

Rotary International Grants and Projects Management Using Process Libraries and Electronic Handbooks



(Where Shakespeare Meets Freud)



Quick Summary



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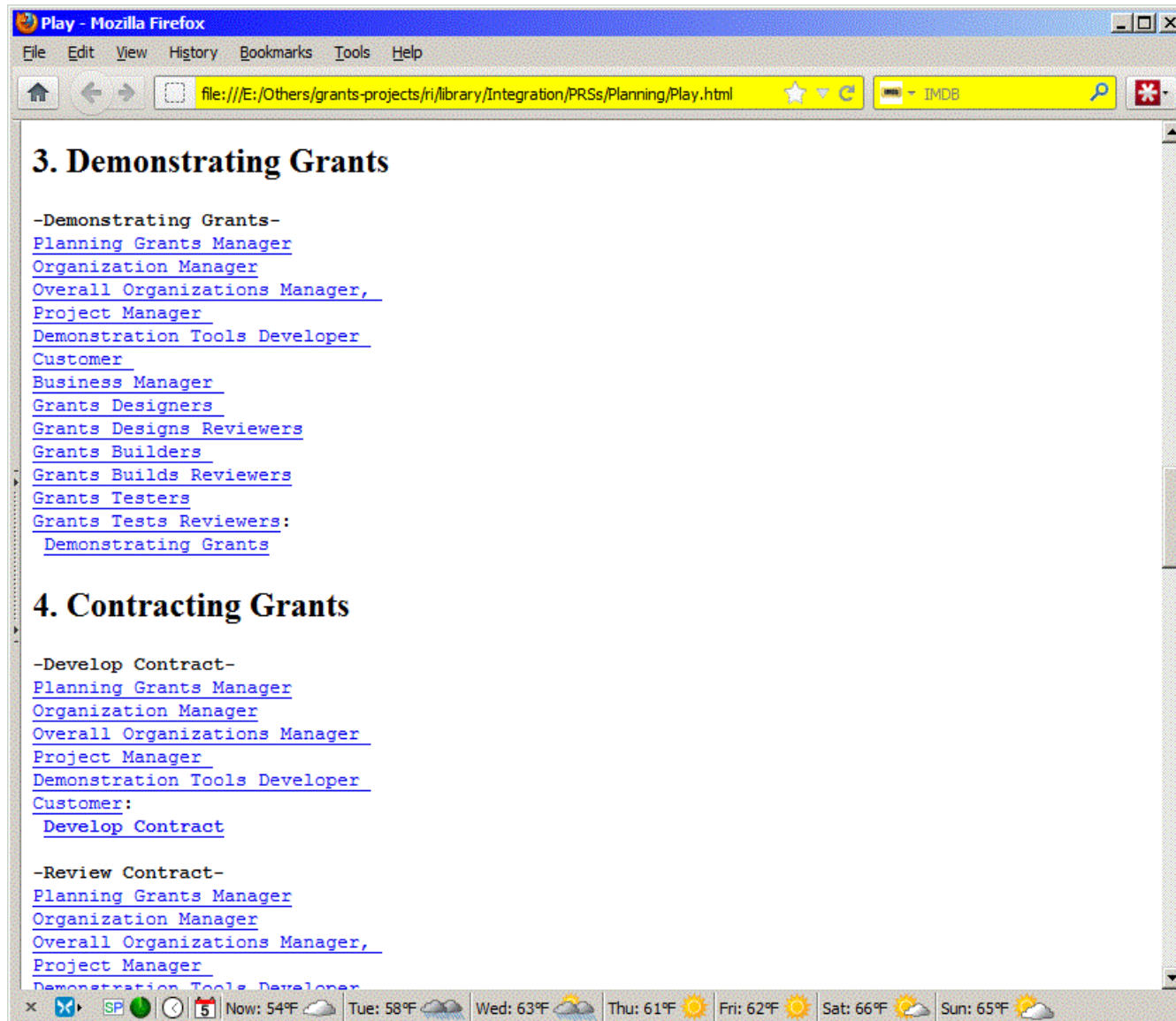
The Bottom Line:

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.

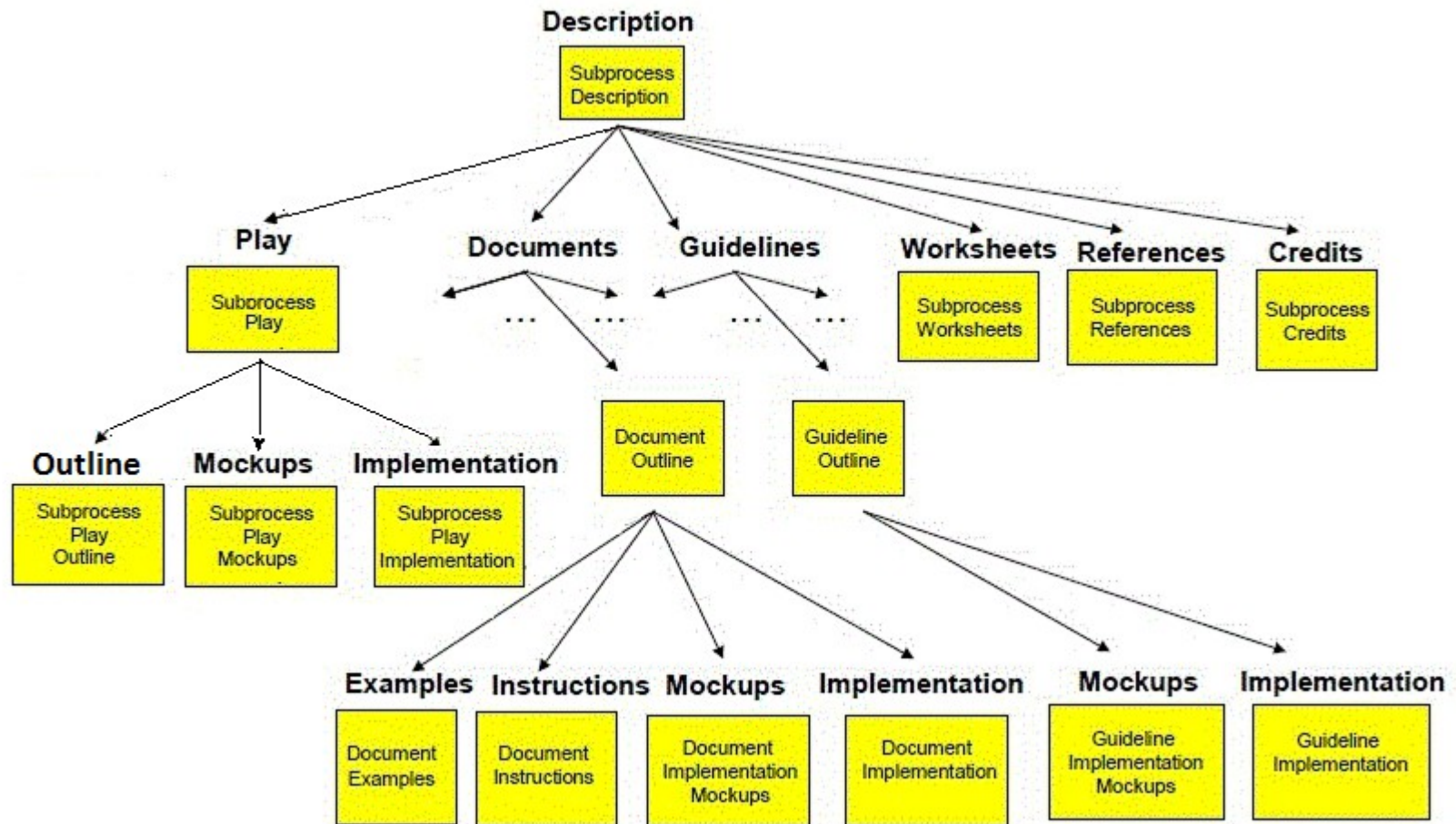
Plays describe subprocess execution.



