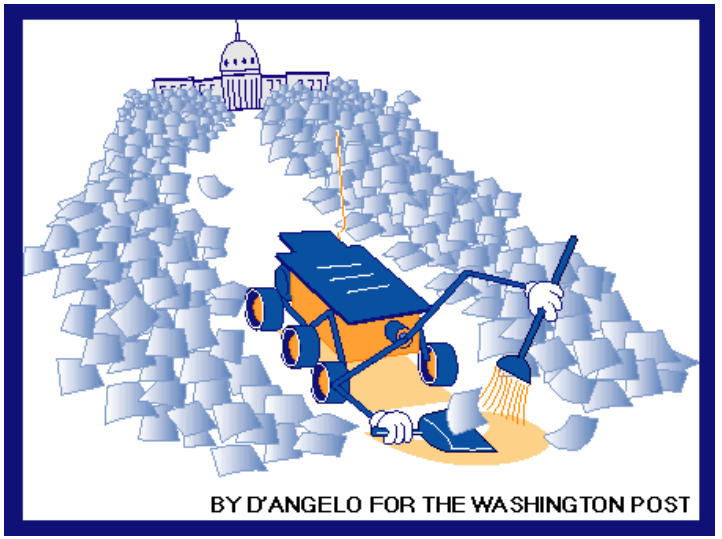
Financing Loans Management Using Process Libraries and Electronic Handbooks

(Where Shakespeare Meets Freud)

Demonstration



Dr. Barry E. Jacobs
barry.e.jacobs@comcast.net

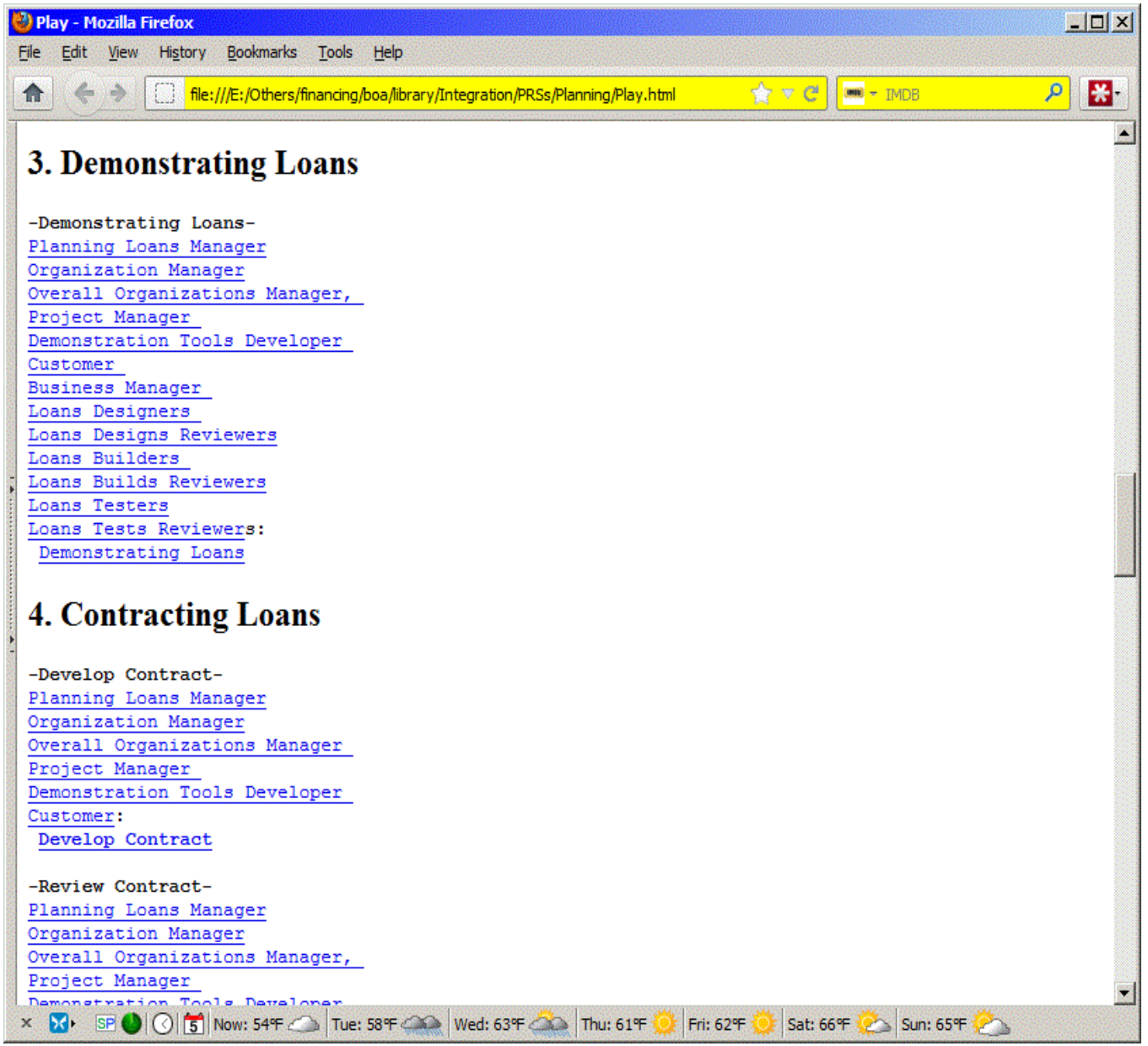
The Bottom Line:

We believe that to truly understand one's universe, one must see it thru multiple “eyes” and also have tools to “communicate” these views.

**To do this, we propose editable and cost-saving process documentation “plays”
for process developers and participants
to help them quickly and effectively learn, integrate, test, teach, and work together.**

These “plays” may be added to new or existing systems.

Plays describe subprocess execution.



Benefits:

- Facilitates the collection of system and organizational requirements,

- Does not anger/upset people whose opinions are heard,

and

- Increases the interaction between managers, process developers, and participants.

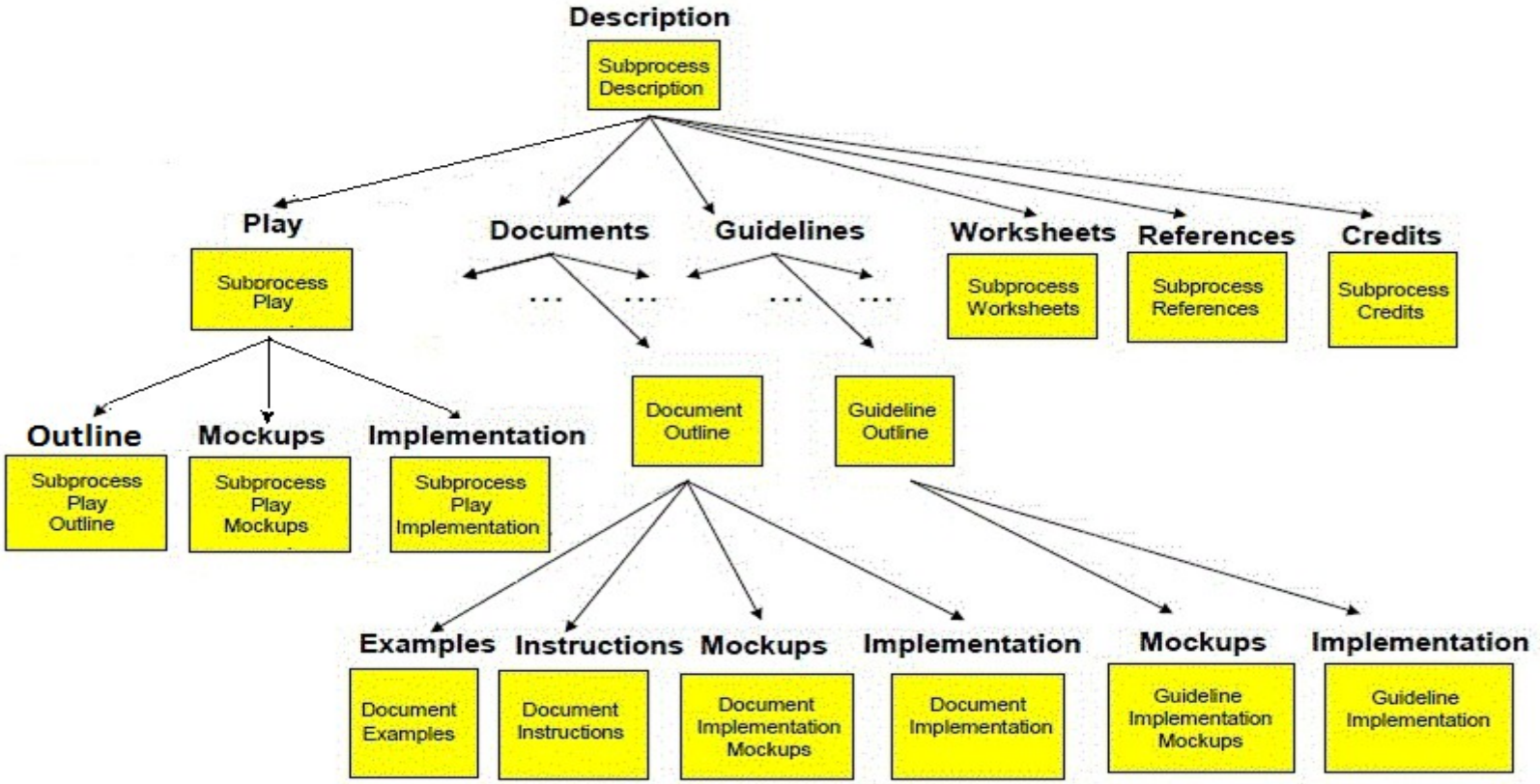
Basic Approach - Mozilla Firefox

File Edit View History Bookmarks Tools Help

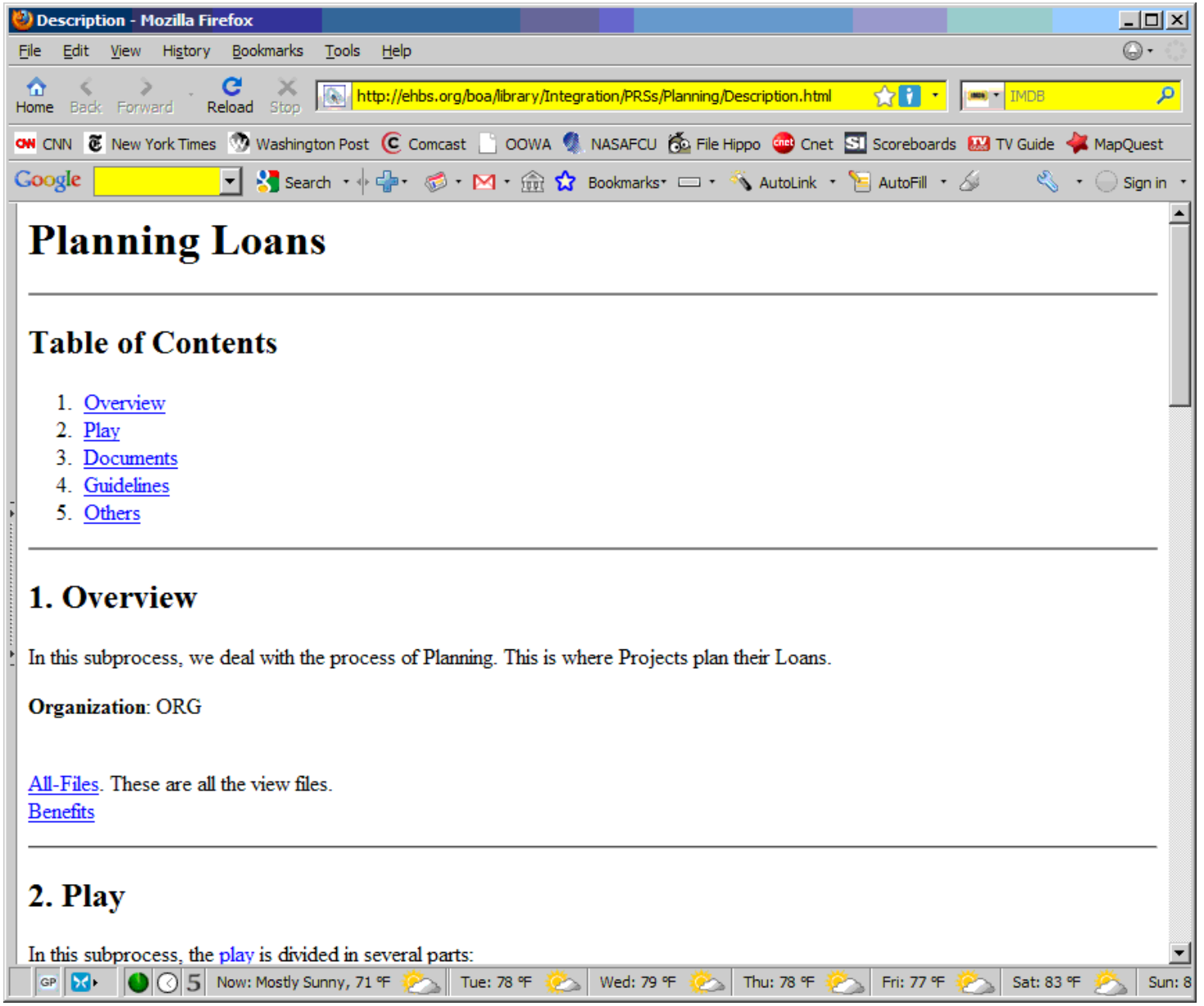
ehbs.org/intro/summary/approach.htm

Search

Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate intra- and inter-organization communication.



Descriptions summarize subprocesses.



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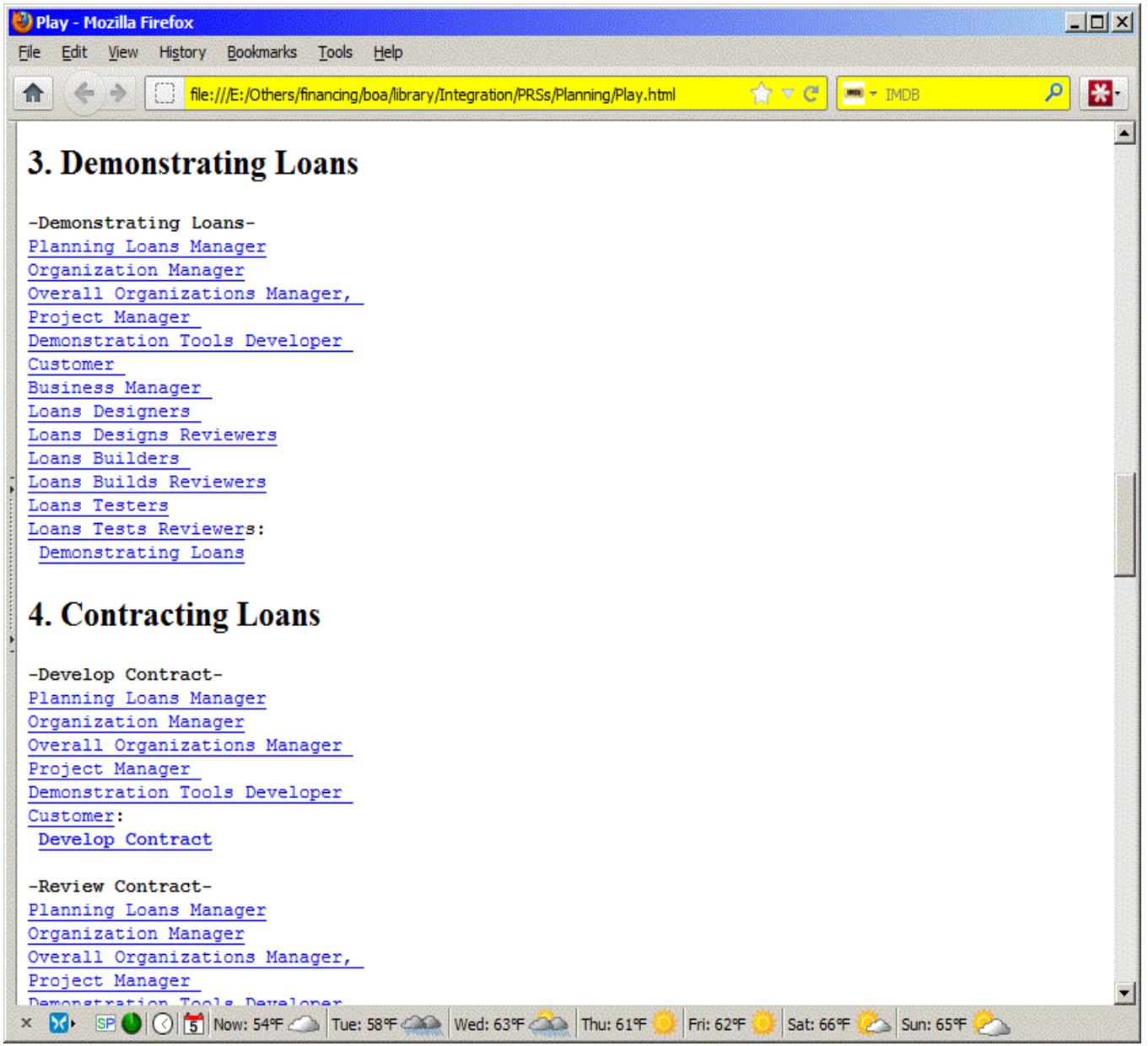
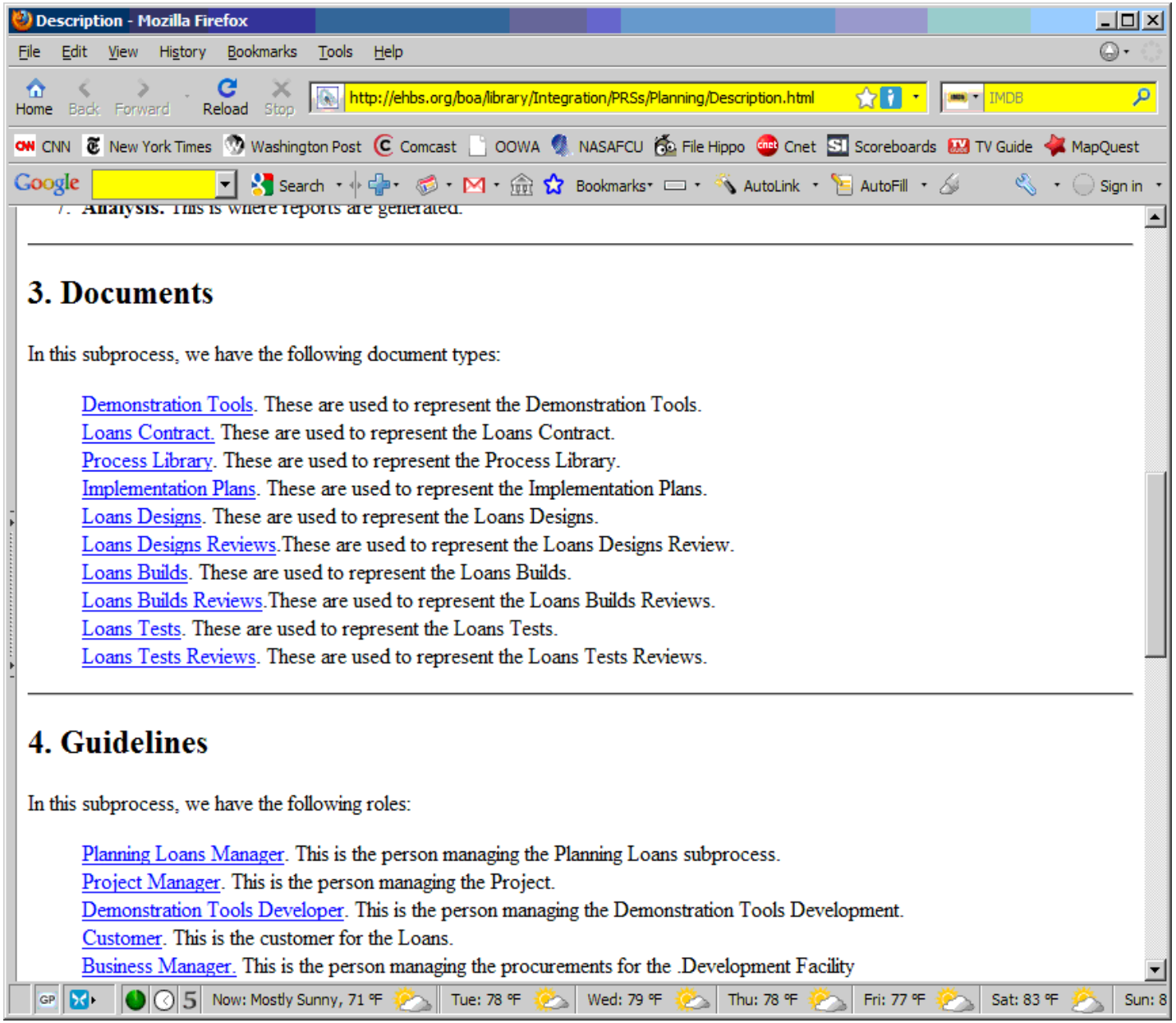
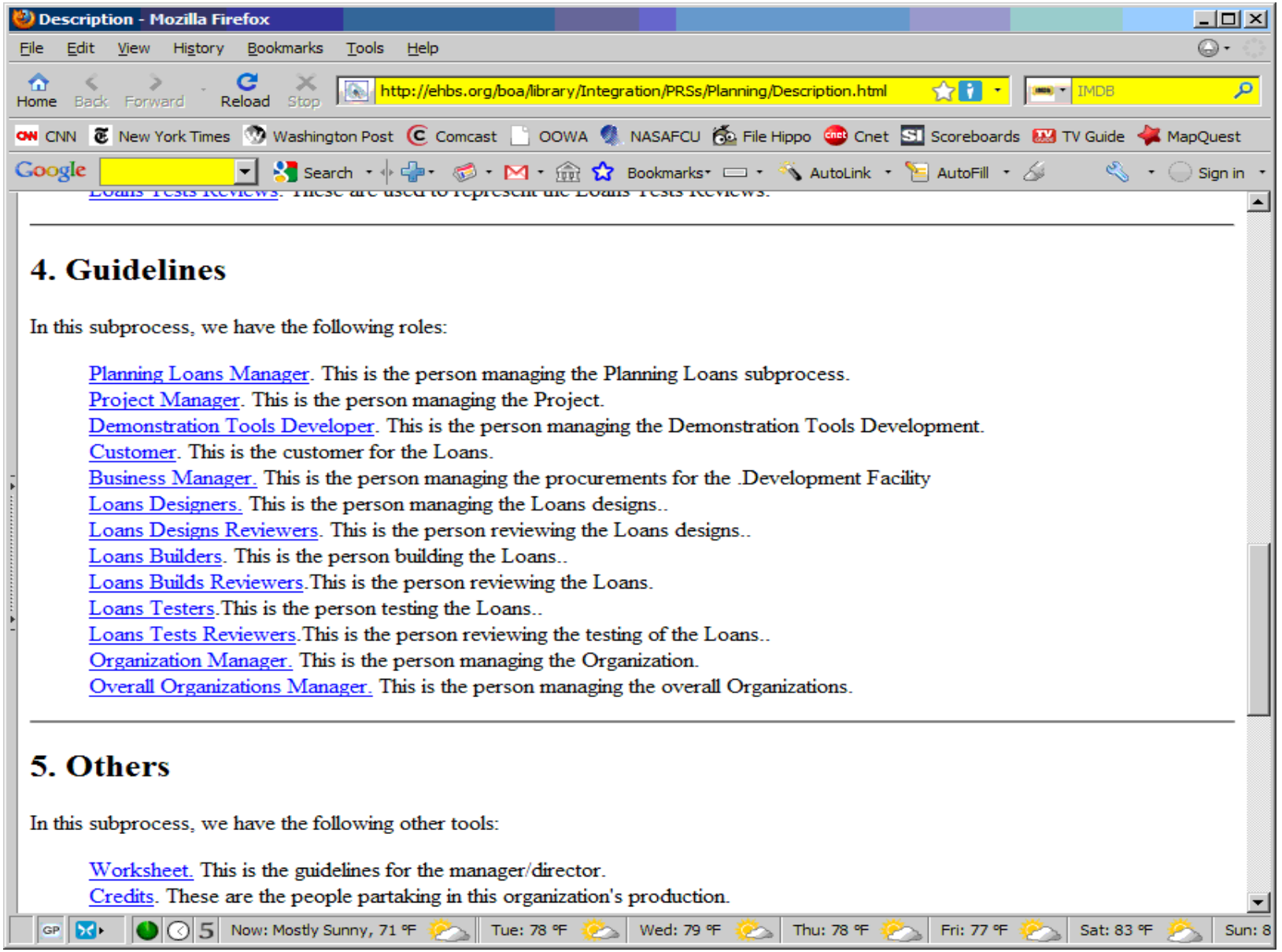


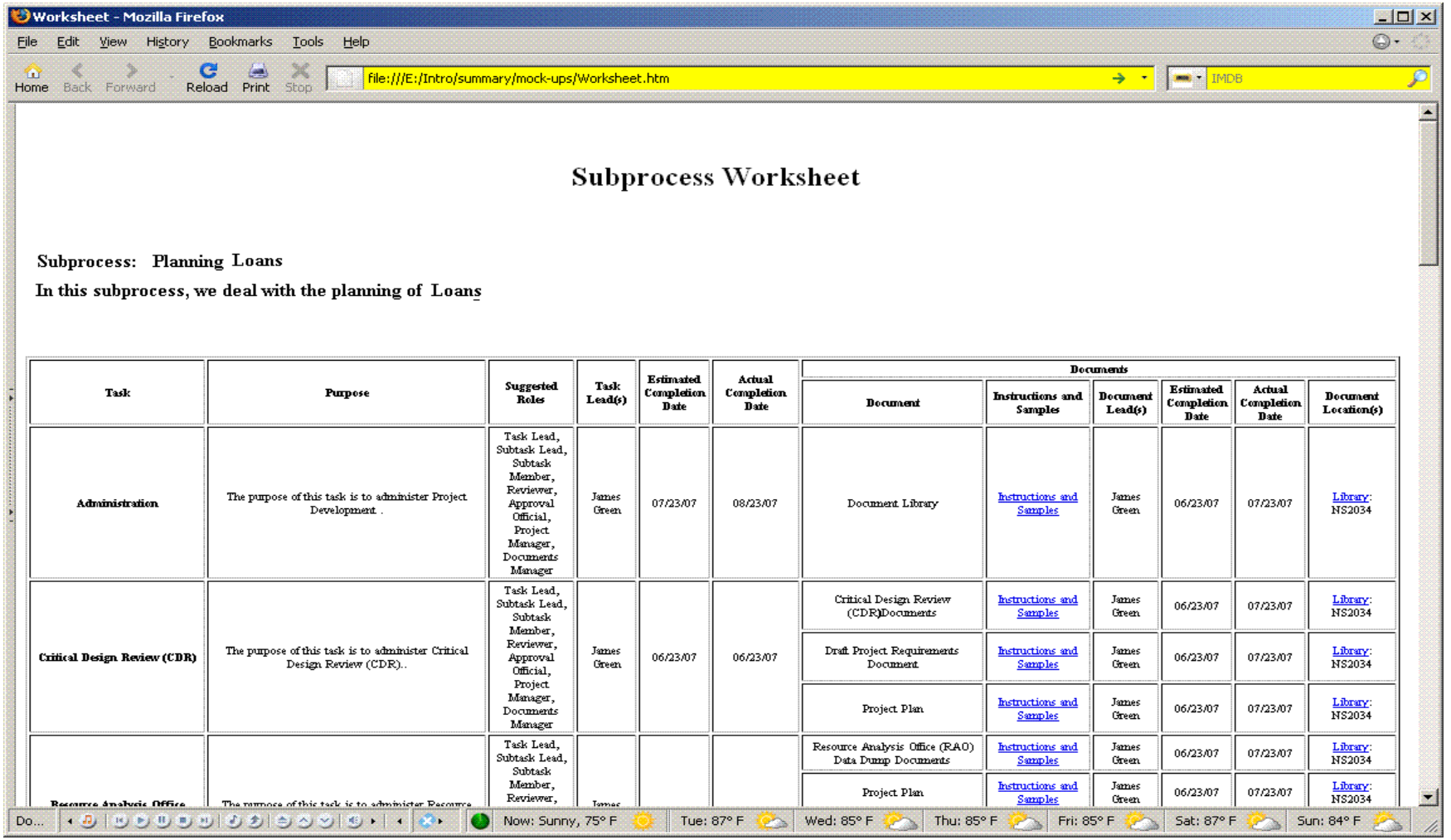
Documents describe subprocess data.



