear Trace -** Removes any marked (red) lines in and replaces them with unmarked (blue) lines.

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Validate -** Produces a list of warnings regarding any item in the Activity Decision Flow Diagram that does not comply with the representation rules of Workflow•BPR.

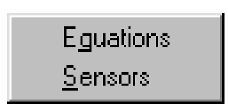
- **Calculate -** Updates the calculations applied to open tables after a Process has been modified.

  * This item is not available in the IBM FlowMark and IBM MQ Workflow Editing Modes; it is available in all other Editing Modes.

- **Edit -** Opens the **Edit** window, which allows for changing activity Durations, Resources, Classifications, and Decision Choice percentages for the active Activity Decision Flow Diagram.

  ✍ **You can access this command by typing Ctrl+D.**

- **Performance Measures -** Opens a sub-menu that allows you to define Performance Measure Equations and Sensors (see the figure below).



  * This item is not available in the Basic Editing Mode; it is available in all other Editing Modes.

  * **Equations –** Opens the **Performance Measure Equation** dialog box.

  * **Sensors –** Opens the **Sensors** dialog box.

- **FlowMark Validation -** Opens the FlowMark Validation Report after checking an extensive set of items for compliance with FlowMark requirements.

  * This item is available only in the IBM FlowMark Editing Mode.

- **MQ Workflow Validation -** Opens the MQ Workflow Validation Report after checking an extensive set of items for compliance with MQ Workflow requirements.

  * This item is available only in the IBM MQ Workflow Editing Mode.

- **DesignFlow –** Opens a sub-menu that allows you to validate Processes for DesignFlow standards and then export and debug files for import into the DesignFlow Viewer (see the figure below).

  * This item is available only in the Line of Visibility Editing Mode.

  * **Validate DesignFlow** – Validates the active Process for adherence to the DesignFlow Methodology.

    - This item is available only for Line of Visibility Editing Activity Decision Flow Diagrams.

  * **Export DesignFlow** – Exports a file for import into the DesignFlow Viewer.

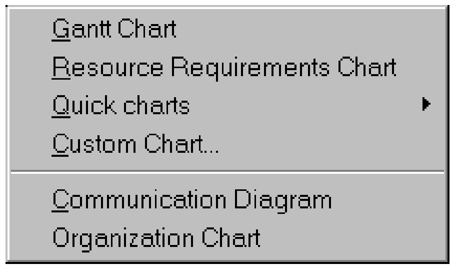
    - This item is available only for Line of Visibility Editing Activity Decision Flow Diagrams.

  * **Debug Exported File** – Debugs the exported DesignFlow Viewer file.

    - This item is available only for Line of Visibility Editing Activity Decision Flow Diagrams.

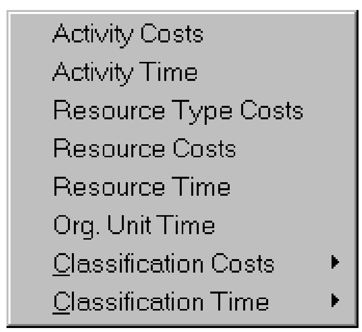
2.1.5 View Menu

The **View** menu contains commands to display Process information in the form of specialized diagrams and charts (see the figure below).



The **View** menu commands are:

- **Gantt Chart -** Opens a Gantt Chart for the active Activity Decision Flow Diagram. *This menu item is only available for a Generated Case.*
- **Resource Requirements Chart -** Creates a diagram showing the resource time scale for a selected resource.
- **Quick Chart -** Creates, in one step, one of a set of common charts (see the figure below).

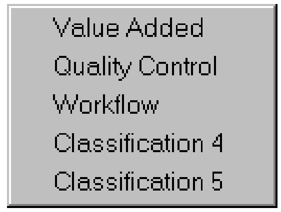


- The **Quick Charts** sub-menu commands of this command are:

  * **Activity Costs** - Automatically displays the default Activity Costs chart.
  * **Activity Time** - Automatically displays the default Activity Time chart.
  * **Resource Type Costs** - Automatically displays the default Resource Type Costs chart.
  * **Resource Costs** - Automatically displays the default Resource Costs chart.
  * **Resource Time** - Automatically displays the default Resource Time chart.

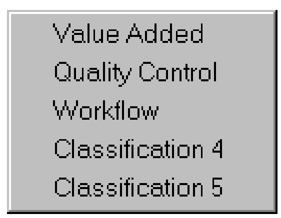
* **Org. Unit Time** - Automatically displays the default Org. Unit Time chart.

* **Classification Costs** - Automatically displays the default charts related to the cost of Tasks, based on their classifications (see the figure below).



* The **Classification Costs** sub-menu automatically displayed commands include:
  - **Value Added** - Default Value-Added Cost chart.
  - **Quality Control** - Default Quality Control Cost chart.
  - **Workflow** - Default Workflow Cost chart.
  - **Classification 4** - Default Classification 4 Cost chart.
  - **Classification 5** - Default Classification 5 Cost chart.

* **Classification Time** - Automatically displays the default charts related to the time of Tasks, based on their classifications (see the figure below).



* The **Classification Time** sub-menu automatically displayed commands include:
  - **Value Added** - Default Value-Added Time chart.
  - **Quality Control** - Default Quality Control Time chart.
  - **Workflow** - Default Workflow Time chart.
  - **Classification 4** - automatically displays the default Classification 4 Time chart.
  - **Classification 5** - automatically displays the default Classification 5 Time chart.

- **Custom Chart -** Creates a custom Chart for a selected Table based on numeric data that you select. *This command is only available when a Table is the active Window.*
- **Communication Diagram -** Opens a diagram that shows the Phi hand-offs between Organization Units from the active Activity Decision Flow Diagram.
- **Organization Chart -** Opens a diagram showing the hierarchical structure of the Organization.
- **Show Sensors** – If Sensors have been defined for the active Process, then icons showing the Sensor type will be displayed next to the object that the Sensor is attached to.

  * This item is not available in the Basic Editing Mode; it is available in all other Editing Modes.

2.1.6 Report Menu

The **Reports** menu groups together all the commands that can be used to view the Weighted Average Analysis of Process Model measurements or to generate a set of useful reengineering reports (see the figure below).

These reports summarize the different types of analysis available for a detailed Process Model. The **Reports** menu commands are:

- **Calculate Averages -** Opens the **Calculate Averages** dialog box. This dialog box allows for the selection of one or more Processes in order to calculate the Weighted Averages of the measurements that are presented in the reports.
- **Times -** Accesses a group of sub-menu commands related to different types of time analysis (see the figure below).

