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Driving Efficiencies Through PRAXIS Workflow Platform

Rodney Page, Senior Premium Support Specialist, Autodesk Inc

Doug Look, Business Solution Architect, Autodesk Inc

Learning Objectives

- Learn how workflow mapping can be used to redesign existing processes and improve efficiency by eliminating unnecessary and repetitious steps
- Learn about the role of optimized workflows in helping you to optimize your workflow practices and business objectives
- Learn how workflows might be documented/refined using the PRAXIS workflow platform
- Discover how workflow mapping can help identify measureable improvements

Description

Mapping Workflows is like BIM. Everyone talks about it and agrees we should adopt it, but does nothing about it. We need to change our thinking. Learn how to effectively evaluate your workflows to continuously improve efficiencies and maximize the value of your Autodesk, Inc., technology utilizing the PRAXIS platform. This roundtable will discuss how to identify repetition, bottlenecks, industry best practices, and inefficiencies in your workflows. If you are managing a large team and having difficulty getting mired down in detail and not having time to get to tactical and strategic tasks, this is the roundtable for you. This is a unique opportunity to share your insights and industry experience with each other and learn how mapping of workflows can help identify measurable improvements utilizing Autodesk technology. Attendees will have the opportunity to participate in a workflow assessment and show how it might be documented/refined using the PRAXIS workflow platform.

Your AU Expert(s)



Douglas G. Look, Business Solution Architect for the GCSO, currently leads strategic planning, research, and design efforts to discover and create ways to help customers optimize their productivity through the acquisition, creation, and sharing of knowledge. Prior to joining Autodesk, Doug received his Master of Design Methods from the Institute of Design at the Illinois Institute of Technology and also worked for Doblin/Monitor Group. He holds architectural degrees from the University of California, Berkeley and Cornell University, and also practiced as a licensed professional architect.



Rodney Page has been Senior Premium Support Specialist since he joined Autodesk in 2010 where he's been responsible for working collaboratively and proactively supporting Autodesk software solutions and workflows for Autodesk's Global Engineering Enterprise Customers SMEC & GHD. Prior to this he has over 30 years of AEC/ENI Industry software experience with as a Structural Engineering Design Technician working for large consulting and manufacturing firms in various capacities including Designer, Drafting Manager and Product Designer. He has participated on major projects including the Pre-Stressed Concrete Girder Bridge at the Sydney International Regatta Center for the Sydney 2000 Olympic Games.



Introduction

Mapping workflows engages all levels of staff throughout the organization. Staff engagement generates additional input and helps build their commitment to the end goal. It is essential to involve all staff in the planning of strategy and direction for the organization. It provides insight into issues, challenges, concerns, and opportunities which may not have been known or fully understood. Ensures everyone's "buy-in" to help execute the strategies. The senior management team such as the BIM manager will not execute the workflow – staff will. Engage them and your workflow execution success rate will increase dramatically.

Key Challenges

A workflow is an intangible asset that is not physical in nature and exists informally locked in the minds of key staff members. These informal workflows are objectified by the owner and provide social standing and status within the company based on how many high value workflows are owned by them. The ownership of workflows can be a bone of contention especially when it involves different key people who have a specific interest in it. It becomes unclear who owns the tasks in the workflow. Once agreement is reached to map the workflows there is a reluctance to revisit them to review and refine. Information such as standards and content key to these workflows can be siloed and hard to find when required. There is a benefit transferring knowledge, but we need to overcome an individual's fear if they transfer knowledge that they might make themselves dispensable. We have a tendency to hide knowledge for our own advantage, because we are afraid it will diminish our value if we share it. We must convince the owners of workflows the benefits of sharing them and learning off each other of alternative ways to improve and optimize them.

Learn how workflow mapping can be used to redesign existing processes and improve efficiency by eliminating unnecessary and repetitious steps

In order for businesses to be successful and to provide efficient services they are reliant on getting access to high quality information, documents and workflows. Usually within an organization there are a key people who have access to information and documentation important to others in the workflow. Having visibility as to who those people are and the transfer of information is important. By engaging all the key people to deliver that workflow it will assist in the identification of this information. Information can become siloed and inaccessible by others resulting in some instances of the information being recreated from scratch when it already exists. How do we unlock the workflows key to our business's success? Starts with moving outside your own silo. Getting started is always difficult. Identify those processes that are key to the success of your business. E.g. Software Deployment. Next identify a primary contact who has knowledge of overall processes and workflows. E.g. IT Department. Determine what the key objective\goal for the business is. Next identify one or two key underlying workflows that are core to their success followed by Identifying participants and key stakeholders in each workflow.

