

Adding Associated Documentation to a Process Model

Avantage allows you to associate dynamic links to external documents from the BPMN flow objects in your process diagram. You can create links to corporate procedures, web sites images and more. This allows you to seamlessly and transparently integrate documentation directly into your BPMN process models.

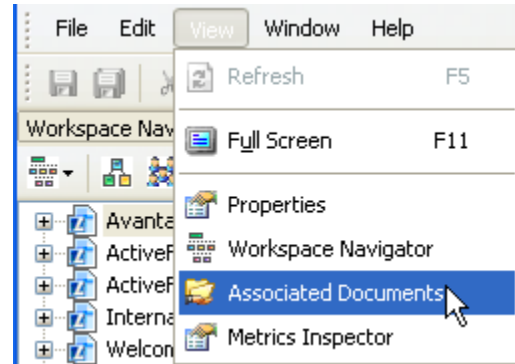
The importance and power of process documentation.

In a classical BPM project it is necessary to obtain a *complete picture* of the **As is** situation of the patient. This entails creating process maps which describe the current practices, capturing sufficient information and baseline metrics so as to allow numerical/analytical process analysis to take place.

In a BPM **As Is** project of any size, a considerable amount of documentation is generated and/or discovered. Much of this documentation is of a nature that is not directly related to the process model so it doesn't make sense include it directly into the process model **Repository**. (See Repository Chapter). In this case it is best to create a dynamic associative link from the BPMN shape in your diagram.

This chapter describes how to use this facility.

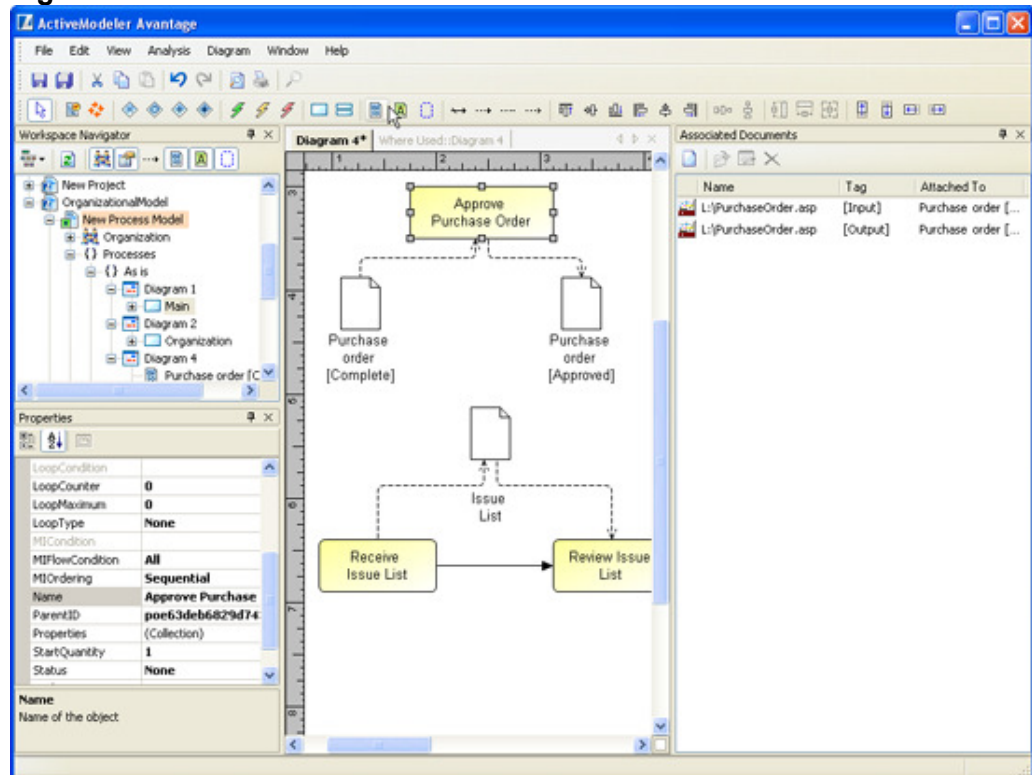
Figure 1. Activating the Associated Documents viewer



The Associated Documents View

This view shows a list of document associations belonging to a BPMN shape when that shape is selected in the Diagram window or the Navigator View.