- Each one of the sub-menu commands opens the **Reports** dialog box with the report name that matches the sub-menu command selected. The **Times** sub-menu commands include:

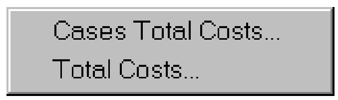
  * **Cases Cycle Times**

  * **Cases Process Times**

  * **Cases Total Times**

- * **Cases Resource Tim**es
- * **Cycle Times**
- * **Process Times**
- * **Total Times**
- * **Resource Times**

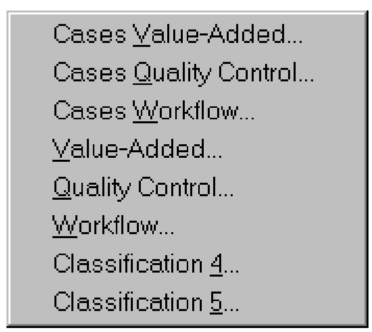
- **Costs -** Accesses a group of sub-menu commands related to different types of cost analysis (see the figure below).



- Each one of the sub-menu commands opens the **Reports** dialog box with the report name that matches the sub-menu command selected. The following are the **Costs** sub-menu commands:

- * **Cases Total Costs**
- * **Total Costs**

- **Classifications -** Accesses a group of sub-menu commands related to different types of classification analysis (see the figure below).

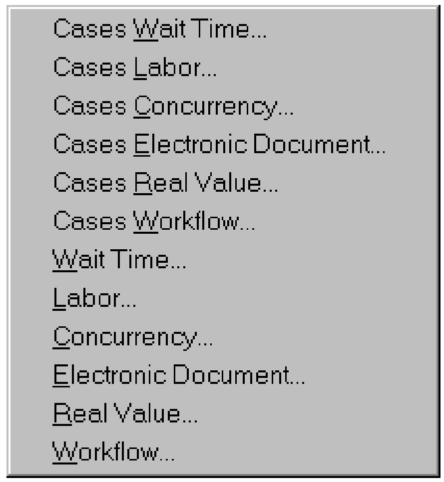


- Each one of the sub-menu commands opens the **Reports** dialog box with the report name that matches the sub-menu command selected. The **Classifications** sub-menu commands include:

- * **Cases Value-Added**
- * **Cases Quality Control**
- * **Cases Workflow**
- * **Value-Added**
- * **Quality Control**

* **Workflow**
* **Classification 4**
* **Classification 5**

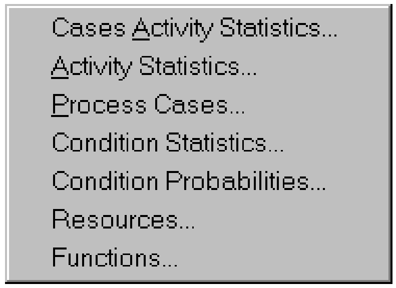
- **Indices -** Accesses a group of sub-menu commands related to different types of index analysis (see the figure below).



- Each one of the sub-menu commands opens the **Reports** dialog box with the report name that matches the sub-menu command selected. The **Indices** sub-menu commands include:

* **Cases Wait Time**
* **Cases Labor**
* **Cases Concurrency**
* **Cases Electronic Document**
* **Cases Real Value**
* **Cases Workflow**
* **Wait Time**
* **Labor**
* **Concurrency**
* **Electronic Document**
* **Real Value**
* **Workflow**

- **General -** Accesses a group of sub-menu commands related to different types of general analysis (see the figure below).



- Each one of the sub-menu commands opens the **Reports** dialog box with the report name that matches the sub-menu command selected. The **General** sub-menu commands are:

  * **Cases Activity Statistics**

  * **Activity Statistics**

  * **Process Cases**

  * **Condition Statistics**

  * **Condition Probabilities**

  * **Resources**

  * **Functions**

- **Analysis Reports -** Opens a sub-menu of report types (see the figure below).

  * **Export** - Opens a dialog box that will export 25 reports to Microsoft Excel 4.0 files for a selected Process. These reports are intended for use in Excel Workbooks that are provided in the Add-Ons Folder installed with Workflow•BPR.

  * **Process Summary** - Opens a dialog box that will create and display the Process Summary report.

  * **Process Comparison -** Opens a dialog box that will create and display the Process Comparison report.

  * **Process Redesign -** Opens a dialog box that will create and display the Process Redesign report.

- **Documentation Reports -** Allows you to select a Process in order to create a Documentation Report that can be viewed in the **WordPad** application. Opens a sub-menu of various types of reports (see the figure below, from the Basic Editing Mode).

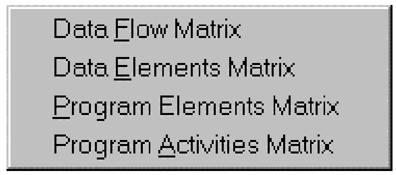
  * **Standard** – The Standard Documentation Report type.

✍ **The following Documentation Report items appear only in the Line of Visibility Editing Mode. In addition, they apply only to Line of Visibility Activity Decision Flow Diagrams and are used in the DesignFlow Methodology.**

  * **Role Definitions** – Creates a report that documents information about the Roles used in the Process.
  * **Application Integration Definition** – Creates a report that documents information about the Applications used in the Process.
  * **Process Participation View –** Creates a report that documents Process Participation View Notes attached to the Tasks of the Process.
  * **System Design View –** Creates a report that documents System Design View Notes attached to the Tasks of the Process.
  * **Activity Matrix –** Creates a report that documents the Input Conditions, Output Conditions, and the Applications of the Tasks within the Process.
  * **Information Flow –** Creates a report that contains three (3) tables that document the Data Fields, Applications, Tasks, and Phis within the Process.
  * **All –** Creates all of the above reports (except the Standard Report).

- **Procedure Report -** Opens a dialog box that will allow you to select a Procedure in order to create a Procedure Report.

- **Data Matrices -** Accesses a group of sub-menu commands related to different types of data relationship matrices (see the figure below).



  * This item is not available in the Basic Editing Mode; it is available in all other Editing Modes.

  * **Data Flow Matrix**

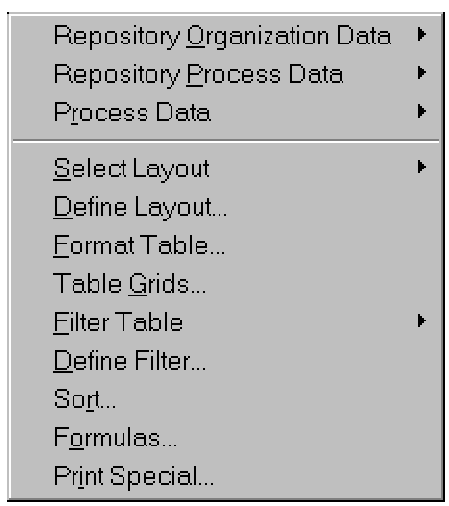
  * **Data Elements Matrix**

  * **Program Elements Matrix**

  * **Program Activities Matrix**

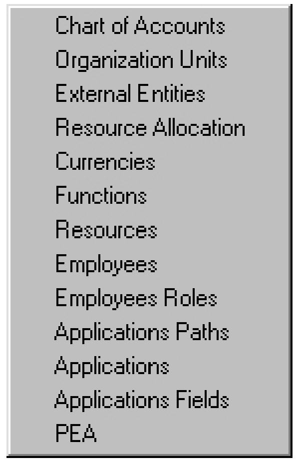
2.1.7 Table Menu

Once a Table or Gantt Chart is opened, Workflow•BPR activates the Table Menu options (see the figure below).