Conduct interviews and Luma Style Pre-work Assessments to identify Key Stakeholders. Sometimes it is necessary to interview key stakeholders separately as they could feel threatened as they may have owned this process for some time. Pre-work can be carried out utilizing a white board and post it notes.

Documenting

Workflow mapping and the process of documenting knits us together by connecting those roles and tasks into a logical flow for your processes that are key to the success of your business. You may have a preferred tool that you utilize within your organization to map workflows including access to software licenses. Please remember it's not about the tool, it's about the people using the tools and the process of mapping workflows that is of prime importance here. There are a variety of tools available in the market place for diagramming workflows. They can be generally broken down into two groups consisting of Desktop Applications and purely Cloud Based Applications. Below is a small sampling of these tools.

Desktop Applications



Visio
Monthly fee.



PowerPoint

Cloud Based Applications



Gliffy
Monthly fee
General purpose diagramming.
Emphasizes collaboration in their marketing. <https://www.gliffy.com/>



Lucidchart
Monthly fee
General purpose diagramming.
<https://www.lucidchart.com/>



PRAXIS (Beta)
Free. Specifically designed for workflow diagramming. Minimal options for color and other graphic properties to keep diagrams reasonably good looking and consistent.



Learn how workflows might be documented/refined using the PRAXIS workflow platform

About PRAXIS

PRAXIS is a cloud-based app for sharing your product knowledge and best practices through simple, step-by-step workflow diagrams.

- It's free
- Operates on your internet browser
- Support on Google Chrome, Windows and Mac OS
- Automatically saved in the cloud
- Share workflows

Goals

These goals informed the design of PRAXIS:

- Communicating your thought processes quickly and easily.
- Clearly giving the context behind each step of the workflow.
- Easily sharing your work with team members.

Note: Use in tablet or smartphone browsers is not currently supported. PRAXIS does not yet support export or print options. However, you can print directly from the browser.

**Improving Business Productivity
Through Workflow Transformation**

Getting started

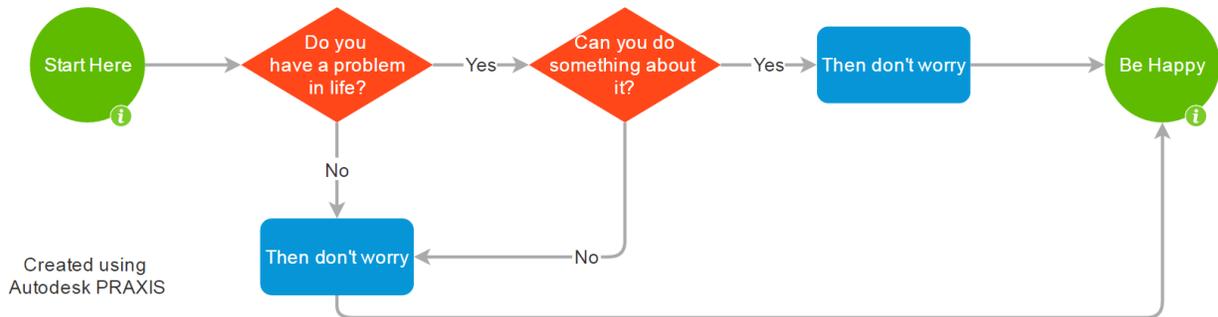
To learn more about PRAXIS navigate to this link
<https://praxis.autodesk.com/praxis/getting-started.php>

PRAXIS Workflow Examples

Basic Workflow

This example demonstrates decisions and tasks including branches linked with connectors in a workflow. View this AKN workflow map by selecting the link below.

