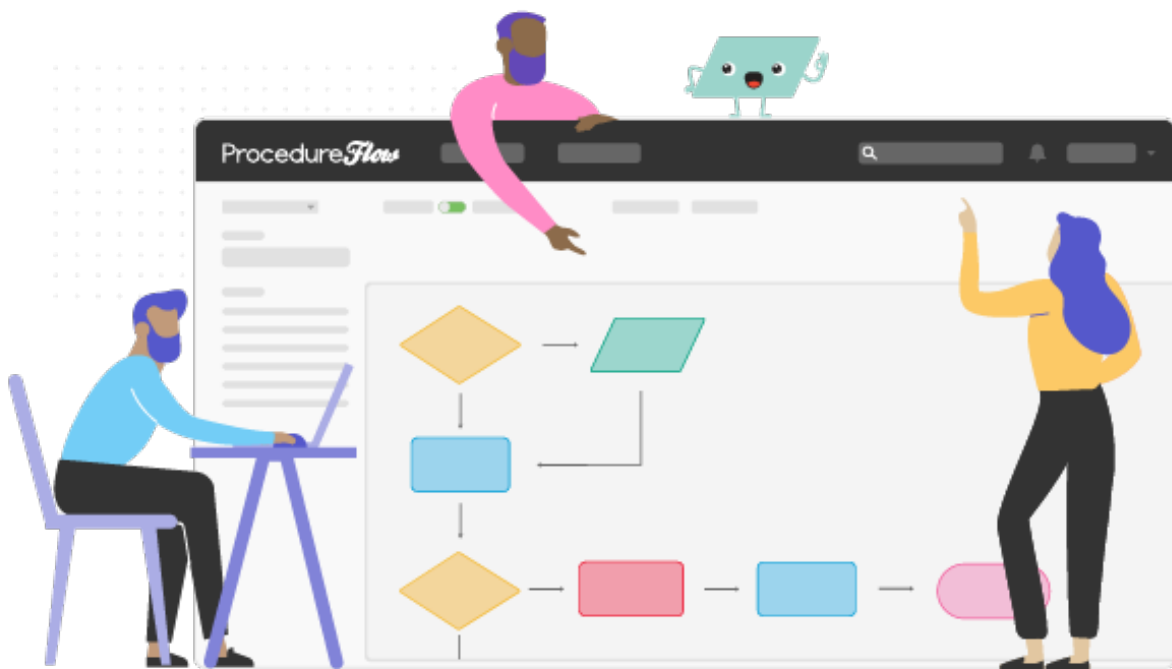# ProcedureFlow

Mapping Best Practices

ProcedureFlow - Best Practices Manual

Welcome to ProcedureFlow! We're sure you have a ton of questions, so here's a cheat sheet outlining some tips and tricks, and our best practices for mapping to help you get started.

1) Access ProcedureFlow

ProcedureFlow is a web application, which means you can access it from any computer with an internet connection. To connect, open Google Chrome, Edge or FireFox browser and go to app.procedureflow.com, login with your work email address and password you chose when you set up your ProcedureFlow account. Add ProcedureFlow to your bookmarks or favorites list and save your credentials, so you don't have to enter them every time!

Tip: If you can't remember your password, you can use the "Forgot your password?" link on the app.procedureflow.com landing page to reset it.

2) The Shapes

Each shape in ProcedureFlow has a distinct meaning. It's important to know what each shape means in order to have a full understanding of the process flows.

The *Action* shape represents a direct action you have to take (i.e. clicking a link, asking a question, advising a customer). The Action box is also used to set up the home page as "big buckets" to group related flows together.

The *Decision Diamond* represents a choice and a "fork in the road." Depending on the answer, you will follow a path and different set of steps.

The *Data Parallelogram* represents information either you should gather or information you should remember (ID number, Postal Code). Write it down or make a mental note of it because you'll need it later.

The *Backstory* shape provides additional information or context to help you understand *why* you are doing something. Use it in a flow, to provide an example, tip, or information that will help the user execute the process more easily.

The *End Point* represents the end of the process. You've satisfied all the steps in the process or customer's inquiry. This can link this to a "Close Call" or "End Call" flow with instructions on any final steps that need to be completed (i.e. making notes customer's account or ticket).

Critical

The *Critical* shape represents information that if missed, could have a massive impact on the business or its customers. This should be built directly into the flows at the appropriate point in the process so there is no chance it could be missed by the user.

3) Shape Colours

To maintain ProcedureFlow's simplicity and keep it user friendly and easy to use – something all our customers love - Keep the usage of the shapes consistent. This allows users to direct their focus and brain power to where it really matters, the substantive content of the flows, instead of using it to decide which one of thousands of shapes or colors to use. Don't worry! We have yet to find a process that can't be mapped using only these seven (7) shapes!

