



WHITE PAPER

GENERAL CONSIDERATIONS FOR MIGRATING A BPMN PROCESS INTO PROCESSMAKER

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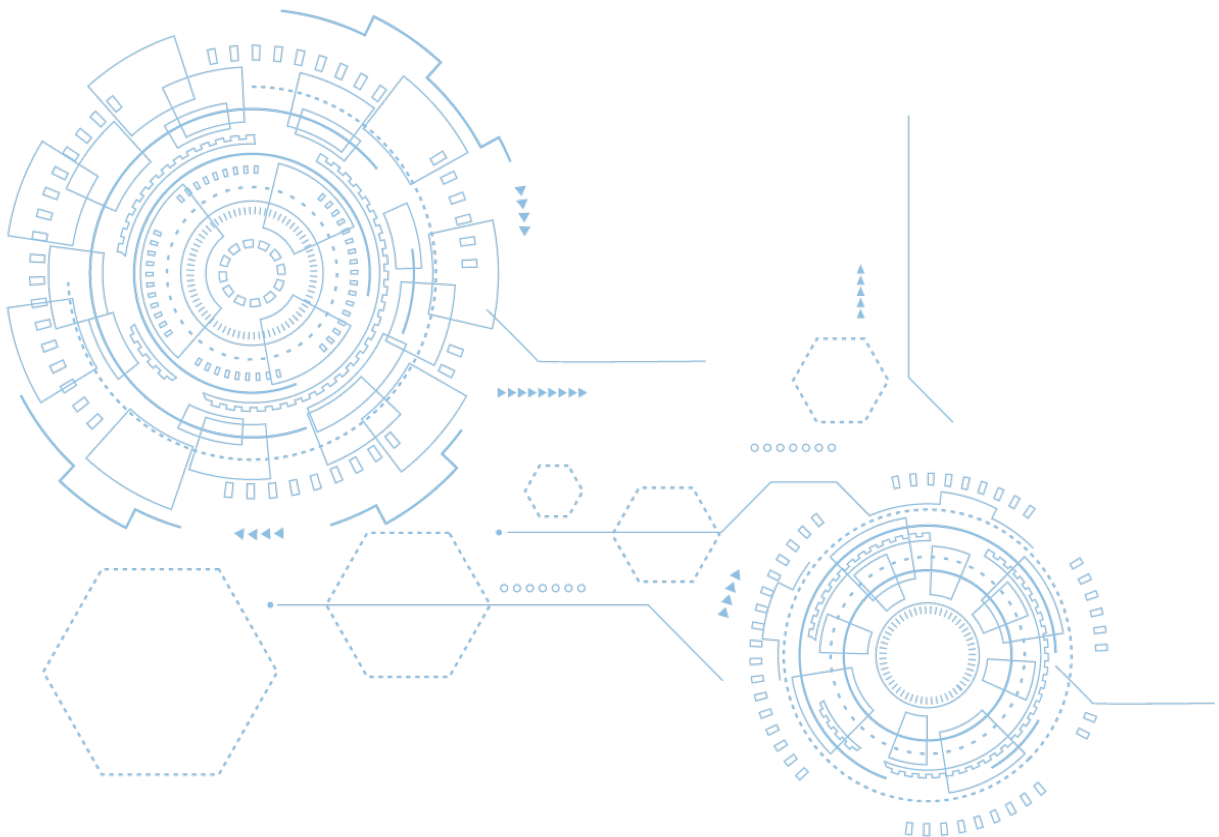
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INTRODUCTION

We often find that technology moves at a pace much faster than a business organization can evolve, thus making tools and processes obsolete, clunky and slow to react to the newly formed demand.

Even human resources bring about change by including their own technologies, both from a mindset as well as from gadgets and devices that they use in their daily work engagements.

Moving forward with large business platforms is no easy task, and there is a lot riding on it when the time comes to upgrade an organization to the Business 4.0 realm, from the go-to-market value proposition all the way into the actual technology stack where the company will now operate and thrive.

This document scopes our approach to bringing your old business workflows solution onto the modern and adaptable solution that ProcessMaker has developed to leverage technology in a way that will make your company capable of delivering a world-class business experience.



PLANNING

As the saying goes, planning is 80% of a successful journey. That is why we dedicate a substantial amount of effort to mapping and understanding how the current workflows in your business add value to the organization.

Over a number of weeks, depending on the sheer size of the undertaking, our team of professional services experts will interview and document every step of the workflows currently in production, review the interactions between departments, map forms and other customer-facing points of contact, as well as gather key components in the way of access tokens, passwords, and digital assets built over time.

