📋 Webinar on Process Mapping/Documentation

WEBINAR

Documenting What Matters:
Practical Process Mapping and RACI Charts with Open-Source Tools

September 12, 2025 | 9:00 AM to 12:00 PM | via Zoom

Register for the webinar:
bit.ly/process-docu-webinar-register

Check out the RESOURCE PAGE: bit.ly/process-docu-resources

itdc_info@up.edu.ph   ovpdx@up.edu.ph

📝 Introduction/Overview

Introduction/Overview

Webinar:
Documenting What Matters: Practical Process Mapping and RACI Charts with Open-Source Tools

Date: September 12, 2025 (Friday)
Time: 9:00 AM to 12:00 PM
Mode: Via Zoom

Overview:

The UP Office of the Vice President for Digital Transformation - Information Technology Development Center (UP OVPDx-ITDC) will be holding this webinar on processing documentation/mapping for UP and State Universities and Colleges (SUCs).

This webinar workshop equips staff with practical skills to document and standardize work processes for greater efficiency, consistency, and accountability. Participants will learn how to create clear Standard Operating Procedures (SOPs), flowcharts, and checklists using freely available open-source tools such as LibreOffice and Draw.io.

The session also introduces the RACI Chart (Responsible, Accountable, Consulted, Informed) to help clarify roles and responsibilities in daily operations. Through guided demonstrations and hands-on activities, participants will draft a process document relevant to their own work and integrate a RACI chart to define accountability. Pre- and post-training activities ensure that learning is applied directly to real processes, supporting quality improvement, knowledge retention, and smoother service delivery.

Objective:

Equip participants with practical skills to document and standardize internal processes using open-source or free tools, including role clarity using RACI.

✍️ Webinar Registration

<u>Registration</u>

The webinar will be held via **Zoom**.

Zoom registration link:
bit.ly/process-docu-webinar-register

Reminders:

1. To register, kindly ensure you have an email address that has a Zoom account (even a free one). You can create a free Zoom account using your email address by going to https://zoom.us/signup

2. Please log in to Zoom beforehand and be at the platform promptly, as the webinar will start **on time**.

🧑‍🏫 About the Speaker

About the Speaker

WEBINAR

Documenting What Matters: Practical Process Mapping and RACI Charts with Open-Source Tools

ABOUT THE RESOURCE PERSON

Vincent is a Program and Project Management Consultant and Instructor with over a decade of experience. He is currently the Project Manager for the Guided Unified System for Asset-Linked Information (GUSALI) Project under the UP Office of the Vice President for Development, Facilities Management Program. He has a proven track record of successfully leading complex technological and developmental initiatives from inception to completion in both public and private organizations.

Beyond his project leadership, Vincent is a passionate innovator and educator, having trained over 350 IT and project management professionals. His expertise lies in guiding cross-functional teams to implement significant changes through strategic planning and innovative solutions.

Mr. Vincent P. Teodosio
Program and Project Management Consultant

itdc_info@up.edu.ph   ovpdx@up.edu.ph

🧑‍💻 Pre-Workshop Activity

Pre-Workshop Activity

PRE-TRAINING ACTIVITY (1–3 Days Before)
Estimated Time: 30 minutes

Instructions:

1. Choose a regular task you do (e.g., faculty clearance, library borrowing).
2. Answer a short form:
    - Process title and purpose
    - Main steps
    - People involved (with roles if known)
    - Common issues or inconsistencies

📝 Live Session Agenda

LIVE SESSION PROGRAM / AGENDA*
*The program is subject to change and updates.

9:00–9:15 AM – **Welcome Remarks, Introduction, & Overview**

- Welcome remarks and introductions
- Why process documentation matters (continuity, quality, onboarding)
- Overview of tools and methods, including RACI for accountability clarity

9:15–9:35 AM – **Basics of Process Documentation & RACI**

- Key Concepts
  - SOPs, checklists, flowcharts
  - Core parts of a process document:
    - Title, purpose, steps, inputs/outputs, tools, and roles
  - Introduction to RACI:
    - Responsible: Person who performs the task
    - Accountable: Person who owns the outcome
    - Consulted: People who provide input
    - Informed: People who need updates

Sample RACI Chart :

No.	Task	Admin Staff	Registrar	Faculty	Students
1	Encode grades	R	I	A /R	I

R - Responsible
A - Accountable
C - Consult
I - Informed
*Emphasize: Clear roles reduce delays and confusion.

