

# White Paper

## Benefits of an Online Process Map Portal

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Peter Harrad is the regional manager for North America, based in Orbus' Washington DC office. He has worked with modeling standards and techniques throughout his 20 years in IT, in a career that has covered software development, solutions architecture and international consulting.

Peter's particular areas of interest are opportunities arising from interdisciplinary touchpoints, how to balance practicality and rigor when modeling, and the importance of viewpoints in addressing different stakeholder perspectives.

**Organizations can have many different reasons for documenting their business processes – optimization, implementation of systems, tracking KPIs...the list goes on. At Orbus, we've identified more than a dozen key reasons for such activities amongst our customers. However, drawing up processes cannot happen in isolation – the questions remains, how do you get these processes in front of the people who have to use them and review them?**

Many process mapping tools offer some kind of web interface; either the ability to save an individual process map to a portable file such as a web page or a PDF, or more powerfully, the ability to make the process maps available via an online portal. In this paper we examine the reasons why organizations find this capability so useful, and consider the attributes of a good process portal.



Figure 1 – An example of a Process Portal Homepage

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# Benefits of an Online Process Map Portal

## Quick Access to Processes

The first and most obvious benefit to having a central portal for processes is access.

### Ability to find processes quickly

I worked with one organization where we joked that finding out how to do something was like re-enacting the film “The Da Vinci Code” – or possibly “National Treasure”. When trying to find out how to do anything, you would go ask one person, who would send you to another person, who would think that a third person might know...and so on. Time consuming, and even in an accessible organization, when you have to ask around it becomes an overhead on time, and therefore, on the bottom line.

### Access to the correct process map

Another common problem faced by organizations is ensuring that the consumers of processes are using the right version of a process. Processes change due to regulatory changes or new systems...there are many different reasons why a business process might change. Without an identified location – “this is the official place to go” – there will always be a risk that the proper process is not followed.

## Collective Knowledge is a Company's Greatest Asset

A company's greatest asset is its employees and the collective knowledge they share. Therefore, organizations should make sure that their employees have the knowledge they need by getting them the right information in the right context. A central Portal where employees have access to up-to-date process maps and information is a key element of any knowledge management system.

Furthermore, when employees can see their process maps online, together with their colleagues' diagrams, it encourages continuous improvement. They get pride in the diagrams they have created and quicker take the ownership to improve the diagrams and processes. Moreover, they will see how their diagrams fit in a larger end-to-end value chain, which will give them a better understanding of the company's operating model and how they contribute to its profits. It is crucial for employees to have an idea of the end-to-end value chain in order to improve the work they are doing.

## Improving the Quality of Processes by Engaging Stakeholders

There is a third aspect to the benefits delivered by a process portal– that of engaging the stakeholders to continuously improve the processes. Process stakeholders often fall into three categories:

- **Approver** – these are the managerial and executive staff who may never have to execute the processes themselves, but who have the power to approve them for use (or not)
- **Subject Matter Expert** - these local experts may be interviewed while defining the process, and may be the ones that are the approvers
- **End User** – these are the people who will be using the process maps; they will often be concerned that a process is being defined that is unrealistic

An online process portal provides benefits while dealing with all three constituencies.

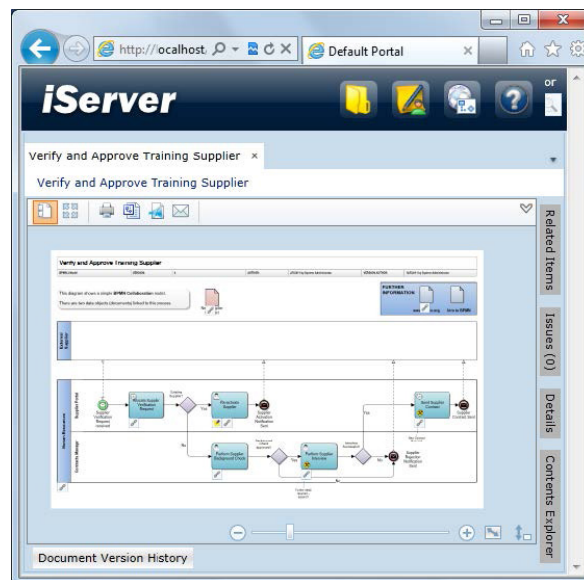


Figure 2 – A Process Portal is an excellent way to share proposed processes and obtain buy-in

### Visibility of proposals

First of all, when stakeholders have a clearly defined location they can visit to inspect proposed new process maps, they are then able to provide their feedback without having to ask for access. This leads to an increase in buy-in and more rapid acceptance of process maps.

### Validation of process maps

Proposing changes to processes visibly via a portal means that those in a position to correct them are much better able to offer feedback and catch errors. This in turn reduces the need for rework as errors and needs for amendments are caught much earlier in the process.

## No need to have access to or knowledge of process mapping tools

Process stakeholders often have no access to process mapping tools or the tool knowledge required to access the information they are looking for. Process Portals are therefore the perfect way to share processes and engage all stakeholders.

