



DP21560-R - Driving efficiencies through PRAXIS workflow platform

Rodney Page

Senior Premium Support Specialist

@AskRodneyPage

Douglas Look

Business Solution Architect Autodesk GCSO

@dlook1

Documenting **workflow**

Pre-work methods for creating PRAXIS Workflows

Douglas Look, Autodesk Knowledge Platform Team

Getting started



- Start with interviewing a primary contact who has knowledge of overall processes and workflows
 - What are key objectives/goals for their business?
 - Identify one or two key underlying workflows that are core to their success
 - Identify participants and stakeholders in each workflow

Stakeholder Mapping

In this example, a team was designing new services for people living with chronic diseases. They drafted a full diagram, then decided to focus on professional caregivers.



QUICK GUIDE

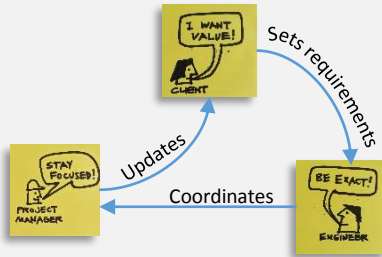
- Identify a subject area to focus on.
- Convene a diverse team of collaborators.
- Generate a very broad list of stakeholders.
- Draw a symbol of a person for each different type.
- Write a speech-bubble to summarize their mindset.
- Write a label describing their role or title.
- Draw lines with arrows connecting the stakeholders.
- Write a label on the line to describe relationships.
- Circle and label related groupings.

HELPFUL HINTS

- Try to include a very broad range of stakeholders.
- Strike a balance between breadth and relevance.
- Don't represent groups of people in one symbol.

- Gather a team that can represent the different participants in core workflow

Stakeholder Mapping



- Draw a symbol of each person for each role that they play in the process (Project coordinator, field operations manager, design engineer, etc.)
- Label each role—with speech bubble of mindset
- Draw lines with arrows connecting the stakeholders
- Write labels on lines to describe relationships

This diagram provides context and a shared understanding of the relationships between the different participants

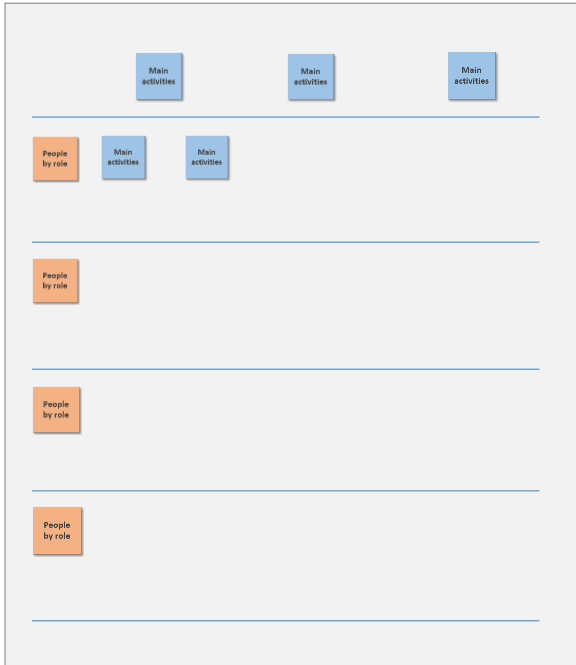
Focus on one workflow

People
by role

Main
activities

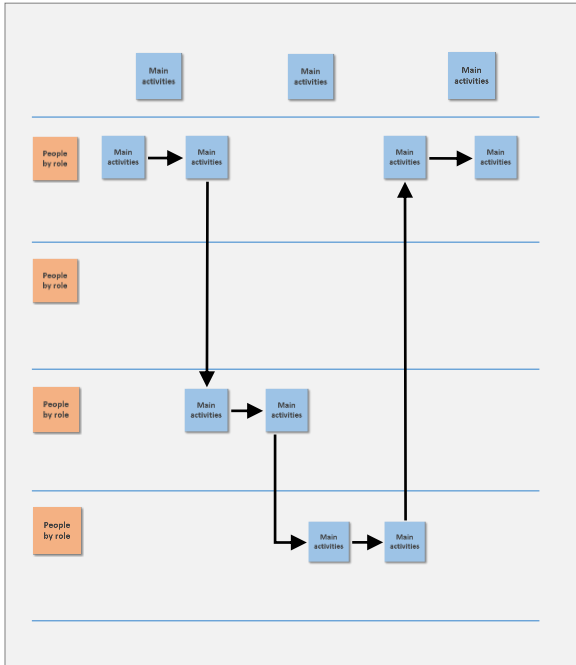
- On separate post-it notes:
 - List all participants in the workflow by role (e.g. Project coordinator, field operations manager, design engineer, etc.)
 - Identify main activities in the process (e.g. Initial layout, detailed design, estimating, etc.)