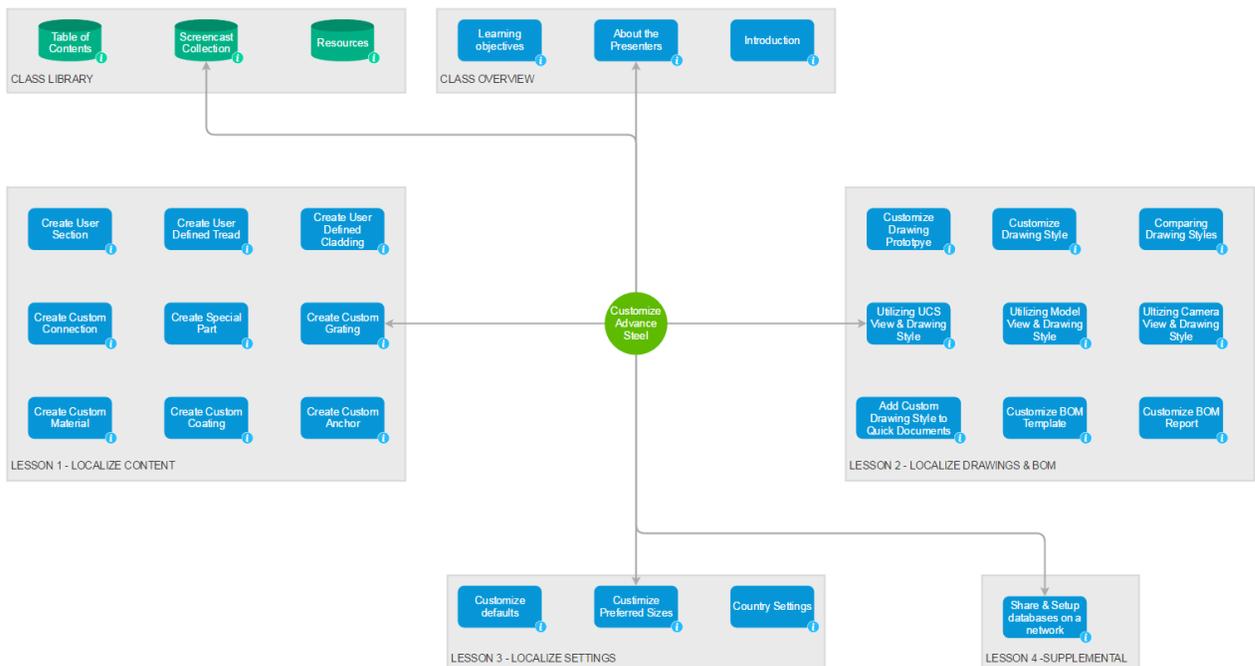
<https://praxis.autodesk.com/praxis/viewer/be6d14c28165ecce68aee45f6c1b10c42e717845>



Training Workflow

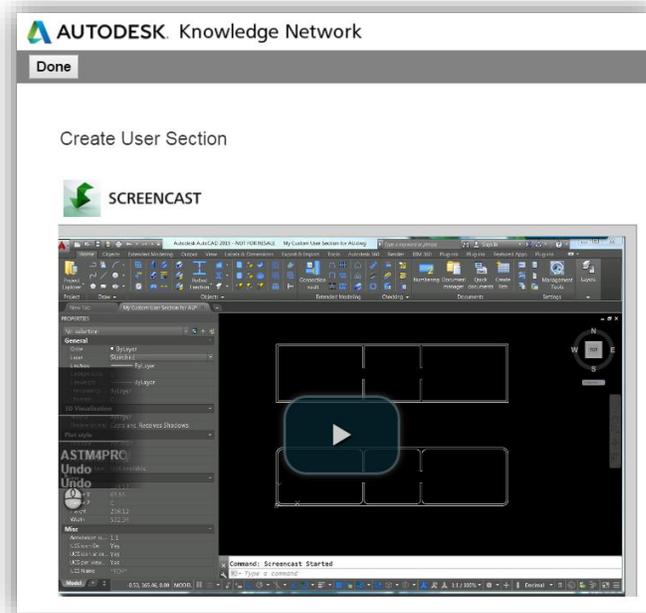
This is an example of utilizing and repurposing PRAXIS to communicate the Autodesk University 2014 Class "Customizing Advance Steel for Local Markets". I organized the class handout and associated datasets and screencast videos into one workflow. Each lesson container has tasks with links to a Knowledge Card containing a Screencast Video. View this AKN workflow map by selecting the link below.

