



Our APG (Adaptive Process Guidance) definition

Overview

- *A single process management platform for structured and unstructured working processes*
- *A single platform for delivering process guides that have either loose objectives or defined goals*
- *A platform for providing process guidance, enforcement and adaptive capabilities*
- *A platform for enabling process embedding*
- *Built on SOA*

workflow, BPM and Case Management are not new concepts. All deliver process management for businesses but in different fashions. APG is no exception to this statement. APG is a concept for guiding user actions through defined processes, therefore it too is a solution for managing how work gets done...

Adaptive Process Guidance (APG) is a management approach to taking control of all forms of processes that operate within an organisation. It is a holistic approach to business processes, one that caters for highly structured processes, processes that are highly unstructured and processes that are a blend of the two. It can be argued that APG can penetrate more business processes across the enterprise, bringing management tools,

improved efficiency and improved services to more areas of an organisation.

The process guide

A process guide is a flexible guide that brings together users, teams, content and a work definition to achieve a business goal. It is also a set of hints and tips, grouped together in steps that bring together content as and when required in the desired fashion to help achieve, not a business goal, rather an objective.

A goal indicates something that has to be done. This could be the completion of particular piece of work or performance of a calculation.

An objective has no tangible value to measure. Therefore “assisting a user with data provided at opportune moments” is an objective of a particular process guide.

Typically a guide is a best practice for goal achievement / objectives, however the user is empowered and is given flexibility in how that goal / objective is actually achieved (they need not follow the guide explicitly). There are occasions that processes require strict enforcement, and this can be implemented with APG, however the default is that a process definition and all components are highly adaptable to users with the correct security roles.

A process can be any form of process within an organisation. As a managerial approach, APG considers the users and collaborators as the key resource of an organisation, and



therefore the most important aspect and component of any business process.

Guide creation

APG does not presume that all business processes can be designed or known, rather APG accepts many processes need detection through the actual actions of collaborators in a process. This detection leads to a process guide in which the process is a) better understood and b) easy for other users to follow.

Alternatively APG allows the design of process guides and these to be published to guide collaborators. This method of guide creation is highly desirable but is only possible if a process is known, and accepted that a) all elements of the process may not be known b) that the known process may need to change based on a real time need. In both instances, adaptive capabilities ensure the guide is updated correctly.

An APG platform is delivered to ensure greater adoption of good practices, improved process efficiency and greater visibility of work being carried out.

Process confusion

APG should not be confused with BPM which central focus is on processes themselves and the belief that processes can be designed, modelled and executed.

APG activities

APG components / activities are:

- Detection – Detection of processes through users actually working
- Design – Design of basic process guides

- Analysis – Analysis of the guide and comparison with how work is actually completed
- Refinement – The ongoing refinement of process guides by analysts (as a result of guide analysis) or actual users based on actual process need

Detection

There are any number of processes within an organisation, many processes are unknown to management layers and as such can not be designed. These processes therefore must be detected from the actual workers actions. Detection can mean the detection of complete processes and or the detection of sub processes within a known process.

Detection may also include “ways of doing things” which do not have a goal, rather are objectives to meet in order to carry out work more efficiently or accurately.

Areas of focus are the type of work, any associated content and or data, the participants, actual work carried out at any stage, the different stages associated with the work / process, how different stages are connected, alerts and notifications, escalations any service level agreements

Design

Process design can only be applied to processes that are known within an organisation. Good design will accept that not all elements of a process may be known, nor detected immediately and that the design



may need to be modified based on an actual need arising at a post implemented stage.

Process design can also include processes that do not have well defined goals, rather that they achieve an objective with no workItem required.

Designed processes are more likely to be used within embedded scenarios. Such process embedment delivers business rules to other business areas, typically outside of the scope of the native APG environment. Embedded processes can also be leveraged by third party applications through the APG SOA.

Areas of focus are the type of work, any associated content and or data, the participants, actual work carried out at any stage, the different stages associated with the work / process, how different stages are connected, alerts and notifications, escalations any service level agreements.

Analysis

Analysis is based on actual work being carried out and the comparison to process guides. Analysis will illustrate users who work in a different fashion and their effectiveness within the process. Effective users will have a positive impact on the process guide with the guide potentially being updated based on their way of working. Note however, that unless enforcement rules are placed on particular elements of the guide steps, users will still have the option to work in their preferred fashion.

Analysis will also identify areas where human interaction is not needed, and as such, these

areas will be broken out into their own stages within the process guide and assigned an automated step processor. Automated step processors carry out automated work without the need of any human interaction, as such, these steps can greatly improve process efficiency.

Good analysis will lead into process guide refinement

Refinement

Process guides are constantly open to refinement, either by business analysts or by the needs of end users. Refinement is at the heart of the APG life-cycle and ensures guides are kept up to date and agile enough to deal with real time business, customer or user needs. Refinement need not be modelled; rather guides are constantly open to analysis and further refinement striving for greater accuracy and efficiency.

Refinement empowers end users to have a positive effect on the actual process itself and puts end users at the heart of how work is carried out within a business.

APG in practice

An APG project can be started in order to detect and better understand how work is carried out within an organisation. An APG project can also be started to raise process efficiency within an organisation while empowering end users and keeping their needs at the centre of any solution and process improvement.



An APG project may also be started to provide business guidance to third party applications, providing a central process intelligence point for multiple business applications. This may include process embedding.

APG may also be leveraged to control other process management tools such as Case Management, BPM or workflow.

APG can be critical to ensuring regulatory compliance, improved process efficiency; reduced process cycle times, empowered and continually motivated users and the delivery of improved customer services.

APG technology

APG technology should provide an adaptive platform for all elements and components of a process, including the players, process guide definitions, enforcement and the adaptive capabilities of the platform. APG technology should take a holistic approach to processes and the securing of any process content, including interactions.

There are six critical components of an APG solution:

- Guide Engine – A robust platform for holding process guide definitions and associated templates
- Guide Tools – Tools that enable the guide engine to be modified in real time by a process participant or analyst
- AECM – An Adaptive Enterprise Content Management repository for storing and securing all forms of

content (any electronic file or piece of data)

- ACRM – Adaptive Customer Relationship Management for assigning customer information to a particular piece of work wherever necessary
- Collaboration Tools – Capture social activity and collaboration activities as valuable assets (store in AECM repository). Actions (work) that result from collaboration will require the collaboration content to be attached to the work item
- SOA – A Service Orientated Architecture should be made available for process guide integration and use of, allowing greater process penetration of APG and embedding capabilities

APG also addresses many critical business and IT issues:

- Managing processes from start to end
- Empowering of the workforce
- Assignment of all relevant content and data to work, enabling accurate decision making
- Greater understanding of work tasks and content in terms of context and status
- Improved process knowledge
- Delivering simpler user experiences
- Integrating line of business systems and data to reduce process cycle times
- Incrementing process automation



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APG should provide a full audit trail and be able to demonstrate regulatory process compliance.