## Qualities Needed in a Process Portal

Given that we have identified the benefits accruing from an online process portal, it is useful to consider what this implies for the features that such a process portal should provide. A process portal should include the following:

### Dynamic View of the Processes

A Process Portal should provide a dynamic view of the processes. It is important that stakeholders always have up to date process information. As an essential part of a knowledge management system a Process Portal should provide a place where stakeholders know they can find the correct and up-to-date information they are looking for.

### Search Capabilities

We have talked about the importance that a process portal plays in enabling stakeholders to find and view processes. So a process portal absolutely needs a way for users to find processes quickly and easily. Ideally, process portal users should be able to search on a variety of criteria to locate the specific process or processes that they need.

### Browsing

While many of those using a process portal will want the ability to rapidly locate one specific process, others may be using the process portal to educate themselves – “how do we do X?”? So as well as possessing a powerful search capability, process portals should allow you to easily browse processes in order to explore the way that an organization operates.

Ideally process information can be browsed on two ways. The first one is via a folder structure as in the repository. The second one is via landing pages. These pages can be used to direct different stakeholder groups, from the CIO to Business Analysts, to the information which is relevant to them.



The screenshot shows a process portal interface. On the left is a tree view of folders, and on the right is a list of processes. The folders include 'U. Reference Models', 'E. Case Study', '1. Business Strategy', '2. Current State Models', '2.1 Business Function', '2.2 Business Process', 'Cross Industry', and a series of numbered folders from 1.0 to 10.0. The process list on the right has the following items:

Process Name	Model Type	Date
6 Develop and Manage Human Capital	BPA - Process Decomposition	7/6/2012
Verify and Approve Training Supplier	BPMN 2 Model	7/6/2012
6.3.5 Develop and train employees - Painpoints	BPA - Process Decomposition	7/6/2012
6.3.5 Develop and train employees - Applications	BPA - Process Decomposition	7/6/2012
6.3.5 Develop and train employees - KPIs	BPA - Process Decomposition	6/7/2011
Schedule Employee Training Event	BPMN 2 Model	5/28/2012
6.3.5 Develop and Train Employees	BPA - Process Decomposition	7/5/2012

Figure 3 – Users should be able to browse processes to gain a general understanding of the operations of an organization

## Access Profiles

While the purpose of a process portal is to share processes, at the same time not every user of a process portal should necessarily have access to every process map. A process portal should provide the capability to selectively restrict access to process maps to different roles.

## Feedback Capabilities

As discussed earlier, a major benefit that an online process portal brings is that it gives stakeholders the opportunity to provide feedback. So a portal that supports the submission of feedback directly via the portal has immediate benefits – it increases the likelihood that feedback will be given and responded to. This capability should be available from shapes and documents in the portal and should then generate an email to a 'feedback' inbox, or directly into an issues tracking system.

## Hyperlinking

The reality is that processes do not exist in a vacuum – they reference documents, data and systems that support the process. So a process portal should provide the ability to navigate via links between objects. At the same time, some information will always reside in systems that are external to the process repository. So the process portal should support the ability to hyperlink to other web portals, enabling process consumers to follow links to other systems.

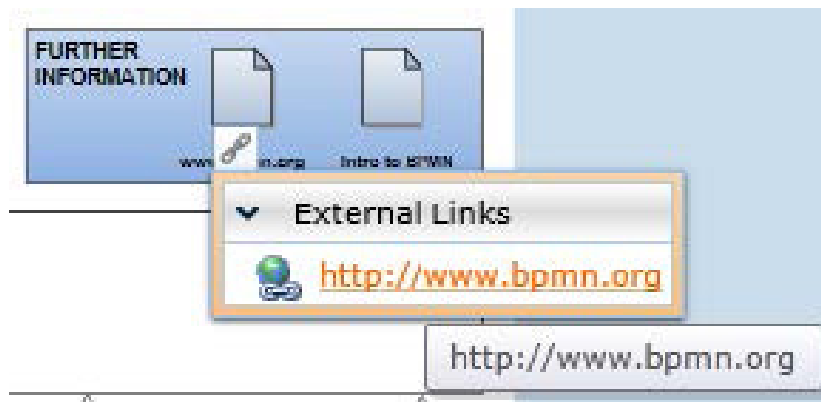


Figure 4 – Hyperlinking is a vital part of any Process Portal's functionality

## Wide Browser Support

People have different browser preferences. So, a process portal that cannot support the common browsers of Internet Explorer, Firefox, Chrome and Safari is naturally going to be less accepted than one that can. Given that obtaining buy-in to any process initiative is one of the most important (and difficult) tasks that the modeling team face, wide browser support is a vital aspect of any process portal.

## Conclusion

The most critical part of any process modeling project is to get the buy-in and acceptance from the business stakeholders. A process portal is an excellent way to share information with these stakeholders, uncover objections and resistance and finally share the processes when they enter production.

In this paper we have considered some of the key benefits that an online process map portal can provide for an organization – and how these benefits should influence what to look for when choosing such a portal.

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