<https://praxis.autodesk.com/praxis/viewer/4ea0b30721b80450ef17245f92a38aa3decb618c>



Knowledge Card

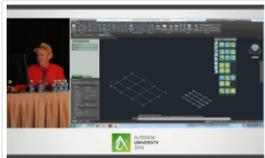
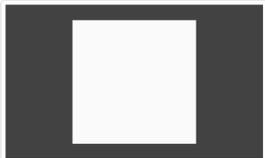
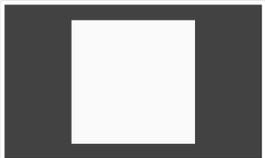
This demonstrates the typical contents of a Knowledge Card. In this example there is a link to a screencast video



In addition you have the ability to add Additional Resources in the Knowledge Card as demonstrated below.

Watch the Recording of the Class & Download Dataset & Class Handout

Additional Resources

 <p>Customizing Advance Steel for Local Markets</p> <p>This lecture class is designed for consultants from Design & Construction Consultants and Structural Steel Fabricators and manufacturing firms who want to</p> <p>Product: n/a Level: Intermediate Content Group: Learn & Explore Date: n/a</p>	 <p>Class Sample Dataset</p> <p>This is the link to download the sample dataset used in this class</p> <p>Product: n/a Level: n/a Content Group: n/a Date: 14711442400</p>	 <p>Class Handout</p> <p>Download the PDF Version of the Class Handout</p> <p>Product: n/a Level: Intermediate Content Group: Learn & Explore Date: 14711442400</p>
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Product Feature Workflow

This example highlights using PRAXIS to communicate a Product Feature Workflow. In this example we are highlighting Work Sharing with Revit Server. View this AKN workflow map by selecting the link below.

<https://praxis.autodesk.com/praxis/viewer/38e8b10cffa0558a64689b130b8351fa1a87cbb8>



Language Specific Workflows

Many large global enterprise customers are spread across diverse regions and office locations around the world and it becomes necessary to communicate your workflows in various languages. PRAXIS can convert your English Language workflows and repurpose for language specific offices such as Beijing in China to Mandarin E.g. Korean, German etc.



English

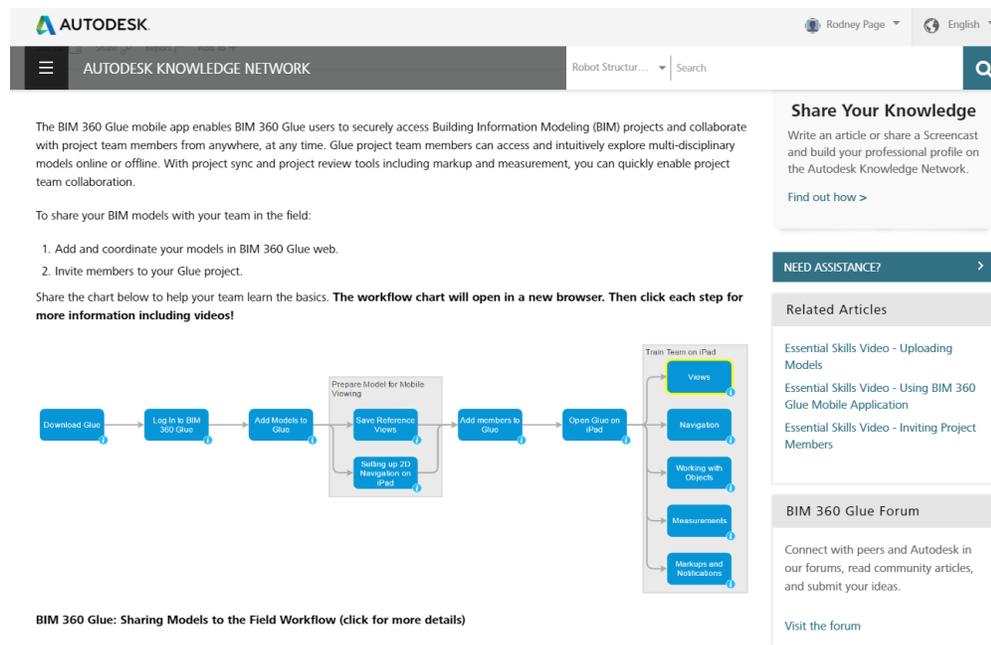


Mandarin

Embed Workflows

This PRAXIS workflow “BIM 360 Glue: Sharing Models to the Field” forms part of an Autodesk Knowledge Network article. These workflows can also be embedded in company intranet web sites for employees to readily access. E.g. Microsoft iConnect