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.**

For each subprocess, an “Integration View” is the integration or combination of other subprocess views. An “Integration View” facilitates intra- and inter-organization communication.



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.**

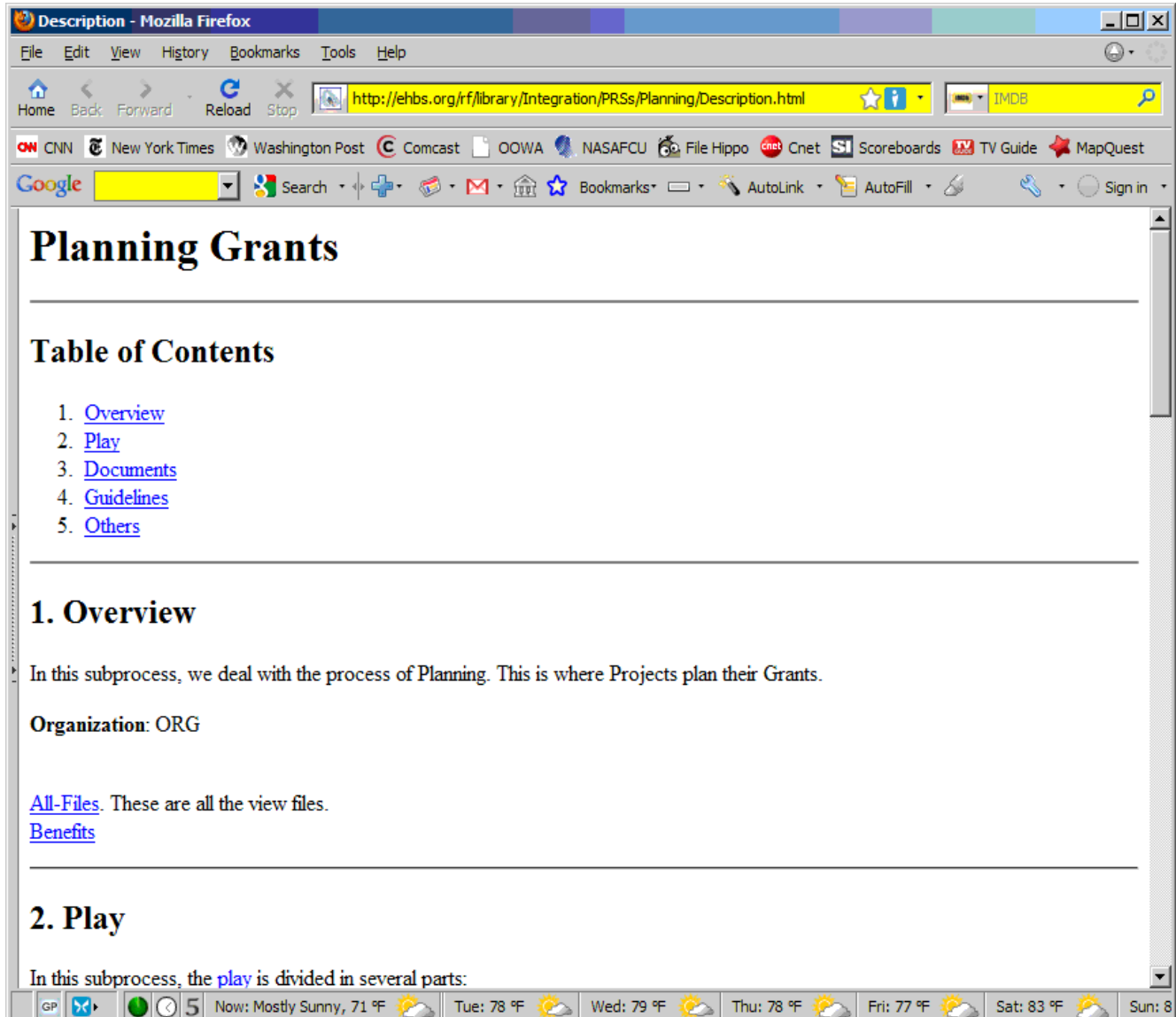
William Shakespeare

As You Like It, Act 2, Scene 7.