4) Saving Favorite Flows

ProcedureFlow provides you the ability to build a customized list of *Starred* flows on the left side of your screen. By clicking the star to the left of a subflow's title, you can add the subflow to your *Starred* list (aka. your favorites list) and quickly jump directly to your frequently used flows.
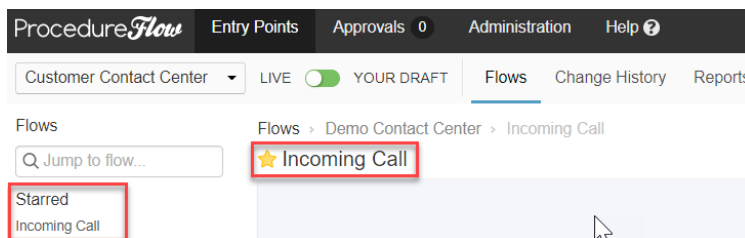

5) Go back and Continue Convention

When you see a "Go back and continue" action box, it means that the process will continue back on the previous flow. You'll need to click on your browser's back button or arrow to go back to the previous flow and the yellow back glow will show you where to continue from.

6) Search Flows in an Entry Point

Not a problem! On the left-hand side of your screen, there is a *Flows …* field. By clicking in this search bar, you can quickly do a keyword search for any flow. Select the flow from the list of search results to navigate directly to it.
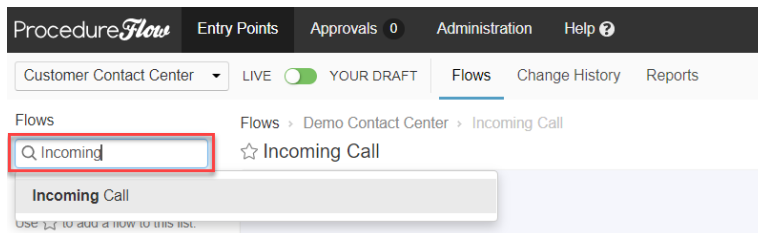

7) Search Flows across multiple Entry Points

You organization may have multiple Entry Points that store processes for different groups of users or departments. On the upper top-right hand of your screen, there is a *Search all Flows…* field. By clicking in this search bar, you can quickly do a keyword search for any flow. Select the flow from the list of search results to navigate directly to it.
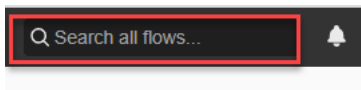

8) Navigating to Home Flow

Simply click the *entry point combo box selector / home icon button* in the top left (under the ProcedureFlow logo), or click *Flows* at the top the screen to quickly return to the home page.
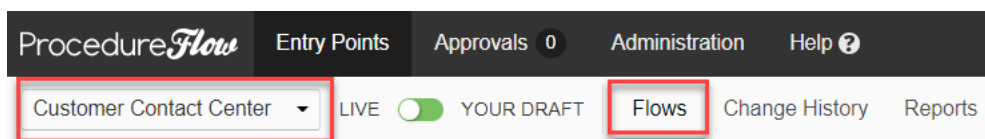
9) Updating a Flow

Your processes are ever changing. ProcedureFlow is a living breathing document, and it should always be updating and evolving with our business.

To make changes to ProcedureFlow, move the toggle on the top left of your screen from *Live* to *Your Draft*.
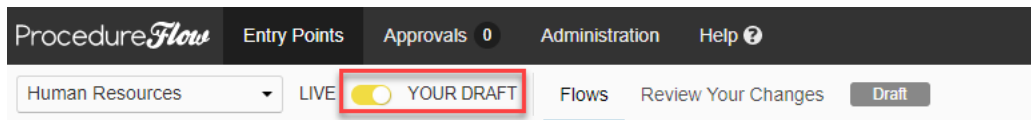
You will then be able to click the *Edit* button in the top right of your screen. This will bring you into a mapping "view" or editing canvas, where you can edit your own version of the flows.
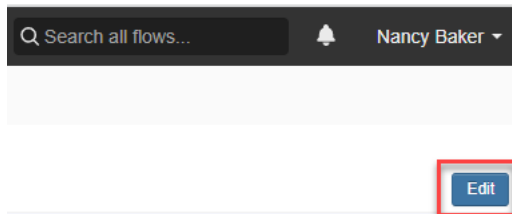
Edit the text in existing shapes by double clicking on a shape to open the Text Dialogue Box where you can make changes to the text or add new shapes by dragging them onto the canvas and adding them to the existing flows.

Once you're happy with your changes, click *Review Your Changes* and submit them for approval. An approver will review the changes you've suggested, and approve, deny, or request further changes. Don't worry! Until the change is approved, you're not changing anything in the live environment that the rest of the team is using.

10) Starting the mapping process

The thought of mapping your first process can be daunting! How do I even start? How much detail do I need? We say start at the top!

- **Step 1:** Most processes can be broken down into 10-12 very high-level steps (or less!). Begin by building your main flow using only these high-level steps and finish with your first end point. Add your backstory in the top right corner that provides additional information on what this process is about, why's it's important, how it ties into other processes, what the expected outcomes are, etc.
- **Step 2:** Take your first step on your main flow and make it into a subflow. Now navigate to your newly made subflow and repeat the process, beginning with the high-level steps needed to complete the first task.
- **Step 3:** Continue to repeat this process over and over for every step of the process, creating layers upon layers of subflows with each one containing more and more detail, until you've completed mapping all steps of the process.