Guidelines describe user subprocesses.



Subprocess Worksheets facilitate subprocess manager communication with process developers and participants.



Worksheet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Home Back Forward Reload Print Stop file:///E:/Intro/summary/mock-ups/Worksheet.htm IMDB

Subprocess Worksheet

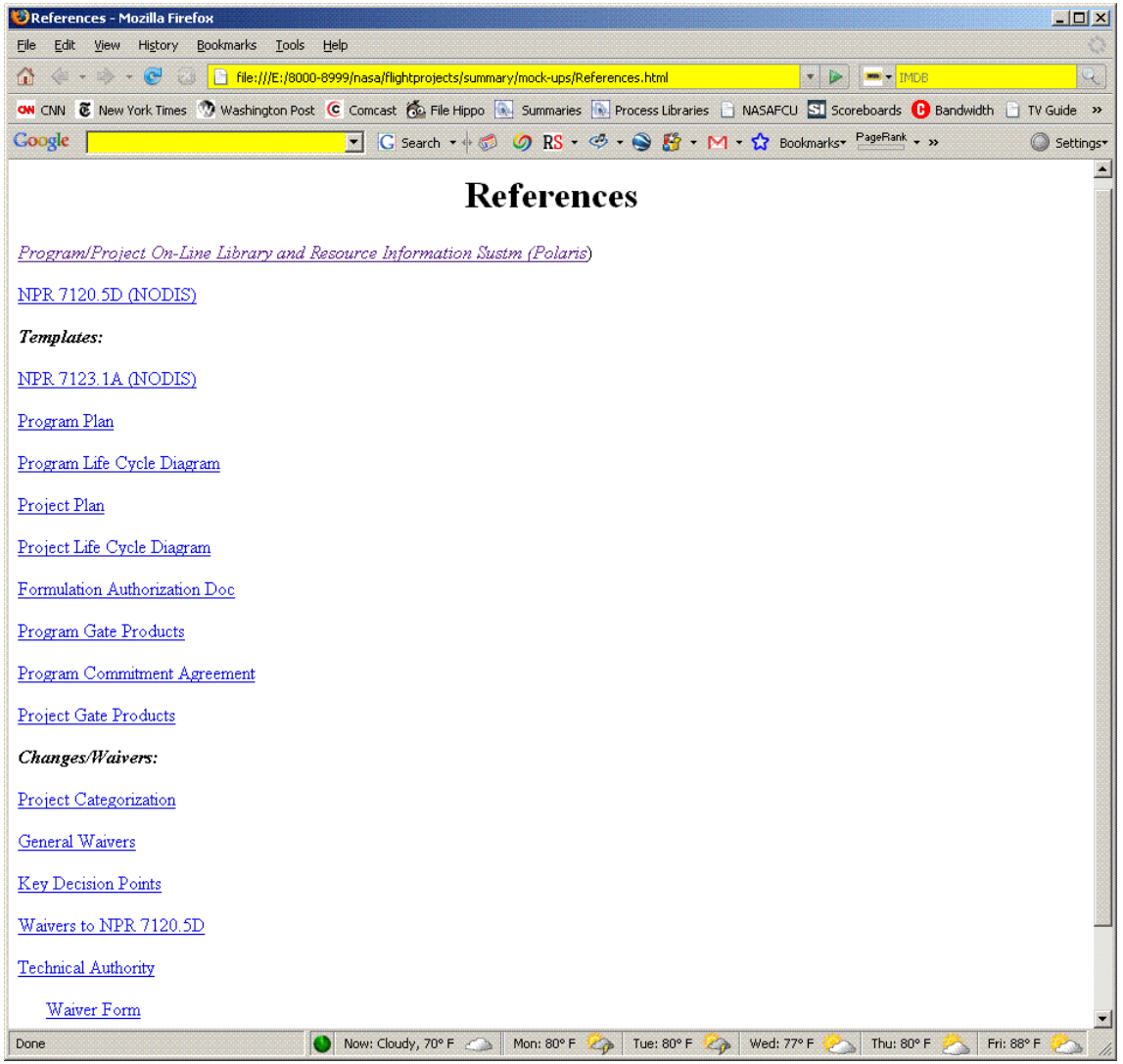
Subprocess: Planning Loans

In this subprocess, we deal with the planning of Loans

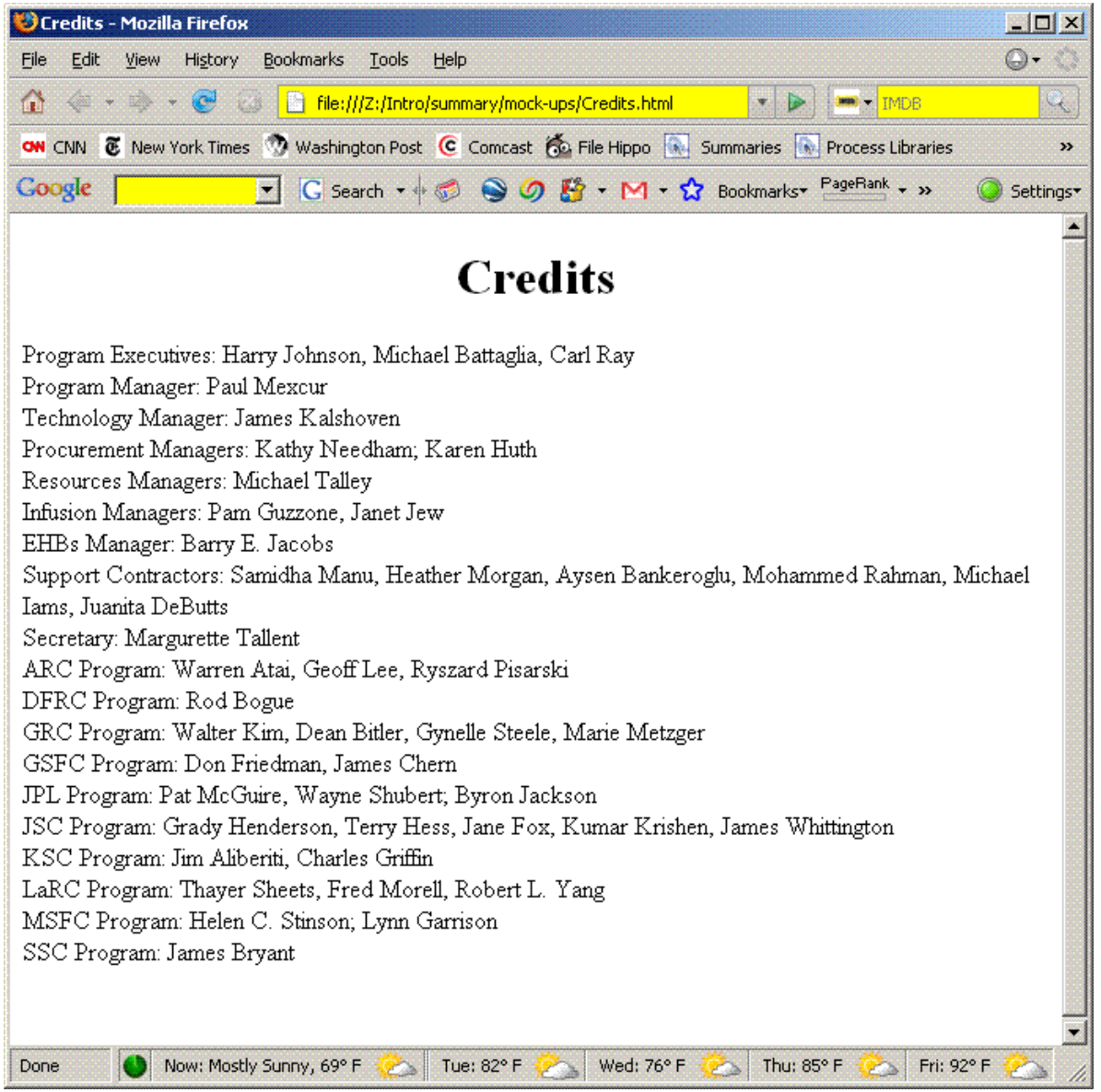
Task	Purpose	Suggested Roles	Task Lead(s)	Estimated Completion Date	Actual Completion Date	Documents					
						Document	Instructions and Samples	Document Lead(s)	Estimated Completion Date	Actual Completion Date	Document Location(s)
Administration	The purpose of this task is to administer Project Development .	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	07/23/07	08/23/07	Document Library	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Critical Design Review (CDR)	The purpose of this task is to administer Critical Design Review (CDR)..	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	06/23/07	06/23/07	Critical Design Review (CDR)Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Draft Project Requirements Document	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Resource Analysis Office	The purpose of this task is to administer Resource	Task Lead, Subtask Lead, Subtask Member, Reviewer,	James			Resource Analysis Office (RAO) Data Dump Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034

Do... Now: Sunny, 75° F Tue: 87° F Wed: 85° F Thu: 85° F Fri: 85° F Sat: 87° F Sun: 84° F

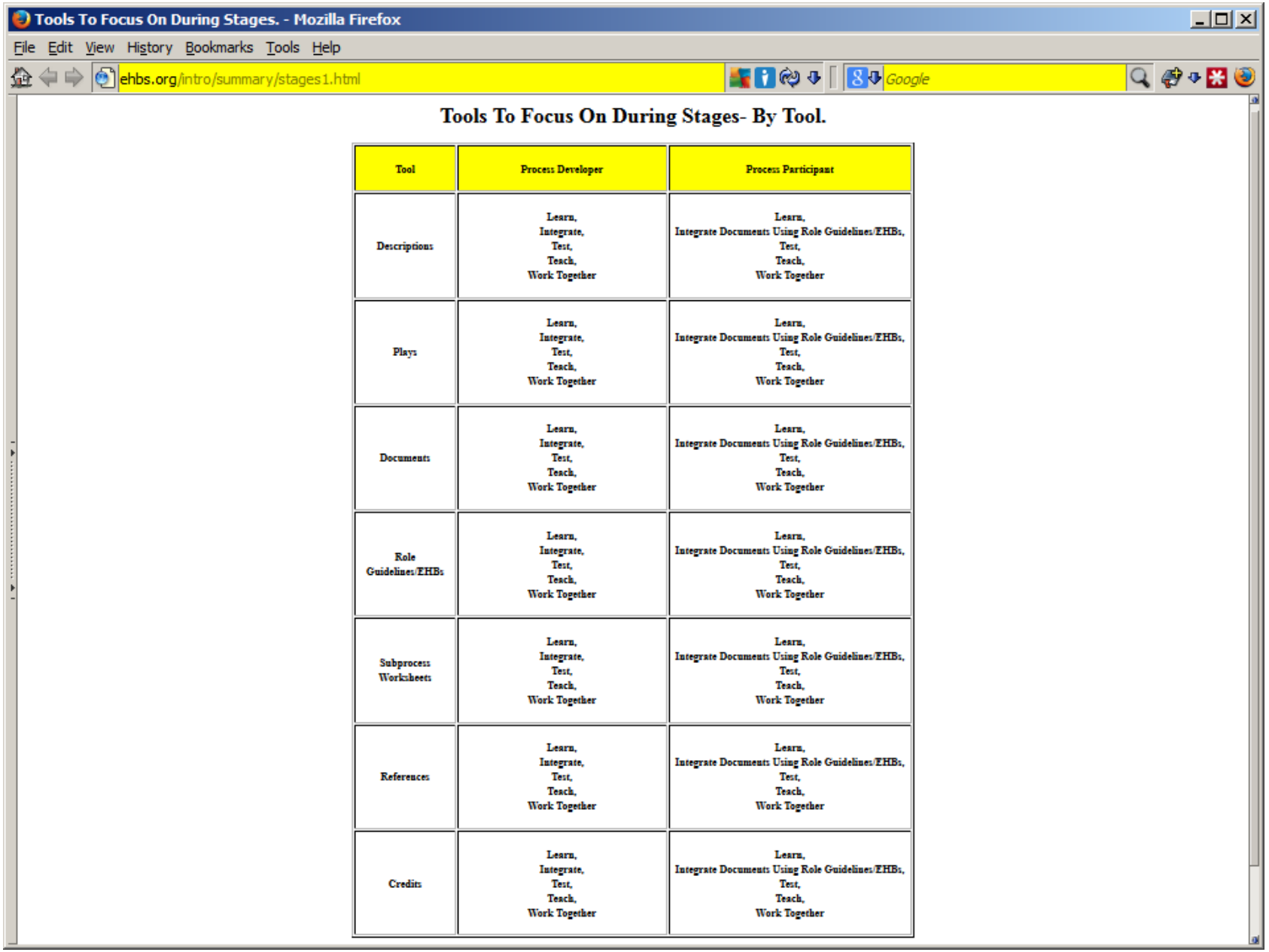
References list other related resources.



Credits acknowledge people's contributions.



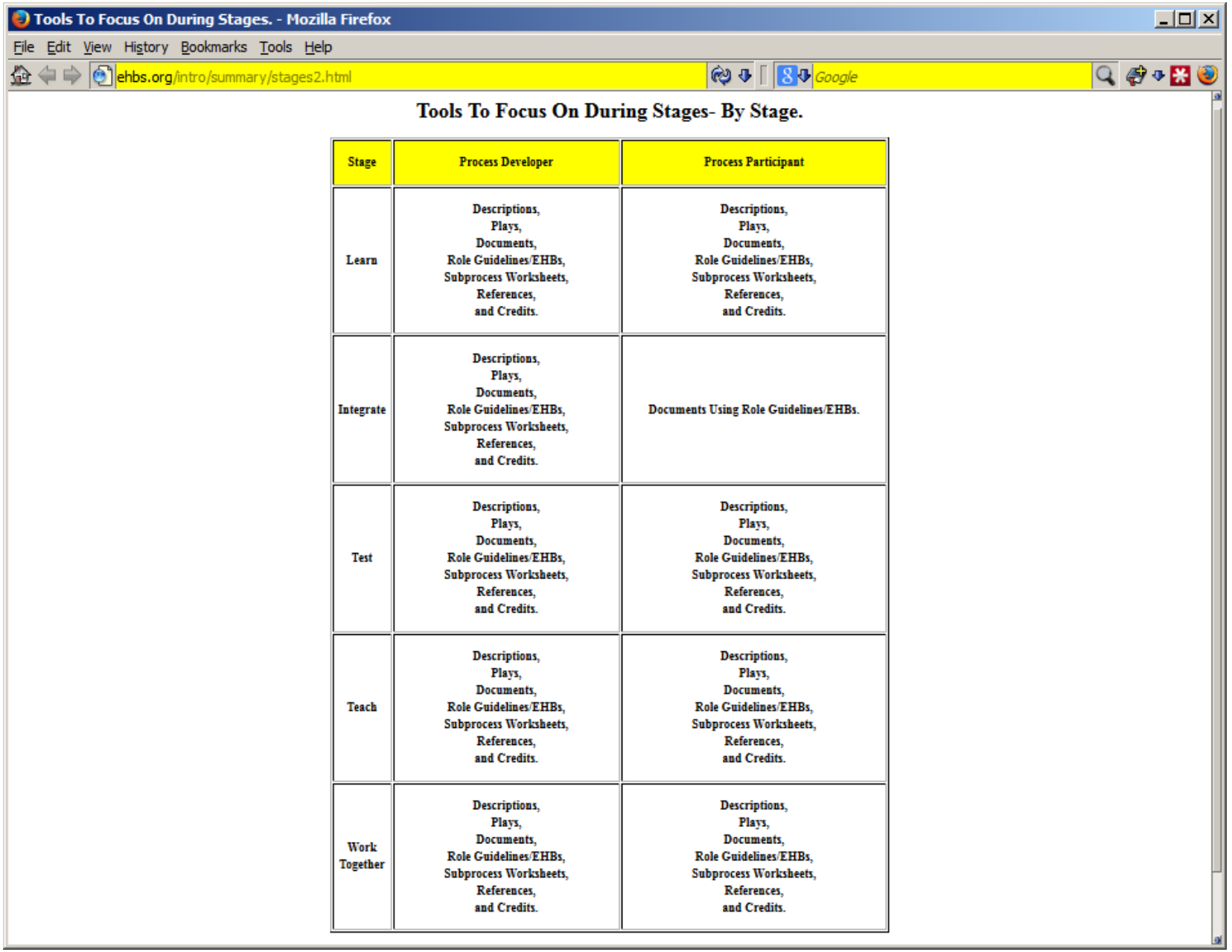
Tools that can be focused on during stages- by tool.



Tools To Focus On During Stages- By Tool.

Tool	Process Developer	Process Participant
Descriptions	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Plays	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Documents	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Role Guidelines/EHBs	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Subprocess Worksheets	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
References	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Credits	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together

Tools that can be focused on during stages- by stage.



Tools To Focus On During Stages- By Stage.

Stage	Process Developer	Process Participant
Learn	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Integrate	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Documents Using Role Guidelines/EHBs.
Test	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Teach	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Work Together	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.

Overview of Bank of America Loans Process Library - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Print Stop
file:///E:/Others/financing/boa/plib/overview.html
IMDB

Overview of Bank of America Loans Process Library

The objective of this tool is to help Bank of America Loans Managers (and Staff) to *quickly learn* to build and manage Loans. We present our approach in five bullets.

- **We focus on the documents that Bank of America Loans Managers prepare. These documents appear within various subprocesses (e.g., 1) and within multiple organizations (e.g., 2).**
- **For each subprocess, we create a directory of documents for that subprocess. (e.g., 1, 2)**
- **For each document type, we create files to help prepare the document. These files include document overview, organization, related links, structure, references, organization samples, organization contacts, and *sample documents from other organizations*. (e.g., 1, 2)**
- **Sample documents have three levels of access: a) Unconditionally Distributable (e.g., 1, 2), b) Maintained In Organization Libraries (e.g., 1, 2), and c) Proprietary (e.g., 1, 2).**
- **Each organization gets worksheets for its own use. These worksheets also help add to the database as Managers go thru the subprocesses. (e.g., 1, 2)**

For more information on the Bank of America Loans Process Library see: paper, summary, and other process libraries.