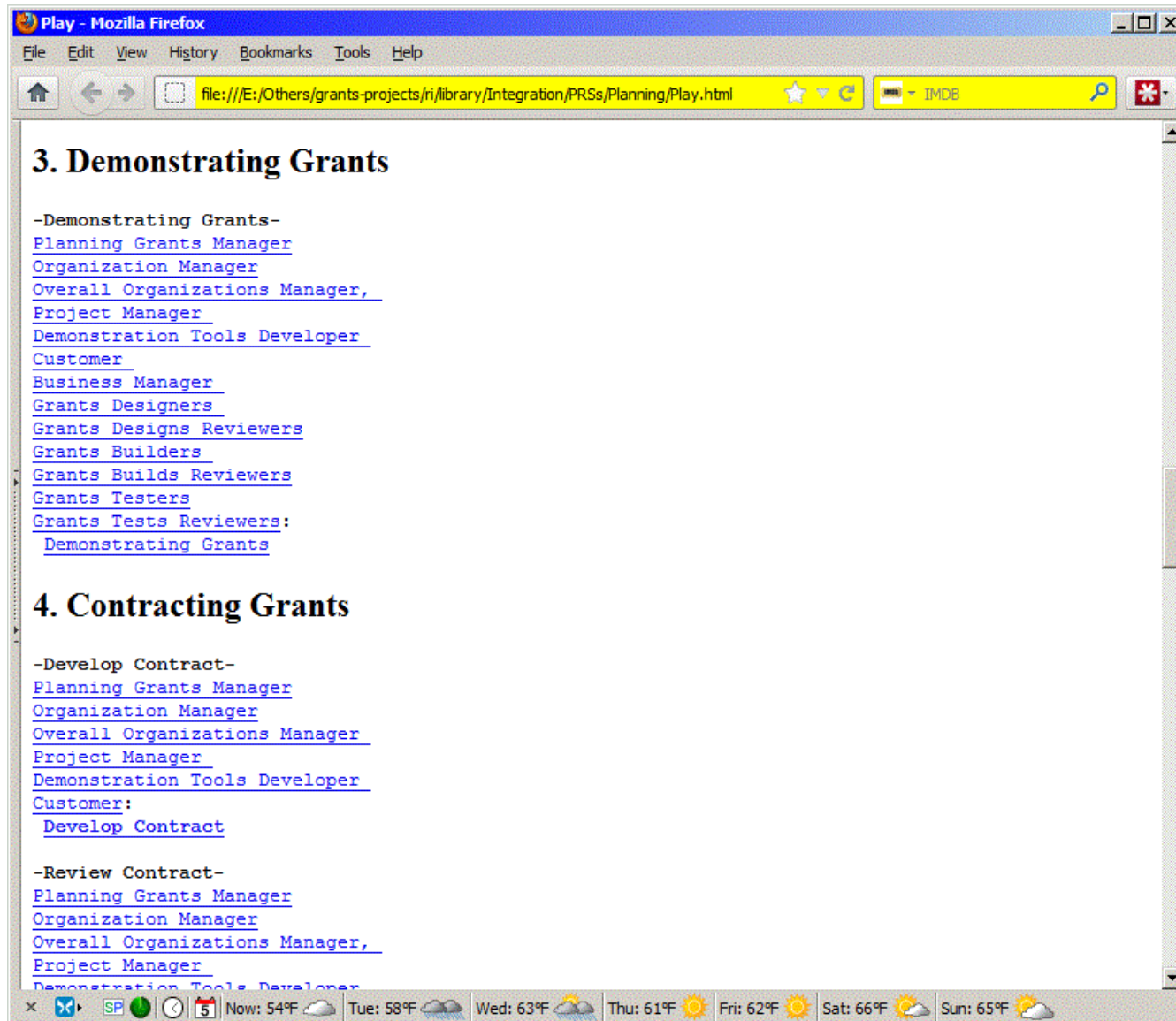
The approach uses a modernization of the Socratic Method or Dialogue to gain consensus between Teachers, Documentors, Managers, Implementors, and Participants.



Descriptions summarize subprocesses.



Plays describe subprocess execution.



Documents describe subprocess data.

The screenshot shows a Mozilla Firefox browser window with the address bar displaying <http://ehbs.org/rf/library/Integration/PRSS/Planning/Description.html>. The browser's toolbar includes various icons for home, back, forward, reload, and search, along with a search engine dropdown set to Google. The page content is organized into two main sections:

3. Documents

In this subprocess, we have the following document types:

- [Demonstration Tools](#). These are used to represent the Demonstration Tools.
- [Grants Contract](#). These are used to represent the Grants Contract.
- [Process Library](#). These are used to represent the Process Library.
- [Implementation Plans](#). These are used to represent the Implementation Plans.
- [Grants Designs](#). These are used to represent the Grants Designs.
- [Grants Designs Reviews](#). These are used to represent the Grants Designs Review.
- [Grants Builds](#). These are used to represent the Grants Builds.
- [Grants Builds Reviews](#). These are used to represent the Grants Builds Reviews.
- [Grants Tests](#). These are used to represent the Grants Tests.
- [Grants Tests Reviews](#). These are used to represent the Grants Tests Reviews.

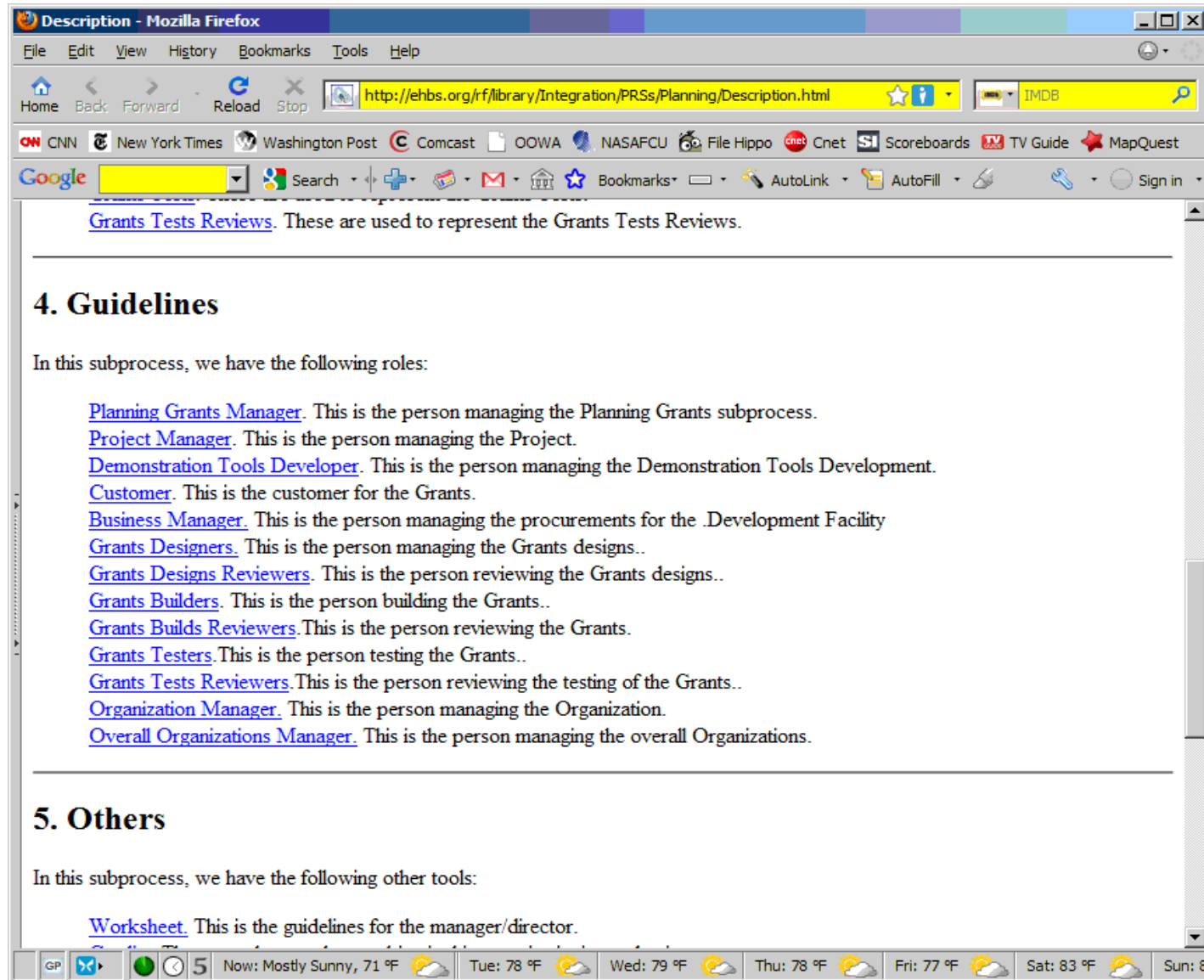
4. Guidelines

In this subprocess, we have the following roles:

- [Planning Grants Manager](#). This is the person managing the Planning Grants 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 Grants.
- [Business Manager](#). This is the person managing the procurements for the .Development Facility
- [Grants Designer](#). This is the person managing the Grants designs.

