Process Map Formatting - Current State

Helpful Tips

- IA considers end-to-end process mapping as a singular process with each step detailed as to whether the process step is automated or manual. We use a process-centric approach to guide all levels of the organization through an understanding and assessment of the impacts strategic decisions have on business processes.
- Avoid referring to people's names in process boxes. Instead, use Actor groups, such as Payroll Processor, Benefits Admin, etc.
- Text boxes should be left-justified and in a smaller font, such as 6 pt. Also, use a gray shade to help identify them.
- Process maps should be end-to-end. This makes it easier to print or share as a single PDF versus breaking down each process map into different documents. *[Note: Printing large process maps is best done on a plotter; therefore, we recommend sharing a PDF]*

Titles should be put in a Block Text box and also centered

At the end of the process name include the state:
- *Current State*
- *Future State*
- *Ideal State*
- *High Level Overview*

Definitions:
PA = Payroll Analyst
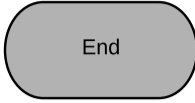PM = Payroll Manager
HP = Hungry Person

Definition boxes or notes boxes should be left-justified and in a gray shade

Start
End

The Terminator shape is used for the start and end of the process.

- *Start = Green*
- *End = Gray*
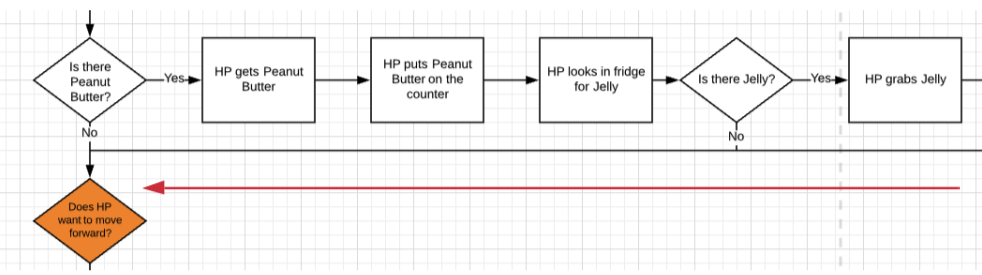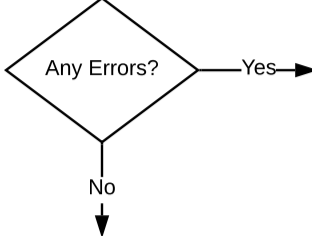
Decision Point

Use the Decision shape when there is a question or deviation in the process.

For example, a file that is loaded may or may not have errors, so it is necessary to map two different paths - one for if there were errors (how are they resolved), and one if there were no errors (move to the next step in the process).

"Yes" and "No" should always be written out versus "Y" or "N."

Helpful Tips:

- *The "Yes" line will always be first when you connect the Decision Point shape to another shape.*
- *If the text is too large for the shape, attempt to adjust the size of the font to keep shapes similar size.*
- *If the next shape is too far away, you can move the "Yes" or "No" text to be closer to the Decision Point*

Any Errors? — Yes →
No ↓

Sometimes you have multiple decision points that need to be connected to a singular process box.

Draw your lines to connect them to the box in question so that they blend and go to the same arrow.

*The red arrow shows the connection in the example.*
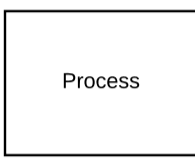
Process

Process boxes should reflect the Actor who is performing the task.

You can abbreviate the Actor but ensure you notate what the abbreviation means in a definitions text box.

For example, if an Actor has to print a report, this is a step in the process. If the Actor has to log into the system this is a step in the process.

PP1 / PP1 PP2 / PP3
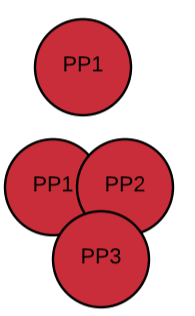
Pain Points should be colored red and placed at the upper right hand of the shape in question.
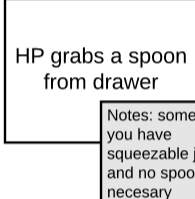
Label the item with a PP (Pain Point) and number of the PP.

If there are multiple pain points for the process step, layer the Pain Points together but in a way they can be seen.

Pain Points:
PP1: Write your Pain Point here
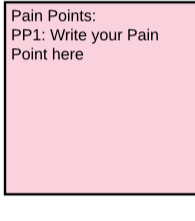
Pain Points should be catalogued in a Block Text box with descriptions for all of the Pain Points collected in the process map.
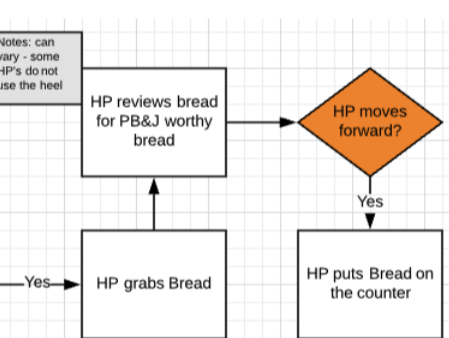
Pain Point Text Box = Pink

HP grabs a spoon from drawer
Notes: sometimes you have squeezable jelly and no spoon is necessary

Block text shapes can be added towards the lower left of the process box if you have something to quickly clarify or add context

If during process mapping, you encounter a scenario where there is a "hanging" step (e.g., you need to bring in a new group to process map) color the item in Orange so that you can easily see where you need to pick up.
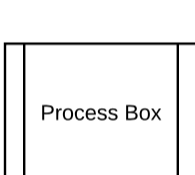
Process Box

The Predfined Process shape is used to refer to a defined process.