How much detail do I need? Think about the audience of your flows! It really depends on the purpose for which the flows will be used and who will be using them. Flows that will be used to train and support new employees will need to include detailed step-by-step work instructions that will allow them to correctly execute the process with little to no mentoring or questions. Flows used by more senior team members who already have a high level of technical expertise will contain much less detail. Put yourself into the shoes of whomever will be using the flows to best determine what level of detail will be required.

What about "blue moon" exceptions? There will always be "one off's" or "edge cases" that the flows won't catch, or "blue moon" exceptions that only occur once in a while. Don't waste time trying to map all of these out! Put in an action shape that says "This is weird. See a supervisor or manager!" and move on. If it starts happening more and more, you can always come back and map it out at a later date.

11) Keeping flows clean and easy to read

When a flow looks messy, contains too many shapes or has too much text or detail, users have a lot to work through and can easily get lost, which increases the amount of time it takes to find the information they are looking for. The goal is to keep all your flows neat, clean and easy to read.   Following the rules and conventions outlined below will help to keep your flows looking pristine!

i. **Use the Spine.** Build your flows so that the situation that occurs 80% of the time goes straight down, with the 20% exceptions jetting out to the right. People scroll straight up and down – don't make them scroll to the right. It's annoying!

ii. **Use Subflows.** Avoid information overload by giving users ONLY the information they need, *as* they need it. Hiding the 20% exceptions and the detailed work instructions within subflows will keep your flows clean and uncluttered. It also allows more senior users to skip over subflows for tasks they already know how to do, while at the same time keeping detailed work instructions available for newer users who need them. See below for more information on how and when to use subflows!

iii. **Use the Backstory.** The backstory shape allows you to bring in lots of general information about the flows, or even something that looks like a Word document you would see in a traditional classroom. Combining the backstory with a subflow allows you to hide this information so users only see it if they need to.


iv. **Tables and Bulleted Lists.** Making use of tables and bulleted lists allows you to bring lots of information into your flows, but keep them looking clean and easy to navigate.

| Name	Price
Apple	$0.50
Banana	$0.30
Orange	$0.80

- Apple: $0.50
- Banana: $0.30
- Orange: $0.80

v. **Be Concise.** Don't use more words than you have to! Text should be short, concise and to the point. Full sentences are NOT required.   i.e. Don't write "Now click the Enter button to go to next step." Just put "Hit Enter".

vi. **Use Space Wisely**.

    a. Don't put too much space between shapes, 2 or 3 "grid" lines is plenty!

    b. Resize shapes so you only have one line of text whenever possible. For example, don't split long field names up over two lines. Keep the text together (and don't forget to BOLD it)!
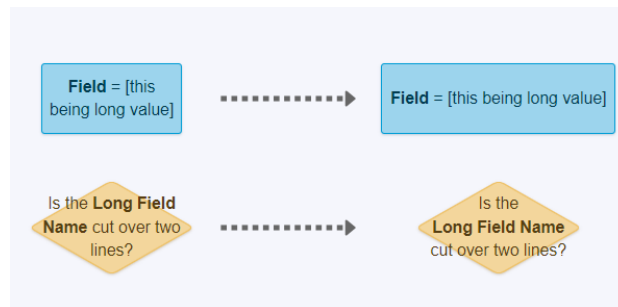

vii. **Use Titles.** If a shape has a large amount of text, it can be hard to read. If you have text that is going to be more than three lines, you can make it easier to read by adding a title, aligning the text to the left, and widening the box.
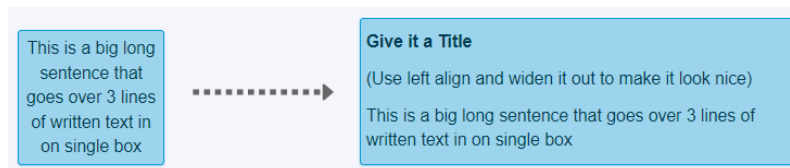
viii. **Avoid Using Ambiguous Text.** Ambiguous means "open to or having several possible meanings or interpretations", uncertain, difficult to understand or lacking clarity. Using ambiguous text within your flows is confusing to the user. If you're using words like "*if applicable*", there needs to be a backstory box that clearly outlines when it IS applicable and when it IS NOT. Without this information, users can't make an informed decision on what their next step should be.

