

Personalised process diagrams

Anastásios Perdicóúlis

Assistant Professor, ECT, UTAD (<http://www.tasso.utad.pt>)
 Affiliate Researcher, CITTA, FEUP (<http://www.fe.up.pt/~tasso>)

Abstract

Personalised process diagrams (PPD) place actors on the process map, but provide only selected information of special interest.

1 Introduction

It is possible to include the process actors in CPDs or EPDs (Perdicóúlis, 2011, 2013), but these remain *global* process views. To obtain special-interest views, personalised process diagrams (PPD) are practical. Let us follow their creation starting with the basics of ‘task–stage’ diagrams.

Node–edge process diagrams such as CPD and EPD are flexible in the positioning of the tasks and stages: either type can occupy a node or an edge (arrow) position (Perdicóúlis, 2011) — Figure 1.

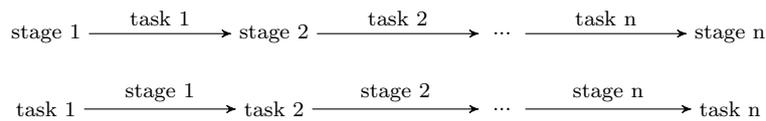


FIGURE 1 Two alternative ways to represent task–stage sequences

We also know that we can add extra information to the tasks and the stages (Perdicóúlis, 2011, 2013). Then, let us substitute the plain tasks with compound boxes containing information about the actors — Figure 2.

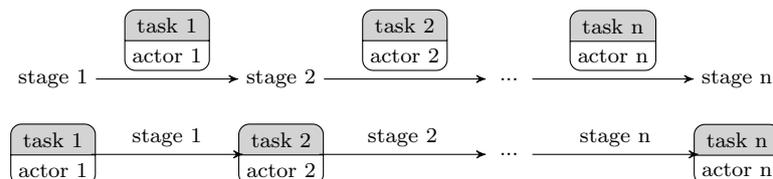


FIGURE 2 Compound tasks, including the identification of the actors

2 Global process view

Starting with a global process view, let us revisit an example (Perdicoulis, 2013) to see how the identification of actors appears in practice. Let us try to adapt the example for two actors in collaboration: one for the lower pathway (the base), and the other for the top layer (the icing) — Figure 3.

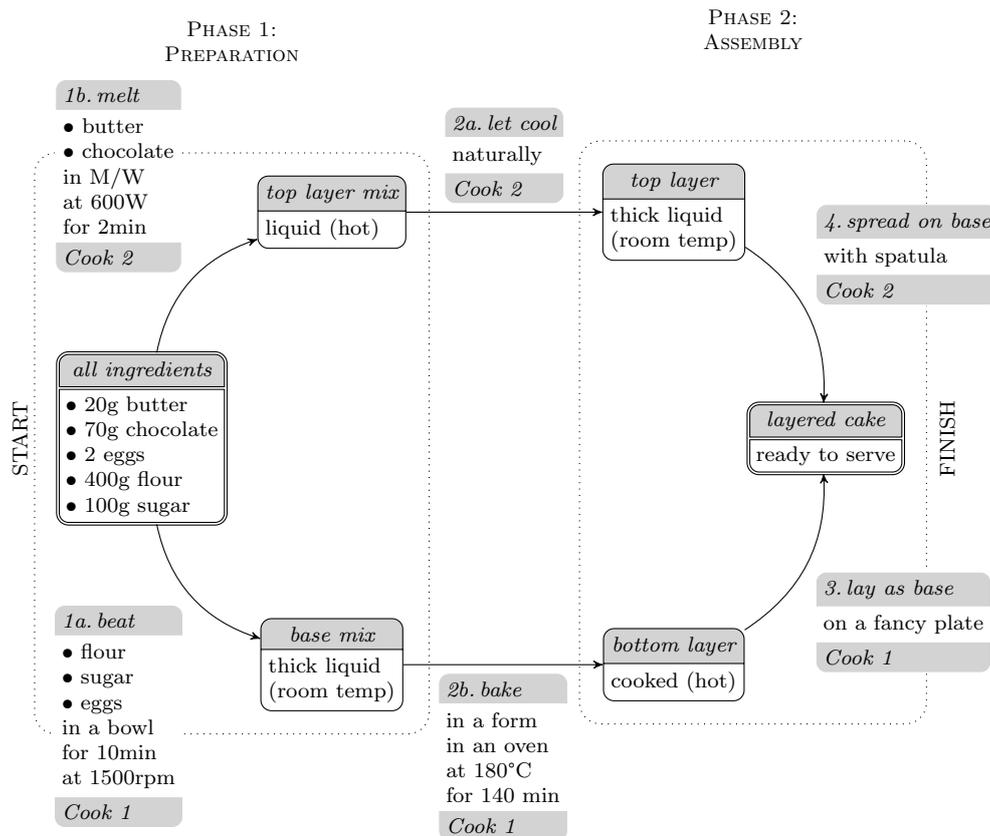


FIGURE 3 Global view of the cooking process, with the cooks identified per task

Even though it contains actor identification, Figure 3 is still an extended process diagram (EPD) because it provides a global process view. Now let us develop this into two special PPDs: partitures and ligatures.

