Process Design Worksheet

The Business Process

1. Name the process that you'd like to automate.

2. Describe the end goal of this process.

3. In a few sentences, describe what exactly is happening during this process.

4. List the people involved in the process, their department, job role and role within the process.

Name	Job Role	Department	Role Within the Process

5. List the process steps and the documents involved, pieces of information required and systems involved.

Process Step	Documents Involved	Information Needed to Perform Task	Systems Involved

6. Each stage is a group of related process steps. For example, the Job Interview stage of a Hiring process can include tasks such as: schedule the interview, interview the candidate and analyze interview results.

   Group the process steps and tasks into stages. Determine what triggers the start of the next stage.

Process Stage	Steps Included in Stage	Trigger to Move on to Next Stage

7. Draw out your process. What steps can be eliminated or condensed? What steps can be replaced by Laserfiche or some other system?

Electronic Form

8. List the pieces of information that you need to obtain through the electronic form.

9. Translate the information that you listed above into questions to include on the form.

Question	Field Type (drop-down, checkbox, free response, etc.)	Is this field required?	Can this information be obtained from another system?

Reports

10. List the people who need to see reports and what information they're interested in seeing.

Role	Information that they would like to see	How they want to see this information
End Users		
Managers		
Executives		

11. Think about the types of reports that you can create from this information.

- Aggregate reports show what happened, when it happened and who did it. Data in an aggregate report can be displayed on a graph or plot.
- Operational reports show how quickly things are happening. They are useful for displaying process efficiency and resource allocation.

Role	Operational Report Type	Aggregate Report Type