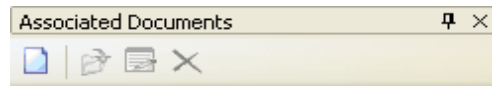
Figure 2. The Associated documents view



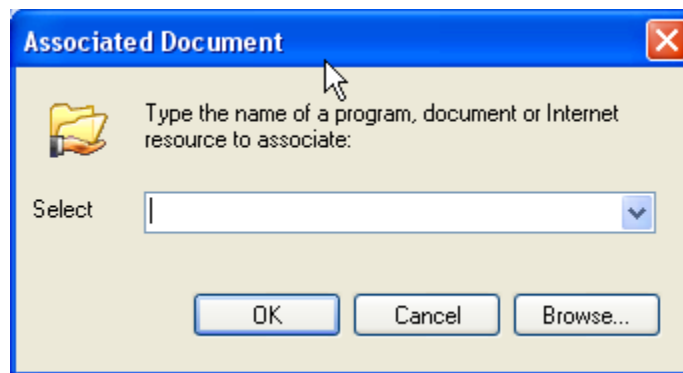
Adding a reference

Click on the shape to select it. Then click on the **Add new document** toolbar icon in the Associated Documents view.

Figure 3. Add new document



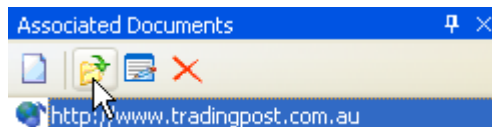
You are then asked to enter the name of a program, document or internet resource to associate with.



Entering the name of a documentation resource

Opening a reference

To view a reference select it from the list and then click the **Open document...** button (or you can double-click it).



Deleting a reference

To delete a reference select it from the list and then click **Delete** button.

Editing a reference

To edit the URL of a reference select the item from the list and then click the **Edit Document Path...** icon. You can then directly ammend the URL.

Using Data objects artifacts to track documents within a process

The BPMN standard provides for data object artifacts to show inputs and outputs to a process. By attaching an associated document reference to data objects it possible to track the inputs and outputs of activities comprehensively.

Figure 4. Data objects sent from one activity to another via a sequence flow or message flow.

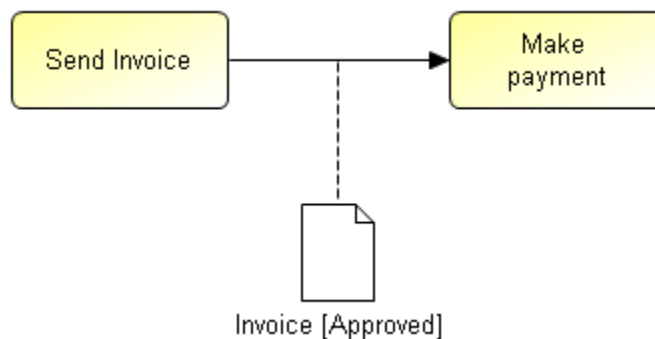
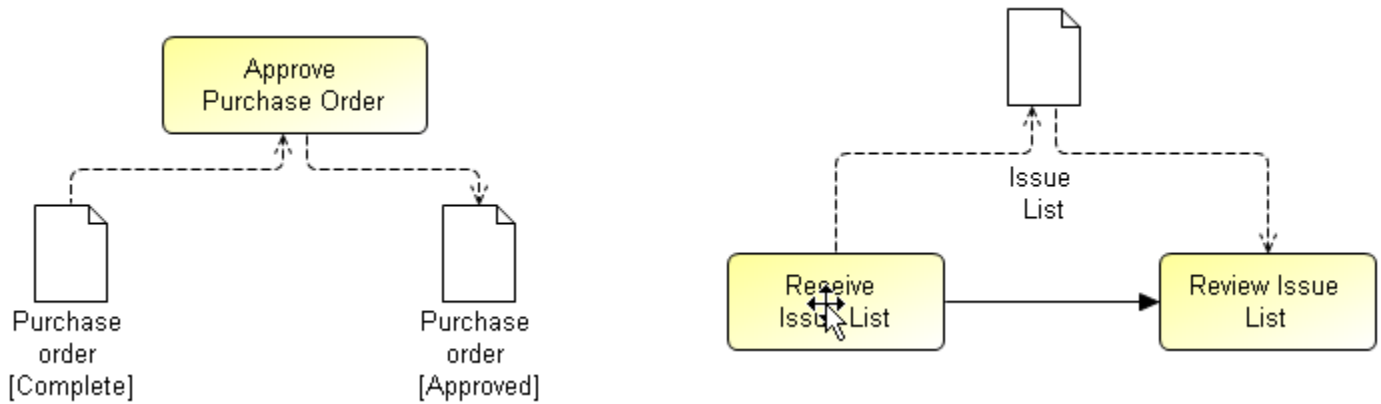