Now: Cloudy, 60° F | Thu: 66° F | Fri: 68° F | Sat: 76° F | Sun: 79° F | Mon: 79° F | Tue: 76° F

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Subprocesses - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://lincoln.gsfc.nasa.gov/boa/whatare/process.htm
Webster

Loans

Product Realization Subprocesses								
Integrated Problems-Solutions Database	Planning Loans	Solicitation Development	Submission	Review & Approval	Negotiations	Loan Adminstration	Closeout	Post-Closeout

(Potential Customers: Clients)

Product Distribution Subprocesses							
Integrated Problems-Solutions Database	Planning Distributions	Distribution Facility Solicitation Development	Problem Submission	Problem Handling	Agreement Administration	Agreement Closeout	Post-Agreement Closeout

(Potential Customers: Researchers)

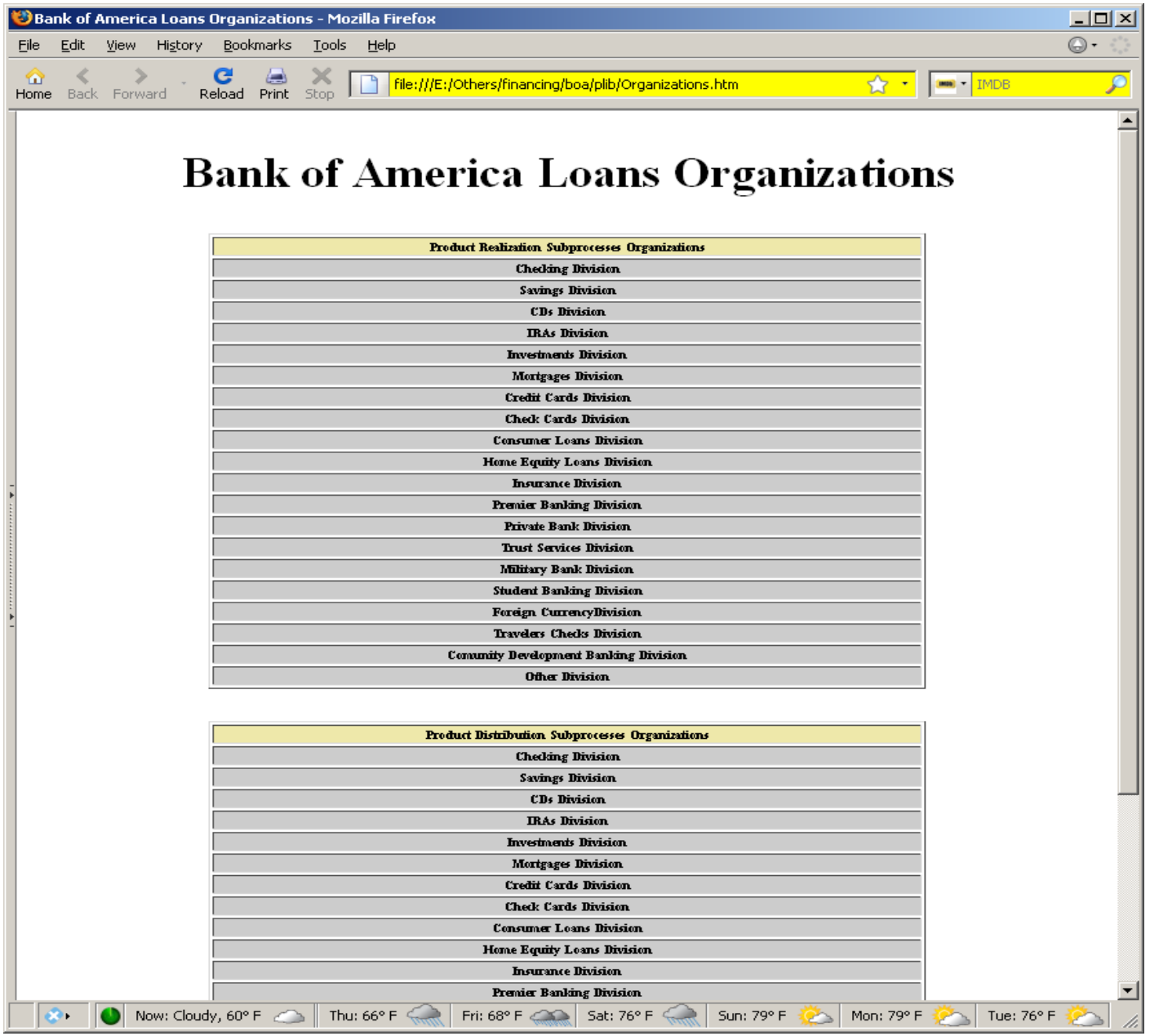
Support Subprocesses								
Survey Management	Computer Systems Development and Evolution	Computer Systems Operations and Network Administration	Home Page Management	Education and Outreach Activities	Facilities Management	Security	Small Systems (Mac and PC) Support	Visualizations

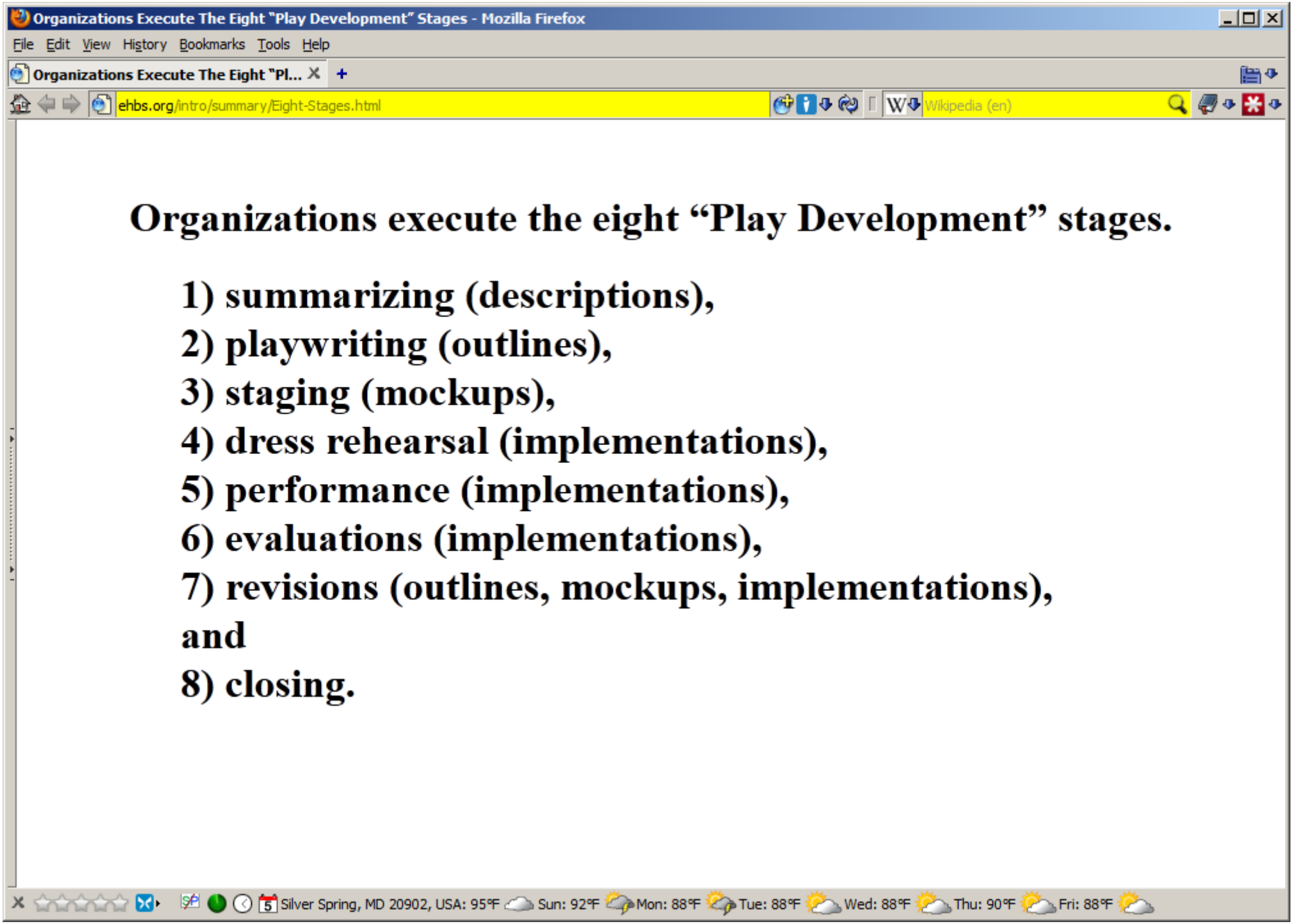
Improvement Subprocesses		
ISO 9001: 2000	CMMI- Staged	CMMI-Continuous

Common Subprocesses					
Organization Subprocess Formulation	Organization Subprocess Implementation	Organization Subprocess Customer Support	Organization Subprocess Evaluation	Organization Subprocess Update	Organization Subprocess Closeout

Now: Sunny, 83 °F | Sat: 87 °F | Sun: 85 °F | Mon: 80 °F | Tue: 85 °F | Wed: 84 °F | Thu: 81 °F

Organizations provide different views of the subprocesses, some of which may be proprietary.




Organizations Execute The Eight "Play Development" Stages - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Organizations Execute The Eight "Pl...
ehbs.org/intro/summary/Eight-Stages.html
Wikipedia (en)
Organizations execute the eight "Play Development" stages.
1) summarizing (descriptions),
2) playwriting (outlines),
3) staging (mockups),
4) dress rehearsal (implementations),
5) performance (implementations),
6) evaluations (implementations),
7) revisions (outlines, mockups, implementations),
and
8) closing.
Silver Spring, MD 20902, USA: 95°F
Sun: 92°F
Mon: 88°F
Tue: 88°F
Wed: 88°F
Thu: 90°F
Fri: 88°F

The Key Human Factor Issue - Mozilla Firefox 4.0 Beta 10
File Edit View History Bookmarks Tools Help

People in organizations provide different views of the subprocesses.

Subprocess Documentor's View

Subprocess Teacher's, Manager's, Implementor's and Participant's Views

Silver Spring, MD 20902, USA: 34°F | Thu: 38°F | Fri: 40°F | Sat: 40°F | Sun: 38°F

Organizations Generate Subprocess Life-Cycle Views - Mozilla Firefox
File Edit View History Bookmarks Tools Help
ehbs.org/intro/summary/Important Human Factor Issues/
Google

Organizations generate Subprocess Life-Cycle* Views

- **Organization subprocess teachers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**
- **Organization subprocess documentors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**
- **Organization subprocess managers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**
- **Organization subprocess implementors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**
- **Organization subprocess participants want to quickly learn, integrate, and perform tasks that are part of their views. (Critical)**
- **Organization subprocess managers want to quickly monitor execution of tasks that are part of their views.**
- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly improve, test, and teach their subprocesses.**
- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly improve, test, and teach using other organization's views.**
- **Organization subprocess teachers, documentors, managers, implementors, and participants become hurt/angry when their views are not supported.**
- **Organization subprocess implementors want to quickly update, test, and teach tools that help facilitate execution of their subprocesses.**
- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly leave when their views continue not to be supported.**

*** Also, called the "Universal Subprocess".**

The "Game of Telephone" Syndrome - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://ehbs.org/intro/summary/Telephone Game Syndrome.htm

YouTube

Feedback

The "Game of Telephone" Syndrome: Where People Pass-On Only Parts of the "Message"

Silver Spring, MD 20902, USA: 54°F | Tue: 61°F | Wed: 58°F | Thu: 51°F | Fri: 47°F

Overview of how editable and cost-saving model/documentation tools can solve problems. - Mozilla Firefox
File Edit View History Bookmarks Tools Help
ehbs.org/intro/summary/problems-solutions/
Google

Overview of how editable and cost-saving process documentation tools can solve problems.

Problem	Solution
Develop Internet-based tools to support the paperless documentation and management of complex distributed processes.	Editable process documentation tools can be tailored to each subprocess.
Organizations provide different views of the subprocesses.	Editable process documentation tools can be tailored to reflect different organization's views of the subprocess.
Organizations execute the eight "play development" stages.	Editable process documentation tools can be tailored to reflect the eight "play development" stages.
People in organizations provide different views of the subprocesses.	Editable process documentation tools can be tailored to communicate different people's views of the subprocess.
Organizations generate Subprocess Life-Cycle Views.	Editable process documentation tools can be tailored to reflect different Life-Cycle views of the subprocess.
The "Game of Telephone" Syndrome: Where People Pass-On Only Parts of the "Message".	Editable process documentation tools can be tailored to layer below different people's views of the subprocess.

Silver Spring, MD 20902, USA: 88°F Tue: 87°F Wed: 89°F Thu: 92°F Fri: 93°F Sat: 95°F Sun: 91°F

Overview of Bank of America Loans Process Library - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Print Stop
file:///E:/Others/financing/boa/plib/overview.html
IMDB

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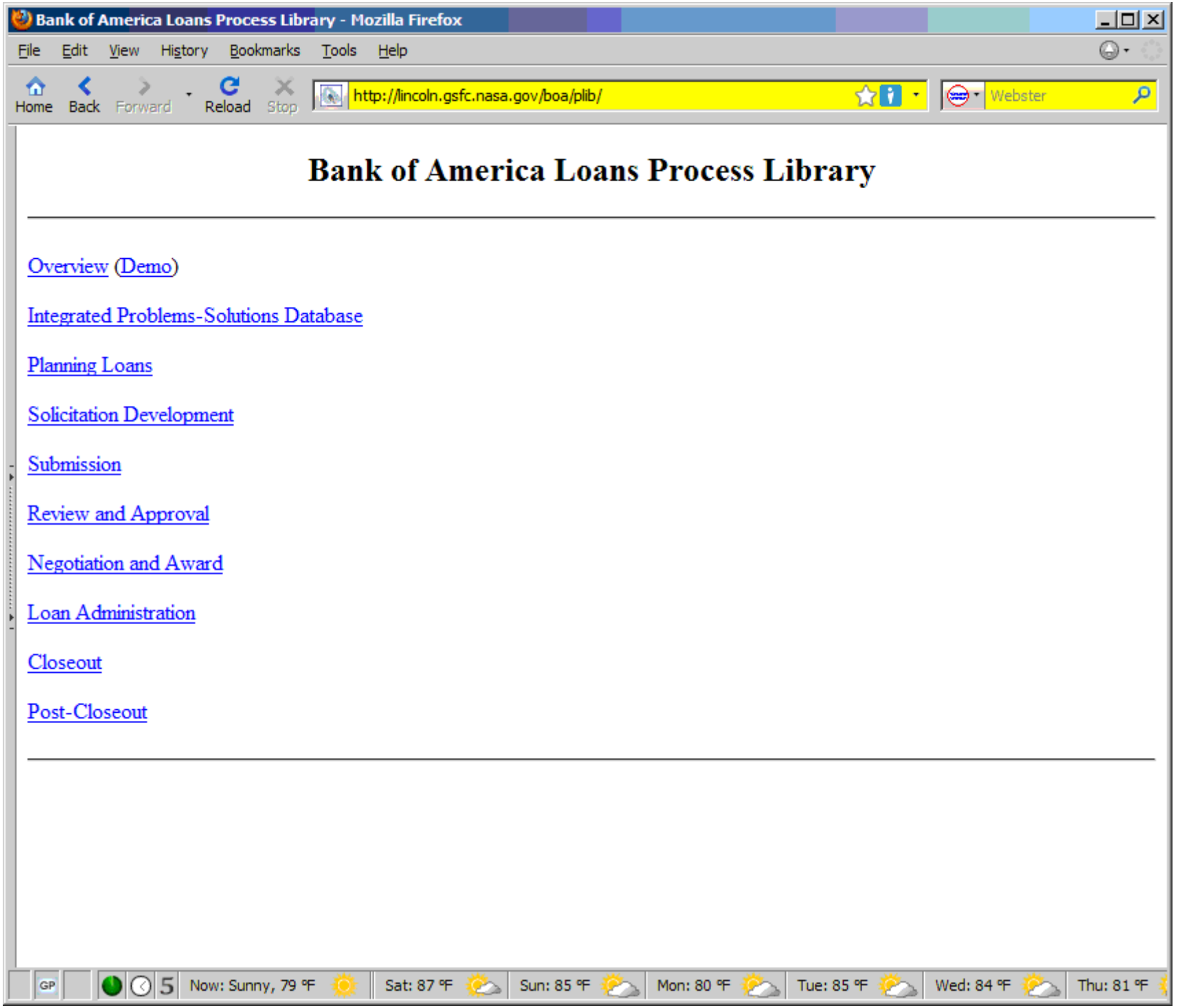
Now: Cloudy, 60° F | Thu: 66° F | Fri: 68° F | Sat: 76° F | Sun: 79° F | Mon: 79° F | Tue: 76° F


Bank of America Loans Process Library - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://lincoln.gsfc.nasa.gov/boa/plib/
Webster
Bank of America Loans Process Library
Overview (Demo)
Integrated Problems-Solutions Database
Planning Loans
Solicitation Development
Submission
Review and Approval
Negotiation and Award
Loan Administration
Closeout
Post-Closeout
Now: Sunny, 79 °F
Sat: 87 °F
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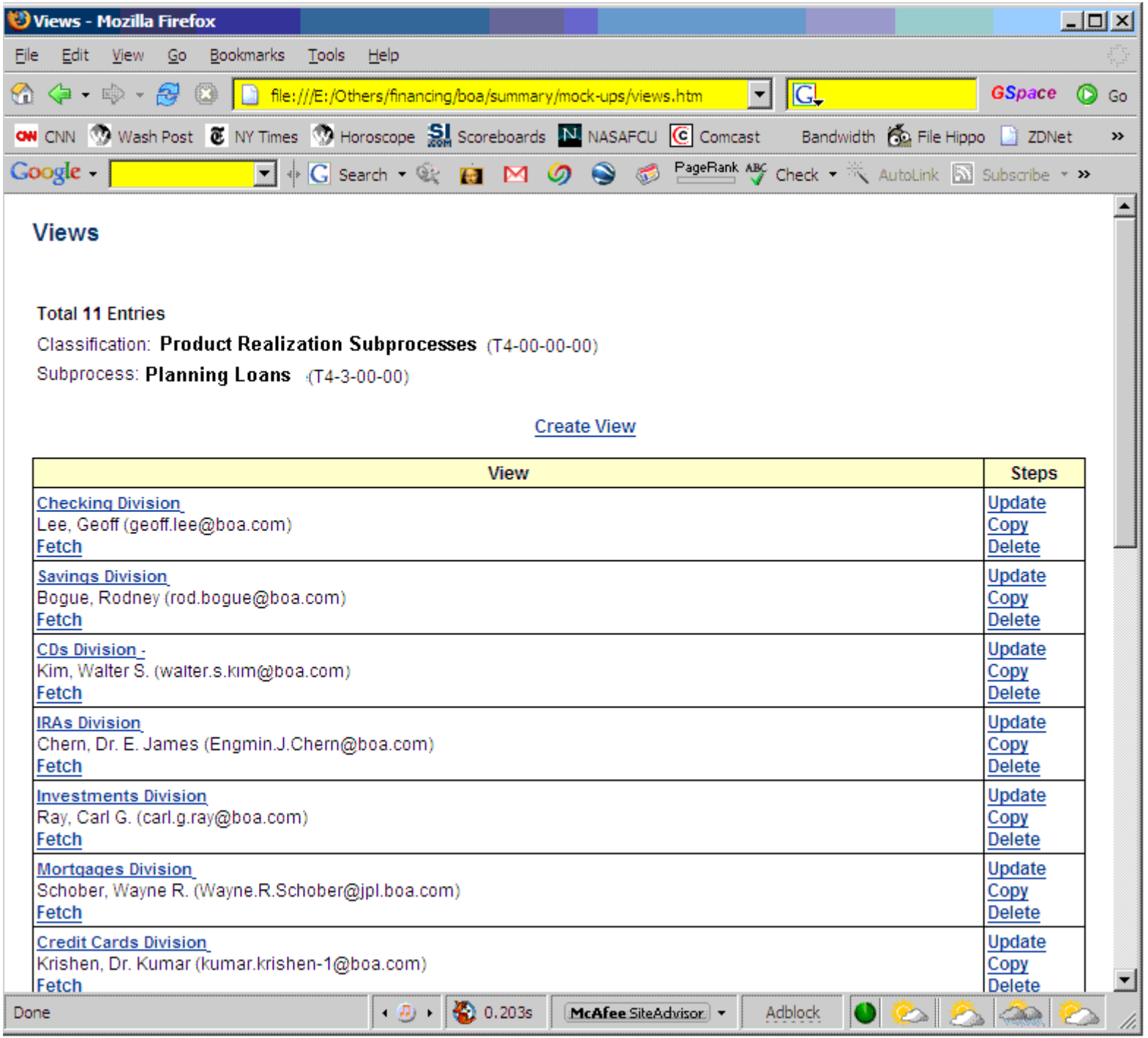

Views - Mozilla Firefox
File Edit View Go Bookmarks Tools Help
file:///E:/Others/financing/boa/summary/mock-ups/views.htm
GSpace Go
CNN Wash Post NY Times Horoscope Scoreboards NASAFCU Comcast Bandwidth File Hippo ZDNet
Google Search PageRank Check AutoLink Subscribe
Views
Total 11 Entries
Classification: Product Realization Subprocesses (T4-00-00-00)
Subprocess: Planning Loans (T4-3-00-00)
Create View
View
Steps
Checking Division
Lee, Geoff (geoff.lee@boa.com)
Fetch
Update
Copy
Delete
Savings Division
Bogue, Rodney (rod.bogue@boa.com)
Fetch
Update
Copy
Delete
CDs Division
Kim, Walter S. (walter.s.kim@boa.com)
Fetch
Update
Copy
Delete
IRAs Division
Chern, Dr. E. James (Engmin.J.Chern@boa.com)
Fetch
Update
Copy
Delete
Investments Division
Ray, Carl G. (carl.g.ray@boa.com)
Fetch
Update
Copy
Delete
Mortgages Division
Schober, Wayne R. (Wayne.R.Schober@jpl.boa.com)
Fetch
Update
Copy
Delete
Credit Cards Division
Krishen, Dr. Kumar (kumar.krishen-1@boa.com)
Fetch
Update
Copy
Delete
Done
0.203s
McAfee SiteAdvisor
Adblock

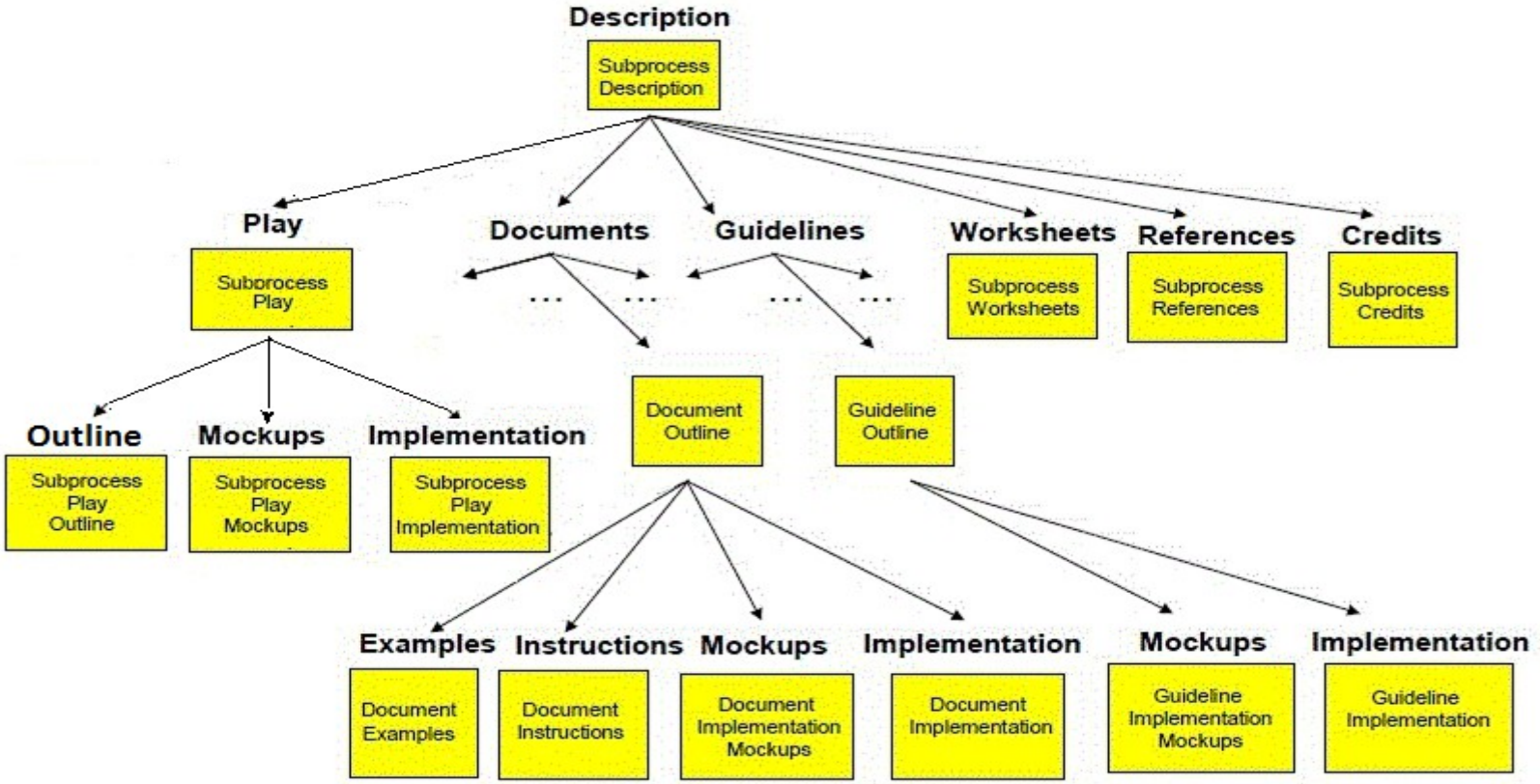
Basic Approach - Mozilla Firefox

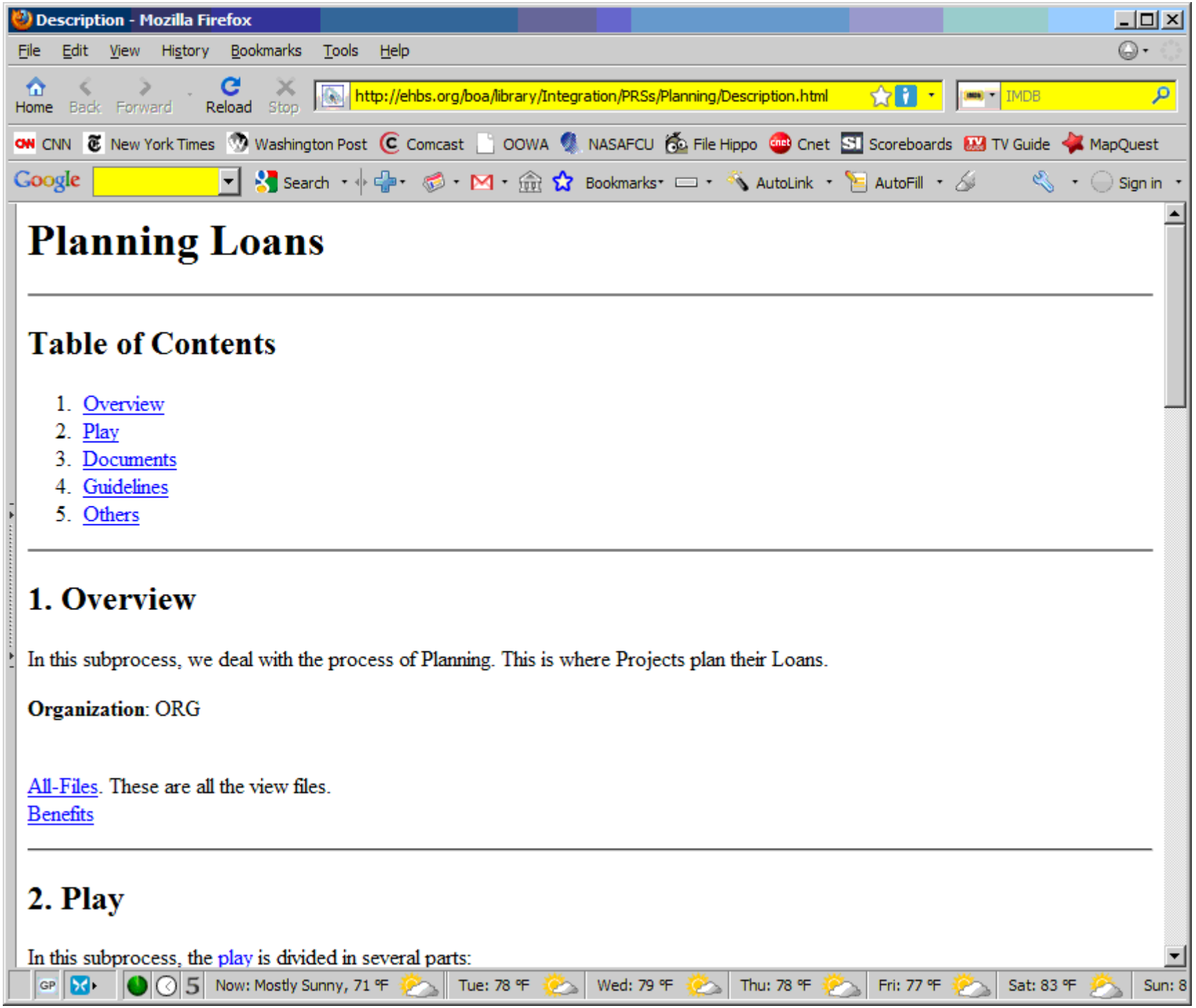
File Edit View History Bookmarks Tools Help