ix. **Use the Multiple Options "Grid".** When you are setting up a home page or landing page, or there are multiple options to a question, the options should be presented in a grid pattern to keep flows looking clean, organized and easy to read. Don't try to put arrows in – it will end up looking like a spider web!
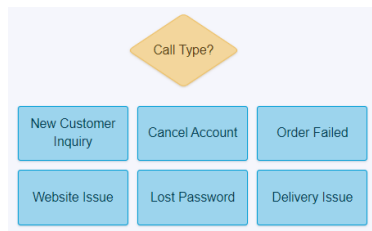

x. **Avoid Diagonal, Crooked or Crossing Arrows.** Not only does it make the flows look messy, it makes it makes it very difficult for the user to read and to know where they need to go.
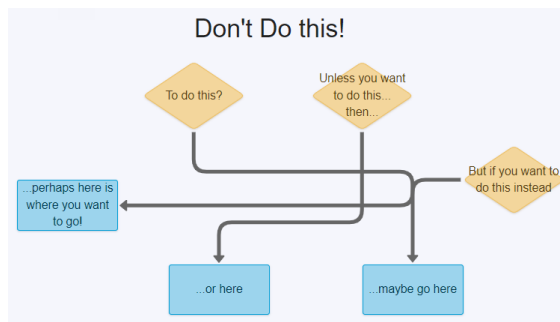

xi. **Avoid 'Blocking In' Shapes.**   Try to avoid using really long arrows if possible and "boxing in" the next steps of the process. Instead, copy and paste the

desired destination and continue building the flow out to the right. If you've followed the spines convention, you can easily build exceptions and additional processes out the right side of the flow.

xii.
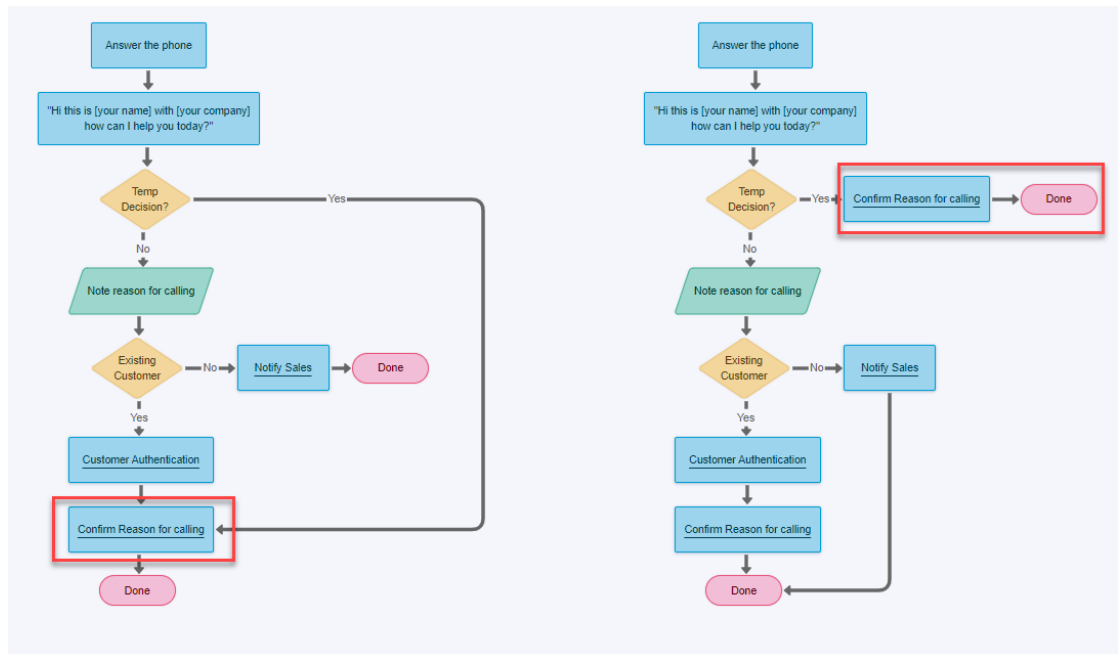
xiii. **No Orphan Shapes.** Every flow should have a finish – an end point, a "Go back and continue," or an arrow that brings them back into the main flow.   If you have an orphan shape at the end of a flow, users won't know where to go or what to do next.
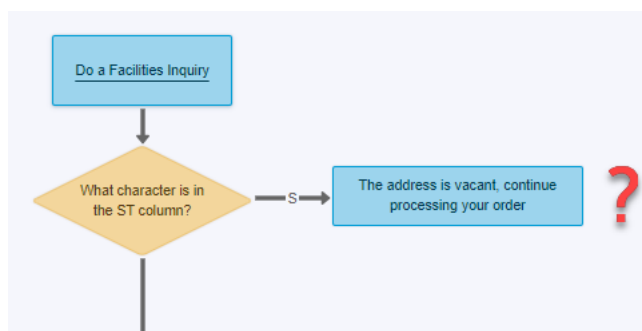
xiv. **Mind Your Arrows.**   Make sure you've added all required arrows between your shapes, *AND* properly labeled all your 'decision diamond' arrows. If you forget to do so, users won't know which path to follow!   To add your arrows, click the *Connector Arrow* and simply drag the 'cross hairs' from circle to circle, ensuring each circle highlights to *green* which indicates the arrow is locked in.
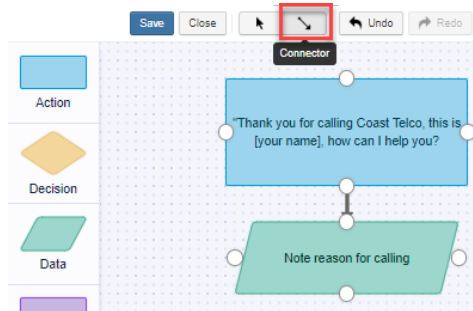
xv. To label your arrows, simply double click on the arrow to open the *Edit Connector* box and enter the desired text. Click *Update* to add the text to the arrow. Your arrows can be labelled *Yes / No*, or something like *New / Existing Customer.*
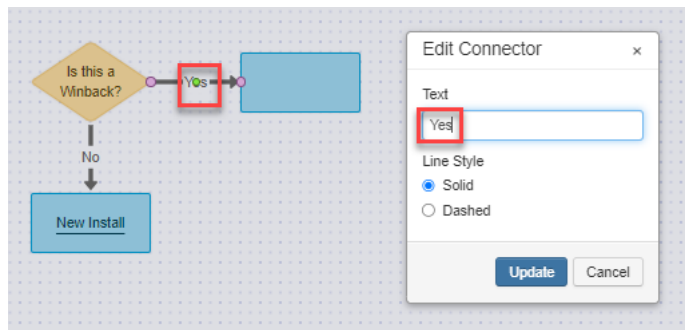
There will also be situations where you'll need to bend your arrows. For example, when you return to the main spine from a subflow, or where the process has a 'loop.'   Start first by adding a *straight* arrow from where you need the arrow to start, and ending where you need the arrow to finish. Then grab the *green dot* in the middle of the arrow and use your mouse to drag the arrow into the required 90-degree angle.   Remember, **no diagonal or crooked arrows!**
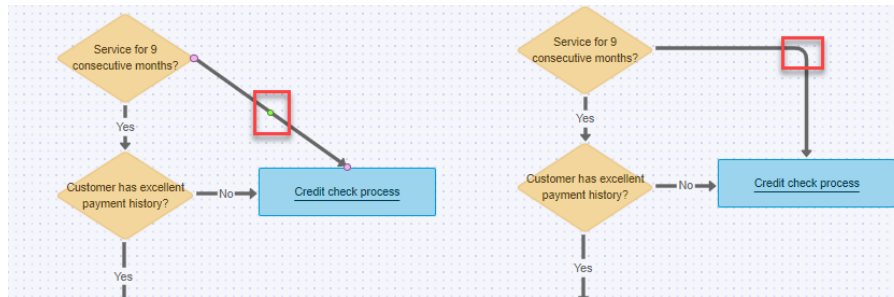