In addition, your team should revisit or create your contingency plan for your IT infrastructure and database. This is also known as your disaster or recovery plan. As they say, “fail to plan and plan to fail.” A contingency plan in the technology world is any critical business assets or operations that are lost unexpectedly due to a lack of computer processing capabilities, typically for more than 48 hours. This may seem as overpreparation, but planning for emergencies is key to preventing data corruption or loss when migrating processes into a system. Have this plan in place for your IT infrastructure to prevent the worst-case scenario during the Execution phase of your migration plan.

Aside from preparing for the worst, the planning process is also the best time to forecast for business growth, strategic planning, and future commitments to enable the newer technologies to support a renewed value proposition while maintaining the product’s identity and market share it has built.

Critical elements of a migration plan would include a sensible timeline, a clear understanding about the risks with data handling, as well as any regulatory compliance matters when personal identifiable data is included, business continuity while the migration process is in flight, and defining clear and objective KPIs to measure the effectiveness of the migration effort.

Although this process is long and tedious, the precision and quality of the planning would allow for the successful and friction-less construction of the new business platform.

“the planning process is also the best time to forecast for business growth, strategic planning, and future commitments”

PREPARATION

The migration preparation process is likely to be the longest phases of the project. During the migration preparation process, new workflows are developed. Following ProcessMaker's best practices, a number of statements of work (at least one for each workflow) are produced, evaluated, and approved by all stakeholders involved.

Workflow and process development is a delicate task, where trained professionals dedicate time and resources to enable the many features available in ProcessMaker to deliver a top-class user experience. We create intuitive forms that capture information or present users with the right information, at the right step of each process.

A considerable amount of engagement with the business analysts and other stakeholders can be expected during this phase of the migration process, as approvals are secured and the work is validated in real-time.

ProcessMaker's development paradigm includes two basic instances before a process is launched into production: a Quality Assurance sub-phase as well as a Release Candidate Review.

The Quality Assurance sub-phase is conducted internally at ProcessMaker, where a team dedicated to this task goes through a battery of tests and validations to assure code consistency, identify significant issues with expected features performance, as well as deliver comprehensive and complete documentation for both the user as well as systems administrators consumption.

Secondly, the Release Candidate Review is a customer-facing step in the process that includes a subset of specific end-user stakeholders tasked with running scenarios as close to a production use case as possible. Planned use cases and KPIs are fundamental to this validation sub-phase.

Legacy data is often used to validate new processes, thus handling repositories as well as old data silos is critical to a successful process migration. This is where information is often processed for consistency and validity going forward. Large volumes of information would add a layer of complexity to the migration process, yet new technologies allow for a seamless and smooth transition onto the new solutions platform.

“During the migration preparation process, new workflows are developed.”

Throughout the Preparation phase, your team should begin the transfer and modeling process. It's easy for business analysts and business managers to model processes. Business analysts and business managers understand the processes that they use in their organizations, and they want to define and improve those processes. For example, business analysts want to learn how much time and money is spent to do work in their organizations, and they want to improve those processes. In ProcessMaker, we refer to these business experts as "process owners."

Each KPI and goal set forth at the beginning of the project is used as a benchmark for progress once the project begins. Depending on the nature of the legacy solution involved, extracting the data behind the workflow of each request or instance can be a tedious process.

BPMN diagrams created in different BPMN applications can be exported and imported into ProcessMaker as long as the file has a .bpmn extension and they fulfill BPMN 2.0 standards. Diagrams will export the following elements:

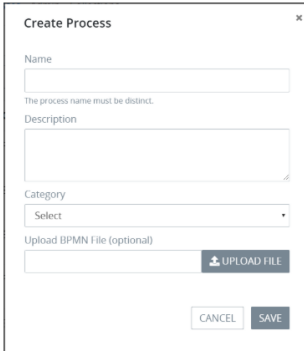
- Gateways
- Pools
- Lanes
- Tasks
- Comments

*** Please note that the task's configuration will not be included. If you upload a third-party BPMN file to use as your process model, any process model elements that do not comply with the BPMN 2.0 specification cannot be used after the process is created. An error displays for any invalid process model elements.



Below, here are the steps to creating a process in ProcessMaker:

1. View your active Processes. The **Processes** tab displays.
2. Click the **+Process** button. The **Create Process** screen displays.



