# ProcessGene™

Business Process Realization

# Training Session

## April 2012

# ProcessGene™ Training

## Duration

- 3-5 hours

## Goals

- After the training you will understand how to operate the ProcessGene™ Suite's basic functions and become familiar with its benefits

## Audience

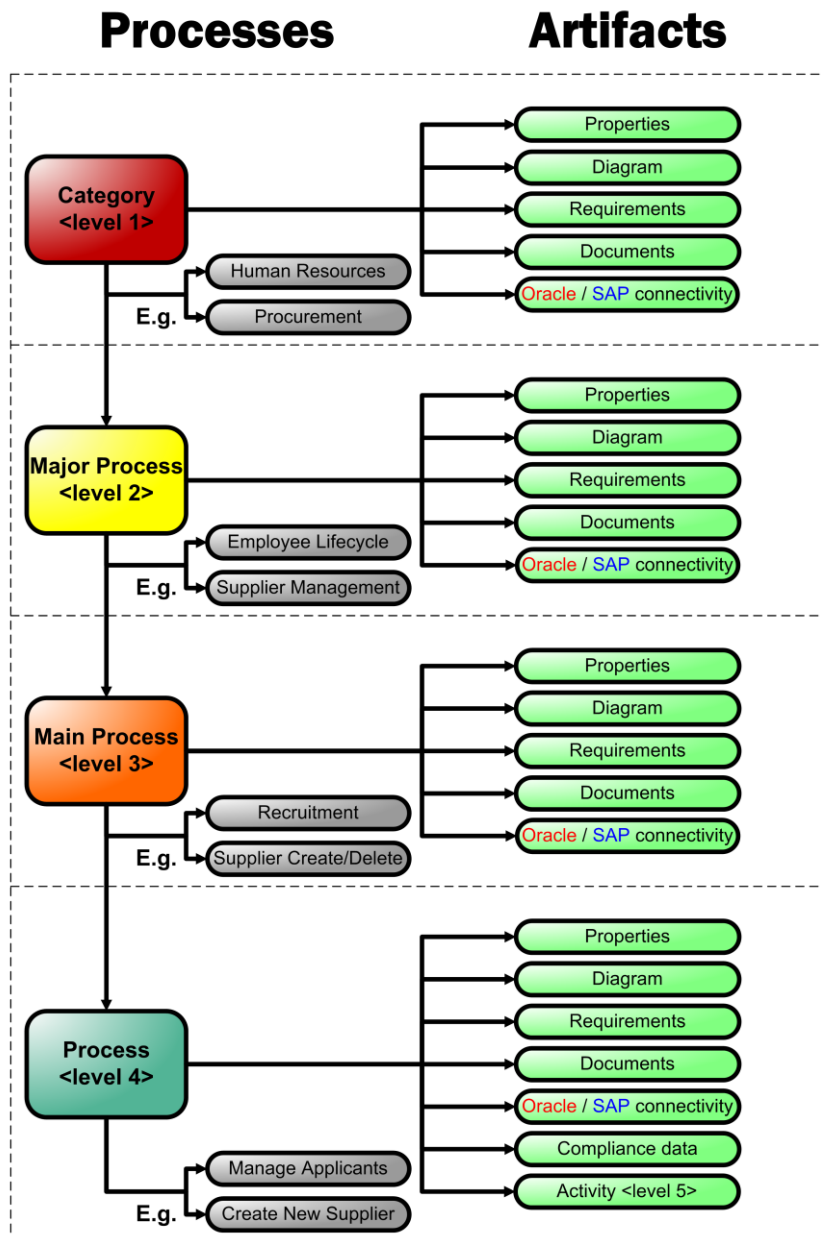- Solution Architects, Business Analysts, Process Owners

## Agenda

| Duration | Content |
|---|---|
| 1 hour and 30 minutes | **Setup** (computer setup and changing initial password) |
| | **Introduction to ProcessGene™ Suite** |
| | **Functionality Review – Part 1** (add\edit\delete Processes) |
| | **Functionality Review – Part 2** (user requirements – add\edit\delete and methodology, documents, diagrams, ERP connectivity) |
| 15 minutes | **Break** |
| 1 hour and 30 minutes | **Application utilities** (search, report wizard, model usage log) |
| | **Hands on work with the ProcessGene application based on Risks and Controls loaded in the system** |
| 15 minutes | **Closure** – Q&A, summary |

## After training

- Upon completing the ProcessGene training session, you will be certified to operate the ProcessGene™ Suite according to your permission level (Administrator, Modeler, Model User / Audit User)

# Introduction to Hierarchal Modeling

## Processes                    Artifacts

**Category <level 1>**
- E.g.
  - Human Resources
  - Procurement
- Properties
- Diagram
- Requirements
- Documents
- Oracle / SAP connectivity