The Table Menu contains commands to format and filter your Table information. These commands vary, depending upon the data category selected. The **Table** Menu commands are:

- **Repository Organization Data -** Accesses sub-menu commands that will open tables displaying the Organization Data contained in the Repository (see the figure below).



- Each one of the sub-menu commands opens a table with the same name as the command. The **Repository Organization Data** sub-menu commands include:

  * **Chart of Accounts**
  * **Organizational Units**
  * **External Entities**
  * **Resource Allocation**
  * **Currencies**
  * **Functions**
  * **Resources**
  * **Employees**
  * **Employee Roles**
  * **Application Paths**
  * **Applications**
  * **Application Fields**
  * **PEA**

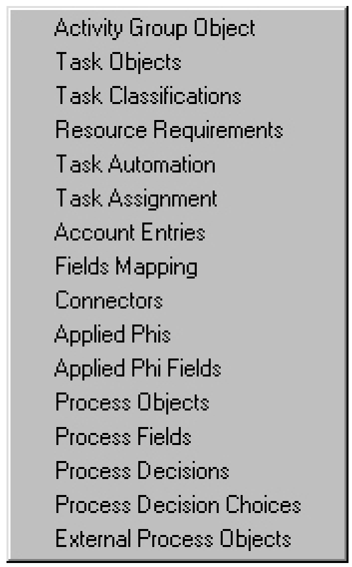
- **Repository Process Data -** Accesses sub-menu commands that will open tables that display the Process data contained in the Repository (see the figure below).

- Each one of the sub-menu commands opens a table with the same name as the command. The **Repository Process Data** sub-menu commands include:

  * **Tasks**
  * **Activity Group**
  * **External Processes**
  * **Phi Types**
  * **Phis**
  * **Phi Fields**
  * **Phi States**
  * **Media**
  * **Organization Processes**
  * **Process Statistics**
  * **Classifications**
  * **Delay Reasons**
  * **Authorization**

* **Data Fields**
* **Resource Fields**
* **Decisions**
* **Decision Choices**

- **Process Data -** Accesses sub-menu commands that will open tables displaying the Process data contained in the active Activity Decision Flow Diagram (see the figure below).



- Each one of the sub-menu commands opens a Table with the same name as the command. The **Repository Organization Data** sub-menu commands include:

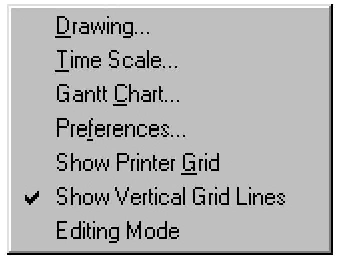
* **Activity Group Object**
* **Task Objects**
* **Task Classifications**
* **Resource Requirements**
* **Task Automation**
* **Task Assignment**
* **Account Entries**
* **Fields Mapping**
* **Connectors**

  * **Applied Phis**
  * **Applied Phi Fields**
  * **Process Objects**
  * **Process Fields**
  * **Process Decisions**
  * **Process Decision Choices**
  * **External Process Objects**

- **Select Layout -** Selects a predefined or user-defined layout for a table. *This menu item is only active when a table is open.*
- **Define Layout -** Defines the basic layout and attributes of a table, such as title and column headings, column field names, and background color selection. *This menu item is only active when a table is open.*
- **Format Table -** Formats the body text of a table. *This menu item is only active when a table is open.*
- **Table Grids -** Formats the color and style of the row and column grid lines. *This menu item is only active when a table is open.*
- **Filter Table -** Selects a predefined or user-defined filter for a table. *This menu item is only active when a table is open.*
- **Define Filter -** Defines the way Workflow•BPR filters row information in the selected Table. *This menu item is only active when a table is open.*
- **Sort -** Sorts the Table information in either ascending or descending order. *This menu item is only active when a table is open.*
- **Formulas -** Creates formulas that can be added as numeric fields in the layout of a table. *This menu item is only active when a table is open.*
- **Print Special -** Prints a report based on a selected Table. The numeric columns of the Table can be sub-totaled and totaled.

2.1.8 Format Menu

The **Format** menu contains commands to customize the way your diagrams and views are displayed (see the figure below).

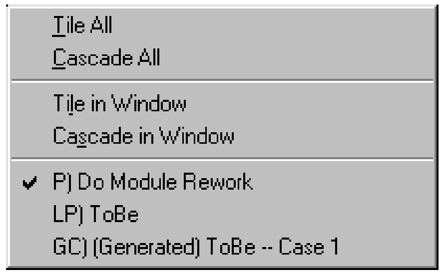


The **Format** menu commands are:

- **Drawing -** Defines display options for Activity Decision Flow Diagrams. *You can access this command by double-clicking an empty spot on the ADF toolbar.*
- **Time Scale -** Defines new time scales for definitions containing schedules or for an associated Gantt Chart or Resource Requirements Chart. *You can access this command by double-clicking on the time scale of a Gantt Chart or a Resource Requirements Chart.*
- **Gantt Chart -** Selects, creates, and saves Gantt Chart options.
- **Preferences -** Selects, creates, and saves preferences regarding the user interface of Workflow•BPR.
- **Show Printer Grid -** Displays a dashed line marking where page breaks will occur during printing of an Activity Decision Flow Diagram when checked.
- **Show Vertical Grid Lines -** Displays the vertical grid lines of an Activity Decision Flow Diagram when checked.
- **Editing Mode -** Allows you to select an Editing Mode. These Editing Modes will configure the menus, dialog boxes, and preferences to aid process modeling for specific purposes, such as general process modeling or modeling for workflow integration.

2.1.9 Window Menu

The **Window** Menu contains commands to manage the windows within Workflow•BPR (see the figure below).