12) When to create subflows and what to name them

Keep flows small! The heart of ProcedureFlow is all about *small* hyperlinked flowcharts. When a flow gets too large, users have a lot to scroll through and can easily get lost, which increases the amount of time it takes to find the information they are looking for. The goal is to keep all your flows neat, clean and easy to read.

If you are mapping and come to a step in the process that you already know will be a subflow with lots of additional steps and detail, create a subflow then as a "placeholder." You can dive in and start to map the new subflow right away, or come back to it later.

If you are mapping and have a flow that has grown to more than 15-20 shapes, you can go back to see what can be combined into a new subflow and pushed down to the next level, using the *"Move into New Flow"* feature.

Simply select the shapes you want to move into the new subflow. *Right-click*, select *Move into new flow*… Add a *New Flow Name*.
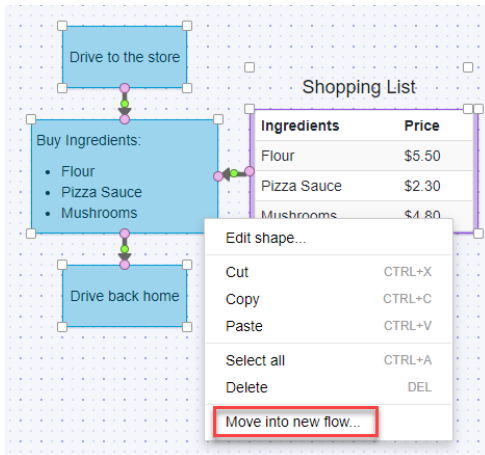
When creating new subflows, it's important to pay attention to what you are naming them. When searching ProcedureFlow with the keywords, it will prioritize subflows with key words in the **subflow titles.** So, when deciding what to name a subflow, include keywords in the title that would likely and logically be used if a user was searching for that subflow.

