ABC 2016 Fall Summit

Documenting your Workflows

September 7, 2016
Documenting Workflows

Resources

Task Analysis
- USDA NRCS Template

Creating a Process Flowchart
- Flowcharts in Microsoft Word
- Flowcharts in Microsoft Excel

Creating Documentation
- Creating Procedure Manuals and Documentation
- Handout - How to Document Workflows

Using MS Word
- Word Template and Ribbon Customizations
- Using Quick Parts
- Using Styles
**Introduction**

**Why?**

- Opportunity to improve processes
- Anytime you are handing off a task
- Reinforce learning in a new process
- Succession planning
Media Production

Documentation
# Setting up the Ribbon in Microsoft Word

This will only need to be done once. If you have customized the ribbon yourself prior to this, consider that this process will eliminate your customizations.

1. Right Click on the Ribbon and Select Customize Ribbon.

2. Select the Import/Export button.


4. Browse for the file named “DocumentationTemplate.exportedUI”

5. Select Yes to replace the existing Ribbon customizations.
Absence Management Self Service Training
For Employees
Introduction

How? Just-in-time

-- or --

Process mapping and task analysis
Task Analysis

Job task analysis worksheet

<table>
<thead>
<tr>
<th>Job:</th>
</tr>
</thead>
</table>

| Question 1: | Question 2: |
| What does the trainee need to know and/or be able to do to perform this job? | Can it be taught and someone learn that task in 30 minutes? |

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
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<td>2.</td>
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<td>5.</td>
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</tbody>
</table>
Envisioning your Process

Start

Task/Procedure

Task/Procedure

Task/Procedure

Step 1

Step 2

Step 3

End
Example: Producing a Report

Report Requested

Log into System → Select Parameters → Download Report

Select Parameters
1. Start Date
2. End Date
3. Employee

Send Report
Demonstration
Activity

- Using SnagIt and the Word template: Create a guide on accessing SkillPort:
  - Task 1: How to log into the portal, and
  - Task 2: How to open SkillPort.

- Using Camtasia: Create a video covering the same two tasks.