3. In the **Name** field, enter the name of the Process. This is a required field.
4. In the **Description** field, enter a description of the Process. This is a required field.
5. From the **Category** drop-down, select a category to associate with the Process. This is a required field. See [What is a Process Category?](#) for more information.
6. Optionally, upload a third-party [BPMN 2.0 compliant](#) BPMN file from which to use its Process model in ProcessMaker. Do not use this function to [import a ProcessMaker version 4 .json](#) file.
To do so, follow these guidelines:
 1. Ensure that the third-party process model is BPMN 2.0 compliant and has the `.BPMN` file extension.
 2. Click the **Upload File** button, and then browse for the third-party `.BPMN` file to use as your Process model.
7. Click **Save**.

In the case of a legacy solution that holds processes with systems or permissions that aren't compatible with a seamless transfer, the migration process becomes more complex. For example, the forms, script tasks, and other information working behind the process that either:

In the case of an incompatible system, each process map will upload as a diagram without the data or automation found in the former legacy solution. Essentially, one will be looking at a template to which a ProcessMaker Architect can begin to "fill in" the process map with tasks. Since each individual process instance requires information to know the next step in the sequence, this data needs to be input by hand.

After this information is completed, ProcessMaker enables automation in real-time of that data. Once all of the processes have been uploaded, migrated, and created with custom code to perform the functionality as desired, an enterprise can move forward with the implementation of the processes in the Execution phase.

“ProcessMaker
enables automation
in real-time of all the
data.”

EXECUTION

To conclude the project timeline is the last phase, the Execution phase. This is where the migration goes live. There are three sub-phases involved in a successful migration plan. They include the following:

- Downtime
- Contingency Plan
- Testing, testing, and more testing
- Live launch

Going back to the planning phase of the project, your team should anticipate a considerable amount of downtime during the migration. You are going to want to give your stakeholders as large of notice as possible, with plenty of time factored in while migrating. Keeping your customers, partners, and internal stakeholders “in the loop” will allow the migration ample time to complete. As with any project management development, a timeline — complete with as much information as possible — is best practice.

**“A timeline
— complete with as
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possible — is best
practice..”**

Secondly, you will need to have your contingency plan on hand during this Execution phase. This provides end-users with business continuity assurance, should major issues come up during the actual process activation phase. Contingency plans often include rollback procedures, backup restoration, and an alternative site availability.

To the third point, your enterprise will then move into the Testing sub-phase. This is sub-phase of Execution is where the enterprise begins to test the accuracy and quality of the code in the processes either transferred over from the legacy solution or rebuilt using BPMN 2.0 notation within ProcessMaker in the Preparation phase.

Once the quality assurance procedure has ensured that the processes work as anticipated from the migration, the final sub-phase in Execution is the launch itself. Before going live, your team will move forward with the scheduled live date. Having the old data on-hand in case of an emergency and a contingency plan readily available, the legacy solution is essentially shut off. The new system is then activated and ready for use.



VALIDATION

A successful migration process is validated through a batch of tests and indicators that ensure a complete and functional solution has been deployed.

User experience is often the best KPI to confirm that the overall process has had the impact it set out to accomplish. Having a survey in place, as well as other user experience validation tools, is just as important as performance and uptime indicators.

A long-run approach to validating a migration process, for a large technological solution, would aim to calculate a positive Return On Investment, as the final indicator of success.

SUMMARY

Migrating processes can seem like a daunting task for many IT departments. ProcessMaker is experienced in empowering IT technical and business users alike to design and deploy their own processes from another source into a new target system. Our software architecture and robust functionality, paired with the expertise of ProcessMaker staff, guide your stakeholders through the migration process.

In a review of how an enterprise can create a successful plan, there must be three phases of the project: planning, preparation, and execution. Within those phases are critical sub-phases that create a smooth transfer of the data working behind the processes that are set to be transferred. Quality control and assurance protocol, reviews, contingency planning, strategic goal forecasting, and KPIs must be planned for to use as benchmarks for success. This ensures implementing the solution happens as quickly and effectively as possible, and also provides a way to improve upon measured outcomes.



For preparation, beginning to upload and migrate process instances and maps over to ProcessMaker is the main focus of this phase. This phase takes time and attention to detail but pays off in the execution phase. For the final phase of execution, downtime, executing a contingency plan if needed, testing, and launch are the key components of a successful process migration. To verify that implementation is going as smoothly as planned, along with KPIs being met, is the validation phase. This ensures that the solution accomplished the goals it set to accomplish from the planning phase.

ProcessMaker has helped hundreds of clients realize their full business operational potential. To learn more about how our award-winning workflow platform has enabled customers all over the world to achieve this success, visit our website at www.processmaker.com.



ABOUT PROCESSMAKER

ProcessMaker is a low-code business process management and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.