In addition, a list of all currently opened Activity Decision Flow Diagram windows can be accessed. These commands are similar to Window Menu commands in Microsoft Windows. The **Window** menu commands are:

- **Tile All -** Tiles all Workflow•BPR windows on your screen.
- **Cascade All -** Cascades all Workflow•BPR windows on your screen.
- **Tile in Window -** Tiles subordinate Workflow•BPR windows inside a selected Process File window. For example, you can tile an Activity Decision Flow Diagram window and one of its tables inside the dominant Process File window.
- **Cascade in Window -** Cascades subordinate Workflow•BPR windows inside a selected Process File window. For example, you can cascade an Activity Decision Flow Diagram window and one of its tables inside the dominant Process File window.
- **P: <Name> -** Opens the Standard Process File window for the selected <Name>.
- **LP: <Name> -** Opens the Line of Visibility Process File window for the selected <Name>.
- **GC: <Name> -** Opens the Generated Case File window for the selected <Name>.

2.1.10 Help Menu

The **Help** Menu provides quick, useful information whenever you have questions about using Workflow•BPR (see the figure below).

The following are the **Help** Menu commands:

- **Help Index -** To see a listing of the available Help topics, including both a glossary and a chapter-by-chapter content listing.
- **About Workflow•BPR -** To determine which version of Workflow•BPR you are currently running.

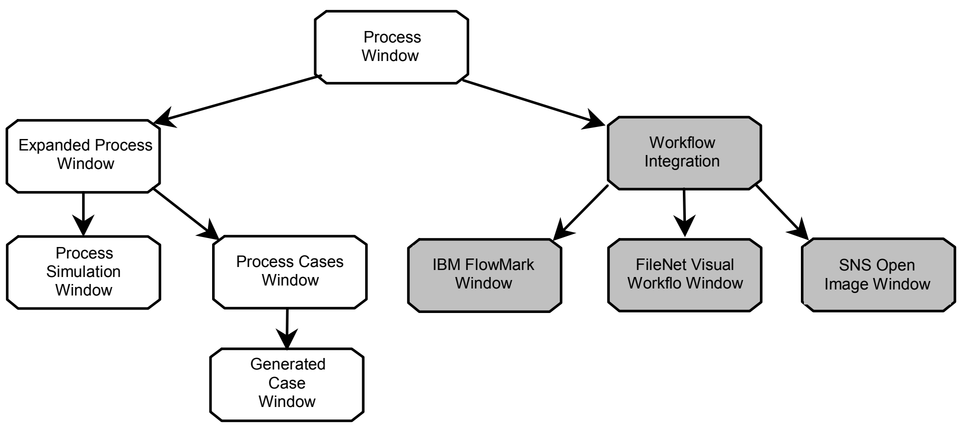
2.2 Touring Workflow•BPR Windows

Workflow•BPR is a highly visual modeling tool. It provides you six key types of windows, each with a focused purpose:

- Process

  * **The Process can be one of the following two (2) type: Standard or Line of Visibility.**

- Expanded Process
- Process Cases
- Generated Case
- Process Simulation
- Workflow Integration (Included with Workflow•BPR Version 3.4: Builder)



The figure above displays a road map for the types of windows in Workflow•BPR. The road map shows how to get from one window to another. The boxes that are gray represent windows that are included only with Workflow•BPR Version 3.4: Builder. The white boxes represent windows that are part of the basic Workflow•BPR Version 3.4: Modeler.

2.2.1 Process Window

In Workflow•BPR, you always start with the Process Window where you model your Process as an Activity Decision Flow Diagram (ADF). The ADF is the main subordinate window of the Process Window and contains objects that represent elements of the Process such as Tasks, Decisions, and other (nested) Processes. There are two (2) forms of ADFs, Standard and Line of Visibility. Line of Visibility Processes are a new feature in Workflow•BPR and they allow you to create graphical “swim lanes” that show all the work of a particular Role or Organization Unit.

Each Decision that occurs in a Process has Choices. Each Choice creates a unique path through the Process—only one path can be performed at a time. A path continues through activities and then divides into more paths as additional Decisions occur in the Process. Each unique path through the Process is called a Case. Each individual Case can be separated and placed in its own file that is called a Generated Case File (refer to the section entitled "Generated Case Window" on page 45).

Refer to Chapter 2 of the Modeling Guide or the Workflow•BPR Tutorial for more information on the Process Window.

2.2.2 Expanded Process Window

Once your Process is modeled, the next step is to move to the Expanded Process window where you can view your Process expanded down to the lowest possible level. This is useful when the Process contains a number of nested Processes with further sub-structure. This Window serves as a middle ground from which you can go to one of two other windows—Process Cases Window or Process Simulation Window.

Refer to Chapter 1 of the Analysis Guide or the Workflow•BPR Tutorial for more information on the Expanded Process Window.

2.2.3 Process Cases Window

The Process Cases Window allows for viewing all or some of the possible ways to perform your Process. A single way of performing a Process is called a Case. In addition, you can also view the Choices for each Decision that determined the variations of the Process. In this Window, a Generated Case File can be created for any Case you select. A Generated Case is opened just like any Process File.

Refer to Chapter 1 of the Analysis Guide or the Workflow•BPR Tutorial for more information on the Process Cases Window.

2.2.4 Generated Case Window

The Generated Case Window is created from the Process Cases window. Like the Process File Window, the Generated Case File Window has an Activity Decision Flow Diagram Window as its main subordinate window. However, the Activity Decision Flow Diagram for a Generated Case Window does not have the same functionality as the Activity Decision Flow Diagram Window for a Process File. The activities that are shown in a Generated Case are part of a single path through the Process from which it was generated. Tasks, Phis, External Entities, and External Processes are displayed in a Generated Case, but *Decisions, Choices, (nested) Processes, and Go To Objects are not displayed.* In this Window you can perform any scheduling-related analysis such as scheduled cycle time and Gantt Charts. In addition, all the analysis that applies to a Process, *with the exception of Weighted Average analysis*, can be performed, such as Cost and Resource analysis.

Refer to Chapter 1 of the Analysis Guide or the Workflow•BPR Tutorial for more information on the Generated Case Window.

2.2.5 Process Simulation Window

The Process Simulation Window allows for the simulation of your Process and examining its performance against the changing inputs over time and resource allocation among the Organization Units participating in the Process. Outputs of the Simulation include Resource utilization and bottleneck identification.

Refer to Chapter 3 of the Analysis Guide or the Workflow•BPR Tutorial for more information on the Process Simulation Window.

2.2.6 Workflow Integration Windows

The Workflow Integration windows allow you to extract the automated portions of your process and transform them into formats compatible with the Workflow Applications supported by Workflow•BPR. Currently, Workflow•BPR supports SNS Open Image, IBM FlowMark, FileNet Visual WorkFlo, and the Workflow Management Coalition standards. These features are only available with Workflow•BPR Version 3.4: Builder.

Refer to the Integration with Workflow Applications manual for more information on the Workflow Integration windows.