13) Including exceptions to the process

Trying to figure out how and where to fit exceptions into the process can be difficult. One of the biggest mistakes in documenting procedures is using bullet points to list exceptions to the process *outside of the flow*, where they easily could be missed. All steps of the process should be included *within the flow* itself to avoid mistakes.
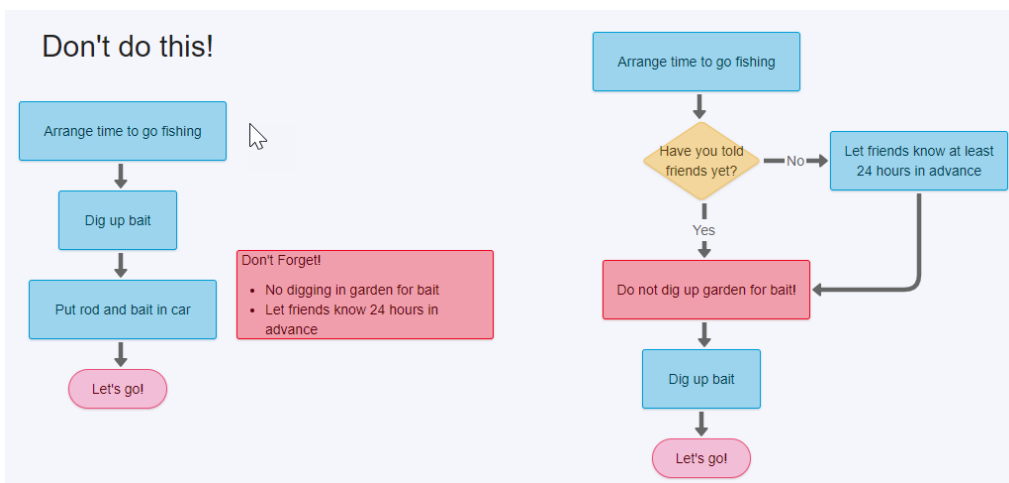
14) Using Pop-ups

You can add a pop-up to a shape by selecting the Pop-Up tab in the Add Shape dialog box. Once added to the flow, the shape will appear with the pop-up icon in the top right corner. Users can then click on the shape to view the text in the pop-up.
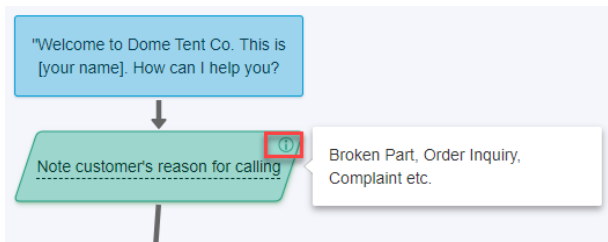
Pop-ups should be used for examples or general information only! Do NOT hide important information in pop-ups that should be mapped directly into the flow itself, as it could possibly be missed.

Also, do not include a whole "wall of text" within a pop-up, as it becomes very difficult for a user to read. If you would like to include a lot of general information within a pop-up, create a new subflow to hold the information and use the pop-up to hyperlink to that subflow. This allows the user to still have the information at their fingertips without having to read through a large amount of text tucked within a small popup window.

   Note: Pop-ups are only able to hold text. You cannot attach an image within a pop-up!

15) Adding screenshots

Of course, but we encourage users to do so sparingly! If we wanted to map out how to create a new entry point in ProcedureFlow, we could take a screenshot of each step, which would take up a lot of space, would require lots of extra time to map, and would be hard to maintain. Anytime there was a change, we'd have to take and upload a brand new image.

Instead, we would map out the steps in ProcedureFlow like this, which takes up much less space, is easier to read and is easy to maintain! Give your users credit …. they're smart and they'll figure it out without the screenshots! If you think they still may need help, you can always add the location of what they are looking for in brackets, like (bottom left).
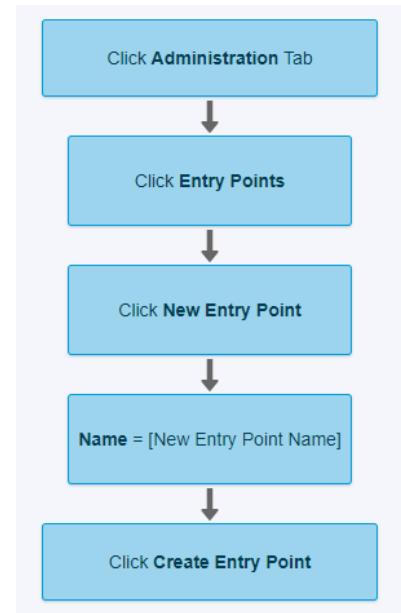
Having said that, adding in images and screenshots can be helpful to assist users if the system is especially complex or the interface is difficult to work with. If you do include a screenshot, make sure you connect the screenshot – **using a dashed arrow** – to the action box that it refers to. This is important so that the user knows exactly which screenshot goes with which action box and doesn't get confused.

Note: Images must be saved on your hard drive in order to add them to your flows. You cannot copy and paste them in from a different location. Create a folder on your desktop called "Mapping Images" and save all your screenshots to that folder. Then you can use the *"Add image …"* feature to upload the image to ProcedureFlow. If you need to resize your image to fit within the flows, hold down the `Shift` button as you do so to maintain the aspect ratios of the image.

16) Link to an external website or to another subflow

ProcedureFlow allows you to hyperlink to external websites, documents on SharePoint or MS Teams, and also to other subflows. For security reasons, it cannot link to documents stored on a shared drive.