9:35–10:00 AM – **Open Source Tool Demos**

10:00–10:40 AM – **Hands-On Drafting with RACI**

- Activity: Participants to document a real process using any tool
- Include the following:
  - Process title & purpose
  - Step-by-step guide
  - Flowchart
  - RACIChart

10:40–11:00 AM – **Sharing, Feedback & Wrap-Up**

- Select participants share samples
- Group provides feedback on clarity and RACI usage

- Key takeaways:
  - Documentation = standardization + accountability
  - RACI clarifies who does what
  - Tools should support your actual workflow

🤓 Post-Training Activity

POST-TRAINING ACTIVITY (Due Within 3 Days)
Estimated Time: 30–60 minutes

Instructions:
1. Finalize your SOP or flowchart
2. Ensure RACI Chart is included
3. Submit for optional feedback

Rubric Criteria:
- Clear steps and structure
- Proper use of RACI roles
- Logical flow and tool formatting

Optional:
- Certificate of Participation
- QA or department recognition

TRAINING MATERIALS
- SOP Template (LibreOffice / Word) with RACI Chart
- Flowchart Template (Draw.io)
- Markdown checklist sample
- RACI Cheat Sheet
- List of Open-Source Tools with links

Contact Details

Contact Details

Office of the Vice President for Digital Transformation (OVPDX):
Email: **ovpdx@up.edu.ph**

Information Technology Development Center (ITDC):
Email: **itdc_info@up.edu.ph**
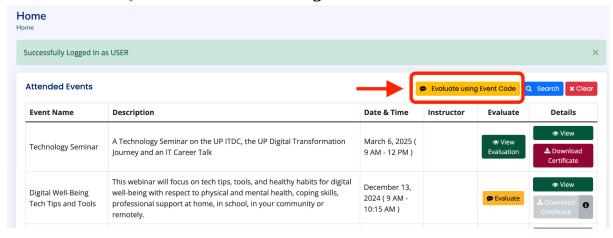
📜 e-Certificates of Attendance (Post-training)

Certificates of Attendance (Post-webinar)

The e-certificates of attendance for the training will be available **only after** participants have accomplished the evaluation form **after the webinar**.

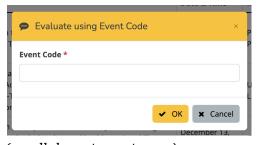***An email will be sent to the participants who are eligible for the e-Certificate.**

Answering the evaluation and claiming the Certificate:

1. To **evaluate** the webinar, go to the **UP Public EMS**: publicems.up.edu.ph

2. If this is your first time to use the Public EMS, click "Create New Account" and fill up your profile (please make sure to use the email you used to join the webinar). Make sure to fill out with your correct information.

- NOTE IF YOU ARE CREATING A NEW ACCOUNT: If you see the message "The Email Address has already been taken," this means that you have already previously registered/created your EMS account using that email.

- If this is not your first time to use Public EMS and if you already have an account that you have previously created in Public EMS, kindly use that account as you can edit your user profile information.

3. After creating your account there, or if you have an existing account, you can then log in to publicems.up.edu.ph

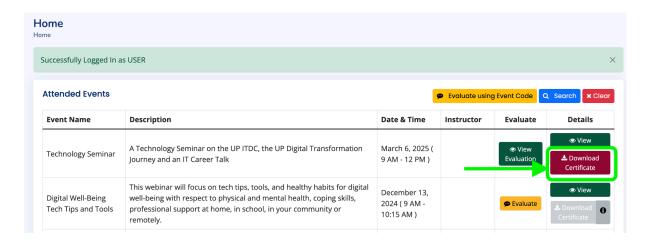4. You can click the **yellow** button **"Evaluate using Event Code"**:

The field will appear where you can enter the **Event Code.**
The Event Code is GOLZU47.

(scroll down to next page)

5. Answer the evaluation form and make sure to click **Submit** at the very end.

6. **After answering the evaluation form**: Under the "Details" column of the webinar you attended, click the "Download Certificate" button colored **red/maroon** (this will be clickable **only after** you have submitted the evaluation form). The PDF of your certificate will then be downloaded to your computer/laptop/device.

If you need assistance regarding your certificate of attendance after the webinar, please email us at itdc_info@up.edu.ph