Diagram using swim lane format



- On large poster sheets:
 - List all people by role in left hand column in separate rows
 - Post main activities from left to right, beginning to end
- Who starts the process?
 - In that swim lane, list activities over time to achieve main activities
 - List more activities that achieve other main activities

Track activities over time



- What happens next?
 - Does data move to a different person/role? If so, place activity in that person's swim lane
- Continue to build out all activities from beginning to end in this workflow
- Connect activities with arrows to show activity flow

Going deeper...

People
by role

Main
activities

Tools &
services

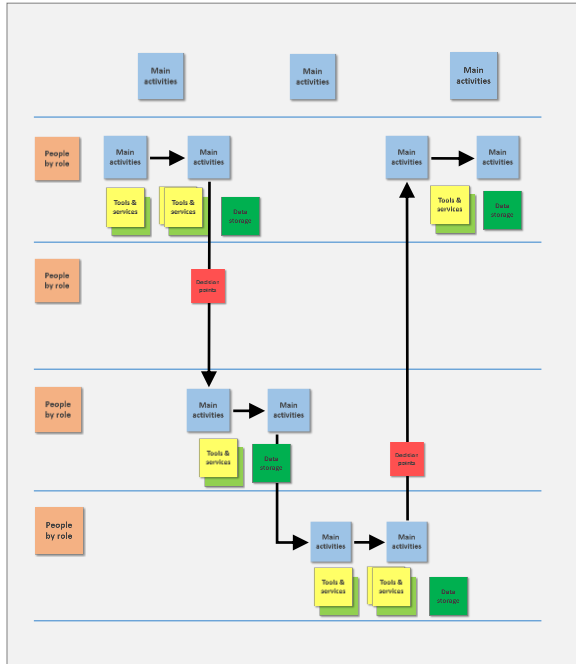
File
formats

Data
storage

Decision
points

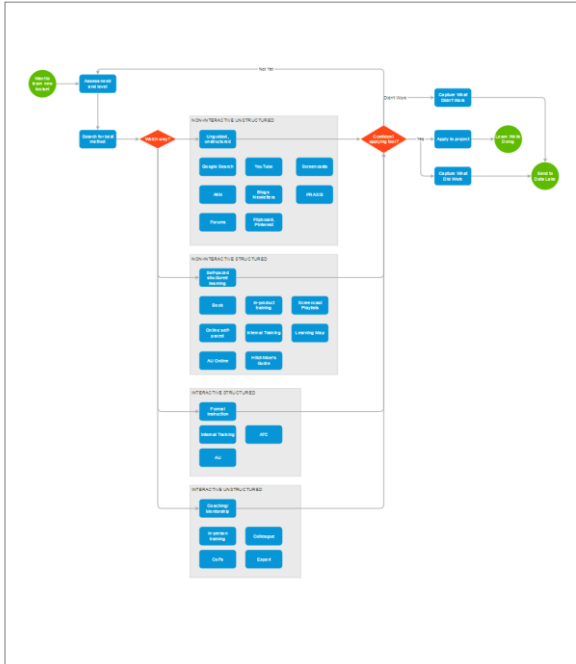
- On separate post-it notes:
 - List all the different software tools & services used in this workflow (e.g. Excel, PPT, Revit, ACAD, etc.)
 - List all different file formats (e.g. .doc, .dwg, .pdf, etc.)
 - List all places where data stored (e.g. local disk, cloud storage, server-based storage, etc.)
 - Identify decision points and choices

Fill out the workflow



- Associate different file formats (e.g. .doc, .dwg, .pdf, etc.)
- Associate where data stored (e.g. local disk, cloud storage, server-based storage, etc.)
- Identify and post decision points, choices

Translate to PRAXIS



- What happens next?
 - PRAXIS EP Team will assist in translating the base workflow information into PRAXIS
 - Circle back with customer to review, edit, and revise the flows
 - Identify activities that might benefit from additional detail
 - List out resources that might be associated with nodes (Articles, YouTube videos, Screencasts, etc.)
 - Attach resources to nodes