To add a hyperlink, enter the text you want in the Add Shape dialogue box and then select the words you want to link and click the chain icon. If you are linking to a website or to a SharePoint document, enter the URL address. If you want to link to another flow, select the button beside *Flow,* enter the flow's title and select it from the list of search results. Click *Insert* to finish adding the link.
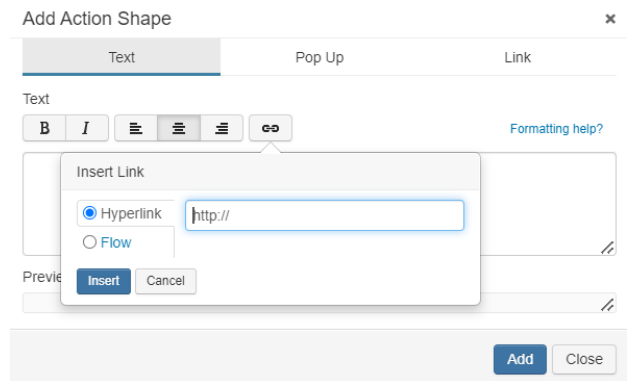
In addition to being able to link to external websites and to SharePoint documents, being able to link to other subflows is extremely helpful:

- It allows you to link to another flow using whatever text you want, instead of being limited to using only the flow's exact title.

- We often create generic process flows, such as Create Service Request or End Call, that will be used again and again throughout the flows. When we also need to provide specific information along with it, we can hyperlink to the generic subflow using whatever text we want, and include a bulleted list of the information
that needs to be included for the user's specific situation.
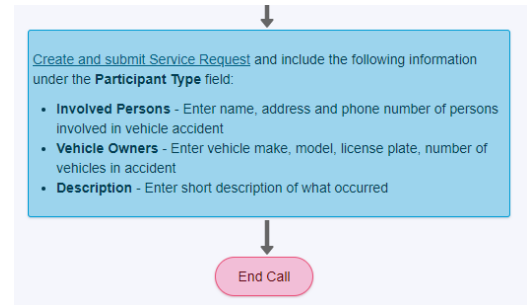
17) **Mapping system work. How to represent the different types of data.**

Mapping system work may seem complicated, but it's actually some of the easiest processes to map.

- **Bold screen text**. Bold whatever text the user will be looking for on the screen. Eyes are drawn to bold text and the user will be guided to the right button, field, or tab immediately. It makes it easier for them to know what they are looking for.

- **Change the font for keyboard inputs.** Wrap keyboard inputs in backticks - the button under Escape on your keyboard. This changes the font into one that is mono-spaced and "computer-y" (our word!) and sets it apart from the rest of the text.
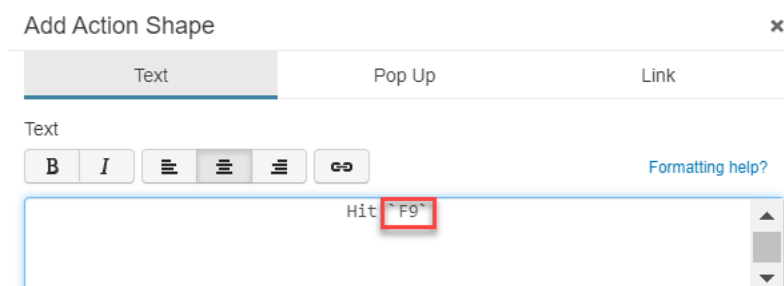
- **Differentiate between hard and variable data.** Variable data is data that will change every time the process or procedure is executed (today's date, customer's address, account number, etc.). Conversely, hard coded data will always remain the same. We differentiate between these two types of data when mapping flows:

- Variable data gets wrapped in SQUARE BRACKETS: **Date** = [today's date as mm/dd/yyyy]
- Hard data has NO BRACKETS: **Date** = January 1st, 2023

18) Validate mapping when flows are completed

If all members of your team follow (or will be following) the particular process or procedure that you've been working on, it's never a bad idea to have a validation session with both senior and junior members of your team once you've finished mapping. These sessions are extremely helpful for several reasons:

- Senior members of the team may have found a more effective and efficient way to complete certain tasks, or may have additional tips, tricks or shortcuts that could be added to the flows so that all members of the team can benefit from them.

- More junior members will be able to quickly find any gaps or information that may be missing in the flows, and point out areas that could use additional clarification(s) or explanation(s) from a new employee perspective.

- These sessions also provide an opportunity for the team to reach a consensus on what the best practice *should be.* Allowing all team members to participate in deciding what that is gets everyone on the same page and using the same version of the process.

19) Submit my changes for approval?

Once you've finished making your changes, it's easy to submit them for approval! Make sure to save and close any flows that you've been working on. Then, click *Review Your Changes*, give your change set a title, and click *Submit for approval* to send it to the Approver(s) for review.
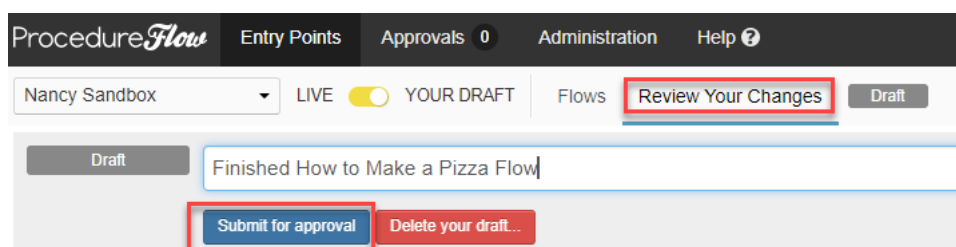
After your draft has been reviewed by the Approver, you'll receive a notification advising whether your changes have been approved, declined or additional changes have been requested.