Part 2 Mini-Tutorial

As a result of performing this Mini-Tutorial, you will be able to:

- Open an Organization File
- Create and model a new Process
- Calculate and view your Process Cost Analysis Report
- Simulate your Process

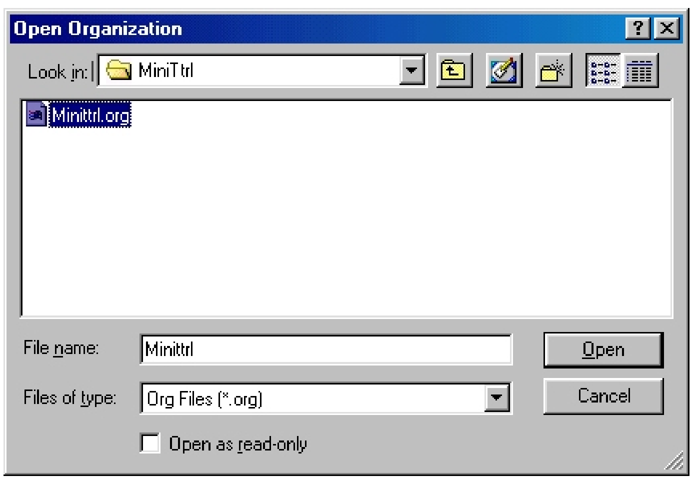
The hands-on, mini-tutorial exercise requires approximately 20 minutes. To run this *mini-tutorial*, open the Organization File *c:\wfbpr\Samples\MiniTtrl\MiniTtrl.org* and then continue with the instructions that follow in this document. To gain a more comprehensive understanding of the tool, we recommended you use the Workflow•BPR *full* tutorial. The full tutorial exercise requires from 4 to 6 hours to complete.

1. Open the Tutorial Organization File

To utilize Workflow•BPR, it is necessary to create an Organization File. If an Organization File has already been created, or if you want to open one of the sample organizations that Workflow•BPR provides, you can select which Organization File to open. The Organization File will contain the Process Models that you develop and the Repository of data that supports the Process Models.

To open the Tutorial Organization File:

1. Open Workflow•BPR (refer to the section entitled "Opening Workflow•BPR" on page 7 of "Getting Started").
2. 🖰 Choose **Open Organization** from the **File** menu, or 🖰 select the **Open an Existing Organization** option from the **Organization File** dialog box that appears when Workflow•BPR is initially opened. The **Open Organization** dialog box appears (see the figure below).



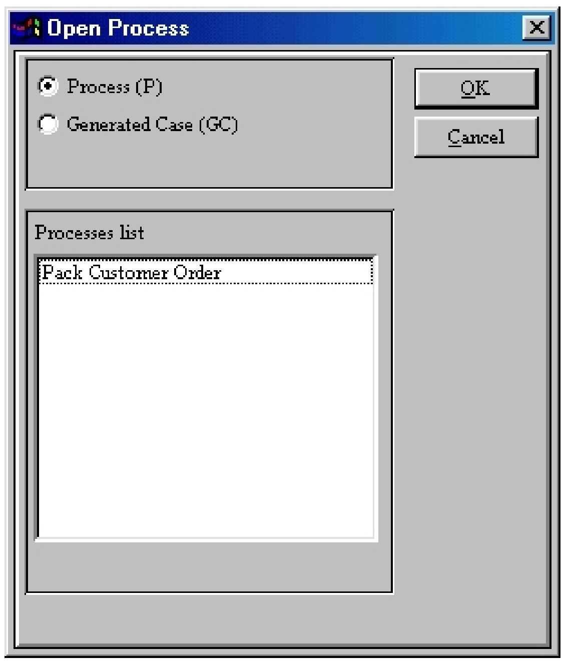
3. 🖰 Select the "MiniTtrl" folder that was installed in the Samples sub-folder of the WFBPR folder from the **Directories** tree list.
4. 🖰 Select "Minittrl.org" in the **File Name** list box.
5. 🖰 Click **OK** or ⌨ press **Enter**. The Mini-Tutorial Organization File is opened.

2. Create a New Process File

In Workflow•BPR, a Process is represented by a connected diagram—an Activity Decision Flow Diagram. The model of the Process is created in the Activity Decision Flow Diagram window that accompanies the Process File that you create or open. An Organization Folder can contain many Process files.

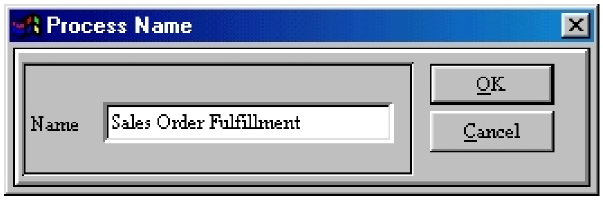
To create a new Process File:

1. When the "Minittrl" Organization File is opened, the **Open Process** dialog box appears (see the figure below). There is one Process File listed in the dialog box: "Pack Customer Order." *Do not open this Process File at this time.* Click **Cancel**.



2. Choose **New Process** from the **File** menu or type **Ctrl+N**. An untitled Process File is created and opened. The main subordinate Window of a Process File is an Activity Decision Flow Diagram.

3. Select **Save Process** from the **File** menu, type **Ctrl+S**, or choose **Save Process As** from the **Process** menu. The **Process Name** dialog box appears (see the figure below).



4. Type “Sales Order Fulfillment” for your new Process in the **Name** text box.

5. Click **OK** or press **Enter**. The name of the Process File in the title bar will be updated.

3. Create a Process Model

You will now build a small Process in an Activity Decision Flow Diagram Window. To model a Process element (e.g., a Task) in an Activity Decision Flow Diagram, it is necessary to use the appropriate tool from the ADF Toolbar in order to insert the Object in the diagram; then the Objects are connected in a left-to-right order. To define the name and data attributes of an Object, double-click on the Object to bring up the appropriate dialog box. Defining the Object can be done by selecting data that has been stored in the Repository or by directly entering new data in the dialog box for that Object.