The browser's status bar at the bottom shows the current time as 5:00 and the weather as 'Now: Mostly Sunny, 71 °F', along with a forecast for the following days.

Guidelines describe user subprocesses.



The screenshot shows a Mozilla Firefox browser window with the address bar displaying <http://ehbs.org/rf/library/Integration/PRSSs/Planning/Description.html>. The page content includes a link to [Grants Tests Reviews](#) and a section titled **4. Guidelines**. Below this section, it states: "In this subprocess, we have the following roles:" followed by a list of roles and their descriptions. The roles listed are: [Planning Grants Manager](#), [Project Manager](#), [Demonstration Tools Developer](#), [Customer](#), [Business Manager](#), [Grants Designers](#), [Grants Designs Reviewers](#), [Grants Builders](#), [Grants Builds Reviewers](#), [Grants Testers](#), [Grants Tests Reviewers](#), [Organization Manager](#), and [Overall Organizations Manager](#). Below the roles section is another section titled **5. Others**, which states: "In this subprocess, we have the following other tools:" followed by a link to [Worksheet](#). The browser's status bar at the bottom shows the current time as 5:00 and the weather as "Now: Mostly Sunny, 71 °F".

[Grants Tests Reviews](#). These are used to represent the Grants Tests Reviews.

4. Guidelines

In this subprocess, we have the following roles:

- [Planning Grants Manager](#). This is the person managing the Planning Grants 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 Grants.
- [Business Manager](#). This is the person managing the procurements for the .Development Facility
- [Grants Designers](#). This is the person managing the Grants designs..
- [Grants Designs Reviewers](#). This is the person reviewing the Grants designs..
- [Grants Builders](#). This is the person building the Grants..
- [Grants Builds Reviewers](#). This is the person reviewing the Grants.
- [Grants Testers](#). This is the person testing the Grants..
- [Grants Tests Reviewers](#). This is the person reviewing the testing of the Grants..
- [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.

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 Grants

In this subprocess, we deal with the planning of Grants

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 Analysis Office	Task Lead, Subtask Lead, Subtask Member, Reviewer,	James Green			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. - Mozilla Firefox

File Edit View History Bookmarks Tools Help

ehbs.org/intro/summary/stages1.html

Google

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. - Mozilla Firefox

File Edit View History Bookmarks Tools Help

ehbs.org/intro/summary/stages2.html

Google

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.

Objective:

Develop Internet-based tools to support the paperless documentation and management of complex distributed processes.

Subprocesses - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Home Back Forward Reload Stop <http://lincoln.gsfc.nasa.gov/ri/whatare/process.htm> Webster

Grants

Product Realization Subprocesses								
Integrated Problems-Solutions Database	Planning Grants	Solicitation Development	Submission	Review & Selection	Negotiation & Award	Administration	Closeout	Post-Closeout

(Potential Customers: Grant Applicants)

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: Grant Applicants)

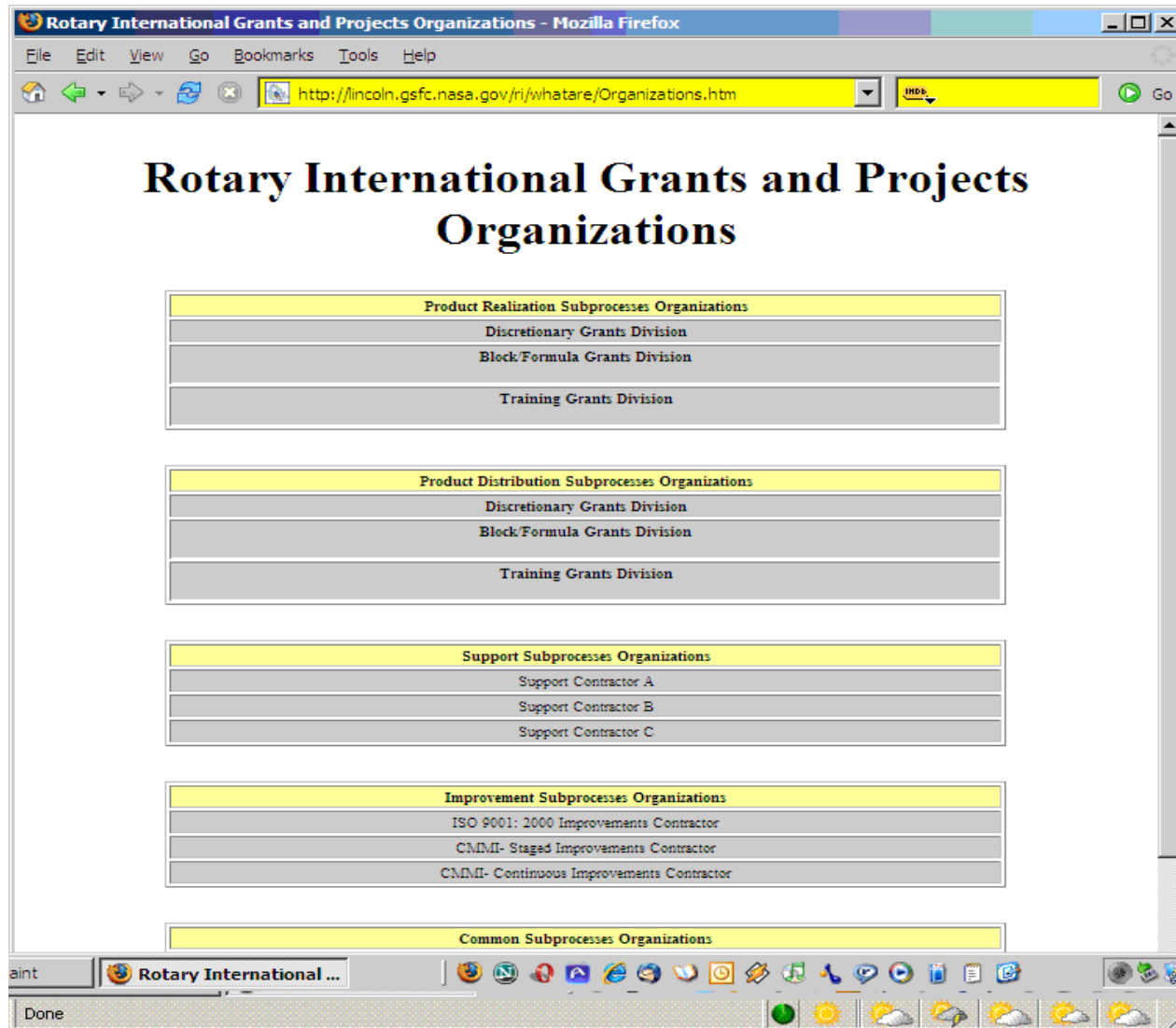
Support Subprocesses								
Survey Management	Computer Systems Development and Evolution	Computer Systems Operations and Network Administration	Home Page Management	Education and Outreach Activities	Facilities Management	Security	Small Systems (Mac and PC) Support	Visualizations