20) Pull draft out of the Approvals queue

ProcedureFlow only allows users to have *one draft* at a time. If you've submitted your draft for approval, you can't make any more changes to it until it's been approved, declined or sent back to you for revisions by the Approver. However, you can cancel your submission and pull your draft out of the Approvals queue, so you can continue to work on it.

To do so, toggle from *Live* over to Y*our Draft* and click *Review Your Changes*. If your draft hasn't yet been handled by the Approver, you'll see that it's still "*Pending Approval*." Click the red *Cancel approval* button.
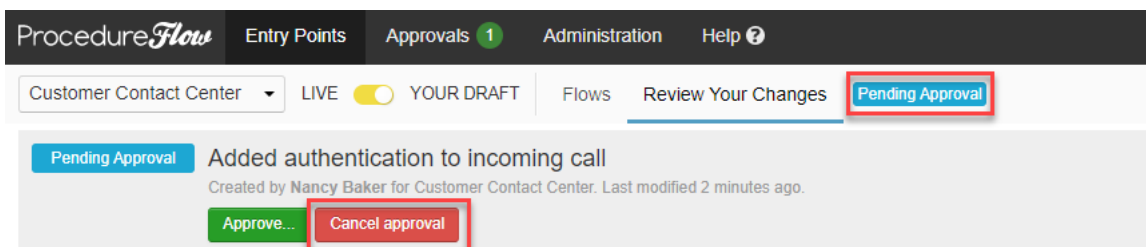

This will pull your draft back from the Approvals queue and you'll be able to continue working on it. When you're all finished, you can submit it for approval again.

21) Stay up-to-date on process changes

One of the most valuable features of ProcedureFlow is the change notifications! Every time a change or update is made to the process, all users receive a notification that there has been a change to the process that they need to review.

When you see the *Change History* counter increase, click on *Change History* to see the list of new change sets and click on the change set that you would like to review. You'll see a complete list of all the modifications, additions and deletions made within that change set on the left side of the screen. You can then click on a flow title in the list to see a side-by-side comparison of the old version and the new live version.
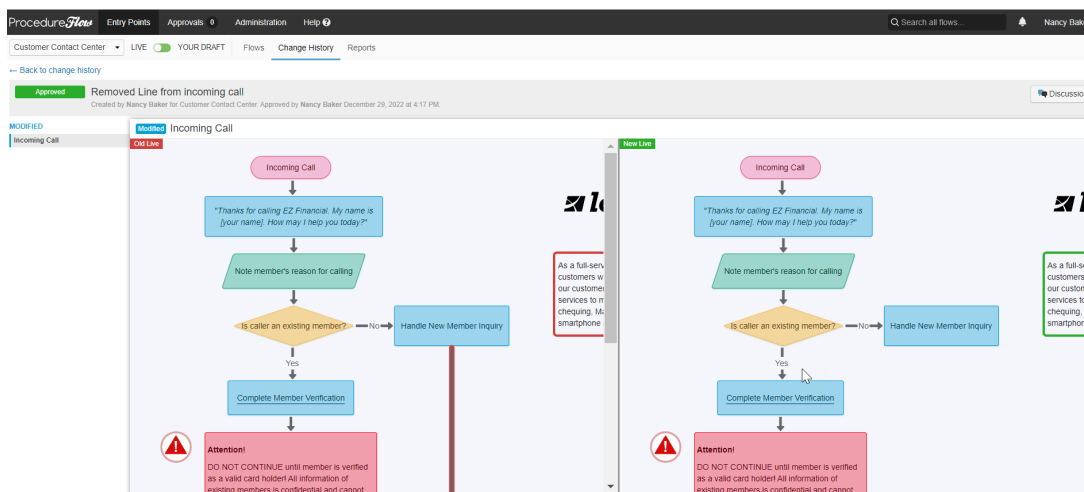
22) Help & Support

If you have any other questions or concerns about the above or how to use ProcedureFlow, please don't hesitate to reach out to the ProcedureFlow via email at **help@procedureflow.com** or for urgent issues via helpline at **1 (888) 827-3918**.

If you want some more self-serve options, you can:

- search our knowledge base of help articles at help.procedureflow.com, including our quick "how to" videos for Viewers and Contributors, or
- check out our ProcedureFlow - https://blog.procedureflow.com/

23) Feedback and/or a feature suggestion or request!

We love feedback from our users and encourage them to provide us feedback by reaching out to our team directly, or by adding their feature suggestion or request to our Customer Feedback page at procedureflow.uservoice.com. UserVoice allows our users to add their feature suggestions and requests to the growing list of customer suggestions so our user community can vote on it.

Our Product Management and Development team reviews all UserVoice feedback and uses it to help decide what to work on next!

Thank you for being an amazing customer! We want to make your first experience using ProcedureFlow a success and are available to support you in any way we can - we want to make sure you're comfortable and getting the most out of this tool!