<https://knowledge.autodesk.com/support/bim-360-glue/getting-started/caas/simplecontent/content/bim-360-glue-sharing-models-to-the-field.html>



The screenshot shows the Autodesk Knowledge Network interface. The article title is "BIM 360 Glue: Sharing Models to the Field". The main content area contains the following text:

The BIM 360 Glue mobile app enables BIM 360 Glue users to securely access Building Information Modeling (BIM) projects and collaborate with project team members from anywhere, at any time. Glue project team members can access and intuitively explore multi-disciplinary models online or offline. With project sync and project review tools including markup and measurement, you can quickly enable project team collaboration.

To share your BIM models with your team in the field:

1. Add and coordinate your models in BIM 360 Glue web.
2. Invite members to your Glue project.

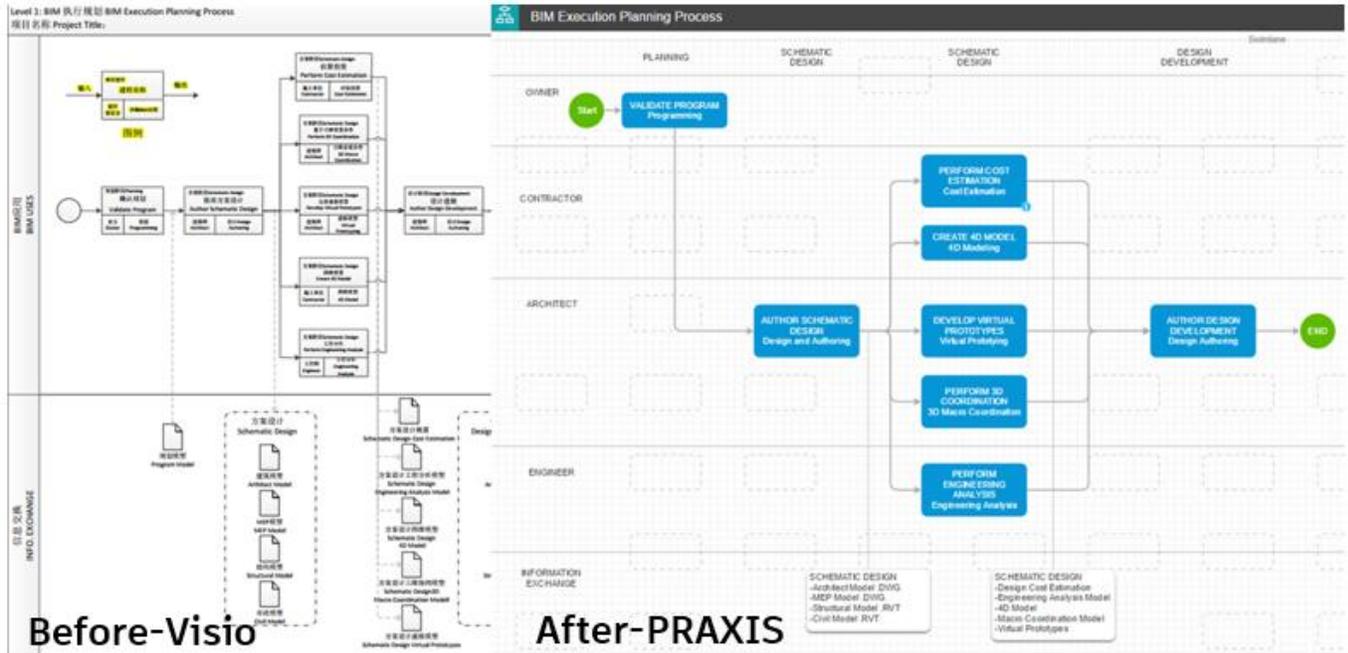
Share the chart below to help your team learn the basics. **The workflow chart will open in a new browser. Then click each step for more information including videos!**