3 PPD–Partitures

A symphony or a theatrical play are the master works containing parts for the musicians and the actors respectively. It is understandable that besides the global appreciation of the work, each musician or actor needs to focus on and practice for their own part, or *partiture*. This can be generalised for all processes. From Figure 3, let us extract the perspective of Cook 1 — Figure 4.

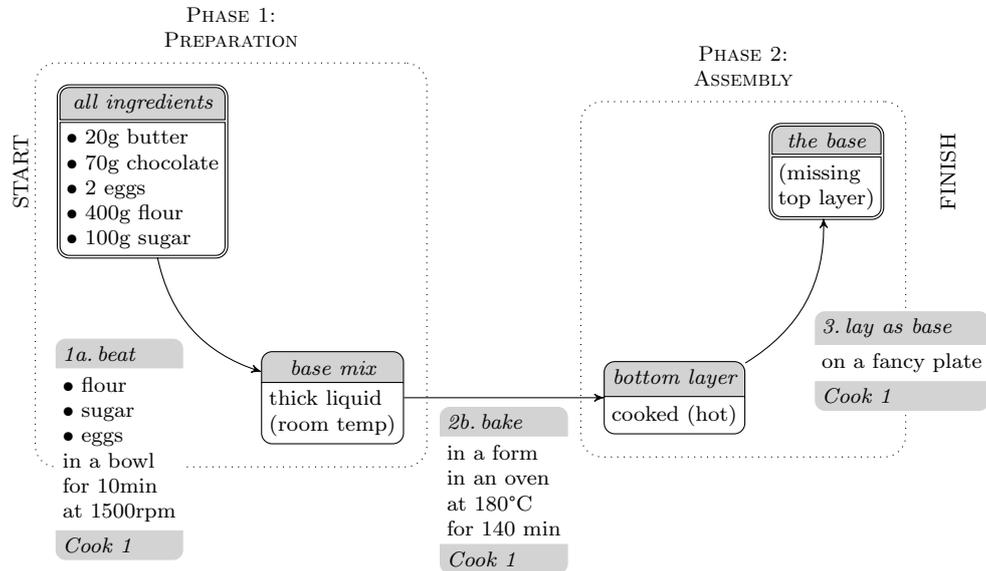


FIGURE 4 The perspective of Cook 1 is a partial or incomplete, but personalised view of the process

4 PPD–Ligatures

Breaking down the processes to give individual ‘roles’ to the actors, the global perspective tends to disappear — out of sight, out of mind. Actors may be tempted towards individualism. The best way to keep the team spirit alive is to always keep a copy of the global process view (CPD or EPD). The next best thing is to present a diagram with the contact points where actors join their efforts. These are the ‘ligatures’ of the parts of the process — Figure 5.

5 Discussion

5.1 Value

PPDs are valuable for individual study and practice. They help answer actor-specific questions such as ‘with whom do I interact in this process?’ or ‘what is my part in the process?’. Ligature PPDs complement and compensate the partiture PPDs, for the actors to respect teamwork.

While partitures identify personal responsibilities, ligatures identify co-responsibilities. In the examples, ‘responsible’ means that the cook must *respond* to anyone (of authority) who enquires about issues of quality, performance, or incidents related to the execution of the cook’s tasks. In the case of co-responsibility of actors, quality control can easily get out of hand — a situation often known as ‘fleet management’, where everyone expects everyone else to carry out the common maintenance tasks. The project management ‘maestro’ has a crucial role here, assisted by the ligature PPD.