Creating the "Sales Order Fulfillment" Process

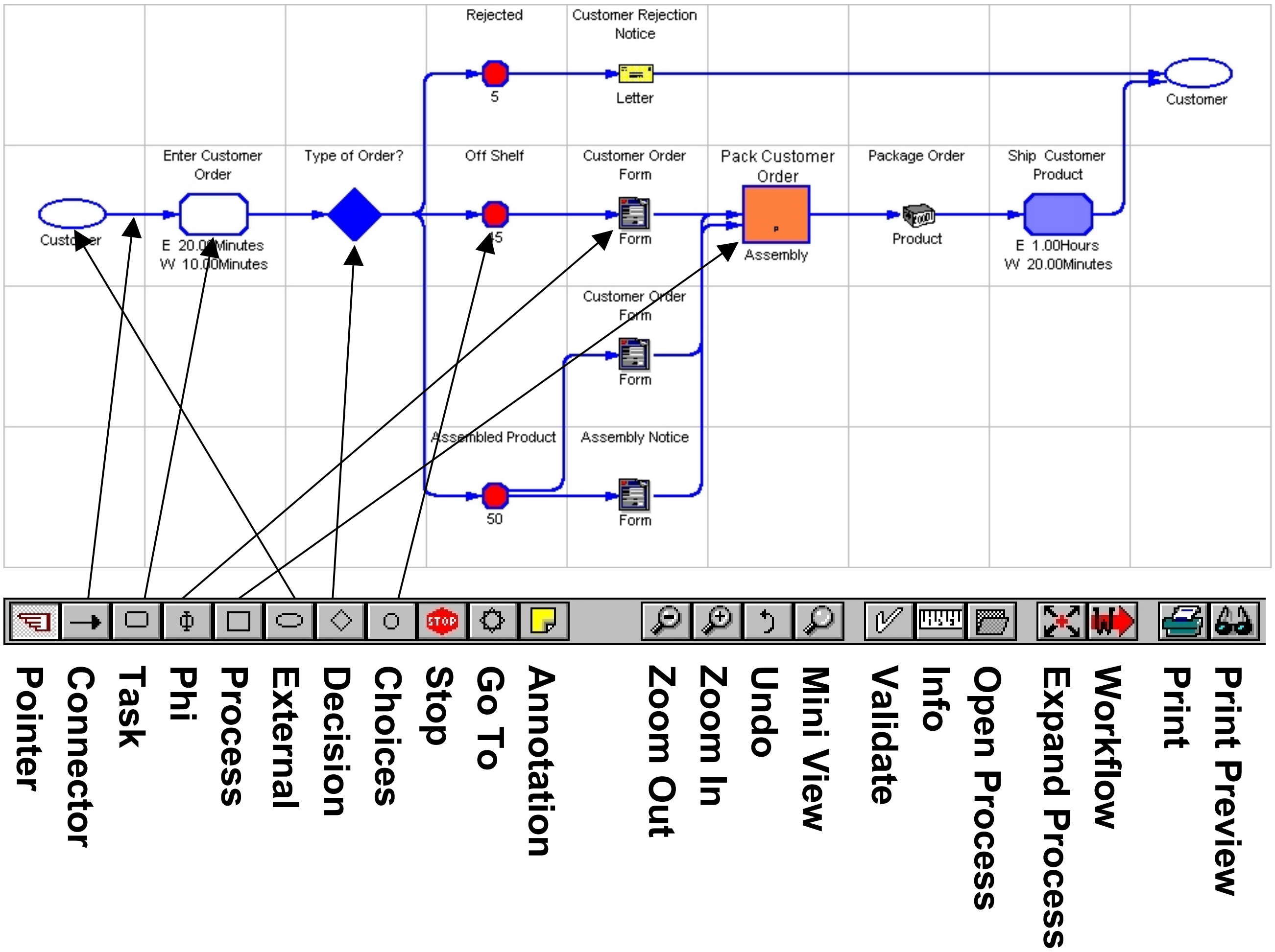
The information required to create the Process Model is presented in the following sections. First, in the section entitled "The "Sales Order Fulfillment" Process Data," there is a set of tables that displays the names and data attributes of the objects you will be creating. Some of the data is already stored in the Repository so all that is necessary to define the object is to select the data. These data are marked with an asterisk (*) in the tables. Other data has not been stored in the Repository; therefore, you will have to gain access through the dialog boxes.

To model the "Sales Order Fulfillment" Process:

1. Use the **Activity Decision Flow Diagram** window **ADF Toolbar** to insert Objects in the same pattern as displayed on Page 51.
2. Connect the Objects in a left-to-right order as demonstrated in the diagram on Page 51.
3. Double-click on the Objects to open the **Object** dialog box so that you can define the Objects.
4. When you are done, choose **Save Process** from the **File** menu or type **Ctrl+S** to save your Process.

There are three sections (Drawing Objects in Activity Decision Flow Diagrams, Connecting Objects in Activity Decision Flow Diagrams, and Defining Diagram Objects in Activity Decision Flow Diagrams) that follow the data tables and describe, in more detail, the actions for drawing, defining, and connecting diagram objects. Refer to these sections or to Chapter 2 of the Modeling Guide for more information.

3.1 The “Sales Order Fulfillment” Process Model



3.2 The "Sales Order Fulfillment" Process Data

Use the tables in the following sections to define the objects in the diagram that you are creating. Items that are marked with an asterisk (*) are already stored in the Repository of the Organization File; these items can be selected through the combo boxes in the dialog boxes of the objects. The items that are not marked will have to be typed directly into the combo boxes in the dialog boxes of the objects. These items will then be automatically stored in the Repository.

3.2.1 Task Data

Task Name	Org. Unit	Role	Function	Elapsed Dur.	Working Dur.
Enter Customer Order	Order Processing	Order Processing Clerk	Customer Services	20 minutes	10 minutes
*Ship Customer Product	*Shipping	*Shipping Clerk	*Manufacturing	1 hour	20 minutes

3.2.2 Process Object Data

Process Name	Org. Unit	Role	Function
*Pack Customer Order	*Assembly	*Assembler	*Manufacturing

3.2.3 Role Data

Role Name	Standard Costs	Currency
Order Processing Clerk	500 /Week	*U.S. Dollar

3.2.4 External Entity Data

External Entity Name
Customer

3.2.5 Decision and Choice Data

Decision Name	Type	Choice Name	Percentage
Type of Order?	Multiple	Assembled Product	50
Type of Order?	Multiple	Off Shelf	45
Type of Order?	Multiple	Rejected	5

3.2.6 Phi Data

Phi Name	Phi Type	Category
*Assembly Notice	*Form	*Electronic Document
*Customer Order Form	*Form	*Electronic Document
Customer Rejection Notice	Letter	*Paper Document
*Package Order	*Product	*Other

3.3 Drawing Objects in Activity Decision Flow Diagrams

In Workflow•BPR, the Process is represented by a connected diagram. *All the objects in a diagram must be connected.*

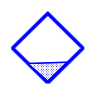
To insert an object in an Activity Decision Flow Diagram:

1. Select a drawing tool from the **ADF Toolbar**. The cursor will change shape to reflect the selected Object.
2. Click inside a free grid cell to insert the Object inside that cell. *Only one Object can be inserted in a cell.*

3.4 Connecting Objects in Activity Decision Flow Diagrams

To connect two objects in an Activity Decision Flow Diagram:

1. Click on the **Connector** tool button from the **ADF Toolbar**.
2. Click and drag *to the right* from the *center* of one diagram object to the *center* of another (see the figure below).