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

GP 5 Now: Mostly Sunny, 82 °F Sat: 87 °F Sun: 85 °F Mon: 80 °F Tue: 85 °F Wed: 84 °F Thu: 8

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



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.**

People in organizations provide different views of the subprocesses



**Subprocess
Documentor's
View**



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

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".**

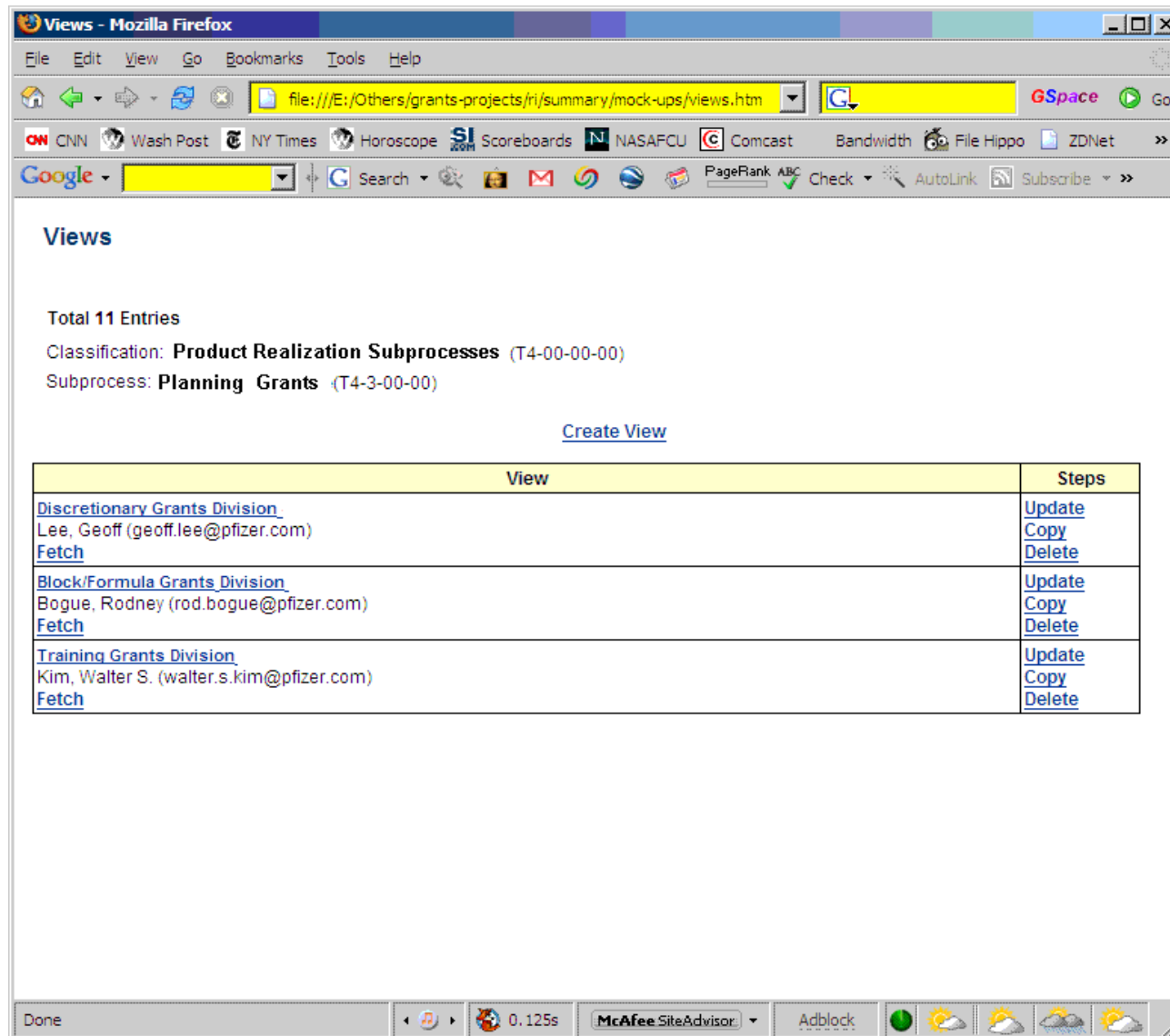
The "Game of Telephone" Syndrome: Where People Pass-On Only Parts of the "Message"



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.

Solution: Process Libraries maintain organization's views of the subprocesses.



Views - Mozilla Firefox

file:///E:/Others/grants-projects/ri/summary/mock-ups/views.htm

Google

Views

Total 11 Entries

Classification: **Product Realization Subprocesses** (T4-00-00-00)