Example: When you are toasting your bread, the toaster is doing its process. So you could use this box to be Toaster Process. Another example, you send a trouble ticket over to a third party provider. The box could be used for something such as "Third Party Provider Ticket Process."
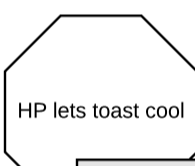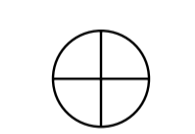
HP lets toast cool
Notes: this takes 3 minutes max

*This Stop Sign shape is used to show when there is a significant lag time for a process.*

For example: this is to show that none of the process can be really moved forward because the person is waiting for the bread to cool.

The Or shape is used to show an alternate path or to show multiple processes that are happening at the same time.

For example, in the PB&J sample process, individuals who weigh their peanut buter and jelly can be represented on an alternate path.
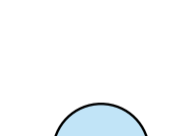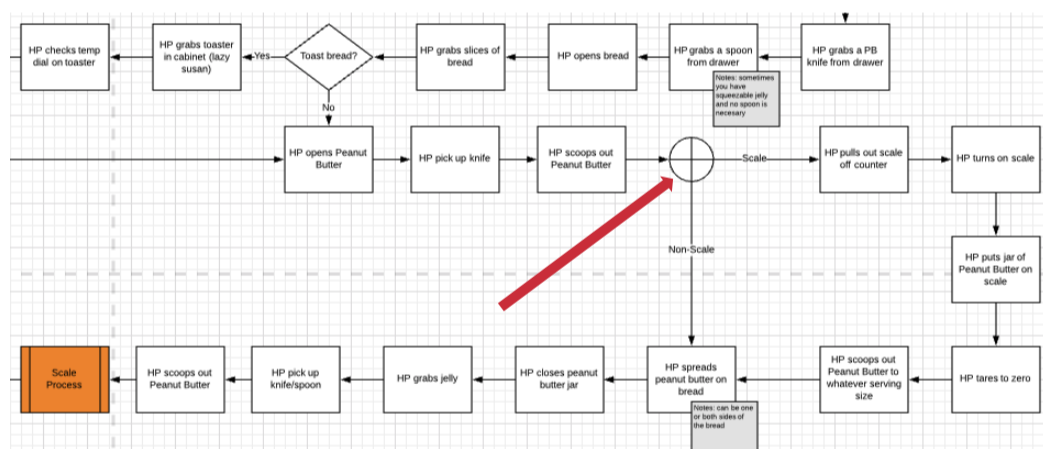
1

Connector shapes are used to connect portions of the process map back together so that the lines are not "jumping" over each other.

Color and number each pair of connectors the same to make it easier to find the connections on the map.

When attaching arrows to the Connectors, the arrow should point outward to the connector if it continues to the next step or inward away from the connector and to the next step if it is where the process continues.
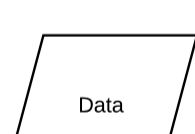
The first step in the process after looping into a connection point - arrow away from the connector

The last step in the process before looping back to a connection point - arrow towards the connector
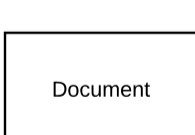
Database

Database shapes are used to show internal system processing.
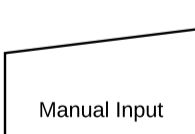
Data

Data shapes are used to show interfaces that are coming in and out of a system.
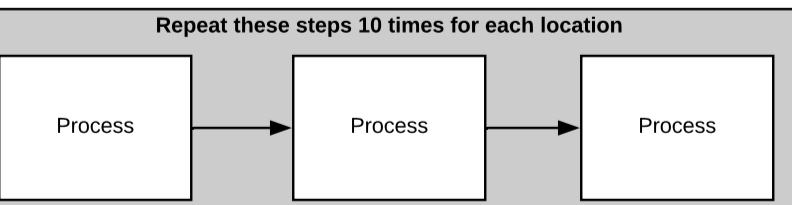
Document

Document shape is typically used to show an automated alert or notification that is triggered and sent out to Actors.

Manual Input

Manual Input shape is used to show a manually generated email, memo, or notification that is NOT automatically triggered from the system.
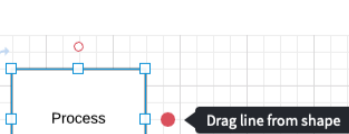
**Repeat these steps 10 times for each location**
Process → Process → Process

A process may have steps that repeat multiple times; e.g., candidate phone screens.

Use a Block text box with a gray color to show which steps will be repeated multiple times. Add text to indicate how often these steps are repeated.

How to Best Add a New Process Box

Process — ● Drag line from shape

Once you add your shape, click on the Red dot on the side of the shape where the process will continue

Process
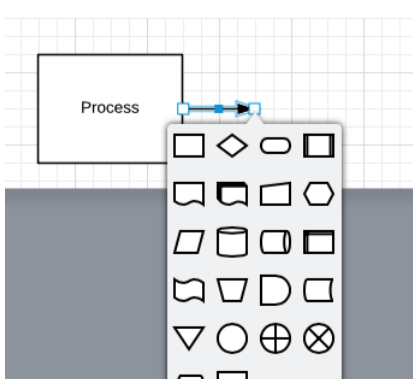
Lucidchart will automatically size the connector line. Choose your shape.

If your shape is not shown, you can still add a shape from the menu on the left hand menu slide out.

Process → Predefined Process

Your shape is now properly sized and entered.