The workflow chart is a sequence of steps: Download Glue -> Log In to BIM 360 Glue -> Add Models to Glue -> Prepare Model for Mobile Viewing (sub-steps: Save Reference Views, Setting up 2D Navigation on iPad) -> Add members to Glue -> Open Glue on iPad -> Train Team on iPad (sub-steps: Views, Navigation, Working with Objects, Measurements, Markups and Notifications).

On the right side of the page, there are sections for "Share Your Knowledge", "NEED ASSISTANCE?", "Related Articles" (with links to Essential Skills Videos), and "BIM 360 Glue Forum".

Before & After – BIM Workflow

An example of BIM Execution Planning Process. On the right is before with the original process produced with VISIO and on the left is after produced with Praxis. It shows how you can utilize the swim lanes both vertically and horizontally to de-lineate between roles and project phases.



Learn about the role of optimized workflows in helping you to optimize your workflow practices and business objectives

A workflow analysis can be a valuable asset to any company of any size. It will help you hone in on any problems within your organization so that you can improve the way your company operates and begin to generate even more profits or get yourself out of debt if you are struggling to keep the company alive. There are simple steps to optimizing your workflows. You can reduce the time to deliver your workflows by enabling parallel processes to occur simultaneously across multiple roles and stakeholders. Adding swim lanes to your workflows to divide the tasks between different participants is a simple, but effective way in the identification of opportunities for optimization. The workflow analysis will invariably uncover wasteful duplication and overlapping of tasks and roles, which will assist in resolving and streamlining. It is important once you have refined and reviewed the workflow that you commit to reviewing on a regular basis. Remember workflows are not static and are always in a state of flux and change. Usually there are key markers or triggers that will set off a review such as a company reorganization, technological change including new software. It must not be underestimated the huge impact that technological changes and new innovations have on your workflows as they can help to automate many of your mundane and repetitious tasks.



Discover how workflow mapping can help identify measureable improvements

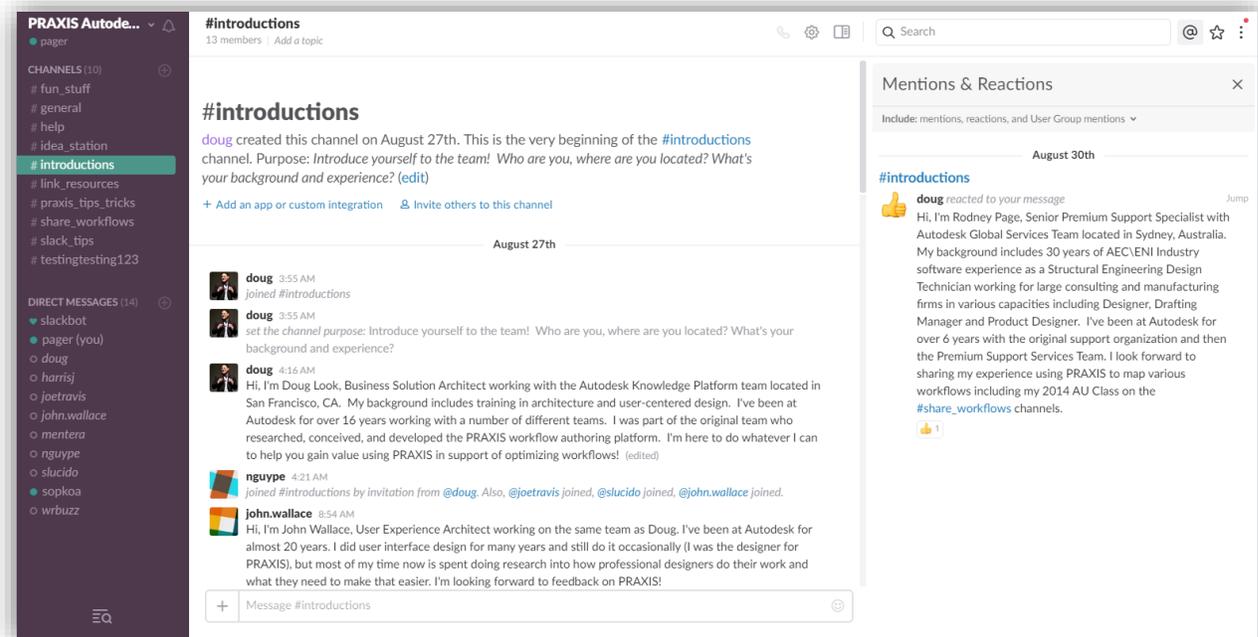
Measuring improvements is key to driving efficiencies. Once you have initially mapped your workflow assign time to each task. This will serve as your baseline workflow prior to the optimization and peer review process. After the peer review process and refinement including optimization of the baseline workflow compare the times post and pre workflow refinement. This will assist in gauging the effectiveness of the workflow review. Repeat this process on a regular basis when reviewing your workflows at designated and agreed times. Mapping Workflows improves employee engagement & satisfaction by breaking down barriers and facilitates Teamwork. It builds a sense of belonging & purpose by encouraging sharing of stories and thereby increases employee's skillset. Therefore on the flipside there are costs associated with employee disengagement in organizations. Initiating a workflow project is a way for your organization to boost employee engagement and thereby reduce costs in the first instance. Measure Employee engagement index before conducting workflow mapping project via. Qualtrics Survey. Commence and conduct Workflow mapping project on a regular basis. Measure Employee engagement index a month later via. another Qualtrics Survey to compare results of Employee engagement index. You will be pleasantly surprised by the results.