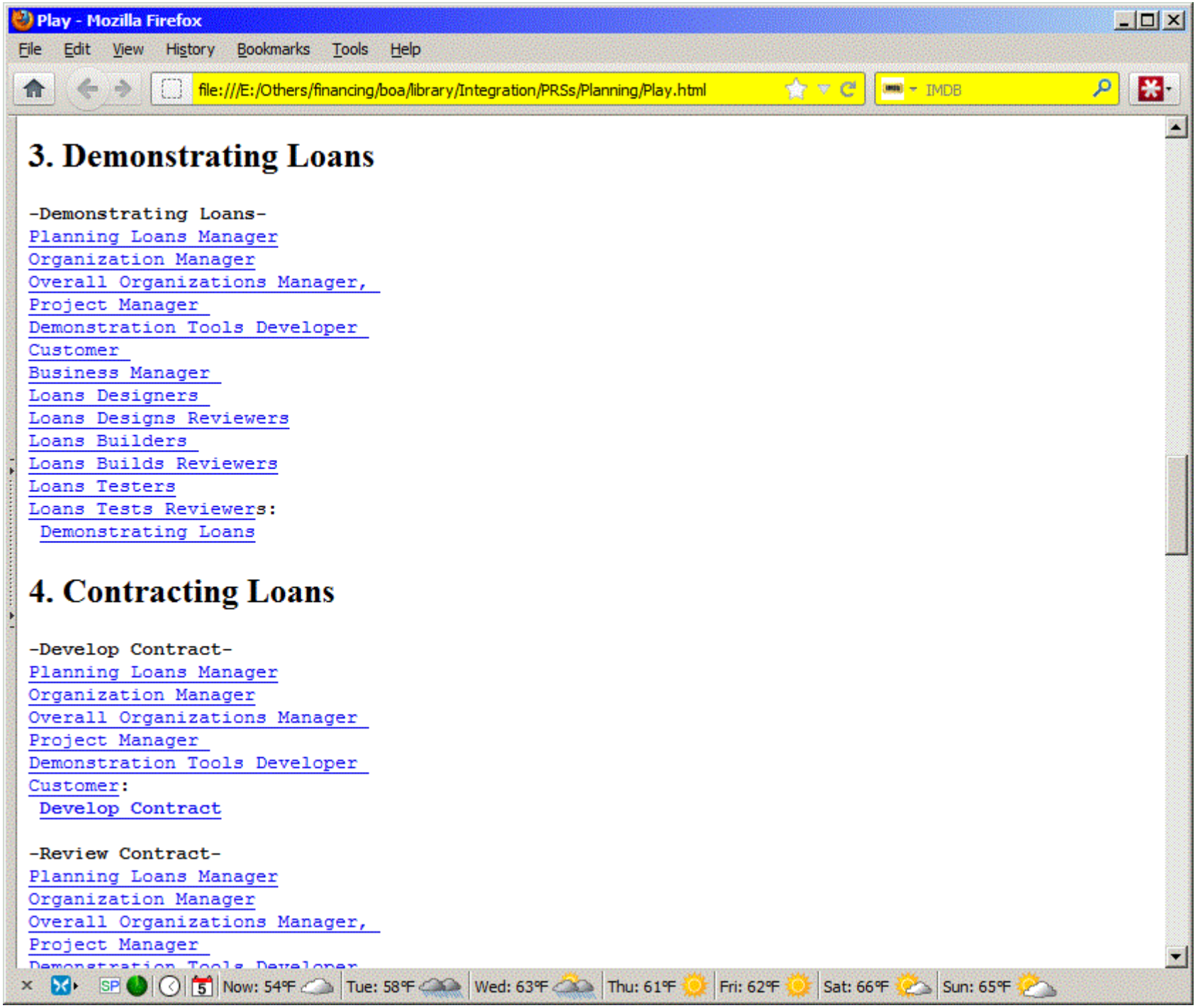
ehbs.org/intro/summary/approach.htm

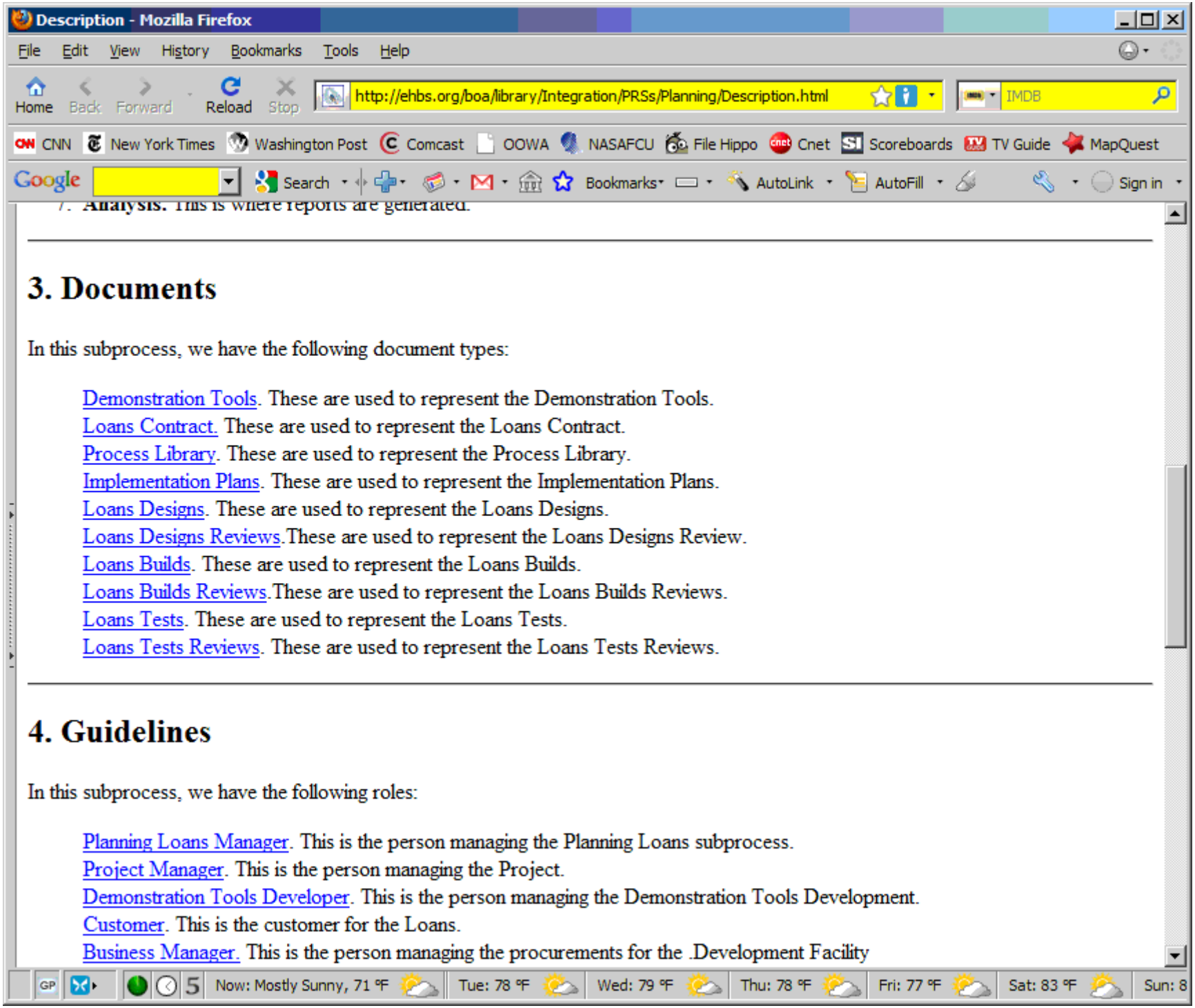
Search

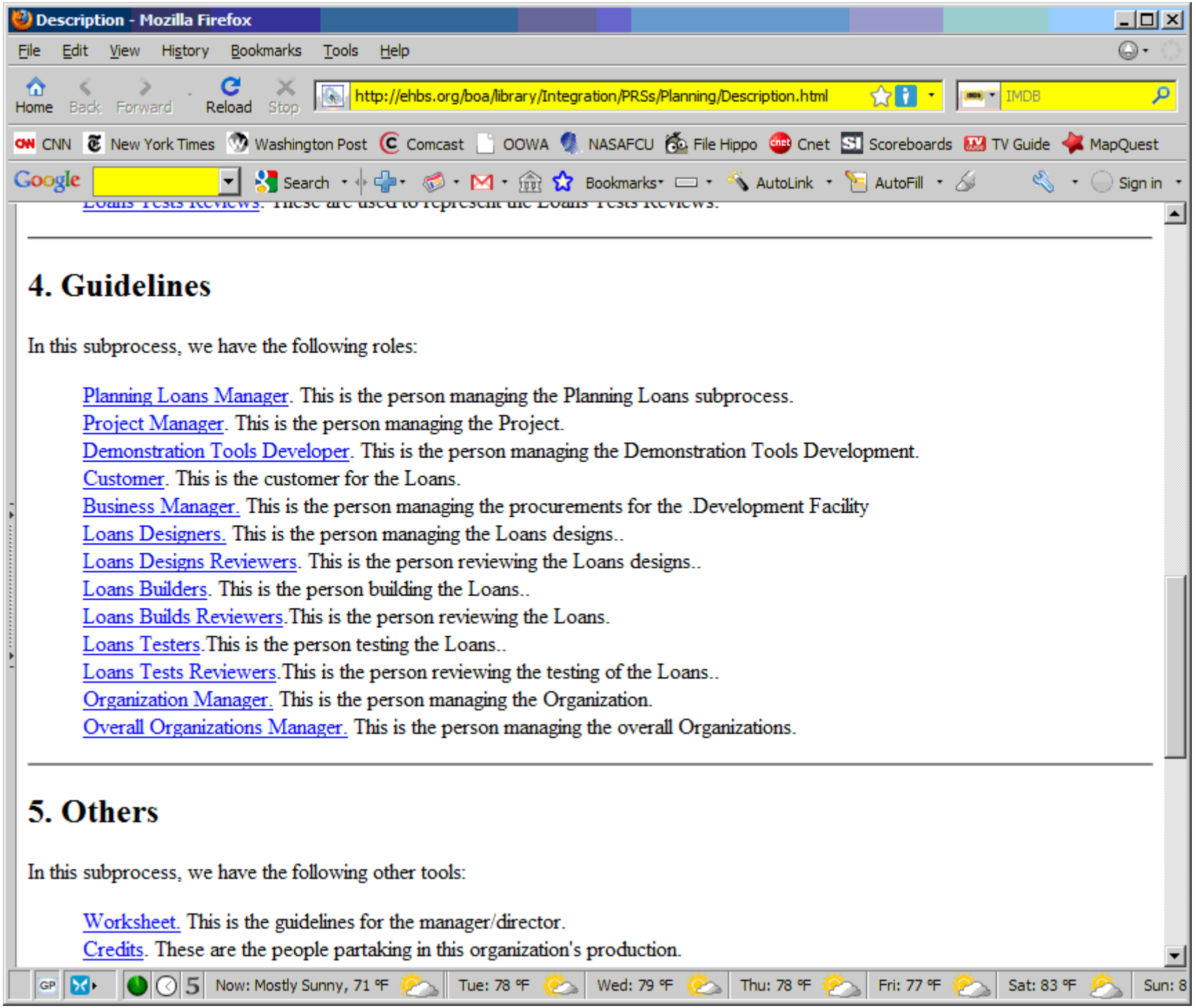
Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate intra- and inter-organization communication.



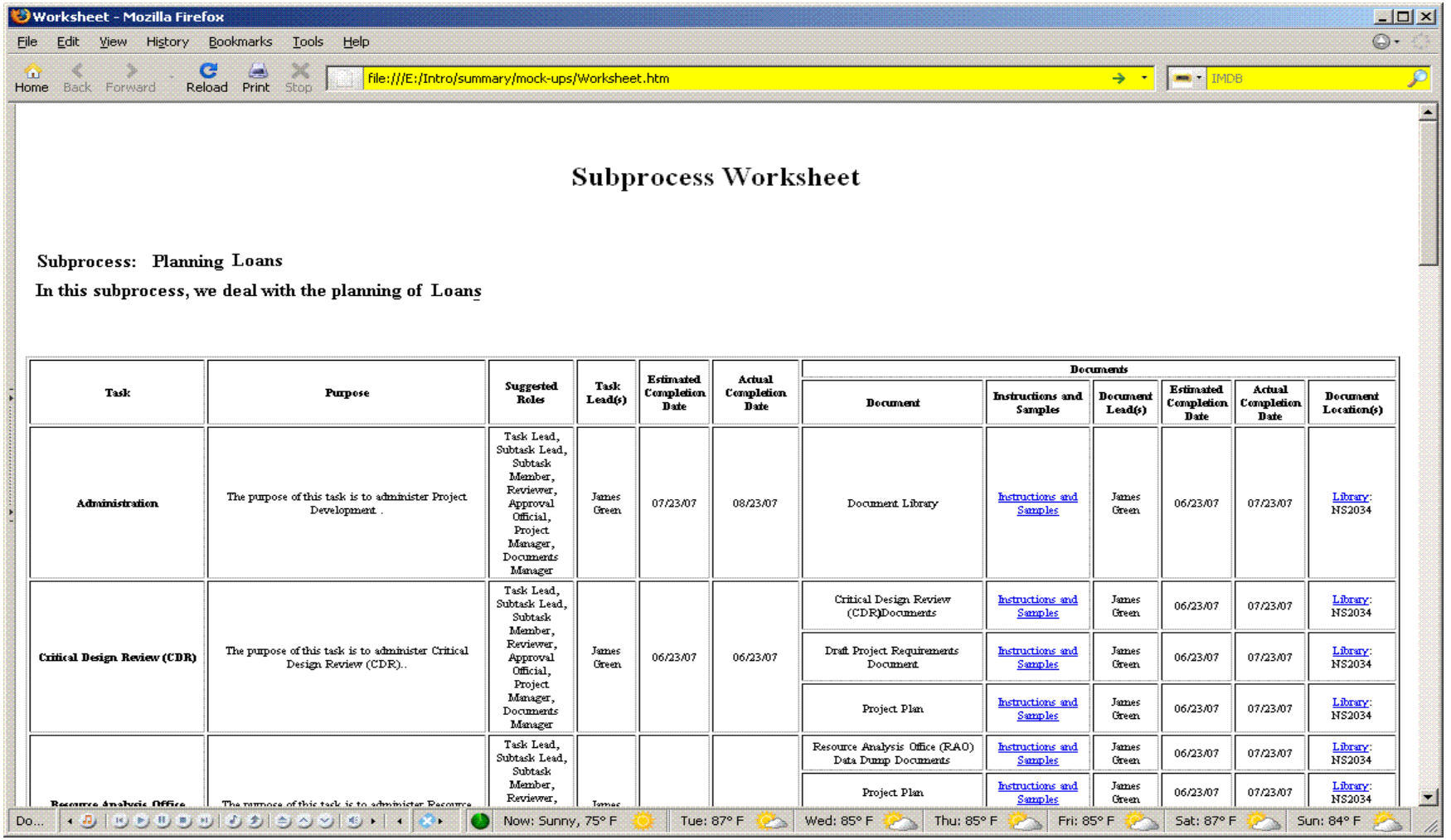

Description - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/boa/library/Integration/PRSs/Planning/Description.html
IMDB
CNN New York Times Washington Post Comcast OOWA NASAFCU File Hippo Cnet Scoreboards TV Guide MapQuest
Google Search Bookmarks AutoLink AutoFill Sign in
Planning Loans
Table of Contents
1. Overview
2. Play
3. Documents
4. Guidelines
5. Others
1. Overview
In this subprocess, we deal with the process of Planning. This is where Projects plan their Loans.
Organization: ORG
All-Files. These are all the view files.
Benefits
2. Play
In this subprocess, the play is divided in several parts:
Now: Mostly Sunny, 71 °F
Tue: 78 °F
Wed: 79 °F
Thu: 78 °F
Fri: 77 °F
Sat: 83 °F
Sun: 8


Play - Mozilla Firefox
File Edit View History Bookmarks Tools Help
file:///E:/Others/financing/boa/library/Integration/PRSs/Planning/Play.html
IMDB
3. Demonstrating Loans
-Demonstrating Loans-
Planning Loans Manager
Organization Manager
Overall Organizations Manager,
Project Manager
Demonstration Tools Developer
Customer
Business Manager
Loans Designers
Loans Designs Reviewers
Loans Builders
Loans Builds Reviewers
Loans Testers
Loans Tests Reviewers:
Demonstrating Loans
4. Contracting Loans
-Develop Contract-
Planning Loans Manager
Organization Manager
Overall Organizations Manager
Project Manager
Demonstration Tools Developer
Customer:
Develop Contract
-Review Contract-
Planning Loans Manager
Organization Manager
Overall Organizations Manager,
Project Manager
Now: 54°F
Tue: 58°F
Wed: 63°F
Thu: 61°F
Fri: 62°F
Sat: 66°F
Sun: 65°F


Description - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/boa/library/Integration/PRSs/Planning/Description.html
IMDB
CNN New York Times Washington Post Comcast OOWA NASAFCU File Hippo Cnet Scoreboards TV Guide MapQuest
Google Search Bookmarks AutoLink AutoFill Sign in
7. Analysis. This is where reports are generated.
3. Documents
In this subprocess, we have the following document types:
Demonstration Tools. These are used to represent the Demonstration Tools.
Loans Contract. These are used to represent the Loans Contract.
Process Library. These are used to represent the Process Library.
Implementation Plans. These are used to represent the Implementation Plans.
Loans Designs. These are used to represent the Loans Designs.
Loans Designs Reviews.These are used to represent the Loans Designs Review.
Loans Builds. These are used to represent the Loans Builds.
Loans Builds Reviews.These are used to represent the Loans Builds Reviews.
Loans Tests. These are used to represent the Loans Tests.
Loans Tests Reviews. These are used to represent the Loans Tests Reviews.
4. Guidelines
In this subprocess, we have the following roles:
Planning Loans Manager. This is the person managing the Planning Loans subprocess.
Project Manager. This is the person managing the Project.
Demonstration Tools Developer. This is the person managing the Demonstration Tools Development.
Customer. This is the customer for the Loans.
Business Manager. This is the person managing the procurements for the .Development Facility
Now: Mostly Sunny, 71 °F
Tue: 78 °F
Wed: 79 °F
Thu: 78 °F
Fri: 77 °F
Sat: 83 °F
Sun: 8


Description - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/boa/library/Integration/PRSs/Planning/Description.html
IMDB
CNN New York Times Washington Post Comcast OOWA NASAFCU File Hippo Cnet Scoreboards TV Guide MapQuest
Google Search Bookmarks AutoLink AutoFill Sign in
Loans Tests Reviews. These are used to represent the Loans Tests Reviews.
4. Guidelines
In this subprocess, we have the following roles:
Planning Loans Manager. This is the person managing the Planning Loans subprocess.
Project Manager. This is the person managing the Project.
Demonstration Tools Developer. This is the person managing the Demonstration Tools Development.
Customer. This is the customer for the Loans.
Business Manager. This is the person managing the procurements for the .Development Facility
Loans Designers. This is the person managing the Loans designs..
Loans Designs Reviewers. This is the person reviewing the Loans designs..
Loans Builders. This is the person building the Loans..
Loans Builds Reviewers.This is the person reviewing the Loans.
Loans Testers.This is the person testing the Loans..
Loans Tests Reviewers.This is the person reviewing the testing of the Loans..
Organization Manager. This is the person managing the Organization.
Overall Organizations Manager. This is the person managing the overall Organizations.
5. Others
In this subprocess, we have the following other tools:
Worksheet. This is the guidelines for the manager/director.
Credits. These are the people partaking in this organization's production.
Now: Mostly Sunny, 71 °F
Tue: 78 °F
Wed: 79 °F
Thu: 78 °F
Fri: 77 °F
Sat: 83 °F
Sun: 8

Subprocess Worksheets facilitate subprocess manager communication with process developers and participants.



Worksheet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Home Back Forward Reload Print Stop file:///E:/Intro/summary/mock-ups/Worksheet.htm IMDB