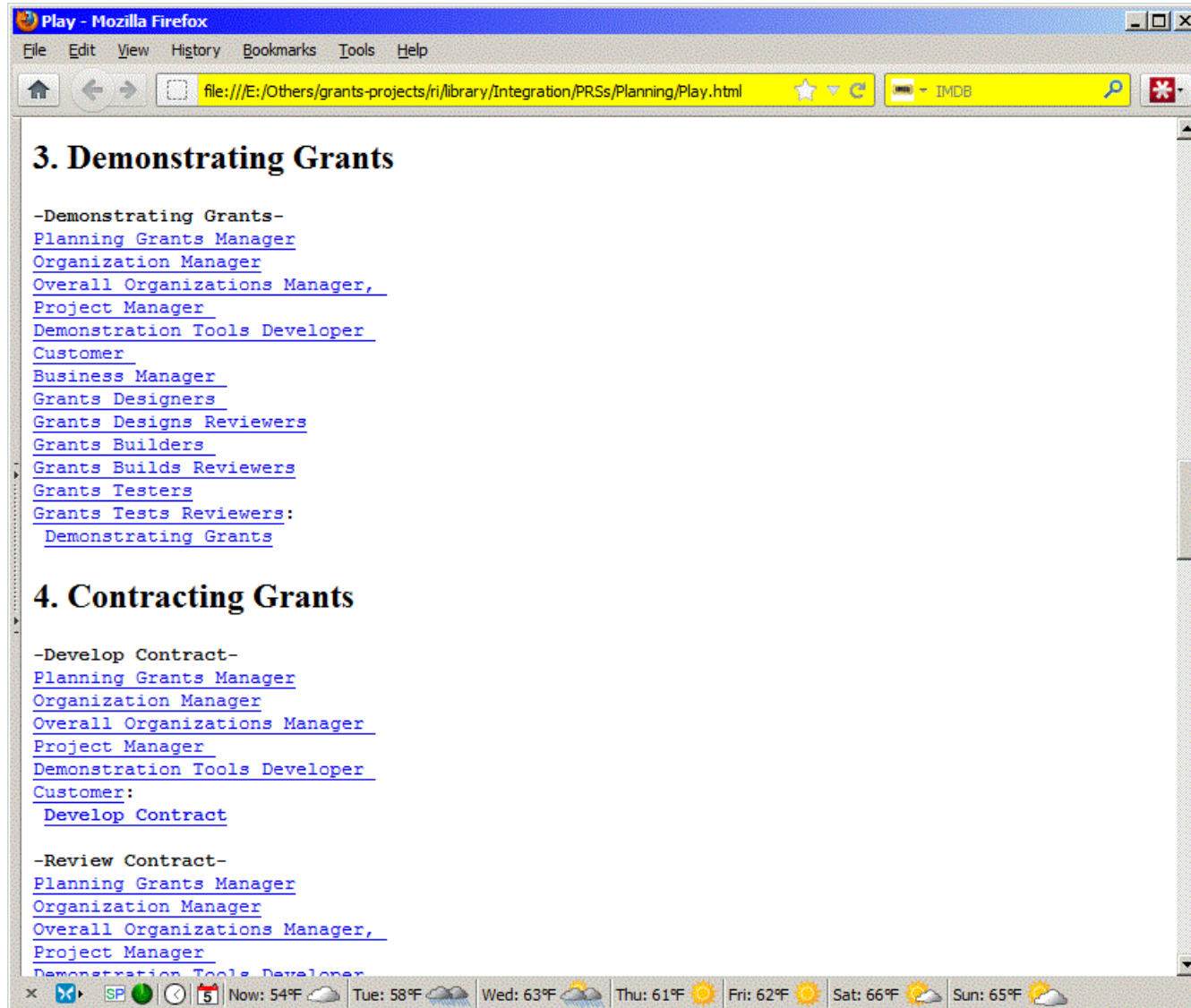
Subprocess: **Planning Grants** (T4-3-00-00)

[Create View](#)

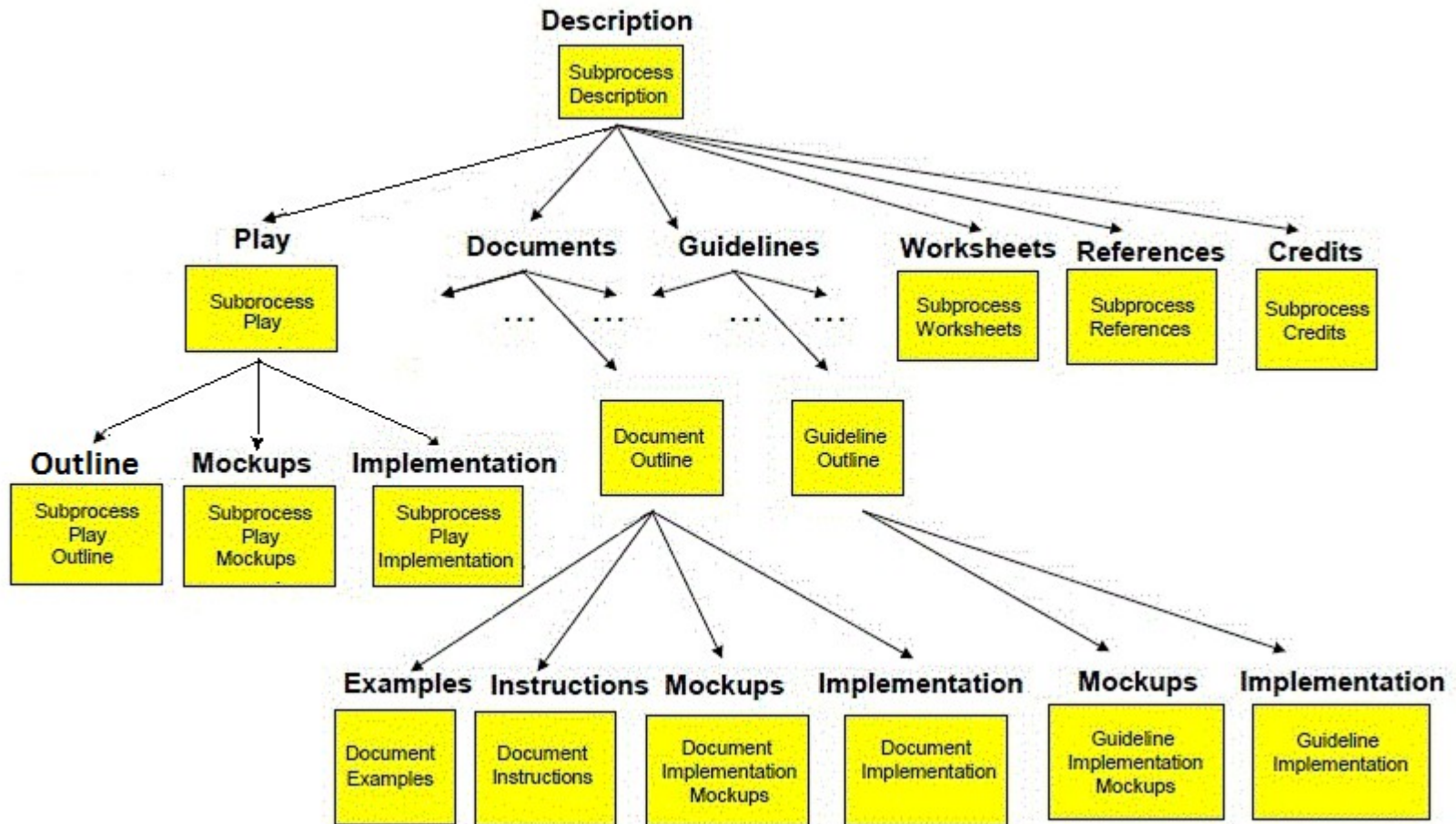
View	Steps
Discretionary Grants Division Lee, Geoff (geoff.lee@pfizer.com) Fetch	Update Copy Delete
Block/Formula Grants Division Bogue, Rodney (rod.bogue@pfizer.com) Fetch	Update Copy Delete
Training Grants Division Kim, Walter S. (walter.s.kim@pfizer.com) Fetch	Update Copy Delete

Done 0.125s McAfee SiteAdvisor Adblock

Plays describe subprocess execution.