**Major Process <level 2>**
- E.g.
  - Employee Lifecycle
  - Supplier Management
- Properties
- Diagram
- Requirements
- Documents
- Oracle / SAP connectivity

**Main Process <level 3>**
- E.g.
  - Recruitment
  - Supplier Create/Delete
- Properties
- Diagram
- Requirements
- Documents
- Oracle / SAP connectivity

**Process <level 4>**
- E.g.
  - Manage Applicants
  - Create New Supplier
- Properties
- Diagram
- Requirements
- Documents
- Oracle / SAP connectivity
- Compliance data
- Activity <level 5>

# WE DO MULTI-ORG

## Providing Process Flexibility to Multi-Subsidiary Organizations

# Training Exercises

## Exercise #1 – add a Category (level 1)

a) Specifications:

- You can choose one of the following subjects:

    a) Preparing the best cup of coffee

    b) Making the trainee's favorite pasta

    c) Changing a car's flat tire

    d) Loosing/Winning 1M$

    e) Becoming a movie star

    f) Invent one of your own

- Put your name at the beginning of the Category name. For example: "Mike – Arranging a wedding" (Under this Category you will build three Major processes (level 2) later)

Note: Don't forget to save you changes by clicking the 💾 (save) button

## Exercise #2 – add a Major process (level 2)

a) Add a Major process that is related to your Category

b) Specifications:

- Put your name at the beginning of the Major process name and a serial number. For example: "Mike 1 – Finding a wedding hall"

Note: Don't forget to save you changes by clicking the 💾 (save) button

## Exercise #3 – add additional Major processes (level 2)

a) Add two additional Major processes that are related to your Category

b) Specifications:

- Put your name at the beginning of the Major process names. For example: "Mike 2 – Finding a DJ" and "Mike 3 – Finding a wedding outfit"

- Complete as many fields as possible. For example: department, owner role, etc.

## Exercise #4 – change the sequence of Major processes (level 2)

Specifications:

- Move the first Major process to the end of the list

Note: Don't forget to save you changes by clicking the 💾 (save) button

## Exercise #5 – edit a Major process (level 2)

Specifications:
- Edit your third Major process
- change its **Department** field

Note: Don't forget to save your changes by clicking the 💾 (save) button

## Exercise #6 – transfer a Major process to the Recycle Category

a) Transfer your first Major process to the Recycle Category

b) Specifications:
- To move your Major process to the Recycle Category, edit the Major process and on the 'Category' field select "Recycle" Category

## Exercise #7 – add documents to your Major process (level 2)

a) Add a document to your second Major process

Specifications:
- using the "Upload" option, and then selecting a file

b) Add a second document to your second Major process

Specifications:
- using the "Link" option, and then selecting your favorite website link

Note: Don't forget to save you changes by clicking the 💾 (save) button

## Exercise #8 – add Change Requests to your Major process (level 2)

Add two Change Requests to your third Major process

Specifications:
- Put your name at the beginning of the Change Request's name.
  For example: "Mike 3 – Shoes should be comfortable"
- Select different values for each of the two Changes Requests

## Exercise #9 – duplicate a Change Request to another Major process (level 2)

Specifications:
- Duplicate your second Change Request to the instructor's first Major process –  "Mike 1 – Finding a wedding Hall"

## Exercise #10 – change the sequence of Change Requests

Specifications:

- Change the sequence of your two Change Requests by making the first one the last one

## Exercise #11 – Relate an Oracle Screen/SAP transaction to a Major process

Specifications:

- Relate one Oracle screen/ SAP transaction to your 2$^{nd}$ Major process

## Exercise #12 – draw a diagram

Draw a diagram that describes one of the following processes:

- Preparing the best cup of coffee
- Making the trainee's favorite pasta
- Changing a car's flat tire
- Loosing/Winning 1M$
- Becoming a movie star

Note:

- Create a new flow diagram to your second Major process
- Draw the diagram based on the diagram template, described below
- Link the proceeding Major process  to one of your Processes (For example, link it to "Mike 1 – Finding a wedding hall")
- Link the following Major process to the second Major process of your neighbor
- Associate an activity owner for each Activity