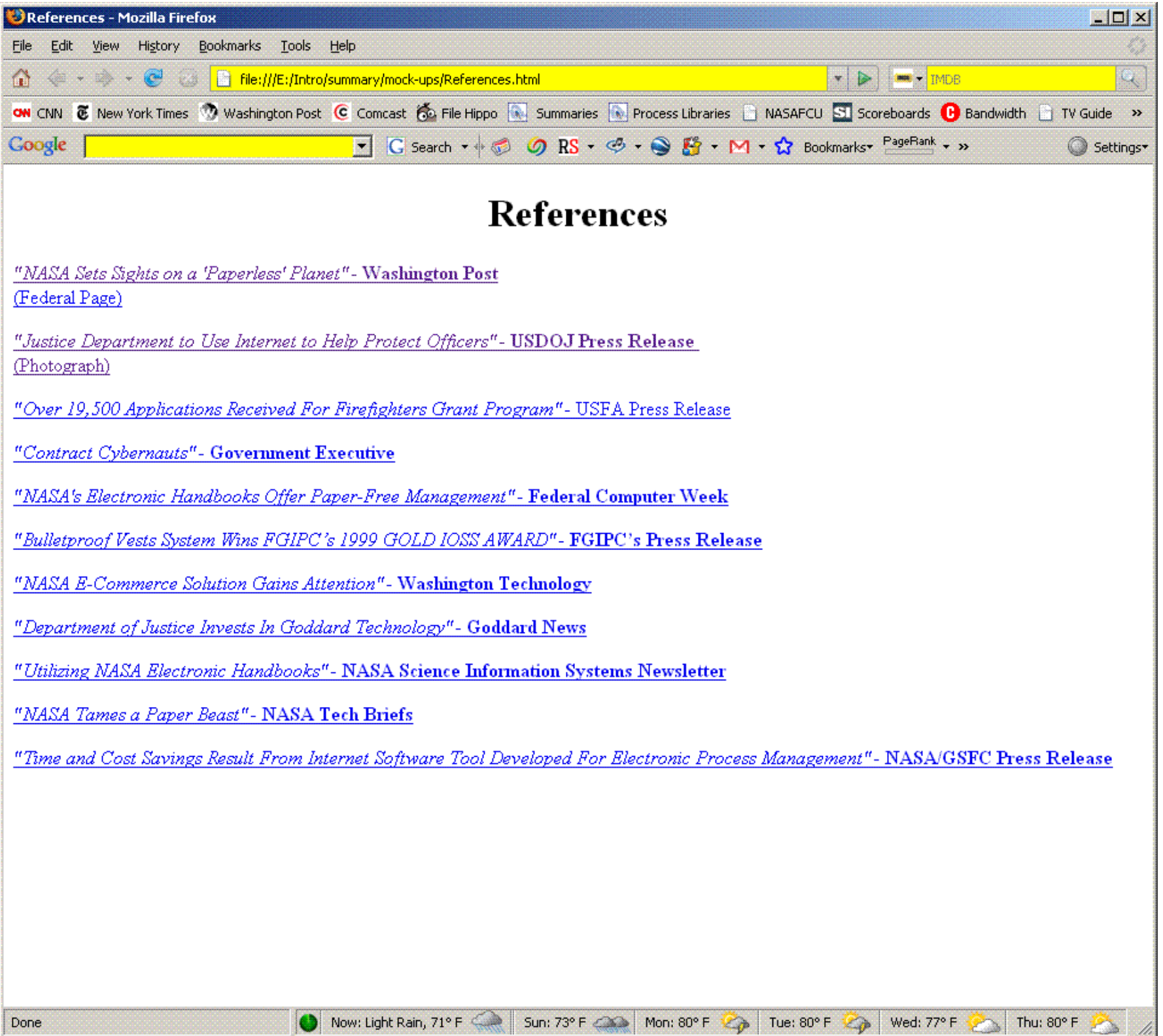
Subprocess Worksheet

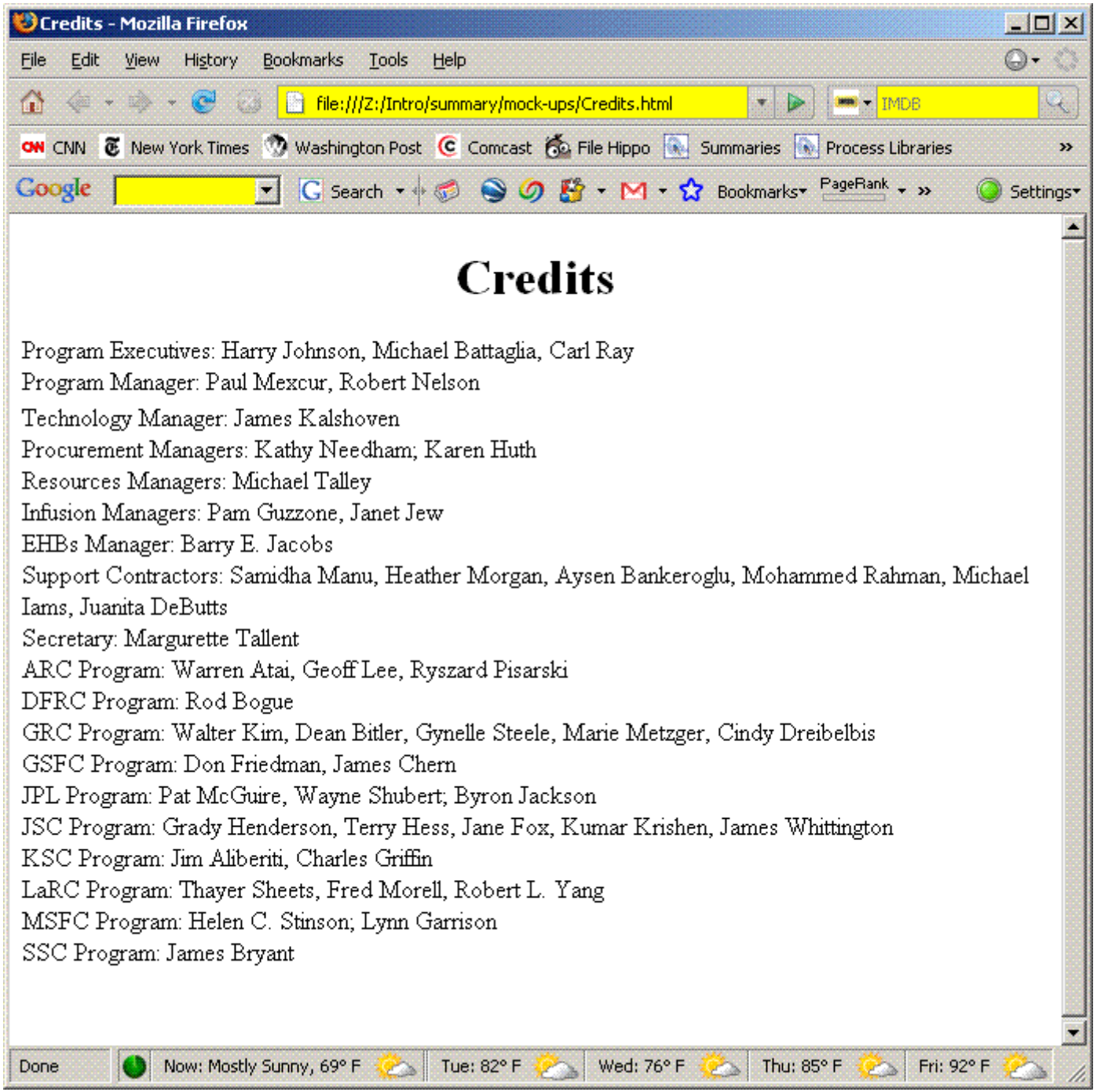
Subprocess: Planning Loans

In this subprocess, we deal with the planning of Loans

Task	Purpose	Suggested Roles	Task Lead(s)	Estimated Completion Date	Actual Completion Date	Documents					
						Document	Instructions and Samples	Document Lead(s)	Estimated Completion Date	Actual Completion Date	Document Location(s)
Administration	The purpose of this task is to administer Project Development .	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	07/23/07	08/23/07	Document Library	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Critical Design Review (CDR)	The purpose of this task is to administer Critical Design Review (CDR)..	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	06/23/07	06/23/07	Critical Design Review (CDR)Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Draft Project Requirements Document	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Resource Analysis Office	The purpose of this task is to administer Resource	Task Lead, Subtask Lead, Subtask Member, Reviewer,	James			Resource Analysis Office (RAO) Data Dump Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034

Do... Now: Sunny, 75° F Tue: 87° F Wed: 85° F Thu: 85° F Fri: 85° F Sat: 87° F Sun: 84° F

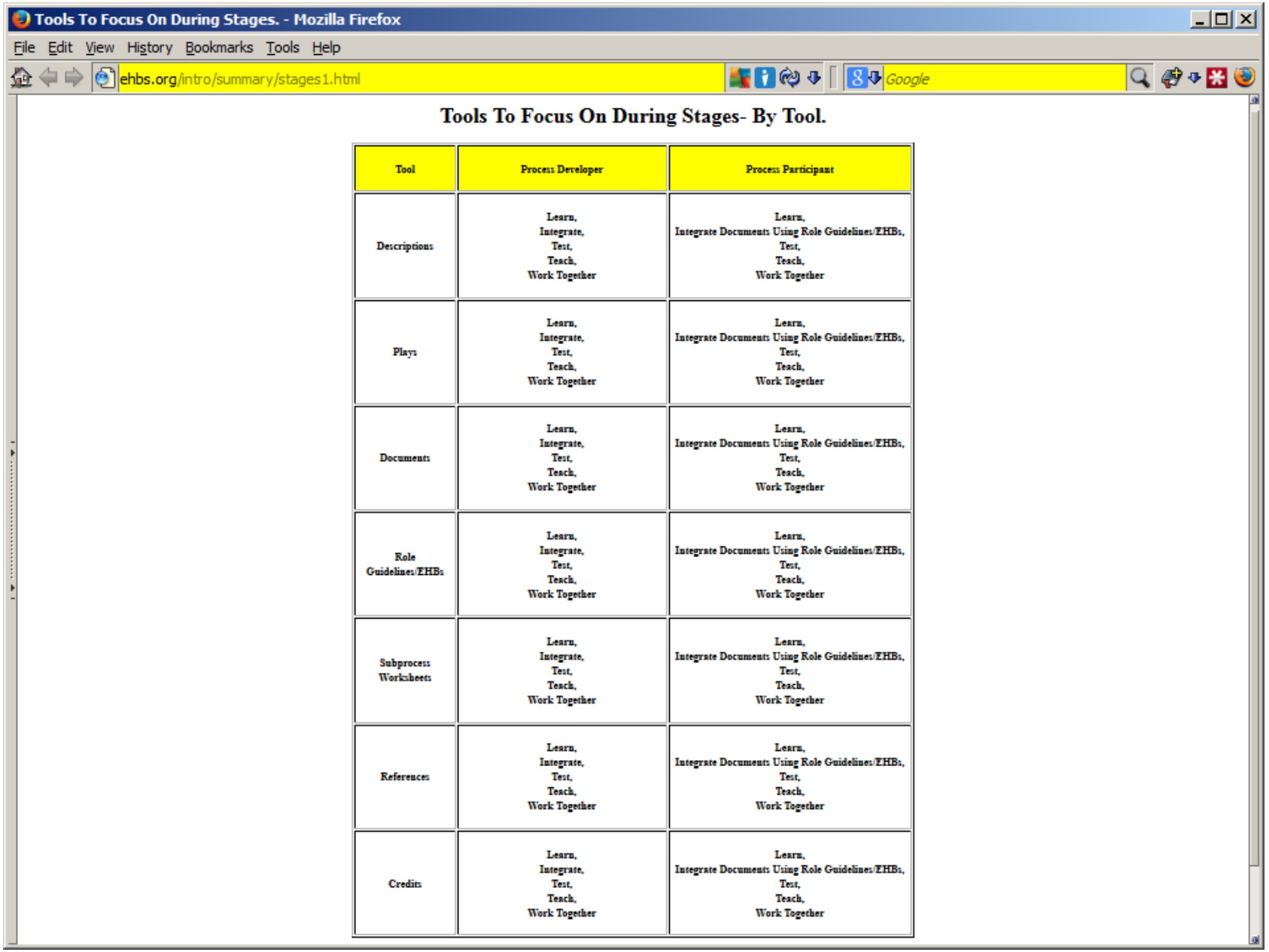

References - Mozilla Firefox
File Edit View History Bookmarks Tools Help
file:///E:/Intro/summary/mock-ups/References.html
IMDB
CNN New York Times Washington Post Comcast File Hippo Summaries Process Libraries NASAFCU Scoreboards Bandwidth TV Guide
Google Search Bookmarks PageRank Settings
References
"NASA Sets Sights on a 'Paperless' Planet"- Washington Post
(Federal Page)
"Justice Department to Use Internet to Help Protect Officers"- USDOJ Press Release
(Photograph)
"Over 19,500 Applications Received For Firefighters Grant Program"- USFA Press Release
"Contract Cybernauts"- Government Executive
"NASA's Electronic Handbooks Offer Paper-Free Management"- Federal Computer Week
"Bulletproof Vests System Wins FGIPC's 1999 GOLD IOSS AWARD"- FGIPC's Press Release
"NASA E-Commerce Solution Gains Attention"- Washington Technology
"Department of Justice Invests In Goddard Technology"- Goddard News
"Utilizing NASA Electronic Handbooks"- NASA Science Information Systems Newsletter
"NASA Tames a Paper Beast"- NASA Tech Briefs
"Time and Cost Savings Result From Internet Software Tool Developed For Electronic Process Management"- NASA/GSFC Press Release
Done
Now: Light Rain, 71° F
Sun: 73° F
Mon: 80° F
Tue: 80° F
Wed: 77° F
Thu: 80° F



Credits

Program Executives: Harry Johnson, Michael Battaglia, Carl Ray
Program Manager: Paul Mexcur, Robert Nelson
Technology Manager: James Kalshoven
Procurement Managers: Kathy Needham; Karen Huth
Resources Managers: Michael Talley
Infusion Managers: Pam Guzzone, Janet Jew
EHBs Manager: Barry E. Jacobs
Support Contractors: Samidha Manu, Heather Morgan, Aysen Bankeroglu, Mohammed Rahman, Michael Iams, Juanita DeButts
Secretary: Margurette Tallent
ARC Program: Warren Atai, Geoff Lee, Ryszard Pisarski
DFRC Program: Rod Bogue
GRC Program: Walter Kim, Dean Bitler, Gynelle Steele, Marie Metzger, Cindy Dreibelbis
GSFC Program: Don Friedman, James Chern
JPL Program: Pat McGuire, Wayne Shubert; Byron Jackson
JSC Program: Grady Henderson, Terry Hess, Jane Fox, Kumar Krishen, James Whittington
KSC Program: Jim Aliberiti, Charles Griffin
LaRC Program: Thayer Sheets, Fred Morell, Robert L. Yang
MSFC Program: Helen C. Stinson; Lynn Garrison
SSC Program: James Bryant

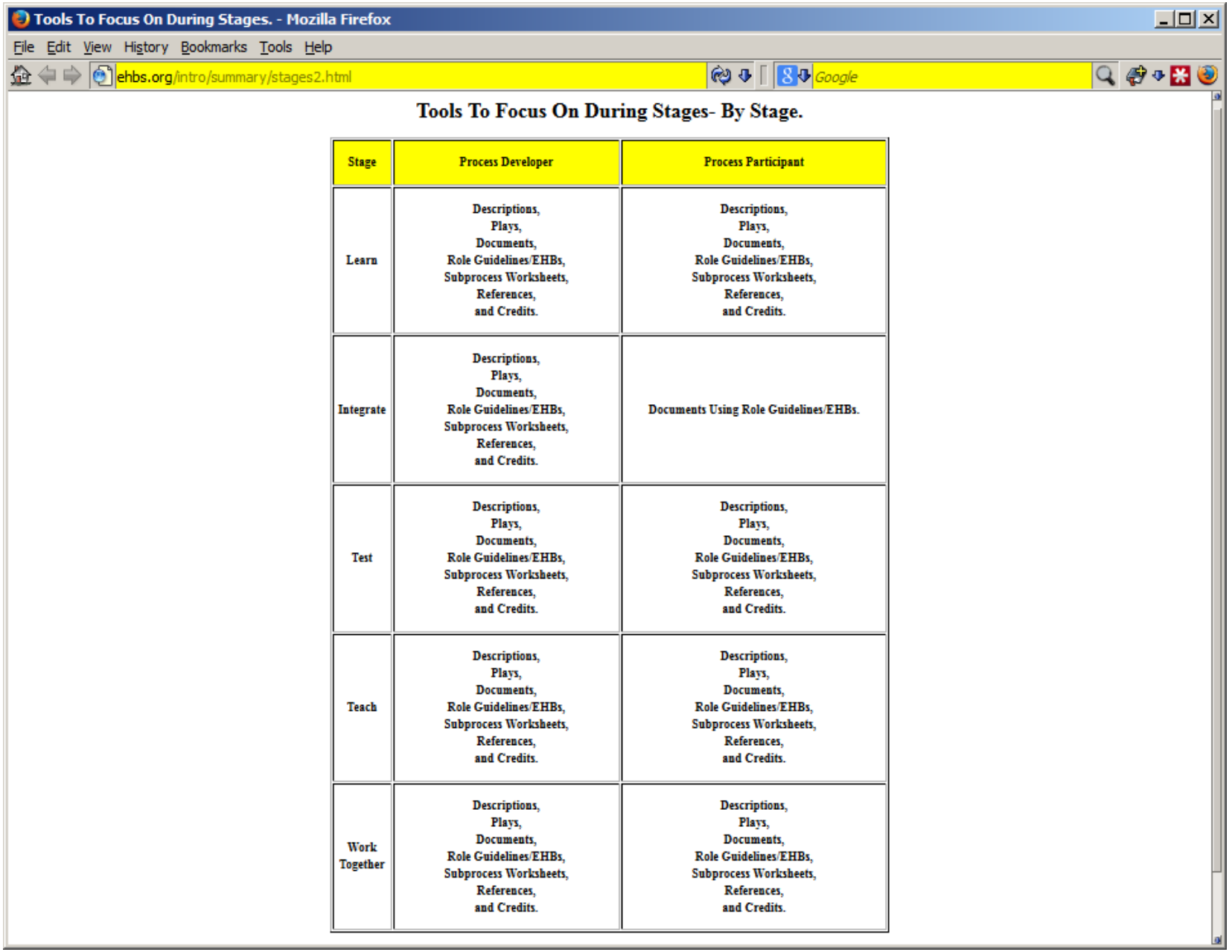
Tools that can be focused on during stages- by tool.



Tools To Focus On During Stages- By Tool.

Tool	Process Developer	Process Participant
Descriptions	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Plays	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Documents	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Role Guidelines/EHBs	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Subprocess Worksheets	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
References	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Credits	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together

Tools that can be focused on during stages- by stage.



Tools To Focus On During Stages- By Stage.

Stage	Process Developer	Process Participant
Learn	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Integrate	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Documents Using Role Guidelines/EHBs.
Test	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Teach	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Work Together	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.

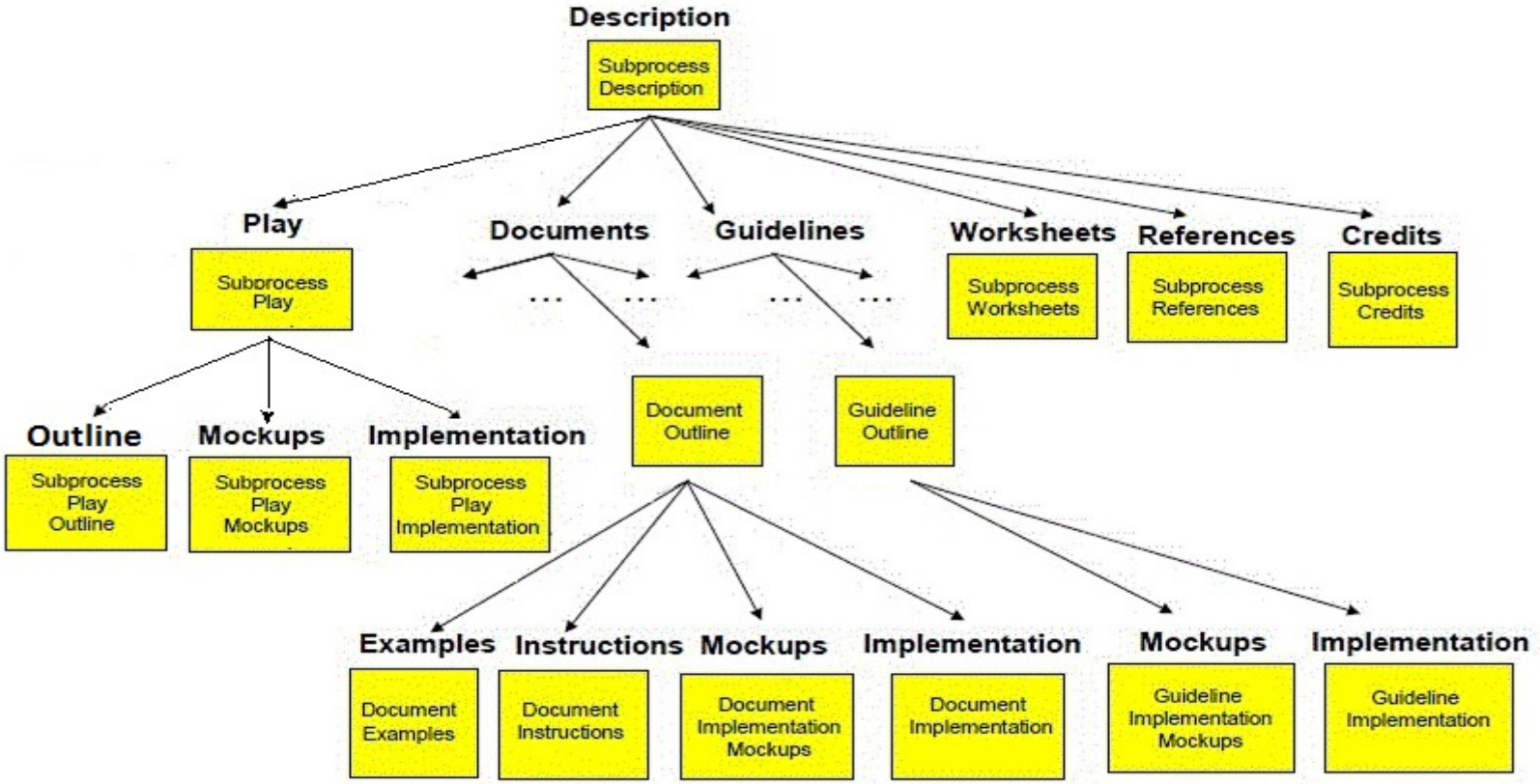
Basic Approach - Mozilla Firefox

File Edit View History Bookmarks Tools Help

ehbs.org/intro/summary/approach.htm

Search

Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate intra- and inter-organization communication.



Shakespeare Meets Freud - Mozilla Firefox 4.0 Beta 3

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Shakespeare Meets Freud

Process Libraries (PLs) and Electronic Handbooks (EHBs) are where Shakespeare meets Freud

- In Process Libraries (PLs), subprocesses are represented as "plays" where "actors" communicate thru the Internet. Each organization puts on its own "productions". For each role, Electronic Handbooks (EHBs) (also called Guidelines) guide "actors" thru their parts. Managers are "directors" using Worksheets as learning/management tools. Documentors serve as "playwrights". [Shakespearean]
- Organizations are represented as "families" having "multiple personalities". Subprocess "plays" and its "components" provide communication vehicles between members of the same family, different families, and families from different subprocesses. Documentors also serve as "family therapists". [Freudian]

Done

Socratic Method or Dialogue - Mozilla Firefox

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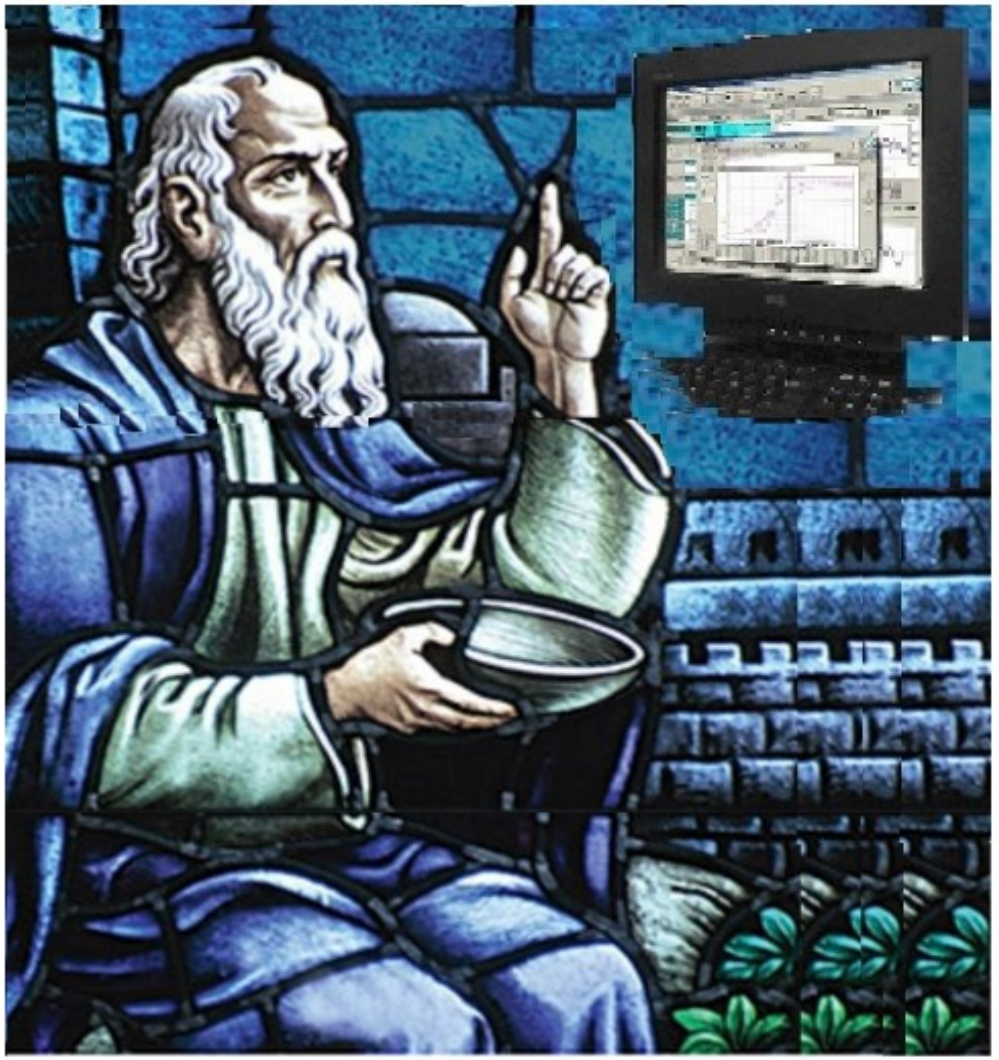
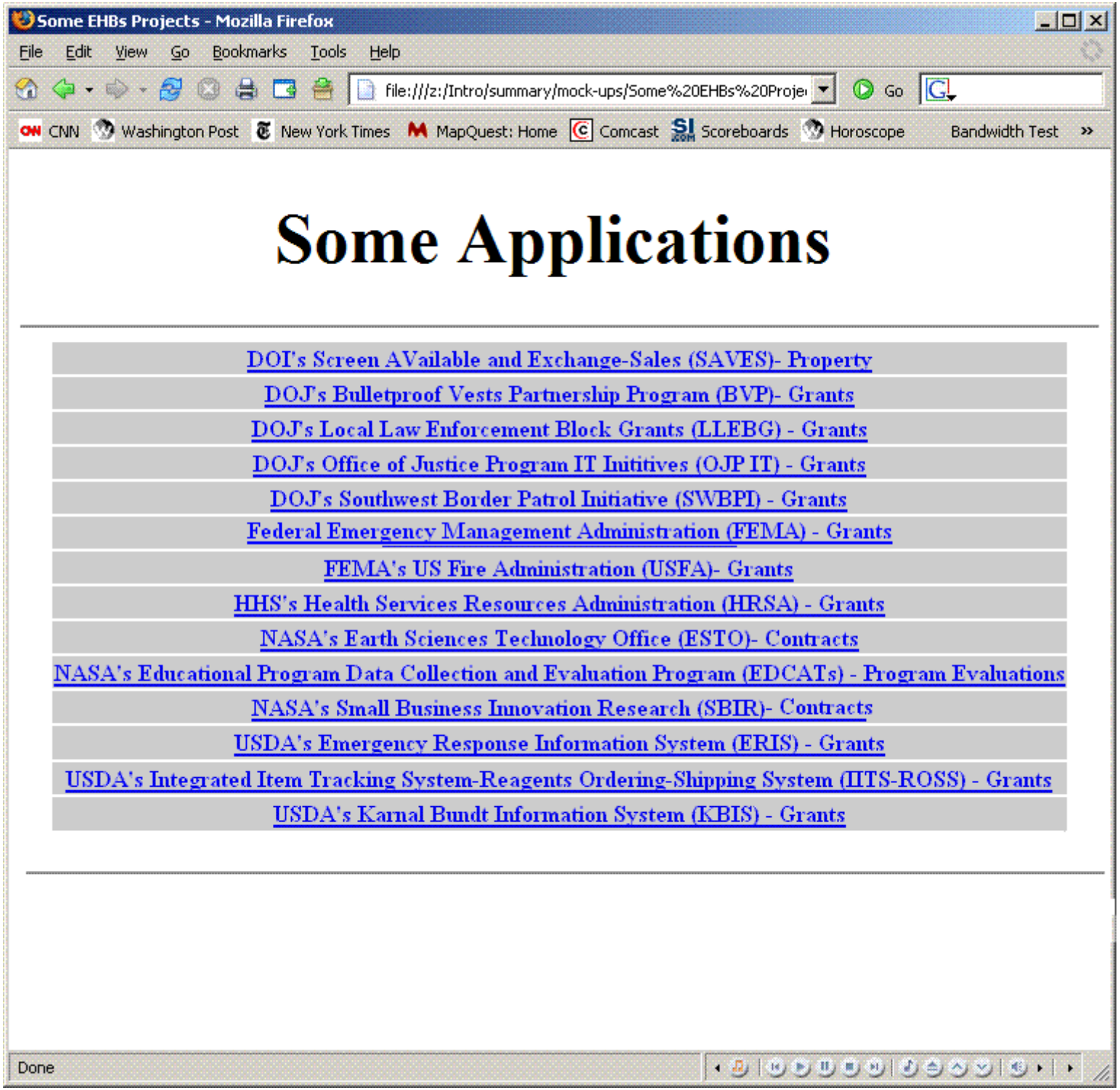
The approach uses a modernization of the Socratic Method or Dialogue to gain consensus between Teachers, Documentors, Managers, Implementors, and Participants



Now: 81 °F | Wed: 90 °F | Thu: 90 °F | Fri: 82 °F | Sat: 72 °F | Sun: 83 °F | Mon


Some EHBs Projects - Mozilla Firefox
File Edit View Go Bookmarks Tools Help
file:///z:/Intro/summary/mock-ups/Some%20EHBs%20Proje
Go
CNN Washington Post New York Times MapQuest: Home Comcast Scoreboards Horoscope Bandwidth Test
Some Applications
DOI's Screen AVailable and Exchange-Sales (SAVES)- Property
DOJ's Bulletproof Vests Partnership Program (BVP)- Grants
DOJ's Local Law Enforcement Block Grants (LLEBG) - Grants
DOJ's Office of Justice Program IT Inititives (OJP IT) - Grants
DOJ's Southwest Border Patrol Initiative (SWBPI) - Grants
Federal Emergency Management Administration (FEMA) - Grants
FEMA's US Fire Administration (USFA)- Grants
HHS's Health Services Resources Administration (HRSA) - Grants
NASA's Earth Sciences Technology Office (ESTO)- Contracts
NASA's Educational Program Data Collection and Evaluation Program (EDCATs) - Program Evaluations
NASA's Small Business Innovation Research (SBIR)- Contracts
USDA's Emergency Response Information System (ERIS) - Grants
USDA's Integrated Item Tracking System-Reagents Ordering-Shipping System (IITS-ROSS) - Grants
USDA's Karnal Bundt Information System (KBIS) - Grants
Done

Subprocess Life-Cycle Views that are supported. * - Mozilla Firefox
File Edit View History Bookmarks Tools Help
ehbs.org/intro/summary/benefits.htm
Google

Subprocess Life-Cycle Views that are supported.