Share out loud and continue refining

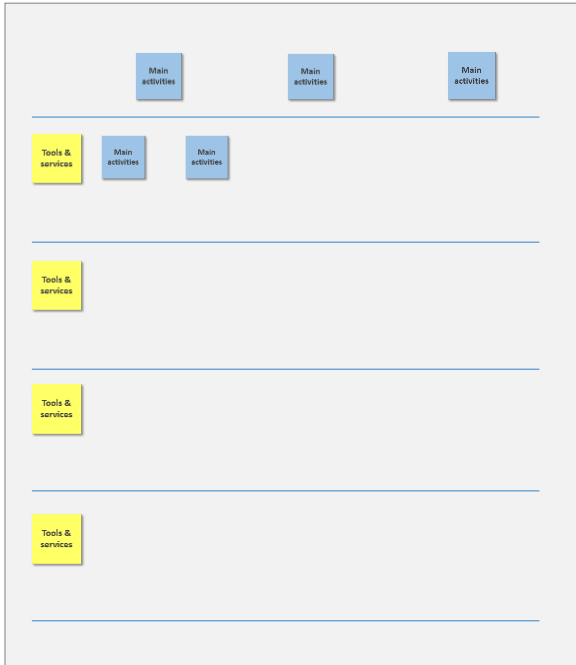
Focus on one workflow

Main activities

Tools & services

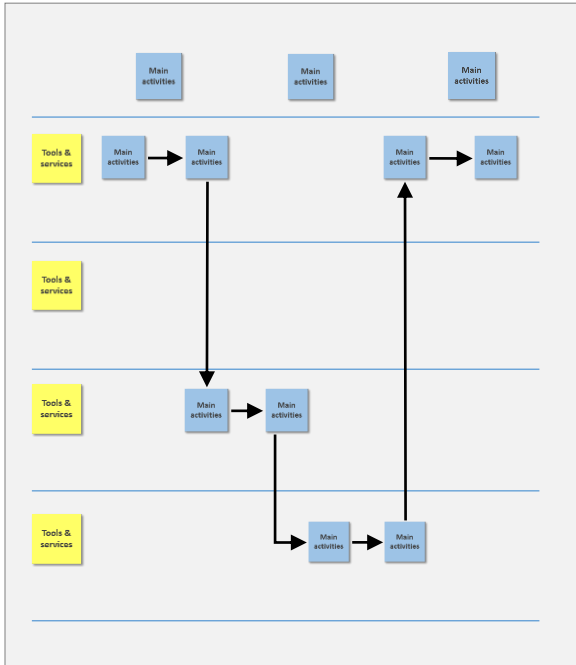
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 - List all the different software tools & services used in this workflow (e.g. Excel, PPT, Revit, ACAD, etc.)

Diagram using swim lane format



- On large poster sheets:
 - List main products/services left hand column in separate rows
 - Post main activities from left to right, beginning to end
- Where does the process start?
 - In that swim lane, list activities over time to achieve main activities
 - List more activities that achieve other main activities

Track activities over time



- What happens next?
 - Does data move to a different product or service?
If so, place activity in that swim lane
- Continue to build out all activities from beginning to end in this workflow
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Going deeper...

People
by role

Main
activities

Tools &
services

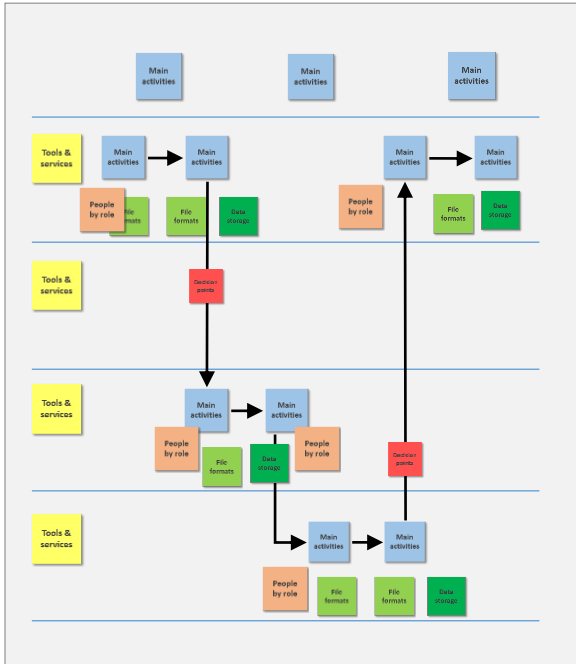
File
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Data
storage