* If you are connecting the **No** Choice of a Binary Decision to another object, then click and drag *to the right* from an *area near the bottom point of the diamond* of the Decision object to the *center* of the other object (see the figure on the right).

A connector can also be defined so that it contains information about the transport medium used to carry a Phi from one Task to the next.

3.5 Defining Diagram Objects in Activity Decision Flow Diagrams

After an Object is drawn, it is necessary to name the Object and to assign attributes or information so that the Object can be identified within the context of your Process. In Workflow•BPR, this is accomplished by *defining* the Object. When an Object such as a Task is defined, you connect it to data entries from the Workflow•BPR Repository. The Repository is a storehouse of previously defined data items that can be copied into a diagram object in order to define that object.

There are two methods to associate data information to that object: by making selections from lists of previously created items that are stored in the Repository, or by entering new information in the edit boxes that will be copied into the Repository. The two methods are accomplished through the combo boxes that are in the object dialog boxes. When a data combo box has no value, you can either type in new information to create a new item, or you can select from a list of the current items. If a previously defined item is selected and typed over, or if the name is edited in any way, you will be prompted with a dialog box asking whether to update the originally selected item or add a new item to your current list.

To define an Object in an Activity Decision Flow Diagram:

1. Select the Pointer tool , either by clicking the **Pointer** tool button on the **ADF Toolbar,** or by clicking the right mouse button on the diagram.
2. Double-click on an Object. The dialog box for that Object appears.
3. Add or update the Name and other attributes of the Object (refer to Chapters 3 through 8 of the Modeling Guide for the details of defining each type of diagram Object).

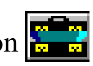
4. Expand Your Process and Browse its Cases

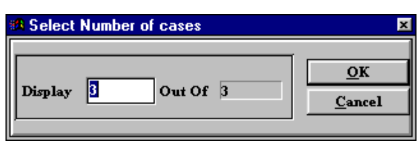
As a result of reviewing the completed mini-process, you will discover that it is possible to perform the Process in three ways. This is true because the Process includes two Decisions—and a Decision causes a fork in the road or path of activities. *Only one path of activities can be followed when a Process is performed.* The Choice that is selected when a Decision occurs determines which fork or path of activities is to be performed. Each Choice has a probability of occurrence, which means that the path taken by the Choice will have that probability. A path continues through activities and then divides into more paths as additional Decisions occur in the Process. Workflow•BPR provides a unique facility of separating and analyzing the individual paths that comprise the complexity of a Process. The individual paths are called **Cases**.

4.1 Opening the Process Cases Window

To open the **Process Cases Window**, it is necessary to first go through an intermediate window. This intermediate window, the Expanded Process Window, displays an expanded version of your Process. If the Process contains Process Objects which represent other lower-level Processes, all the activities in the lower-level Processes will be brought up to the top level.

To open the Process Cases Window:

1. Click on the **Expand Process** tool button  from the **ADF Toolbar**. The **Expanded Process** Window appears.
2. Click on the **Process Cases** tool button  from the toolbar in the **Expanded Process** window. The **Select Number of Cases** dialog box appears. This dialog box will prompt you to determine whether to display all the cases or a subset of them (the default is to display all cases).
3. Click **OK** to choose all cases. The **Process Cases** Window appears (see the figure below).



4.2 Reviewing Your Cases

The Process Cases Window is tiled into two sections, with the upper section displaying the Case View. This is a passive view, in which you can move and rearrange icons, but *you can not edit contents or perform analyses.* The lower part of the Process Cases window displays the Cases Table; the first column displays the case number and the second column displays the percent probability that each Case will occur—*the Cases are sorted from highest to lowest probability*. The remaining columns display the Decisions in the column headings and the Choices that were selected for each Case in the rows. Not all Decisions are applicable for each Case, thus, there may be no listing of a Decision Choice for some Cases. To view a Case, click on its row in the table and the process that is displayed in the Case View will change to reflect the selected Case. You can also create a Generated Case File for an individual Case. By opening a Generated Case File, further analysis of the Case, such as scheduling, can be performed.

5. Calculate and View Your Process Cost Analysis Report

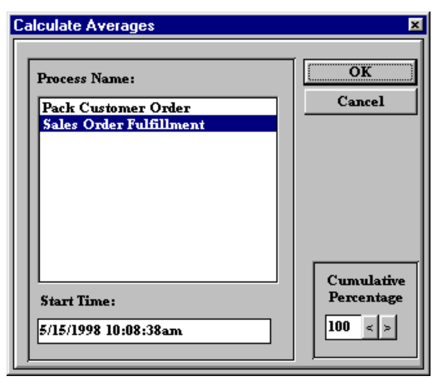
After the model of your Process has been completed, you can view the average cost of the Process and the cost of each possible way to perform the Process (the Cases). Your Process Model consists of three Cases. The following sections describe how to calculate and view the Process Cost Analysis.

5.1 Calculating the Weighted Averages of Your Process

The time and cost of each of the three possible ways to perform the "Sales Order Fulfillment" Process (the three Cases) can be calculated. Because each Case has a different probability of occurrence, the time and cost of each Case will have a different impact on the overall time and cost of the Process. Therefore, the time and cost of the three Cases do not have the same weight when calculating the average time and cost of the Process. Workflow•BPR will calculate a Weighted Average for the time and cost measurements.

To calculate the Weighted Averages of the "Sales Order Fulfillment" Process:

1. Choose **Calculate Averages** from the **Report** Menu. The **Calculate Averages** dialog box appears, with "Sales Order Fulfillment" highlighted in the **Process Name** list (see the figure below).



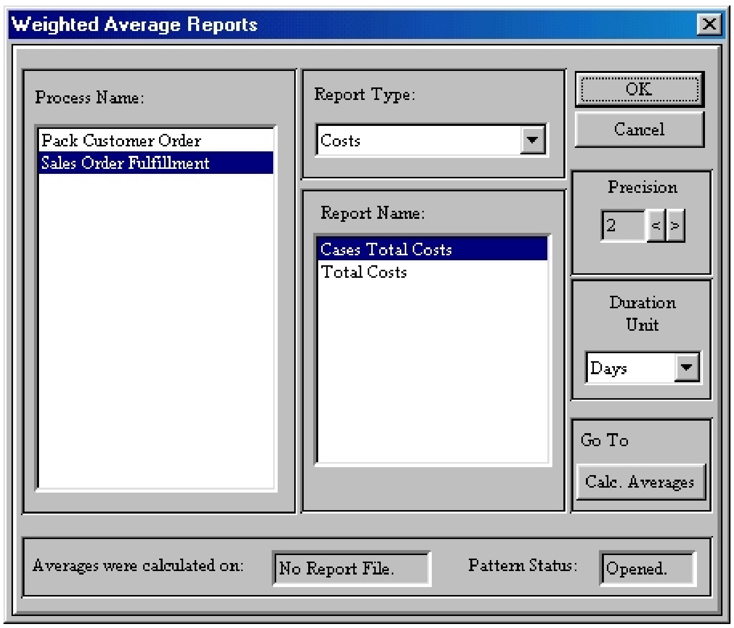
2. Click **OK** or press **Enter**. The **Calc. Average of Sales Order Fulfillment** dialog box appears, displaying a thermometer showing the progress as the Cases are added to the calculation. The calculations are complete when the dialog box disappears.