- **Organization subprocess teachers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess teachers copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents/Guidelines /Worksheets.

- **Organization subprocess documentors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess documentors copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents/Guidelines /Worksheets.

- **Organization subprocess managers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess managers copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents/Guidelines /Worksheets.

- **Organization subprocess implementors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess implementors copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents /Guidelines/Worksheets.

- **Organization subprocess participants want to quickly learn, integrate, and perform tasks that are part of their views. (Critical)** Organization subprocess participants study the steps of their organization subprocess view Guidelines.

- **Organization subprocess managers want to quickly monitor execution of tasks that are part of their views.** Organization subprocess managers monitor the execution of tasks using their organization subprocess Plays/Documents/Guidelines/Worksheets.

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly update, test and teach their subprocesses.** Organization subprocess teachers, documentors, managers, implementors, and participants update, test, and teach their organization subprocess Plays/Documents/Guidelines/Worksheets.

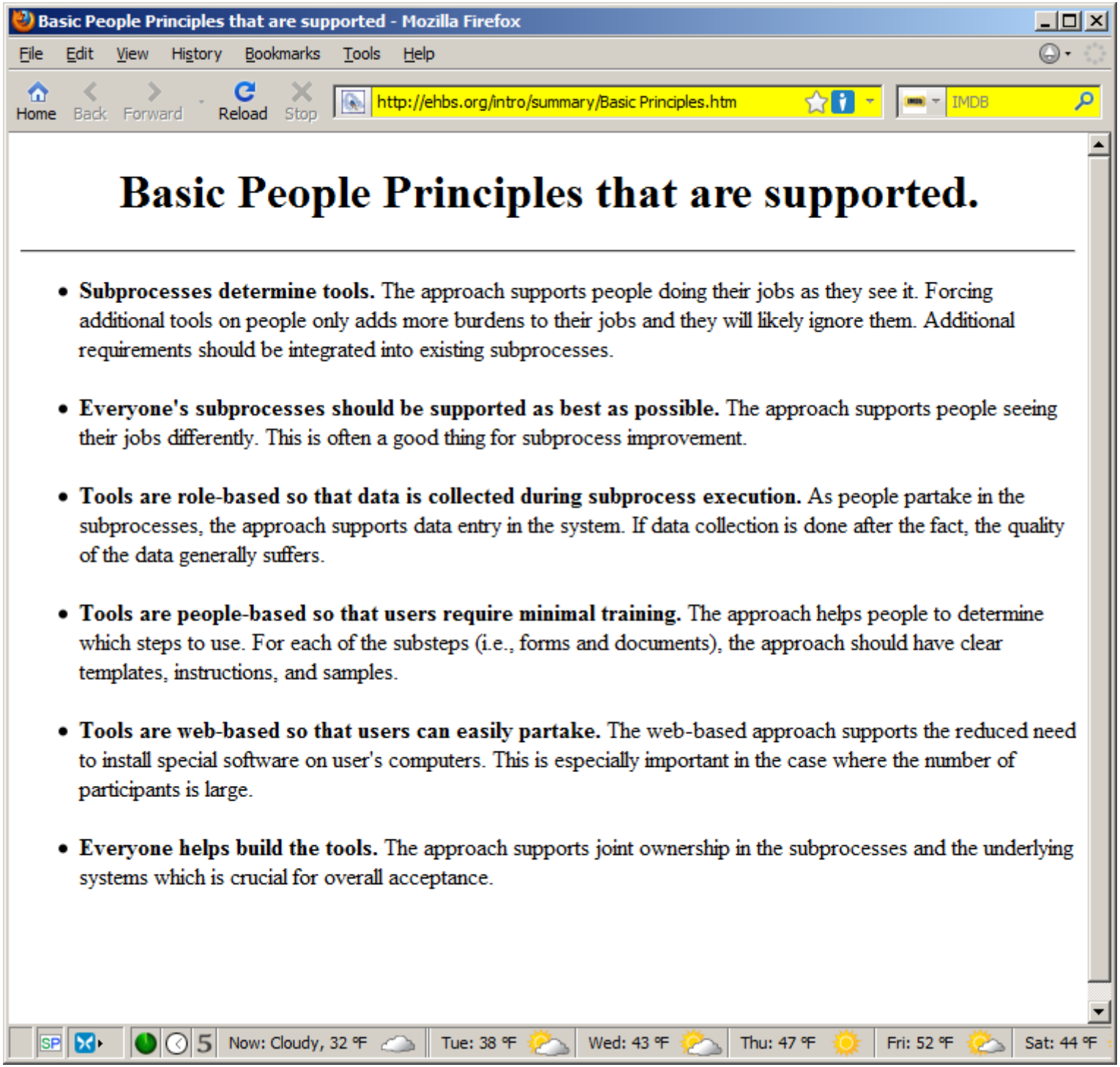
- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly update, test, and teach using other organization's views.** Organization subprocess teachers, documentors, managers, implementors, and participants update, test, and teach using other relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library.

- **Organization subprocess teachers, documentors, managers, implementors, and participants become hurt/angry when their views are not supported.** Organization subprocess teachers, documentors, managers, implementors, and participants update, test, and teach their organization subprocess Plays/Documents/Guidelines/Worksheets.

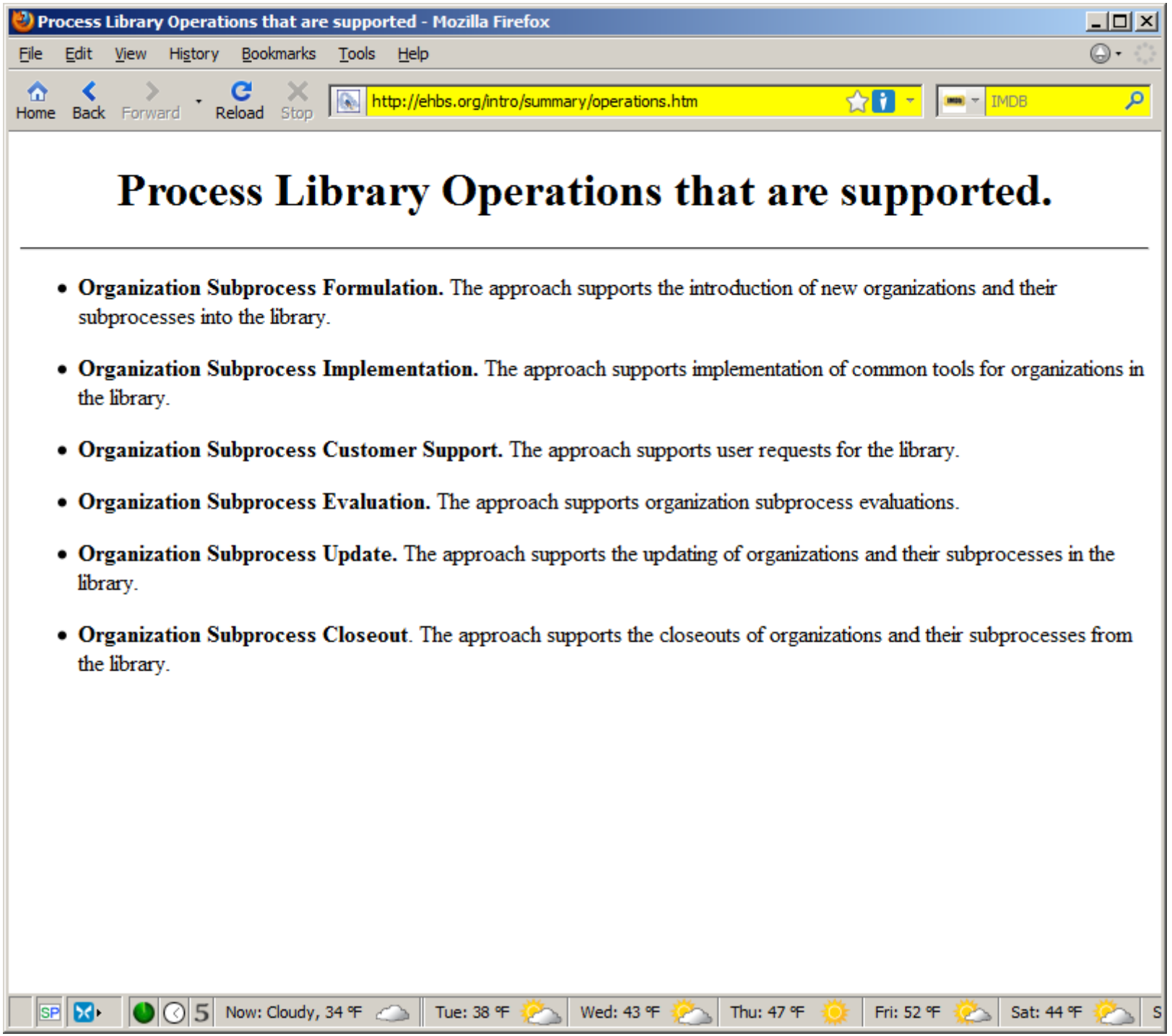
- **Organization subprocess implementors want to quickly update, test and teach tools that help facilitate execution of their subprocesses.** Organization subprocess implementors update, test, and teach tools using requirements from Plays/Documents/Guidelines/Worksheets in the Process Library.

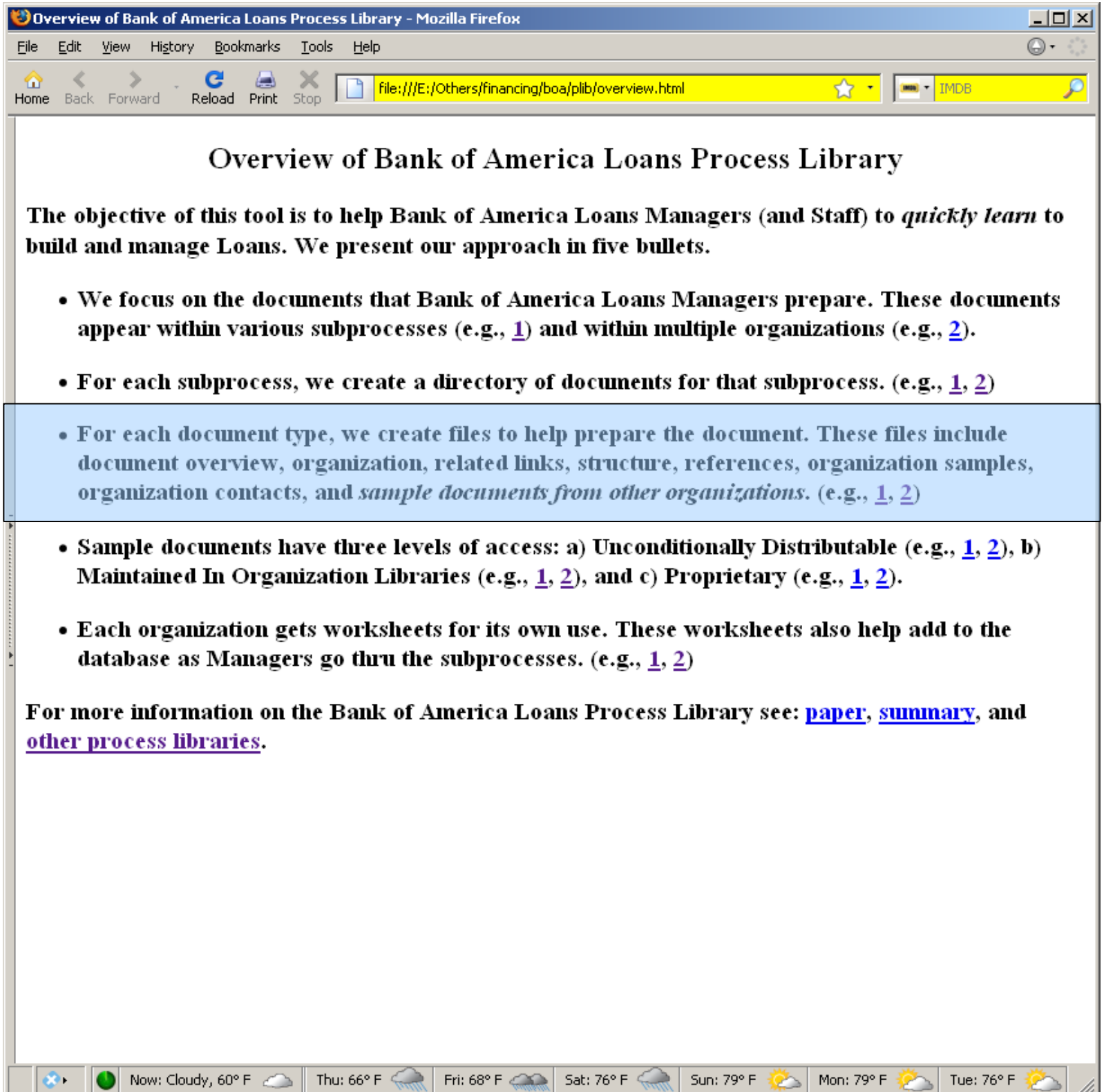
- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly leave when their views continue not to be supported.** Organization subprocess teachers, documentors, managers, implementors, and participants archive their organization subprocess Plays/Documents/Guidelines/Worksheets.

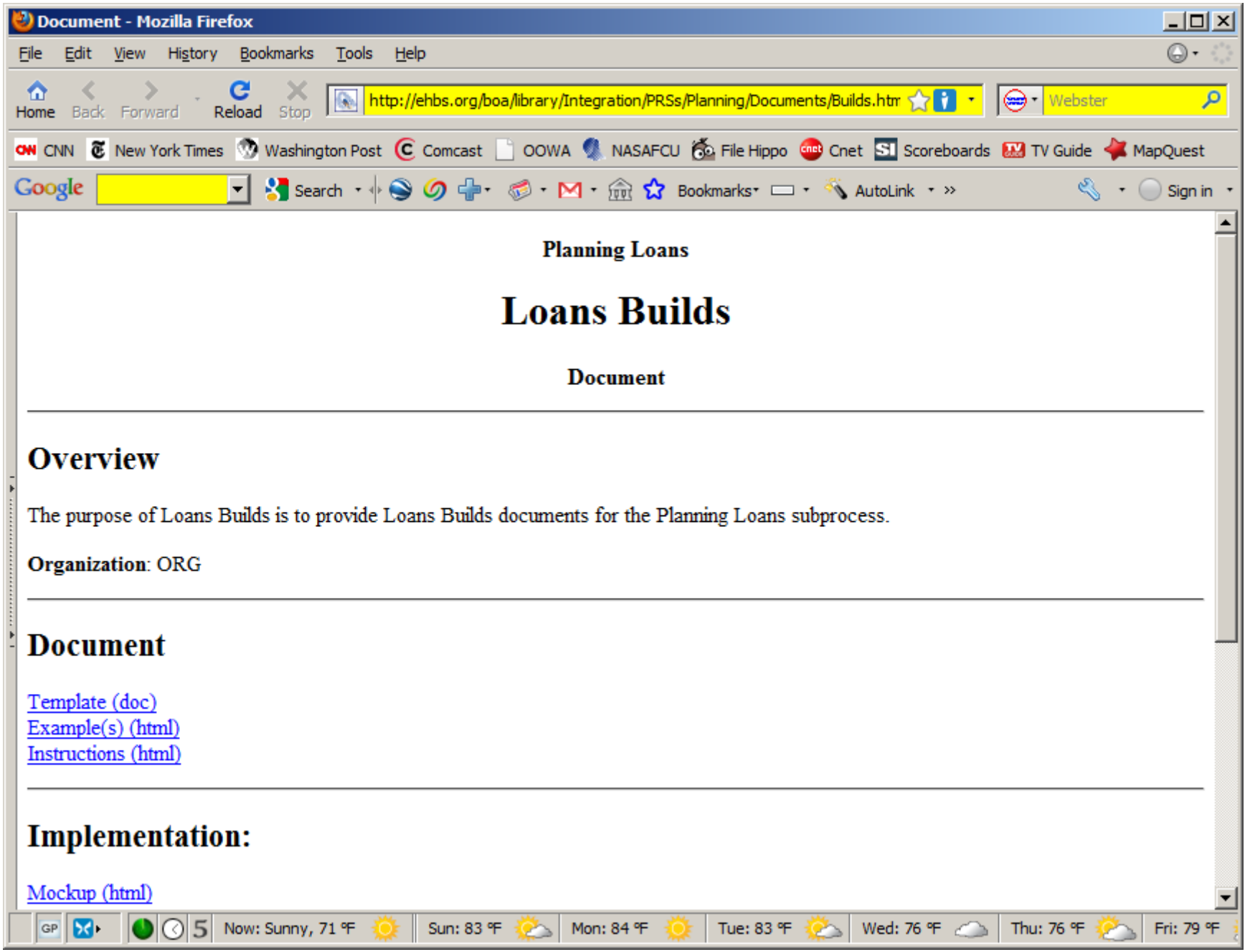
- **The Key Human Factor Issue: Communication Within and Across Organizations.** Organization subprocess Plays/Documents/Guidelines/Worksheets in Process Libraries facilitate intra- and inter- organization communication.

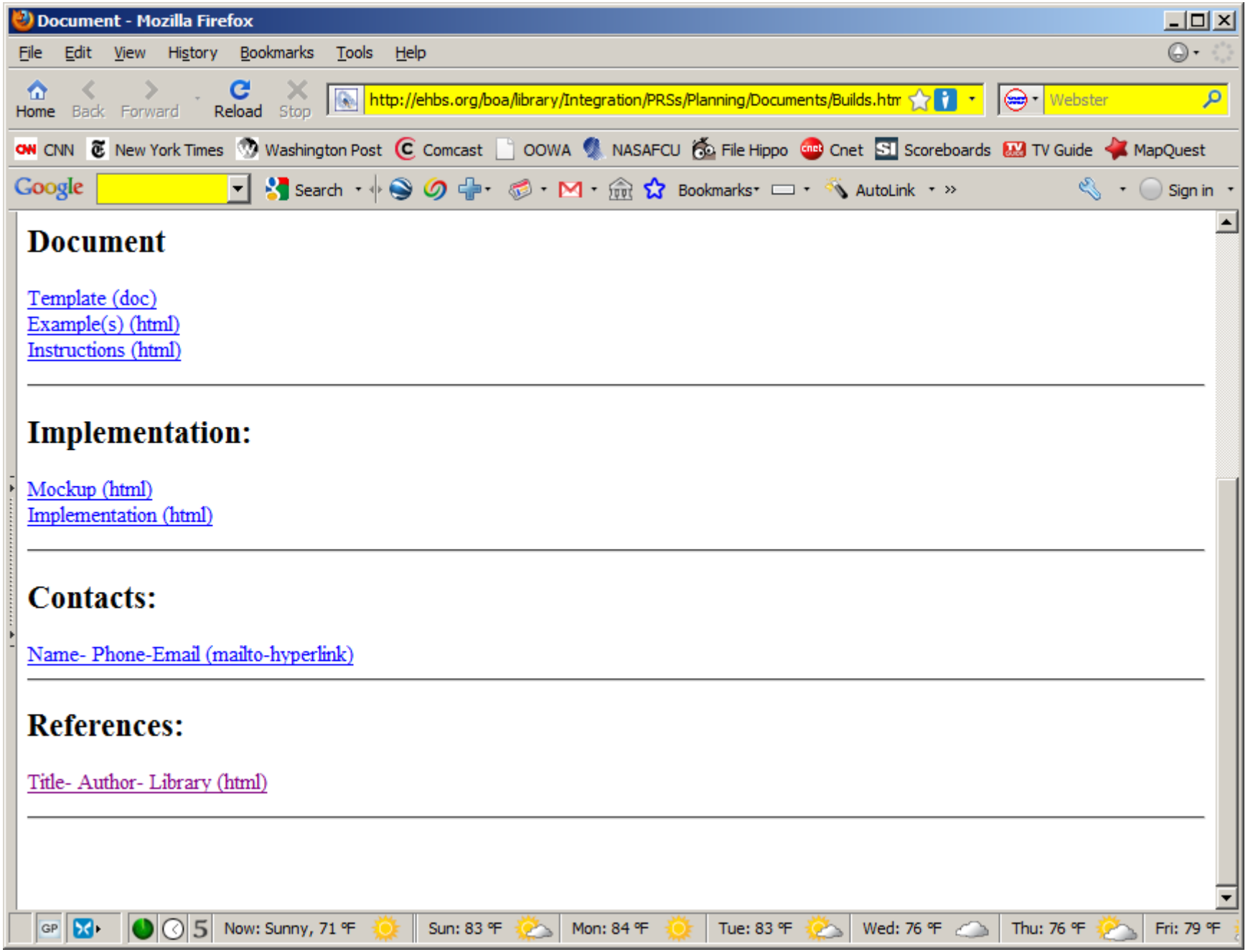

Basic People Principles that are supported - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/intro/summary/Basic Principles.htm
IMDB
Basic People Principles that are supported.
Subprocesses determine tools. The approach supports people doing their jobs as they see it. Forcing additional tools on people only adds more burdens to their jobs and they will likely ignore them. Additional requirements should be integrated into existing subprocesses.
Everyone's subprocesses should be supported as best as possible. The approach supports people seeing their jobs differently. This is often a good thing for subprocess improvement.
Tools are role-based so that data is collected during subprocess execution. As people partake in the subprocesses, the approach supports data entry in the system. If data collection is done after the fact, the quality of the data generally suffers.
Tools are people-based so that users require minimal training. The approach helps people to determine which steps to use. For each of the substeps (i.e., forms and documents), the approach should have clear templates, instructions, and samples.
Tools are web-based so that users can easily partake. The web-based approach supports the reduced need to install special software on user's computers. This is especially important in the case where the number of participants is large.
Everyone helps build the tools. The approach supports joint ownership in the subprocesses and the underlying systems which is crucial for overall acceptance.
Now: Cloudy, 32 °F
Tue: 38 °F
Wed: 43 °F
Thu: 47 °F
Fri: 52 °F
Sat: 44 °F