**A sample of Process Flow Diagram:**
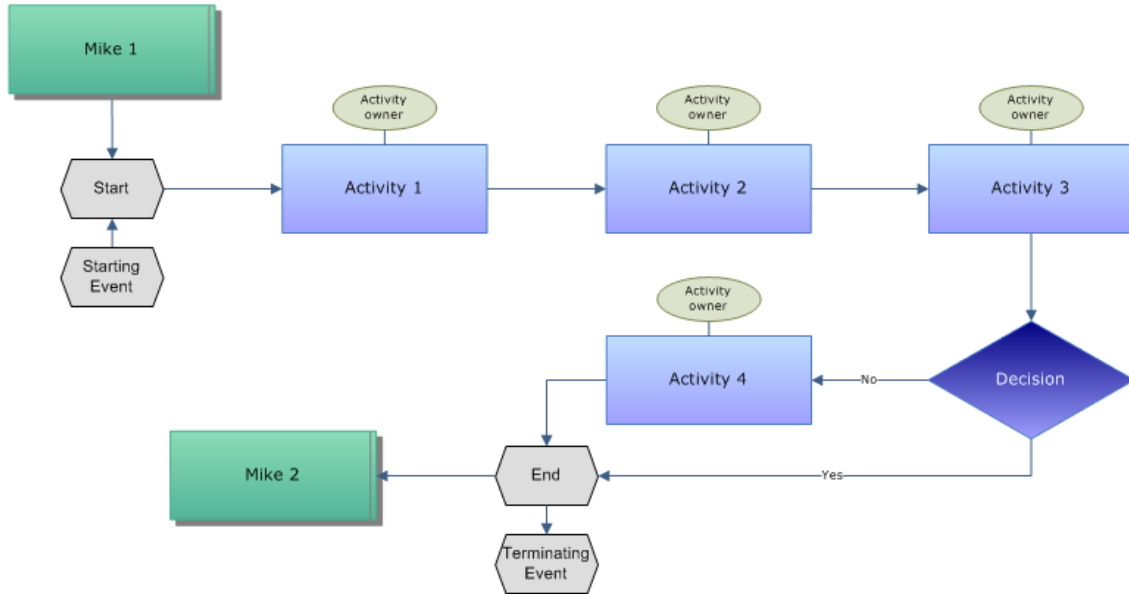


## Exercise #13 – add a Role to the Role list

Specifications:

- Compose the Role's name out of your name and then the Role's title. For example: "Mike – Wedding coordinator"

## Exercise #14 – search for Category (level 1) & Major processes (level 2)

Specifications:

- Search for all the Processes (levels 1 and 2) that you created

## Exercise #15 – search by "Created by"

Specifications:

- Search for all the Major processes that you have created, by marking the "Created by" constraint and writing you name (as appears in the system)

## Exercise #16 – save your search preference

Specifications:

- Save the search form that you created at exercise 15
- Delete the search form that you have just saved

## Exercise #17 – generate a report

Specifications:

- Step #1: choose the "Categories (Levels 1-5)"
- Step #2: choose the Category you have created today
- Step #3:

  a) Select all the checkboxes for the Category and Major process level and present all of its fields

  b) For each Model object that you choose to present, add the constraint to the "Created by" field and fill it with your name

## Exercise #18 – generate a log result list

Specifications:

- Present only records of your user (Hint: check the checkbox next to your user name in the user list)

## Exercise #19 – login to a local organization

Specifications:

- Login to the local training organization
- Verify that each of your global Processes exist in the local Model

## Exercise #20 – review the Multi-Organization functionality

Specifications:

a) Login to the local model (not the Global Baseline)

b) Create a new Category: put your name and at the beginning of the Category name. For example: "Mike – arranging pool parties"

c) Login to the global baseline

d) Switch into the comparison mode and choose to compare with the local organization you have just created the Category there

e) Go to the Model root (level 0) related Categories list

f) Locate the local Category you created (local flag only)

g) Add the local Category to the global model

h) Verify the category is in the Global Baseline (see flags)

Dear trainee,

Thank you for participating in ProcessGene training session.

Please complete the following questionnaire so that we make our future training sessions even better.

**Facilities. Were the facilities (computers, classroom, etc.) in working order?**

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Not at all | | | | Yes, at all times |

Comments:

_____

_____

**Training sequence.  Was the order of training, including the sequence of exercises, appropriate and easy to understand?**

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Not at all | | | | Yes, at all times |

Comments:

_____

_____

**Agenda.  Was there sufficient time for each section of training?**

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Not at all | | | | Yes, at all times |

Comments:

_____

_____

## Results. Do you now feel confident using the ProcessGene Suite?

1          2          3          4          5
Not at all                             Yes, at all times

Comments:

_____

_____

## Instructors. Did the instructors provide the training in a clear and straightforward manner? Did they provide you with an appropriate level of assistance?

1          2          3          4          5
Not at all                             Yes, at all times

Comments:

_____

_____

## General impression. Would you recommend this training session to others? Please make suggestions for improvement.

1          2          3          4          5
Not at all                             Yes, at all times

Comments:

_____

_____

Thank you for your participation,

The ProcessGene Team