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



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

Tools To Focus On During Stages. - Mozilla Firefox

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ehbs.org/intro/summary/stages1.html

Google

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

Tools To Focus On During Stages. - Mozilla Firefox

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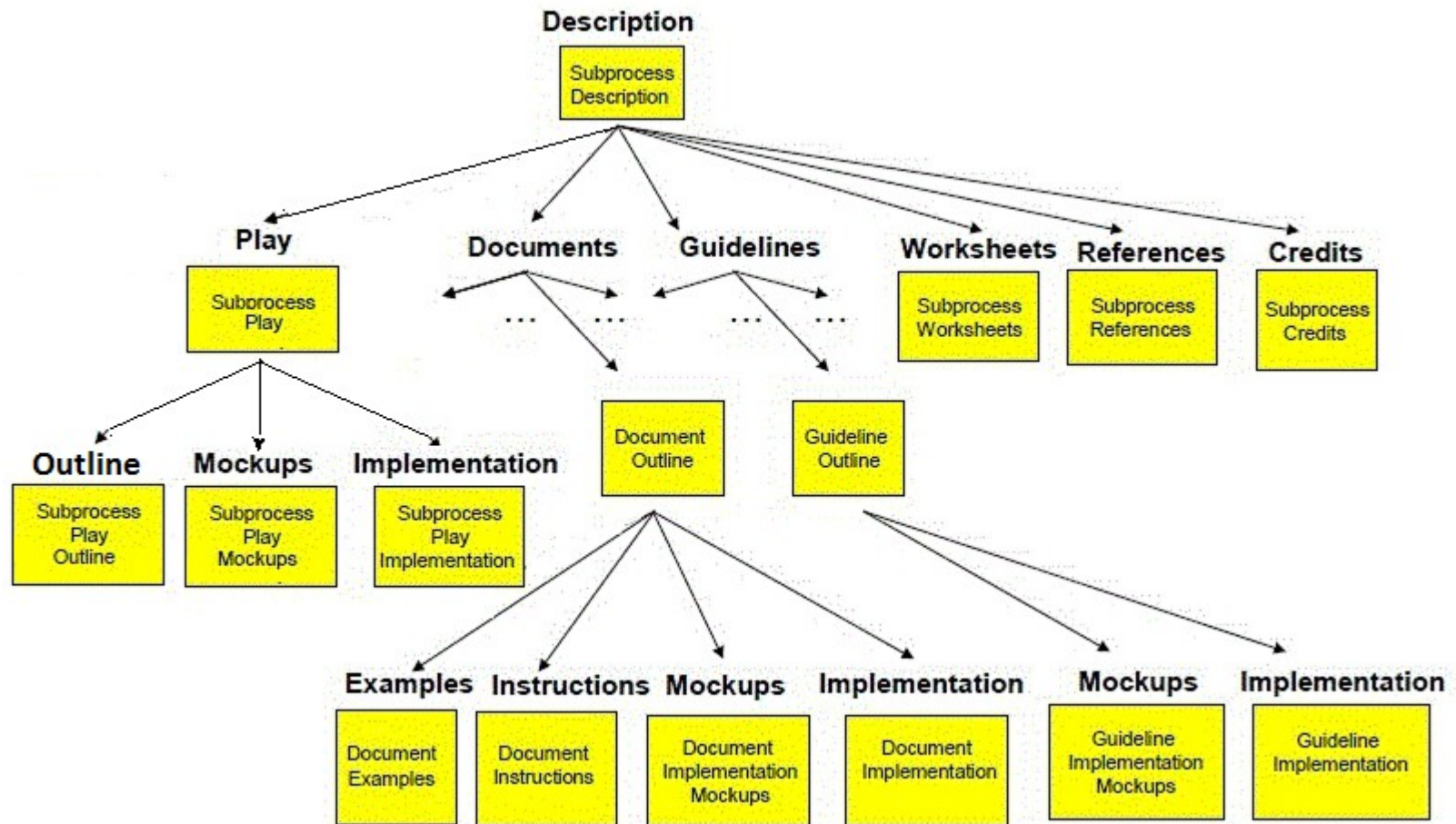
ehbs.org/intro/summary/stages2.html