Subprocess/Play Developments that are supported - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/intro/summary/play-development.htm
IMDB
Subprocess/Play Developments that are supported.
Presentation & Paper/Marketing. The approach supports presentation & paper/marketing using the contents of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Worksheet/Outlining. The approach supports worksheet/outlining using the drafting of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Temporal Flow/Playwriting. The approach supports temporal flow/playwriting using the drafting of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Examples/Rehearsal. The approach supports examples/rehearsals using the mockups of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Implementation/Staging. The approach supports implementation/staging using the building of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Utilization/Performance. The approach supports users utilization/performance using execution of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Revision/New Production. The approach supports revision/new production using updates of the Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Closeout/End Production. The approach supports closeout/ end performance using storage of the Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.
Now: Cloudy, 32 °F
Tue: 38 °F
Wed: 43 °F
Thu: 47 °F
Fri: 52 °F
Sat: 44 °F


Process Library Operations that are supported - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/intro/summary/operations.htm
IMDB
Process Library Operations that are supported.
Organization Subprocess Formulation. The approach supports the introduction of new organizations and their subprocesses into the library.
Organization Subprocess Implementation. The approach supports implementation of common tools for organizations in the library.
Organization Subprocess Customer Support. The approach supports user requests for the library.
Organization Subprocess Evaluation. The approach supports organization subprocess evaluations.
Organization Subprocess Update. The approach supports the updating of organizations and their subprocesses in the library.
Organization Subprocess Closeout. The approach supports the closeouts of organizations and their subprocesses from the library.
Now: Cloudy, 34 °F
Tue: 38 °F
Wed: 43 °F
Thu: 47 °F
Fri: 52 °F
Sat: 44 °F


Overview of Bank of America Loans Process Library - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Print Stop
file:///E:/Others/financing/boa/plib/overview.html
IMDB
Overview of Bank of America Loans Process Library
The objective of this tool is to help Bank of America Loans Managers (and Staff) to quickly learn to build and manage Loans. We present our approach in five bullets.
We focus on the documents that Bank of America Loans Managers prepare. These documents appear within various subprocesses (e.g., 1) and within multiple organizations (e.g., 2).
For each subprocess, we create a directory of documents for that subprocess. (e.g., 1, 2)
For each document type, we create files to help prepare the document. These files include document overview, organization, related links, structure, references, organization samples, organization contacts, and sample documents from other organizations. (e.g., 1, 2)
Sample documents have three levels of access: a) Unconditionally Distributable (e.g., 1, 2), b) Maintained In Organization Libraries (e.g., 1, 2), and c) Proprietary (e.g., 1, 2).
Each organization gets worksheets for its own use. These worksheets also help add to the database as Managers go thru the subprocesses. (e.g., 1, 2)
For more information on the Bank of America Loans Process Library see: paper, summary, and other process libraries.
Now: Cloudy, 60° F
Thu: 66° F
Fri: 68° F
Sat: 76° F
Sun: 79° F
Mon: 79° F
Tue: 76° F


Document - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/boa/library/Integration/PRSs/Planning/Documents/Builds.htm
Webster
CNN New York Times Washington Post Comcast OOWA NASAFCU File Hippo Cnet Scoreboards TV Guide MapQuest
Google Search Bookmarks AutoLink Sign in
Planning Loans
Loans Builds
Document
Overview
The purpose of Loans Builds is to provide Loans Builds documents for the Planning Loans subprocess.
Organization: ORG
Document
Template (doc)
Example(s) (html)
Instructions (html)
Implementation:
Mockup (html)
Now: Sunny, 71 °F
Sun: 83 °F
Mon: 84 °F
Tue: 83 °F
Wed: 76 °F
Thu: 76 °F
Fri: 79 °F


Document - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Home Back Forward Reload Stop
http://ehbs.org/boa/library/Integration/PRSs/Planning/Documents/Builds.htm
Webster
CNN New York Times Washington Post Comcast OOWA NASAFCU File Hippo Cnet Scoreboards TV Guide MapQuest
Google Search Bookmarks AutoLink Sign in
Document
Template (doc)
Example(s) (html)
Instructions (html)
Implementation:
Mockup (html)
Implementation (html)
Contacts:
Name- Phone-Email (mailto-hyperlink)
References:
Title- Author- Library (html)
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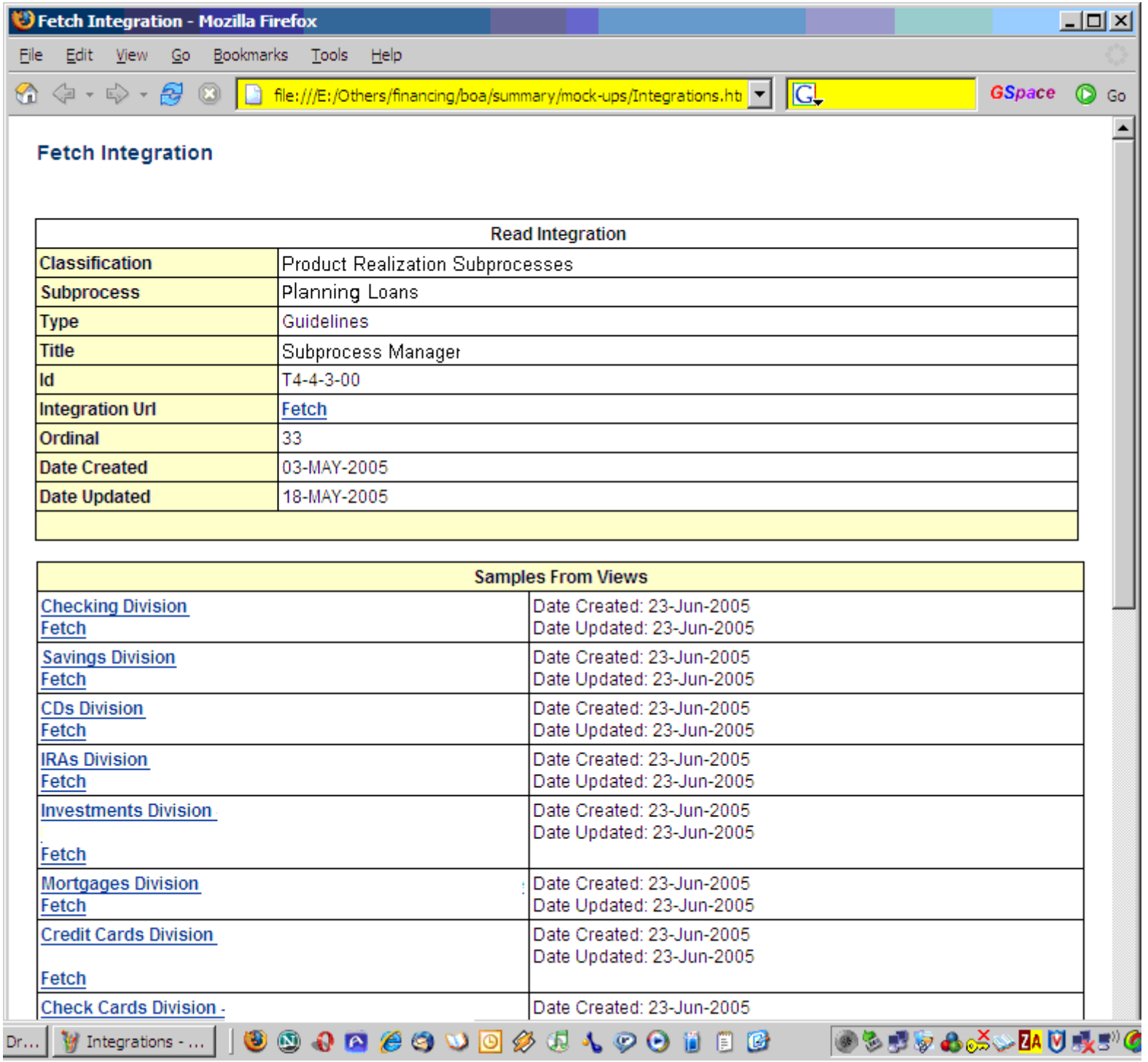
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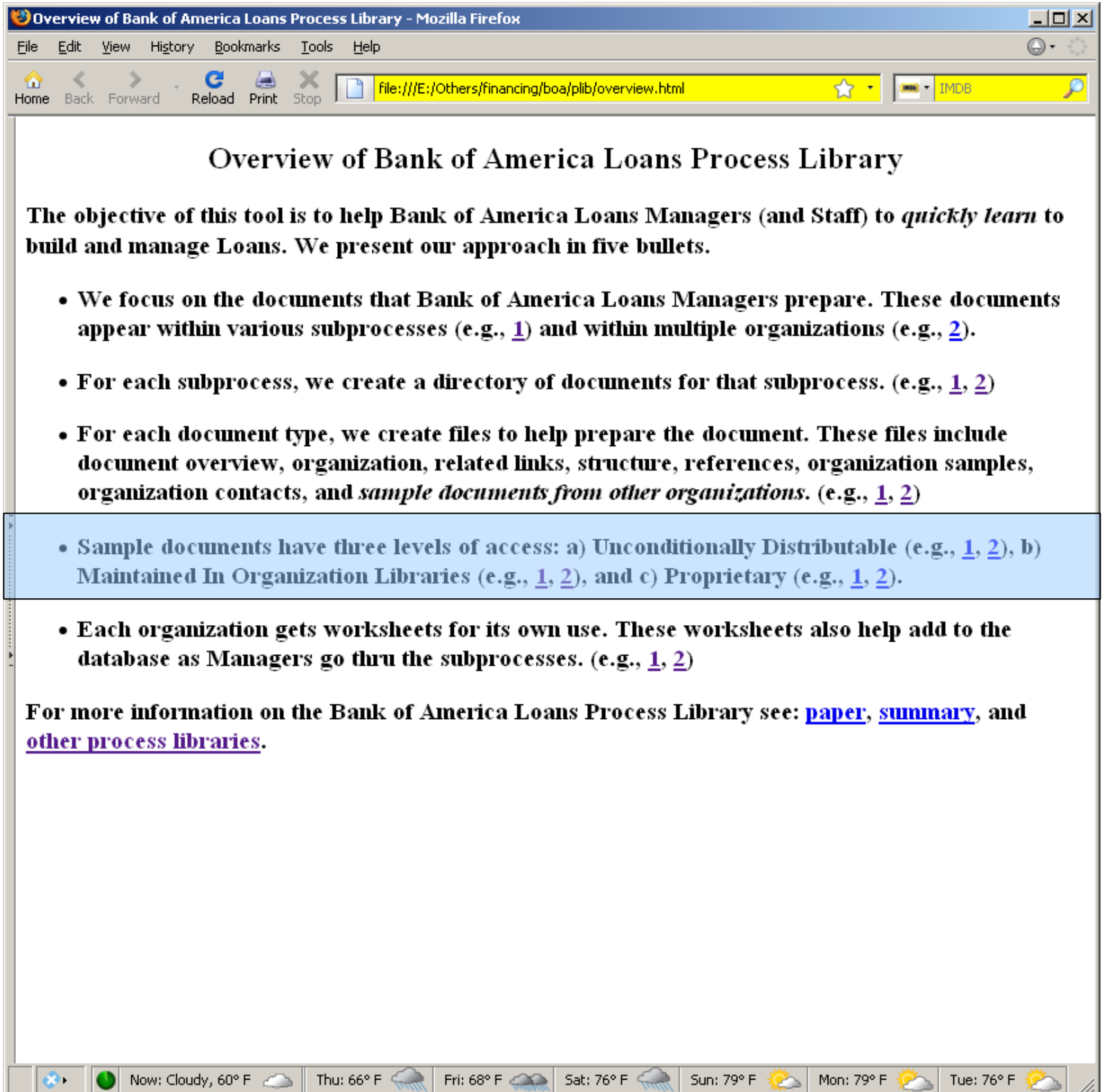
Overview of Bank of America Loans Process Library - Mozilla Firefox
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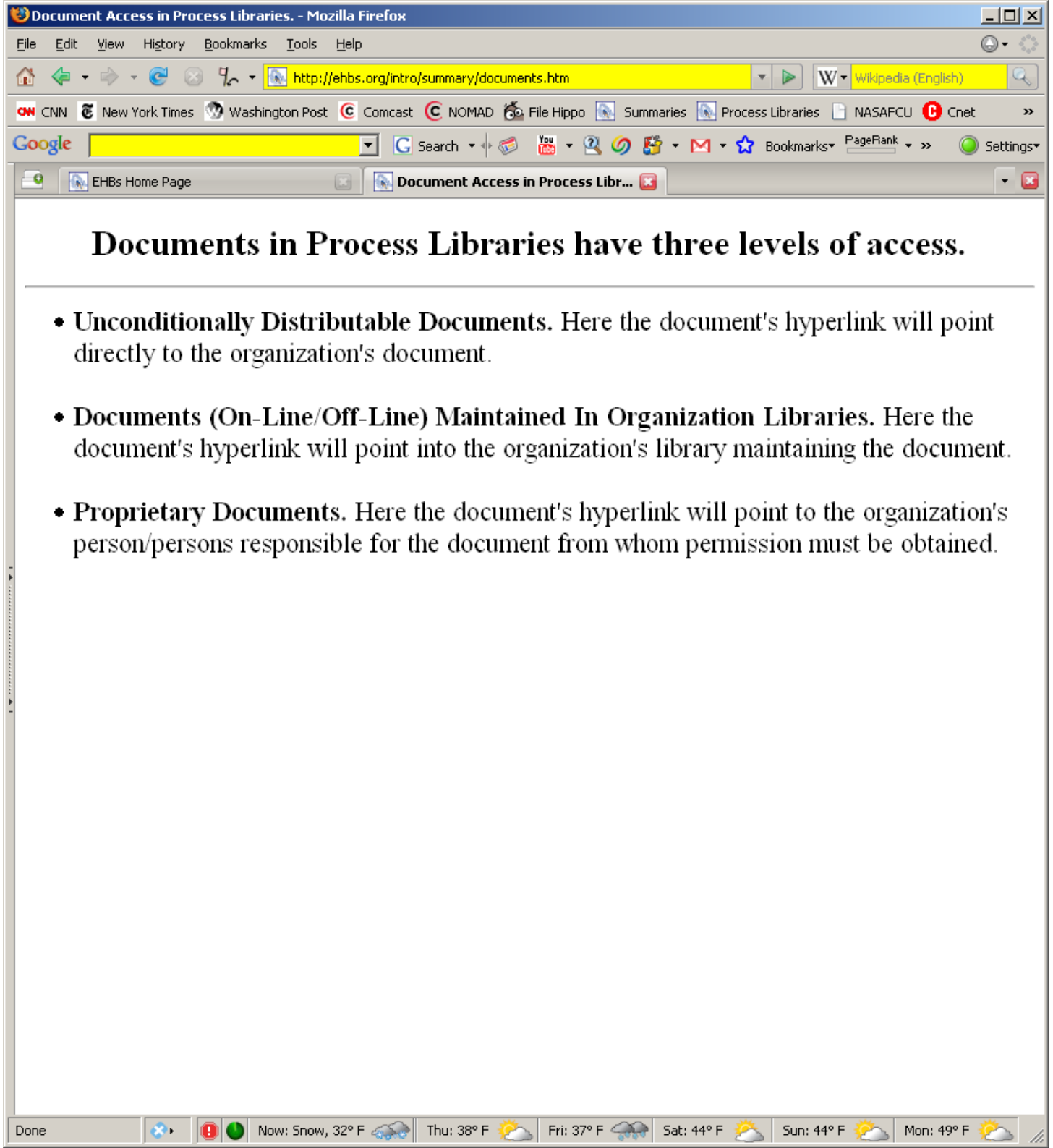
Tue: 76° F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Documents in Process Libraries have three levels of access.
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• Documents (On-Line/Off-Line) Maintained In Organization Libraries. Here the document's hyperlink will point into the organization's library maintaining the document.
• Proprietary Documents. Here the document's hyperlink will point to the organization's person/persons responsible for the document from whom permission must be obtained.
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Bank of America Loans
Management Using Process Libraries and Electronic Handbooks
(Where Shakespeare Meets Freud)

Dr. Barry E. Jacobs
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barry.e.jacobs@nasa.gov

0. Introduction

In this paper, we deal with the important problem of managing complex distributed processes involving potentially thousands of participants. An example of such a process is the management of Bank of America Loans. Bank of America Loans is a key ingredient of Bank of America Corporation. Managing complex distributed processes is difficult due to the complexity of the subprocesses, the diversity of views of different organizations, and the diversity of views of managers and participants taking part in the subprocesses.

An outline of the paper is as follows:

In Section 1, we examine common problems that arise in the management of complex distributed processes. In Section 2, we provide an overview of tools that are solutions to these problems. In Section 3, we provide examples of these tools. In Section 4, we outline some complex distributed processes in the Federal Government that are applications of the methodology.

1. Problems

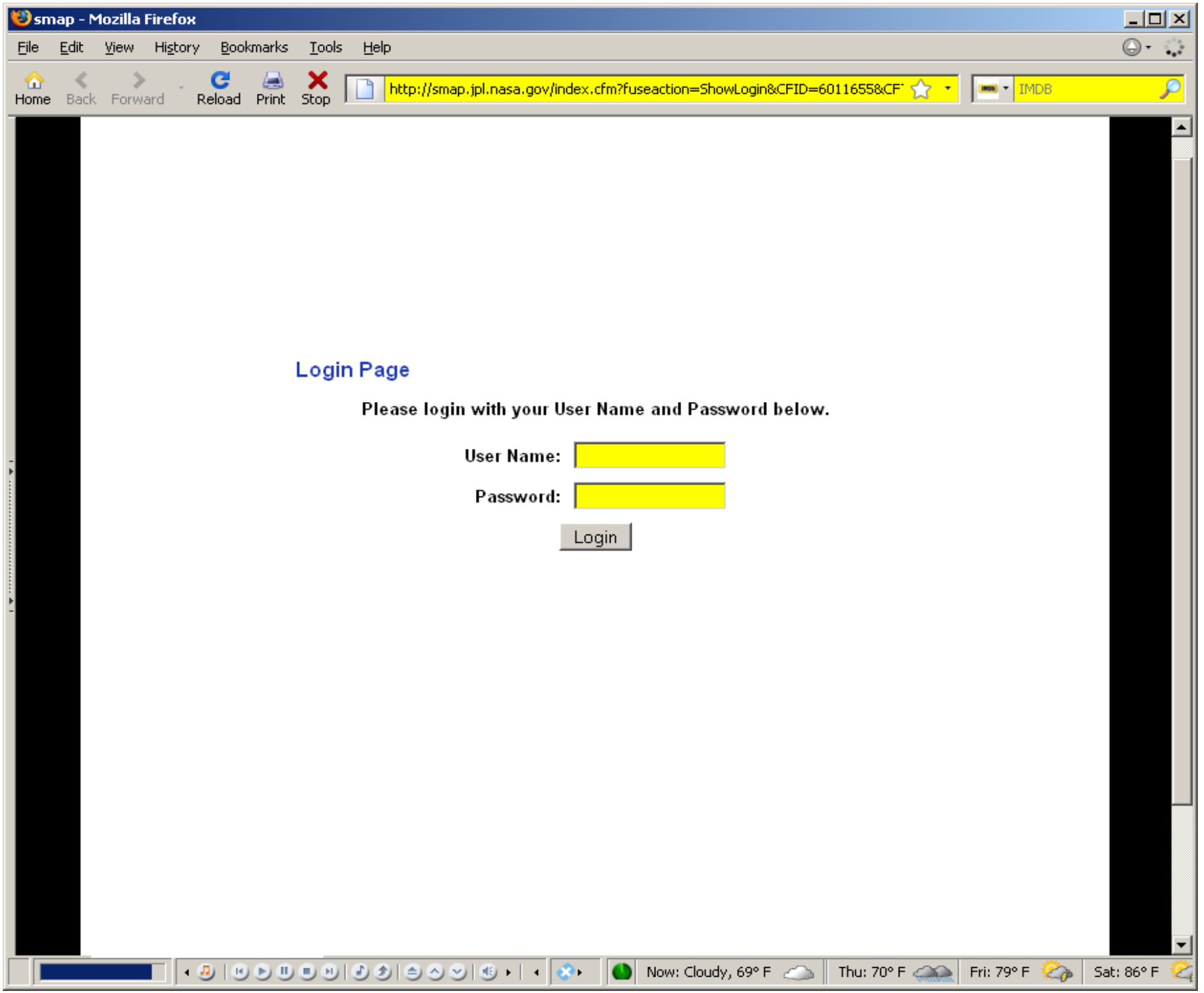
We discuss here some of the problems that are intrinsic to the management of complex distributed processes.

First, complex distributed processes tend to have lots of related subprocesses. For example, Figure 1(a) shows some of the subprocesses of Bank of America Loans. Notice that we organize the subprocesses into five categories: Product Realization, Product Distribution, Support, Improvement, and Common.

Second, for each subprocess, we tend to have multiple organizations, each having their own view of the subprocesses. For example, Figure 1(b) shows some of the organizations participating in the Bank of America Loans. In addition, there are also organizations that distribute the products that come out of the subprocesses as well as organizations that support and improve the subprocesses.

Third, within each subprocess organization, we have numerous managers and participants, each person having their own view of the subprocess. See Figure 1(c). It is very important that both managers and participants quickly learn and then establish integrated views for their roles in the subprocess.

Fourth, there are a number of important human factor issues that have to be dealt with in the management of subprocesses. See Figure 1(d). These factors reflect the life cycle of organizations that participate in the subprocesses. Solutions to these problems are discussed in the next section. At the end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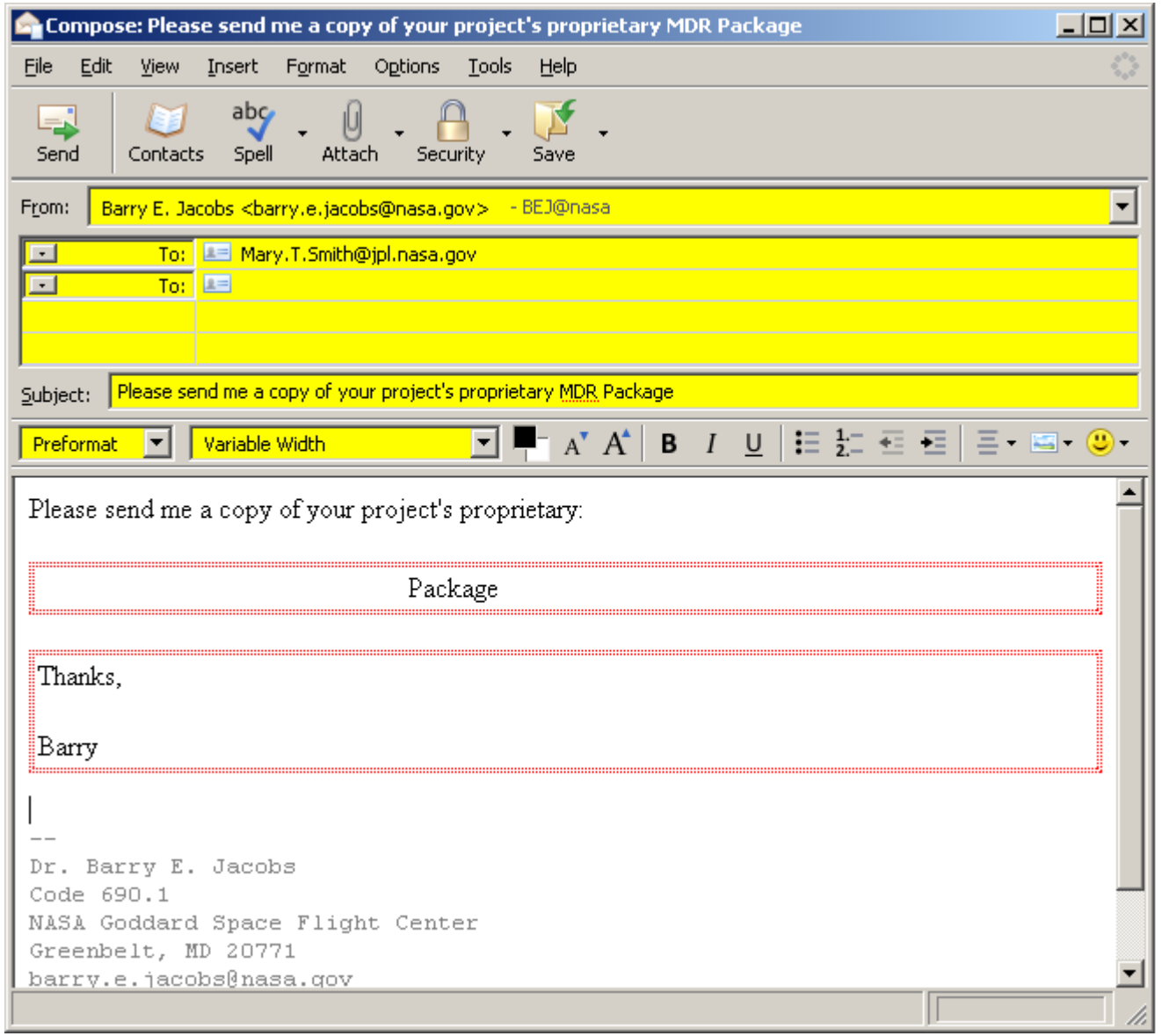
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File Edit View Insert Format Options Tools Help
Send Contacts Spell Attach Security Save
From: Barry E. Jacobs <barry.e.jacobs@nasa.gov> - BEJ@nasa
To: Mary.T.Smith@jpl.nasa.gov
To:
Subject: Please send me a copy of your project's proprietary MDR Package
Preformat Variable Width
Please send me a copy of your project's proprietary:
Package
Thanks,
Barry
--
Dr. Barry E. Jacobs
Code 690.1
NASA Goddard Space Flight Center
Greenbelt, MD 20771
barry.e.jacobs@nasa.gov

Overview of Bank of America Loans Process Library

The objective of this tool is to help Bank of America Loans Managers (and Staff) to *quickly learn* to build and manage Loans. We present our approach in five bullets.