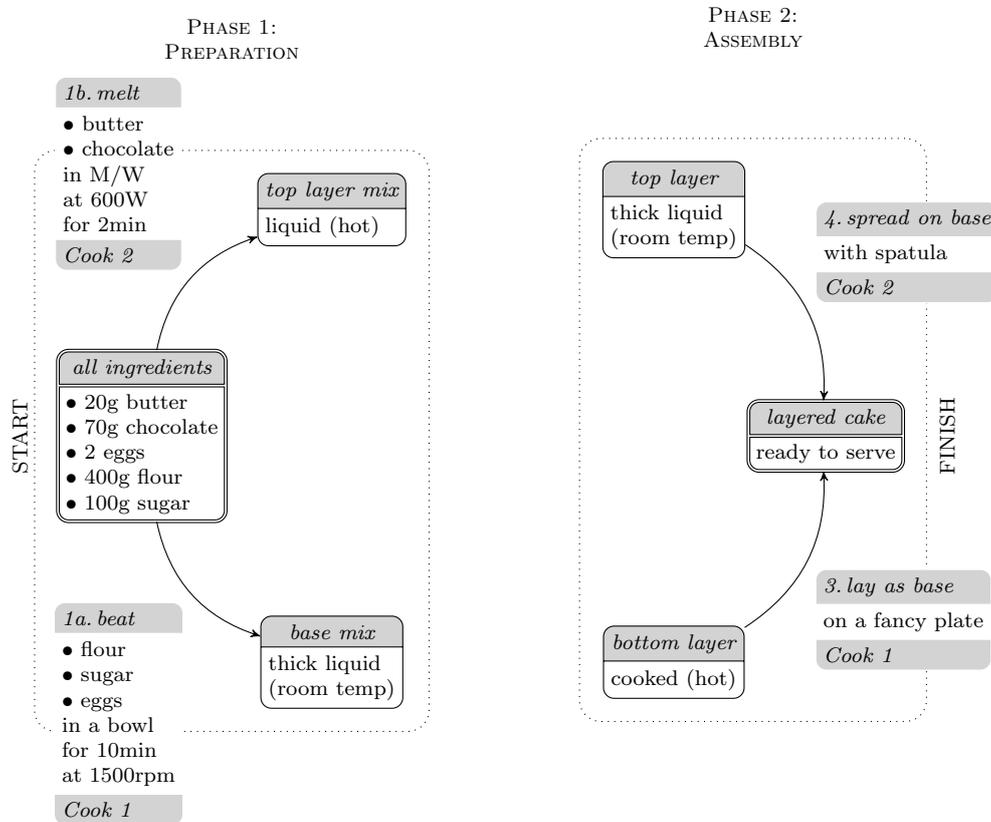


FIGURE 5 ‘Ligatures’ identify the points of collaboration between actors in a process, whether they are sharing (left) or joining resources (right)

5.2 Simplicity

Partiture and ligature PPDs such as those of Figures 4 and 5 can easily become crowded. For process management purposes — as opposed to actor-specific purposes such as training — perhaps ‘zoom out’ views are to be preferred. Hence, CPDs are perhaps a better starting point to create the respective partiture and/ or ligature PPDs.

5.3 Protagonism

Figures 4 and 5 maintain the tasks on the arrows, as in the original recipe example (Perdicoulis, 2013). Since nodes tend to be somewhat more important than edges, this practice gives a focus on the stages of the process, which include intermediate and final products.

If necessary, with an inversion between tasks and stages (i.e. by placing the tasks at the node positions) we can shift the attention of the process to the tasks. Then, with a second, ‘internal’ inversion within each node, we can shift the focus to the actors — Figure 6.

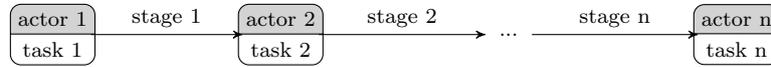


FIGURE 6 Inverted ‘task–actor’ compound boxes at the node position

Diagrams with the focus on the actors, such as Figure 6, often occur when processes involve institutions, which seem to have significant authority. This feature is not exclusive to the partial PPDs, and can also apply to the global-view CPDs and EPDs.

In any case, considerations of efficiency may seek the least number of repetitions in the process diagrams — that is, which element at the nodes (to choose between actors, tasks, and stages) would produce the most streamlined process diagram. For instance, the generic example of Figure 6 would be suitable for a process with many actors, when each actor has a limited number of tasks to perform. With few actors and many tasks, a process configuration such as Figure 3 (global/ EPD) or Figure 4 (partial/ PPD–partiture) would be more appropriate.

6 Conclusion

CPDs and EPDs may contain actor information, whether on nodes or edges, but they still represent the whole process from a global perspective. If the process is to be seen from particular points of view, such as those of each actor involved in the process, then these views must contain just the tasks and stages relevant to each actor. To cover this need, a special type of partial personalised process diagrams (PPD) are created from existing CPDs or EPDs. Two types of PPDs, partitures and ligatures, assist the process actors to focus on their particular and shared responsibilities.

References

- Perdicoulis, A. (2013) Extended process diagrams. *Systems Planner*, **18**.
- Perdicoulis, A. (2011) Application manual for the ‘Systems Thinking’ book. *Systems Planner*, **2**.