5.2 Reviewing Your Process Costs Report

After the averages for the “Sales Order Fulfillment" Process have been calculated, the Reports that summarize the time, costs, and other metrics are available for viewing. There are two basic types of Reports; one type displays the Weighted Average of a particular metric (e.g., costs), while the other type shows the value of the metric for each Case of the Process and then displays the Weighted Average of the metric. An example of opening one of the many available Reports follows.

To open the Cases Total Costs Report:

1. Choose **Costs** from the **Report** Menu. A sub-menu appears.
2. Choose **Cases Total Costs** from the **Report Type** sub-menu. The **Open Report** dialog box appears (see the figure below).



* In the **Open Report** dialog box the “Sales Order Fulfillment” Process is highlighted in the **Process Name** list and the “Cases Total Costs” Report is highlighted in the **Report Name** list.

3. Click **OK** or press **Enter**. The **Cases Total Costs** Report appears.

6. Simulate Your Process

A Simulation of a Process is one of the two major methods that Workflow•BPR provides for analyzing your Process. The other way to analyze a Process is to use a Weighted Average Analysis, which has already been described. This section provides a brief glimpse of Simulation. Refer to Chapter 3 in the Analysis Guide for a more thorough review of Simulation.

The measurements provided by a Simulation analysis that reflect a short period of time and a specific throughput are:

- Short-term resource (staffing) requirements (e.g., the Christmas rush).
- Bottleneck analysis - Identifies Tasks in the Process that have the largest number of items in the queue.

6.1 Moving to the Process Simulation Window

To move to the Process Simulation Window:

1. 🖰 Click on the **Expand Process** tool button  from the **ADF Toolbar**. The **Expanded Process** Window appears.
2. 🖰 Click on the **Simulation** tool button  from the toolbar in the **Expanded Process** window. The **Process Simulation** window appears.

6.2 Simulating the Process

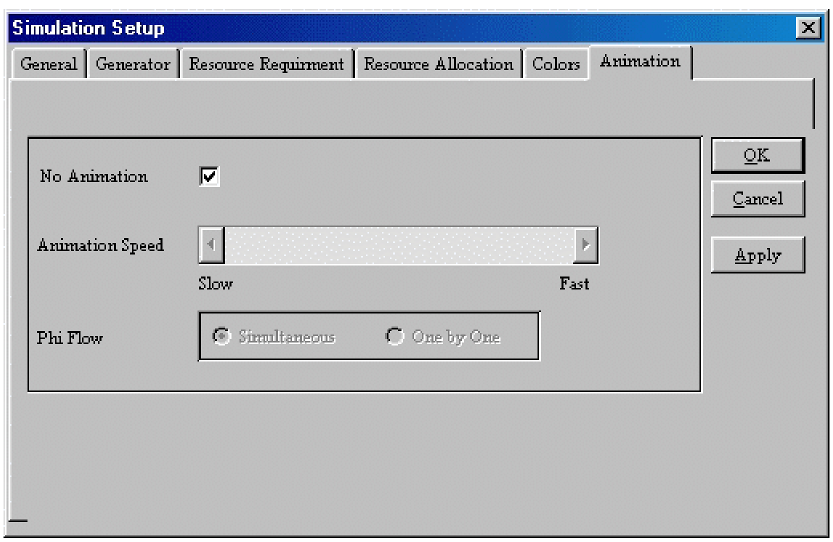
In this section we will have you run a Simulation after adjusting the Simulation setup so that animation of the Simulation will occur. There are many other settings you can adjust prior to running a Simulation, however, this exercise is just a basic introduction to Simulation. Refer to Chapter 3 in the Analysis Guide for a more thorough review of Simulation.

6.2.1 Turning on the Simulation Animation

The default setting for Simulation is to turn the animation off and run the Simulation more quickly. For the purposes of this Mini-Tutorial, however, turn the animation on.

To set the animation of a Simulation:

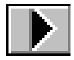
1. Click on the **Simulation Setup** tool button from the **Process Simulation** window toolbar. The Simulation Setup dialog box appears (see the figure below).



2. Click on the **No Animation** check box to deselect the No Animation setting.
3. Adjust the speed of the animation by moving the control bar of the **Animation Speed** scroll bar.
4. Click **OK** or press **Enter.**

6.2.2 Running the Simulation

To run a Simulation:

1. Click on the **Run** tool button  from the **Process Simulation** window toolbar. The "Sales Order Fulfillment" Process will be simulated.

During the Simulation, jobs will be started that show the Phis moving between Tasks. Queues will be filled with the Phis, Resources will drop down to the Tasks to process the Phis, and the Simulation result tables will be updated dynamically.

6.2.3 Reviewing Simulation Analysis

Simulation analysis can be viewed immediately after a Simulation run. The four types of tables generated by the Simulation are:

- **Job Table** - Includes cycle duration, process duration, and total costs.
- **Resource (Res.) Table** - Includes utilization, busy duration, idle time, and total costs.
- **Activity (Act.) Table -** Includes total, working, and blocked duration, the number of times the activities were completed, and total costs.
- **Queue Table** - Includes maximum queue and queue duration.

The Simulation is based on random number generation and each random number seed (refer to the **General** tab of the **Simulation Setup** dialog box) will initiate a new set of random numbers. The data will not be the same each time a Simulation is performed because the Choices for the Decisions are chosen randomly (based on their probability) and the Working Durations of the Tasks are chosen randomly (based on their mean and standard deviation).

7. Summary

This *mini*-tutorial is intended as a brief introduction to Workflow•BPR. By following the instructions in this tutorial, you have an opportunity to gain a better understanding of the basic components of Workflow•BPR including:

- Process Modeling—Working with Activity Decision Flow Diagrams
- Weighted Average Analysis of a Process
- Simulation and Simulation Outputs

Should you prefer additional experience with Workflow•BPR, the *full* tutorial, which requires from 4 to 6 hours to complete, covers the basic methodology for Workflow•BPR including: developing a larger Process Model, importing Process Models, developing a To-Be Process Model using reengineering techniques, and the comparing of As-Is and To-Be Process Models.

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