- **We focus on the documents that Bank of America Loans Managers prepare. These documents appear within various subprocesses (e.g., 1) and within multiple organizations (e.g., 2).**
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Worksheet - Mozilla Firefox
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IMDB

Subprocess Worksheet

Subprocess: Planning Loans

In this subprocess, we deal with the planning of Loans

Task	Purpose	Suggested Roles	Task Lead(s)	Estimated Completion Date	Actual Completion Date	Documents					
						Document	Instructions and Samples	Document Lead(s)	Estimated Completion Date	Actual Completion Date	Document Location(s)
Administration	The purpose of this task is to administer Project Development .	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	07/23/07	08/23/07	Document Library	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Critical Design Review (CDR)	The purpose of this task is to administer Critical Design Review (CDR)..	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	06/23/07	06/23/07	Critical Design Review (CDR)Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Draft Project Requirements Document	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Resource Analysis Office	The purpose of this task is to administer Resource	Task Lead, Subtask Lead, Subtask Member, Reviewer,	James			Resource Analysis Office (RAO) Data Dump Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034

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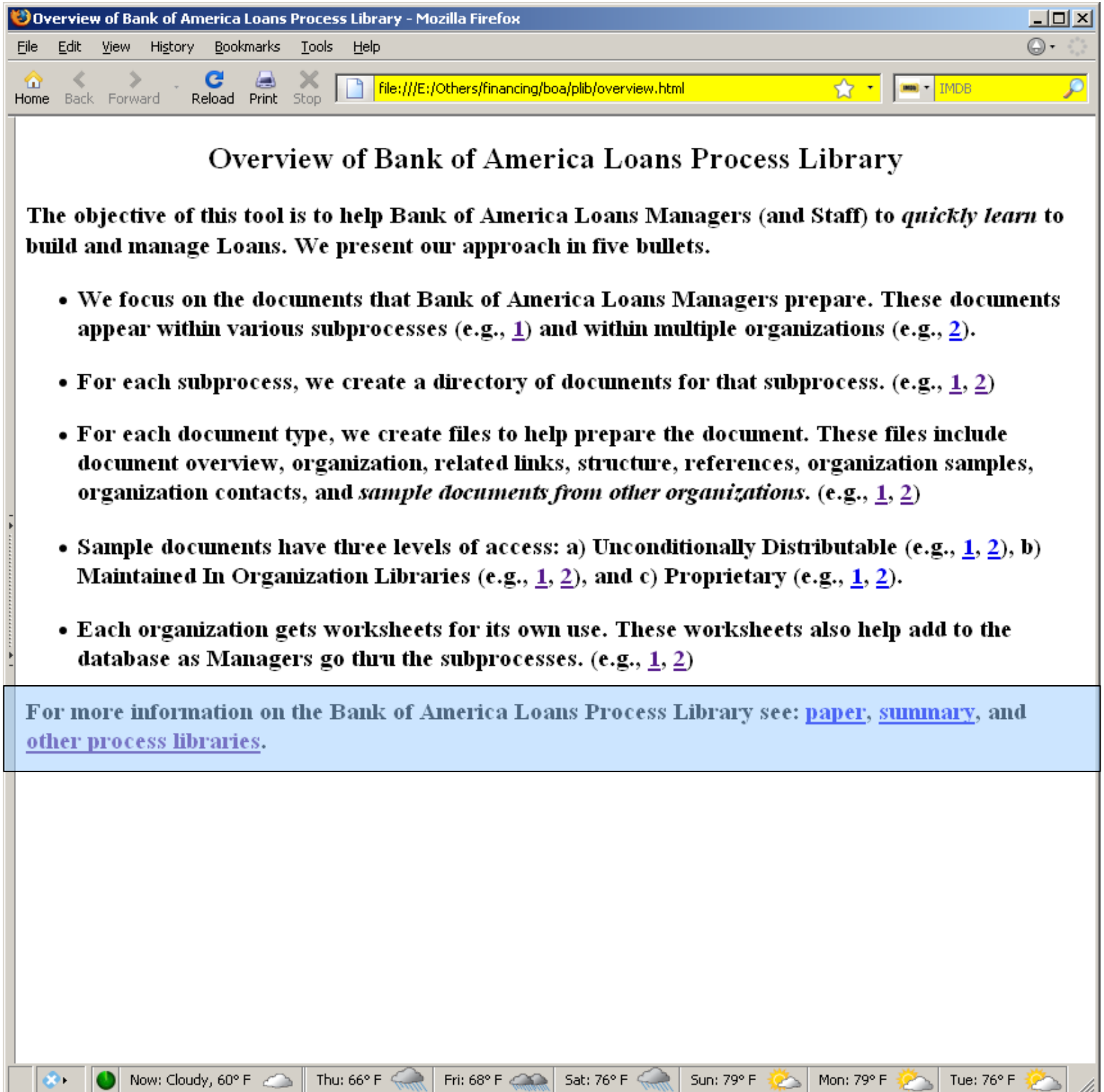
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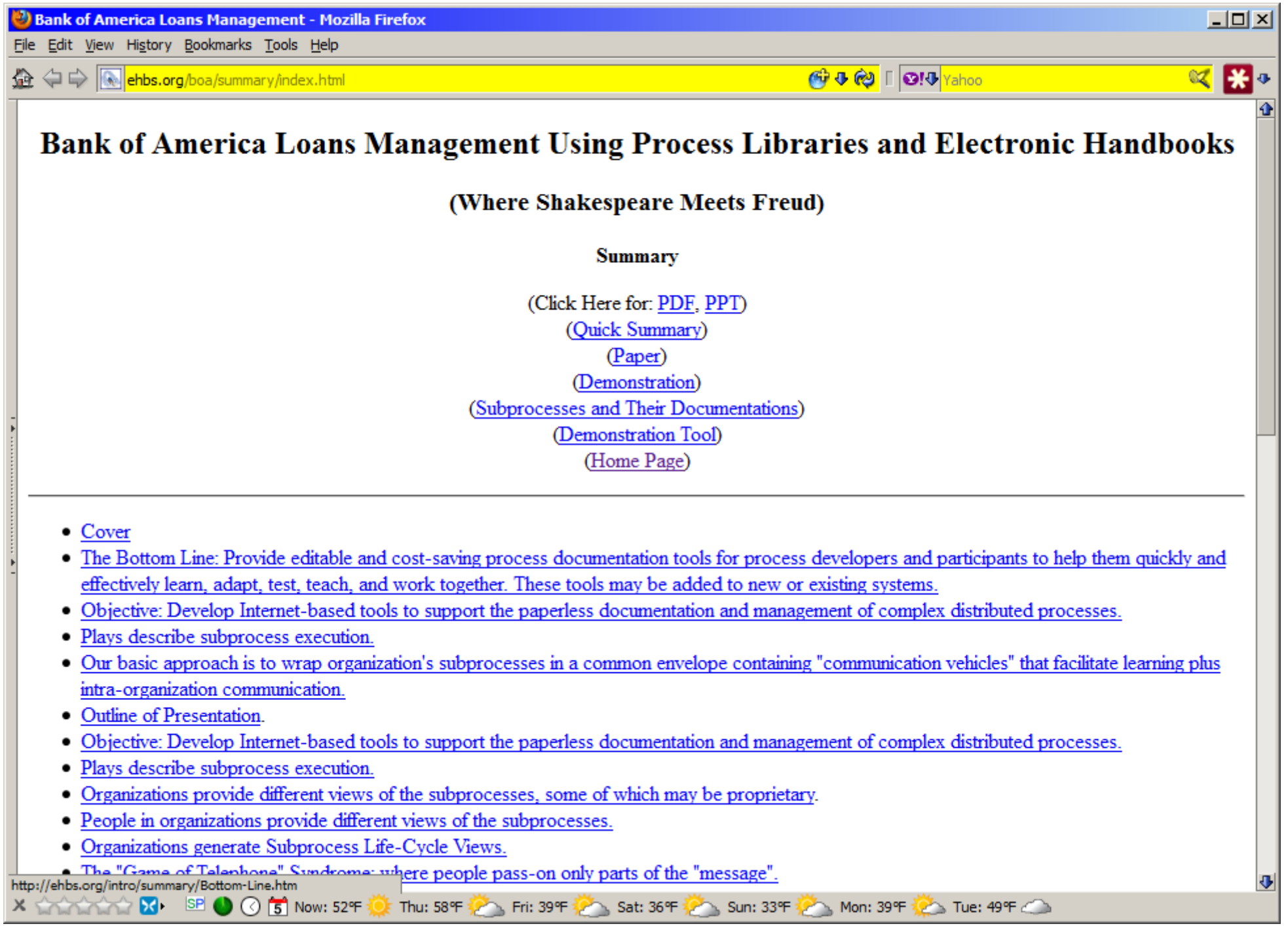
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Yahoo
Bank of America Loans Management Using Process Libraries and Electronic Handbooks
(Where Shakespeare Meets Freud)
Summary
(Click Here for: PDF, PPT)
(Quick Summary)
(Paper)
(Demonstration)
(Subprocesses and Their Documentations)
(Demonstration Tool)
(Home Page)
Cover
The Bottom Line: Provide editable and cost-saving process documentation tools for process developers and participants to help them quickly and effectively learn, adapt, test, teach, and work together. These tools may be added to new or existing systems.
Objective: Develop Internet-based tools to support the paperless documentation and management of complex distributed processes.
Plays describe subprocess execution.
Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate learning plus intra-organization communication.
Outline of Presentation.
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Plays describe subprocess execution.
Organizations provide different views of the subprocesses, some of which may be proprietary.
People in organizations provide different views of the subprocesses.
Organizations generate Subprocess Life-Cycle Views.
The "Game of Telephone" Syndrome: where people pass-on only parts of the "message".
http://ehbs.org/intro/summary/Bottom-Line.htm
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Milky Way - Mozilla Firefox 3.1 Beta 2

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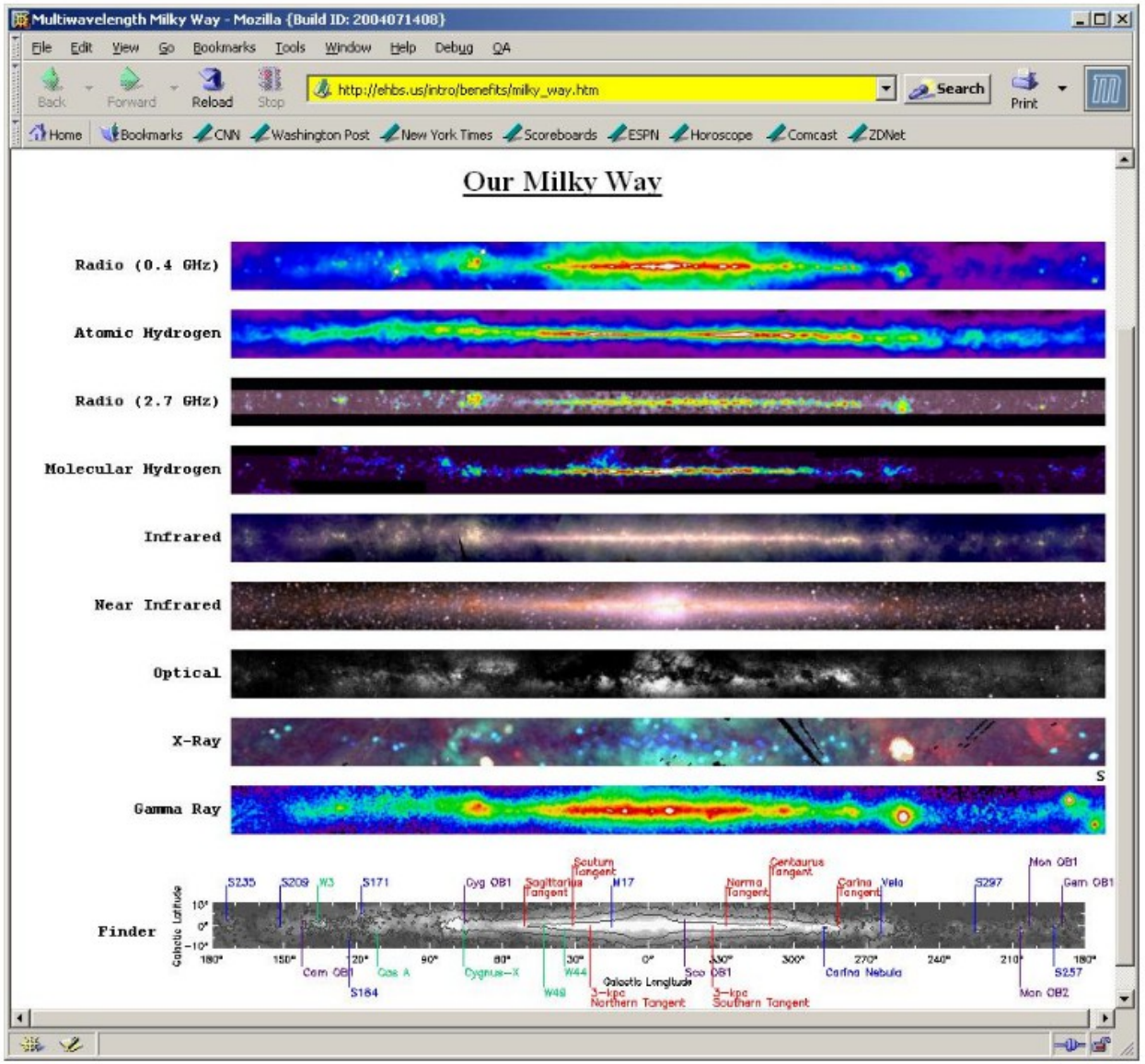
Milky Way

We believe that to truly understand one's universe, one must see it thru multiple "eyes" and also have tools to "communicate" these views.



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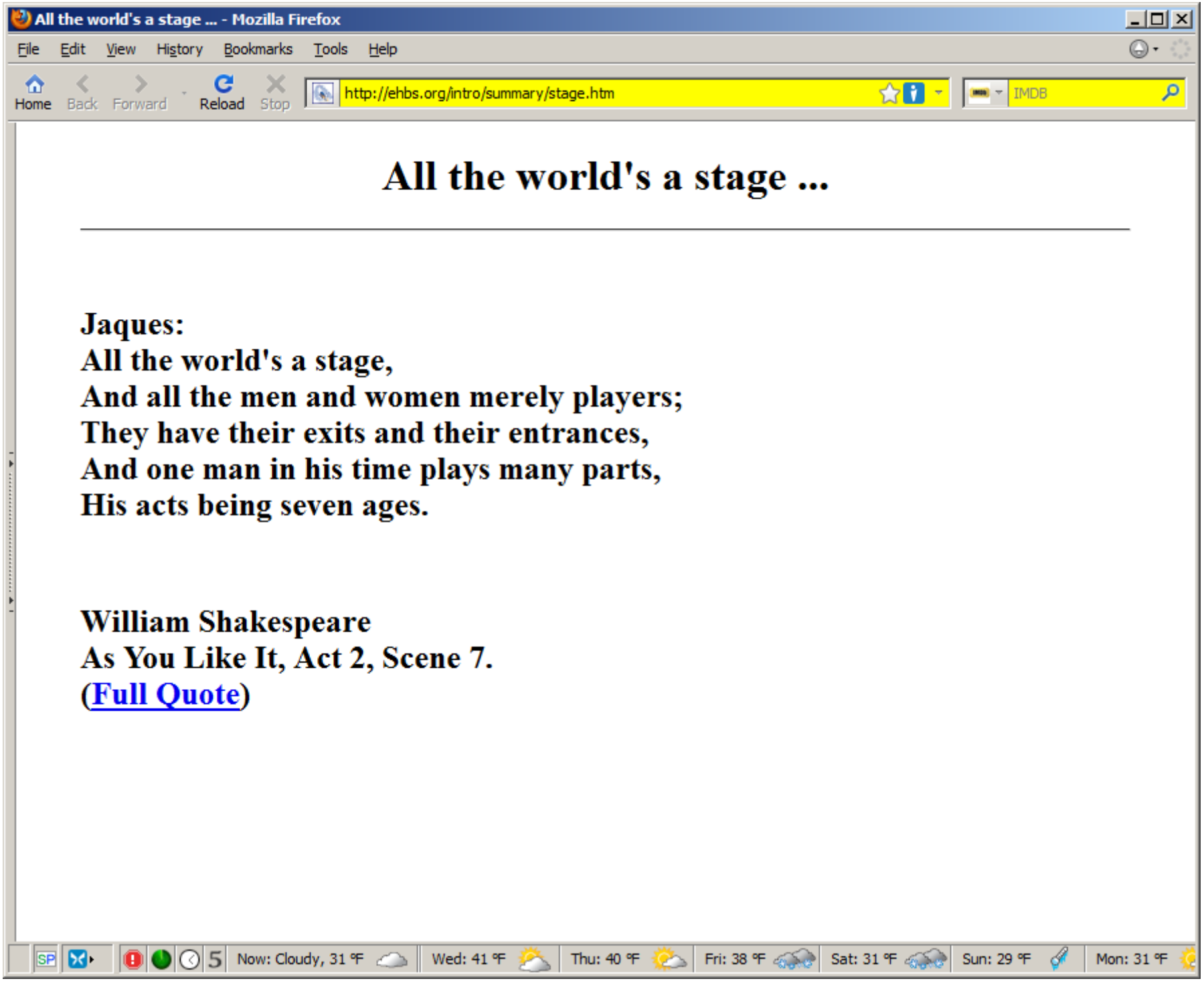
All the world's a stage ... - Mozilla Firefox
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IMDB
All the world's a stage ...
Jaques:
All the world's a stage,
And all the men and women merely players;
They have their exits and their entrances,
And one man in his time plays many parts,
His acts being seven ages.
William Shakespeare
As You Like It, Act 2, Scene 7.
(Full Quote)
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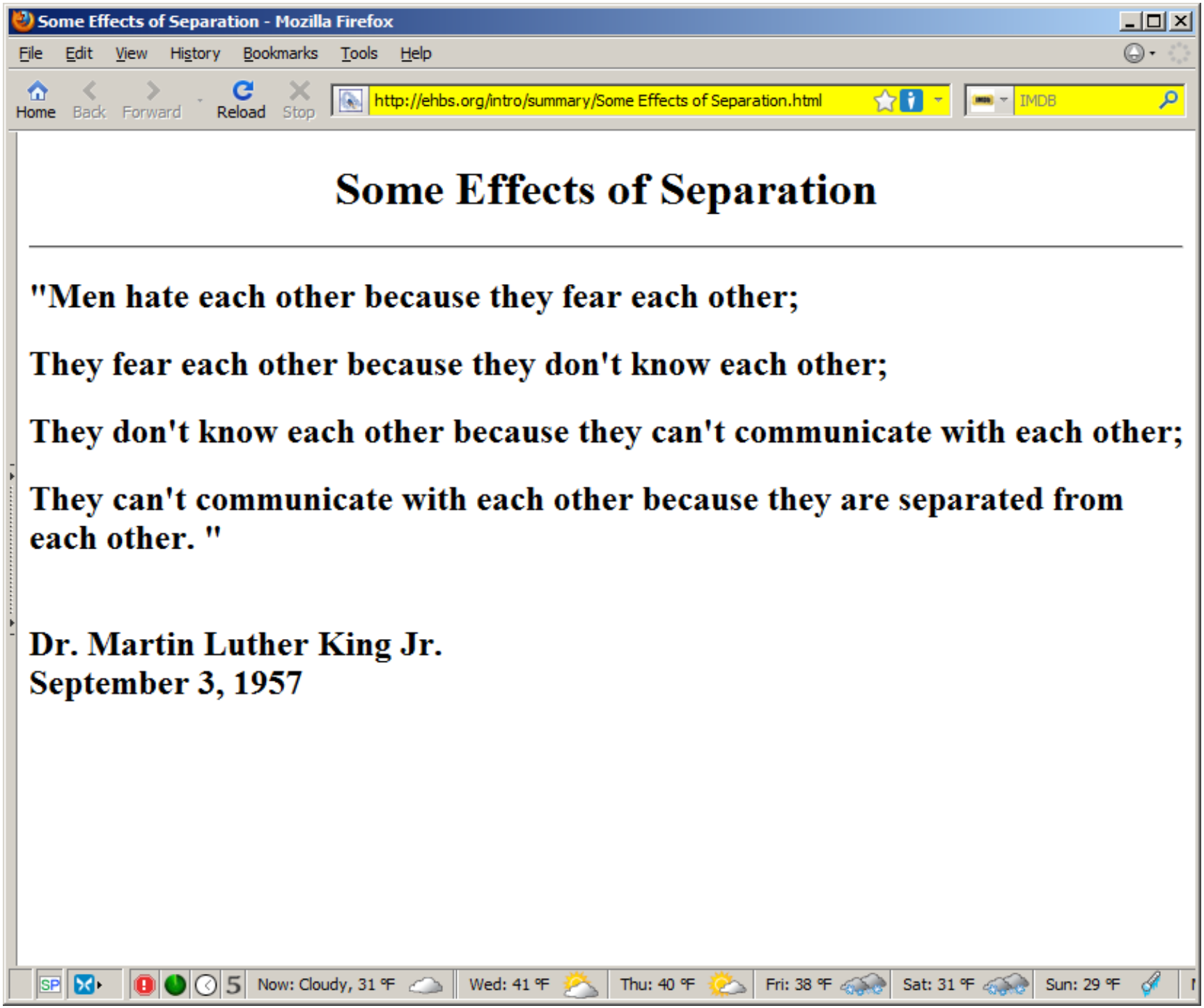
Some Effects of Separation - Mozilla Firefox
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IMDB
Some Effects of Separation
"Men hate each other because they fear each other;
They fear each other because they don't know each other;
They don't know each other because they can't communicate with each other;
They can't communicate with each other because they are separated from each other. "
Dr. Martin Luther King Jr.
September 3, 1957
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Sat: 31 °F
Sun: 29 °F

Theatre of Dionysus- Athens, Greece

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Complex Process Management Using PLs and EHBs [Where Shakespeare Meets Freud]

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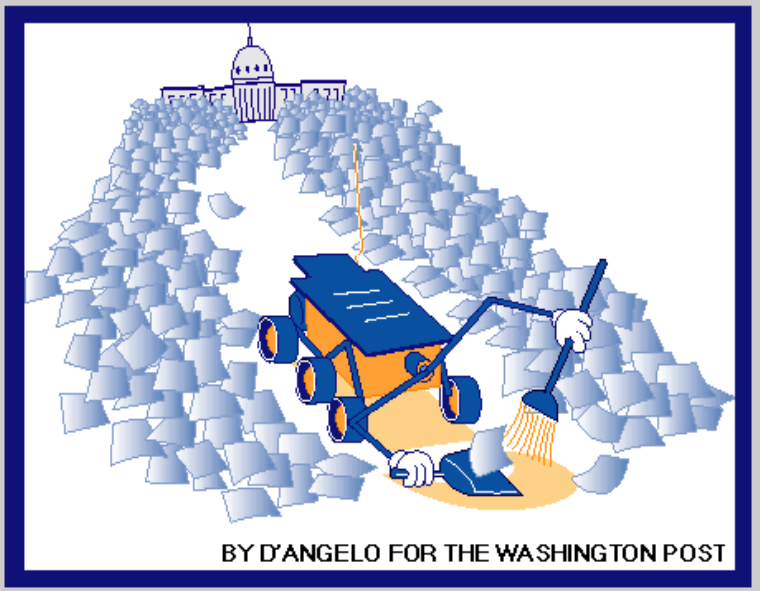
1. What are PLs and EHBs?
2. Some Quick Summaries
3. Some Applications
4. In The Press
5. Experiences
6. Some Papers
7. Some Demonstration Tools
8. Some Subprocesses and Their Documentations
9. Assembly Line Processes
10. Benefits

White Paper
Book

How Can I Apply These To My Organization's Processes?

Complex Process Management Using Process Libraries and Electronic Handbooks

[Where Shakespeare Meets Freud]



Dr. Barry E. Jacobs
barry.e.jacobs@comcast.net
(301) 681-7816
[Mini-Bio]

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