Conclusion

A call to action is necessary. Do not delay in getting started today to deploy a workflow mapping initiative within your organization. Consider developing a library of standard reusable workflow templates accessible to all within your organization. There are no excuses or obstacles in your way. PRAXIS is free and available for all to access now. Employees have lost the old fashioned art of connecting with each other despite all the devices available to us we are failing to tap into the one resource that is plentiful and readily available, that is the human mind. We are more focused on our relationship with our devices than to one another. Workflows key to the success of your business require a team of bright people to implement. They will not succeed if the team is working in isolation and counter to each other. According to Robert Metcalf's principle of networks, the value of a network increases exponentially in proportion to the square of the number of nodes that is people in the network. In other words having people in your workflows will make them more valuable.

Join our AU Slack Channel

As part of this Autodesk University roundtable a private slack channel has been set up <https://praxis-au.slack.com/> where you can share your workflows, ask questions and post ideas and get help from our Autodesk PRAXIS Team. Please let us know if you are interested in joining this channel and we will invite you to the channel.



10 Point Plan for Mapping Workflows

1. Gain buy-in from your management.
2. Develop a core team of liked minded people to drive workflow transformation. E.g. regional representatives
3. Set the goal of the project. E.g. Tangible outcomes through the creation and documentation of useful workflows to enable the business to be more efficient, productive and effective. Improving Business Productivity Through Workflow Transformation.
4. Set up a workflow mapping project & library. E.g. Intranet
5. Set up a communication strategy. E.g. Slack
6. Identify Tools and resources. E.g. Luma, Visio & Praxis
7. Identify processes key to the success of the business.
8. Document Workflows
9. Set up re-usable workflow templates.
10. Remember to measure, review, refine, redesign and optimize on a regular basis.



Roundtable Questions

Below are a standard set of questions that may be asked during this roundtable depending on availability of time. The overriding goal of this roundtable is participation and information exchange by the participants. If this happens we've achieved our objective.

1. What are the processes which are key to the success of your organization?
2. What are your current challenge to mapping workflows?
3. What impact does your organizations workflows have on your work quality?
4. Are your workflows linked to the company's overall strategy?
5. How effective are your workflows in reaching and directing your team to achieve your goal?
6. How often to you review your workflows?
7. What are the triggers for a review? E.g. Reorganization, new technology
8. What impact does technological changes and new innovations have on your workflows?
9. How do you measure the efficiency of your workflows?
10. How do you improve the efficiency of your workflows?
11. How do you identify the key people with in your organization responsible for information and documentation?