Figure 5. Data Objects may be shown as being inputs or outputs of a process. Directionality added to the association will show whether the Data Object is an input or an output:



Associations shows any directionality with an arrowhead. The default is **[None]** (no arrowhead). – in our case means that the associated Data Object is only a reference for our task. A value of **[To]** means that the arrowhead shall be at the Source object – in our case means that the associated Data Object is an **input**. A value of **[From]** means that the arrowhead shall be at the Target Artifact – in our case means that the associated Data Object is an **output**.

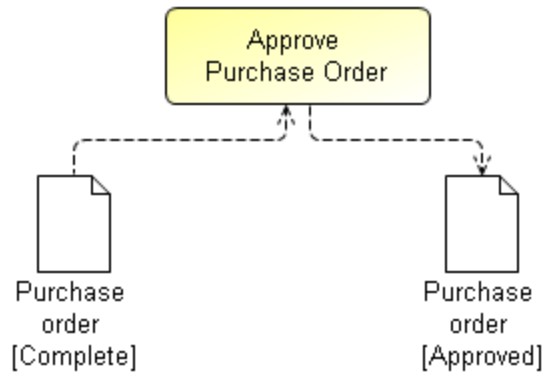
A value of **[Both]** means that there shall be an arrowhead at both ends of the Association line – in our case means that the associated Data Object is both **input** and **output**

How the Associated Documents view tracks data object inputs and outputs

The example below is a simple purchase order approval activity. The purchase order data input to the activity is represented by the Purchase order [Complete] data object. The output from the approval is represented by the Purchase order [Approved] data object.

We have associated a document named “PurchaseOrder.asp” to both artifacts.

Figure 6. Purchase order approval example



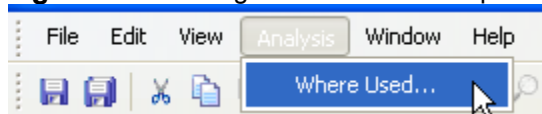
Clicking on the Approve Purchase Order activity in the diagram causes the Associated Documents view to show the assigned inputs and outputs to this activity as defined by the data objects.

Name	Tag	Attached To
L:\PurchaseOrder.asp	[Input]	Purchase order [Complete]
L:\PurchaseOrder.asp	[Output]	Purchase order [Approved]

The “Where used” report

Given that a process model is using data objects to represent documentation inputs and outputs, the **Where used** report can be used to show the inter-relationships in the model.

Figure 7. Invoking the Where Used report



The report can be invoked from a selection in the Navigator (from a MeasurePoint or Diagram object) or at any time that a diagram editor window is active. If you invoke the report from a diagram then you will only see the relationships within that diagram. If you invoke it from a MeasurePoint object then you will see all the relationships that are included within the scope of the MeasurePoint.

Figure 8. A Where Used report

Diagram 4* Where Used::Diagram 4 Where Used::As is < > x			
Document Path	Tag	Diagram	Pool
L:\PurchaseOrder.asp	Reference	Diagram 4	
		Diagram 4	
	Input	Diagram 4	Main
	Output	Diagram 4	Main
L:\InvoiceForm.asp	Reference	Diagram 4	Main