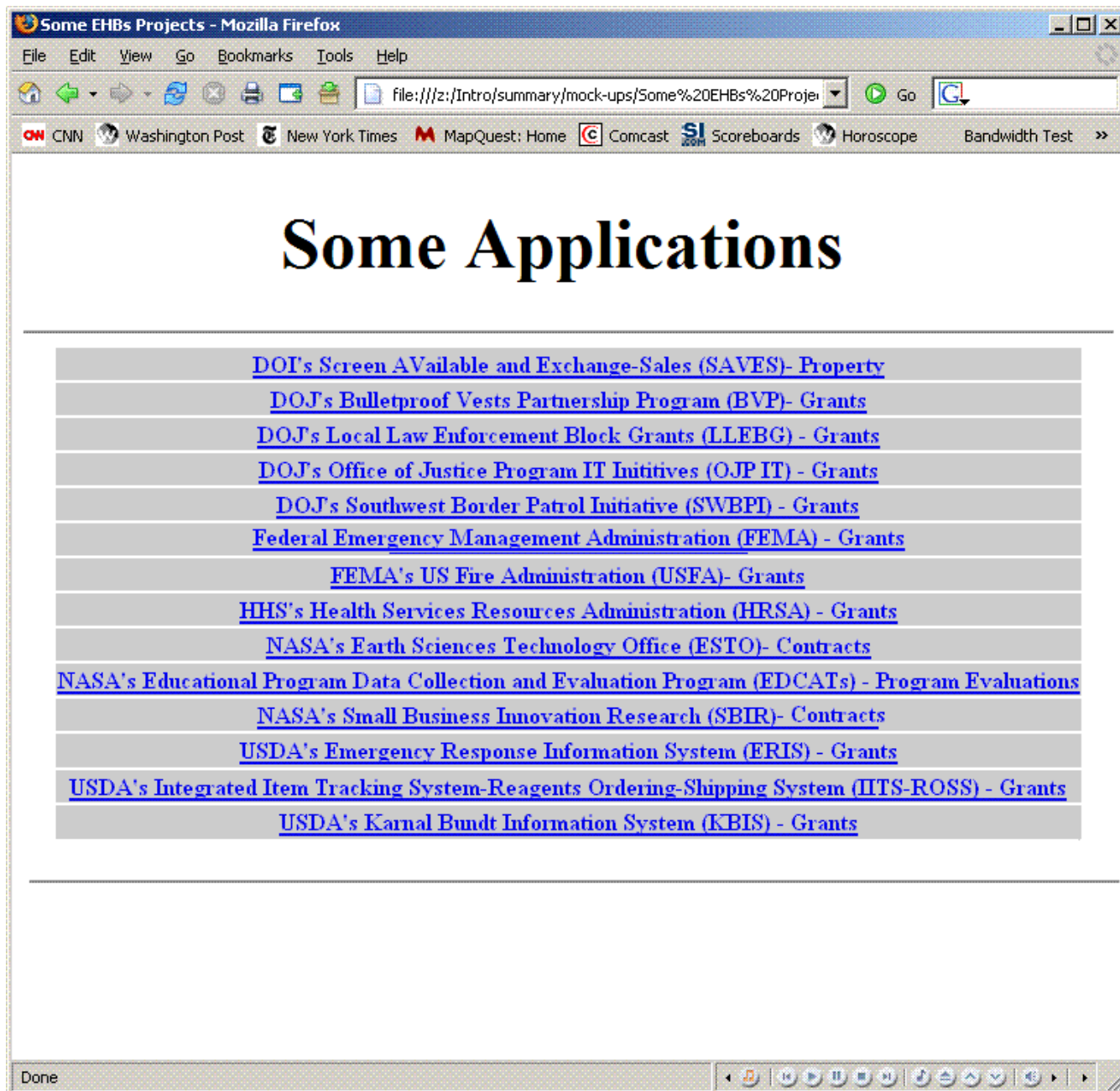
Google

Tools To Focus On During Stages- By Stage.

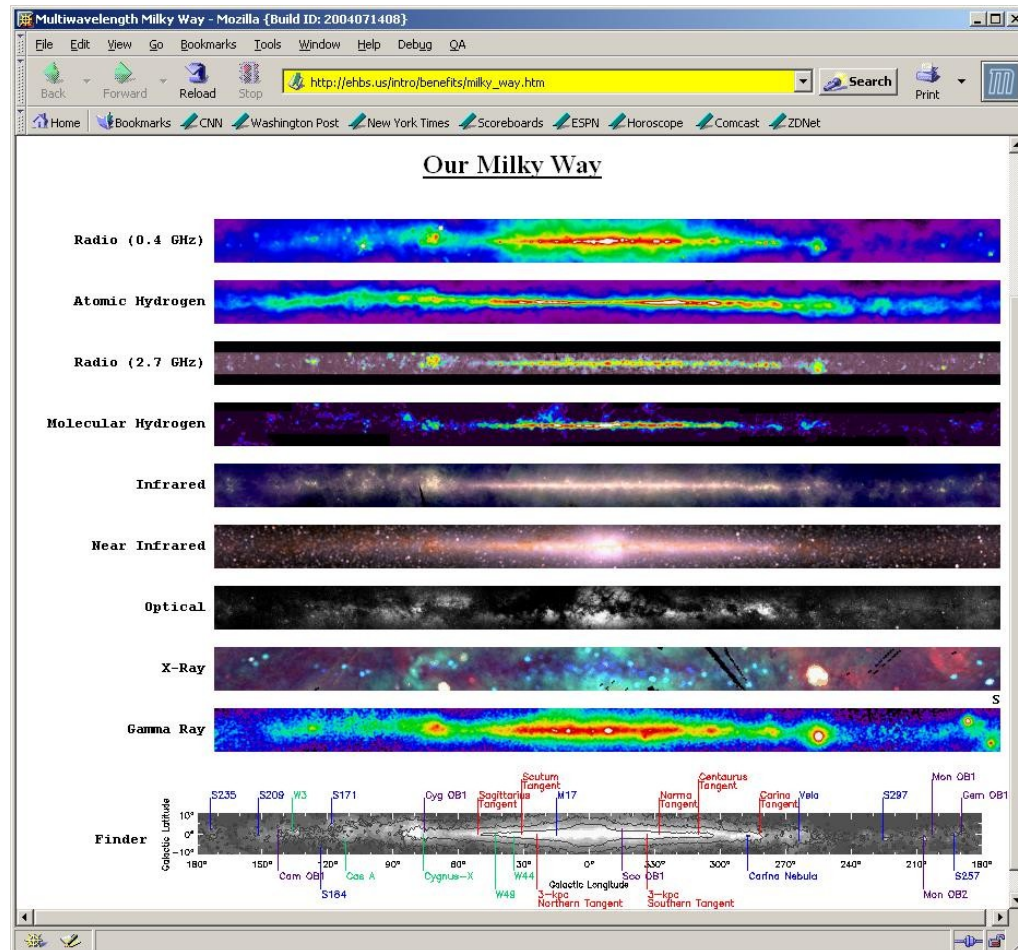
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For each subprocess, an “Integration View” is the integration or combination of other subprocess views. An “Integration View” facilitates intra- and inter-organization communication.





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





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]

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.

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



Theatre of Dionysus- Athens, Greece



For More Details

File Edit View History Bookmarks Tools Help

EHBs Home Page x +

ehbs.us Search

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

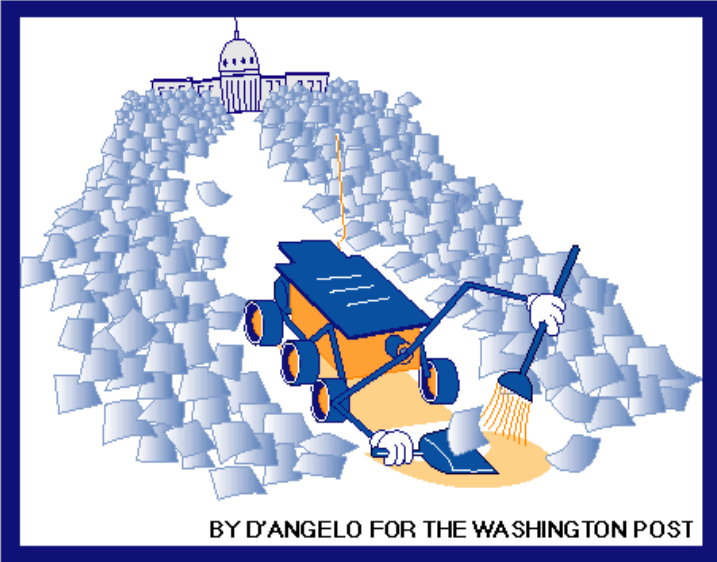
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Complex Process Management Using Process Libraries and Electronic Handbooks
[Where Shakespeare Meets Freud]



BY D'ANGELO FOR THE WASHINGTON POST

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[\[Mini-Bio\]](#)

Now: 64°F Sun: 83°F Mon: 60°F Tue: 62°F Wed: 76°F Thu: 78°F Fri: 62°F