Decision
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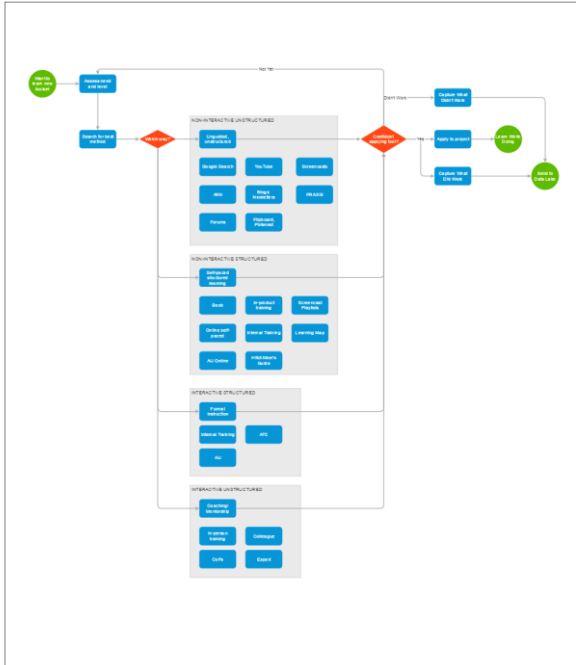
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 - Identify decision points and choices

Fill out the workflow



- Associate different file formats (e.g. .doc, .dwg, .pdf, etc.)
- Associate where data stored (e.g. local disk, cloud storage, server-based storage, etc.)
- Associate participants by role (e.g. Project coordinator, field operations manager, design engineer, etc.)
- Associate decision points, choices

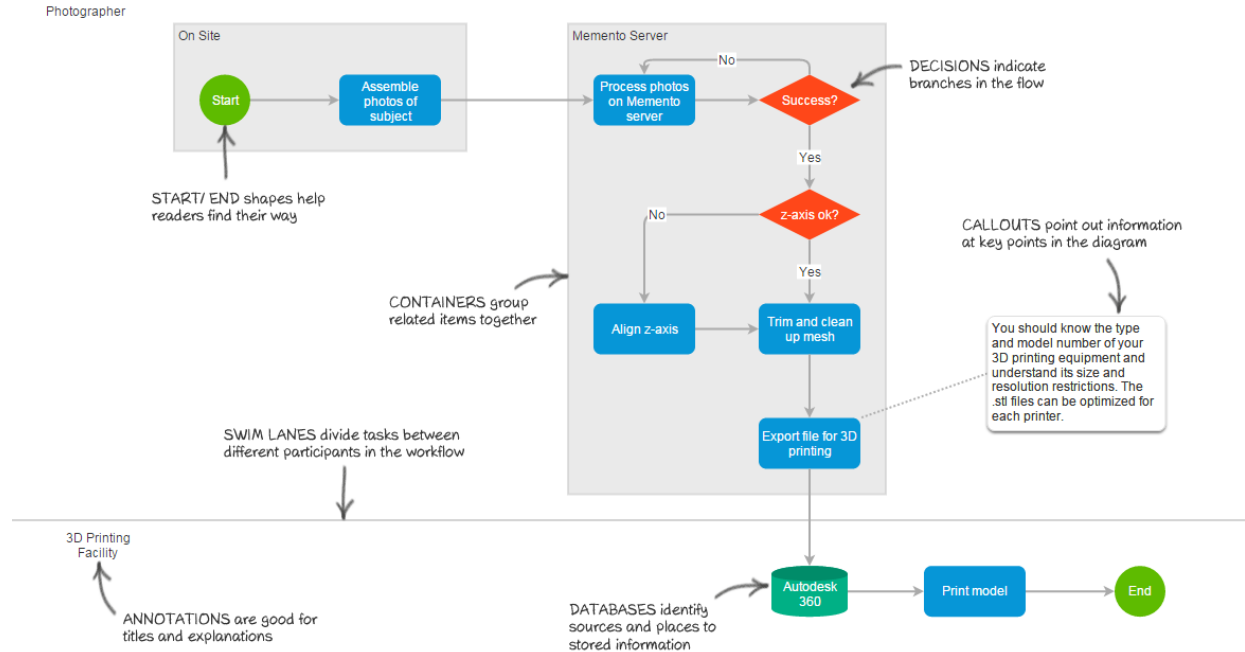
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Quick Tips



QUICK TIPS:

- Edit by double-clicking
- To create arrows, hover over shapes at their edge
- Move selected items using drag & drop
- You work is continuously auto-saved
- To reconnect arrows, select them and drag their endpoints
- Drag swimlanes from the edges of the chart to partition the flow between participants or phases
- Delete items using Delete key (fn-Delete on Mac)
- Select multiple items by dragging out a rectangle with the cursor

