MSB Online Mapping Program

# **Gathering Business Process Workflow Documentation**

A workflow diagram depicts a series of actions that define a job or how work should be done. A workflow diagram visualizes how tasks will flow between resources, whether they're machines or people and what conditions allow the sequence to move forward. This workflow can be illustrated or described with a [flowchart](https://www.smartdraw.com/flowchart/) using abstract boxes and diamonds or it can be created with depictions of real-life objects using graphics and pictures that represent customers, forms, finance, products, shipping, payments, and more. Documenting business processes and workflows is an integral part of a successful Web GIS project. The more analysts understand and are familiar with the business process of the customer, the higher the likelihood of customer satisfaction with the solution.

**Gathering Information**

The customer will be asked in the Help Desk ticket questions if their current business process is documented (the business process they are making a new request for). If a documented workflow already exists, the analyst will need to follow up with the customer to confirm they understand the documentation. If the customer’s business process is not currently documented this will need to be done with the customer prior to going through the Customer and Internal Questionnaires.

**Business Process Workflow(s) Exists**

1. Review the existing documentation, draft any questions or follow-up clarity that is needed from the customer.
2. Review the [Business Workflow Follow-Up Questionnaire](https://intranet.matsugov.us/projectmanagement/OnlineMa162/_layouts/15/WopiFrame.aspx?sourcedoc=/projectmanagement/OnlineMa162/Documents/Design/Web%20GIS%20Gathering%20Business%20Process%20Workflow%20Questionnaire.dotx&action=default) questions.
3. Schedule a meeting with the customer to review their business process documentation.
   1. If the business process is pretty straightforward this follow-up could be included as an agenda item on the requirements gathering meeting.
   2. If significant modification of the documentation is needed additional meetings may need to be scheduled to review changes. Discuss with the customer who should make the changes and the timeline for completing them.
4. Consider shadowing the customer through their business process if a better understanding is needed.

**How-To Document New Business Process Workflow(s)**

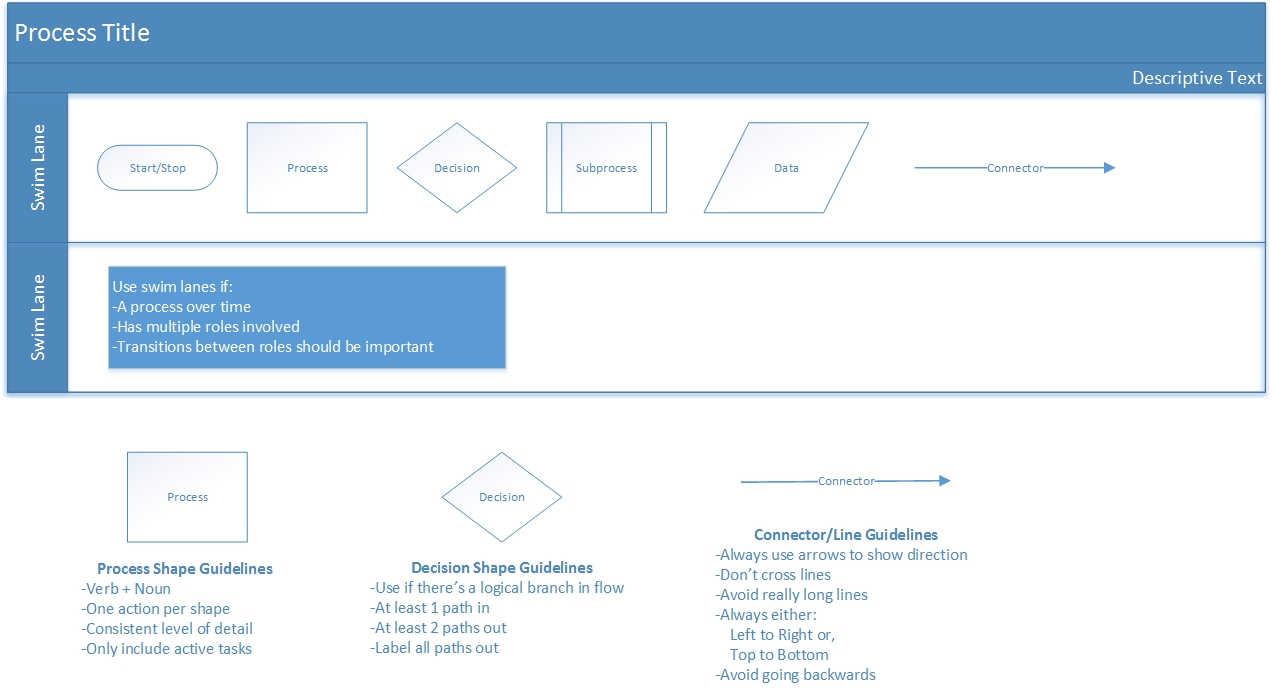
1. Send an email to the customer describing the importance of documenting their business process for success of the project. And that you will assist with this as a first step in the project. Request they be prepared to describe and demonstrate the business process at the first meeting.
2. Schedule the customer meeting.
3. Prep supplies for sketching workflows such as a whiteboard or large sketch pad.
4. Customer Meeting
   1. Ask the customer to describe the business process, take notes and sketch what you hear.
   2. Run through the [Business Workflow Design Questionnaire](https://intranet.matsugov.us/projectmanagement/OnlineMa162/_layouts/15/WopiFrame.aspx?sourcedoc=/projectmanagement/OnlineMa162/Documents/Design/Web%20GIS%20Gathering%20Business%20Process%20Workflow%20Questionnaire.dotx&action=default) questions, as applicable.
   3. If more clarity is needed, discuss feasibility of shadowing the customer to get a first-hand experience of the business process.
   4. Discuss who and when can draft the new documentation.
   5. Identify the next meeting date for reviewing a draft.
   6. Take a photo of sketches, if done on a whiteboard.
5. Continue iterating through drafts and meetings until the business process is fully understood and documented.

**Workflow Document Tips**

* Workflows can be as simple or as complex as your business processes require.
* Define the start point of the process or system and add a symbol to the page to represent it. In a flowchart this symbol is a rounded rectangle, but with a workflow you can use graphics such as a customer or employee entering a request or initiating an action.
* For each step in the workflow add a symbol and connect it to the previous shape. Arrows show the direction of workflow. Continue this until the entire workflow has been illustrated. In some cases, it may loop back to the starting point.

[Basic Elements of a Workflow Diagram](https://intranet.matsugov.us/projectmanagement/OnlineMa162/Documents/Design/WorkflowDiagramTemplate.vstx) – a Visio template has been created as a starting point, it includes shape definitions and tips.

**Business Process Workflow Example**



**Next Step:** begin gathering project specific requirements (Customer and Internal Questionnaires) including completing pre-analysis and scheduling a requirements gathering meeting with the customer.