Quick Guide

SYMBIO

FIRST STEPS → TEST ENVIRONMENT → EXPERIENCE → REQUIREMENTS → START TRIAL

BEGINNER

TEST BASIC FUNCTIONS

Search process

Model process

Select views

Store roles

Release process

ADVANCED

APPLY FUNCTIONS

Build a Process House

Make process changes

Store information and objects

Design an organigram

EXPERT

LEARN MORE FUNCTIONS

Create variants

Apply filters/stereotypes

Create process maps

Mapp end-to-end processes

Assign permissions

Define Customer Journeys

FIRST STEPS → TEST ENVIRONMENT → EXPERIENCE → REQUIREMENTS → START TRIAL

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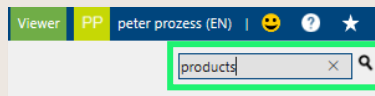Define Customer Journeys

BEGINNER

Search Process
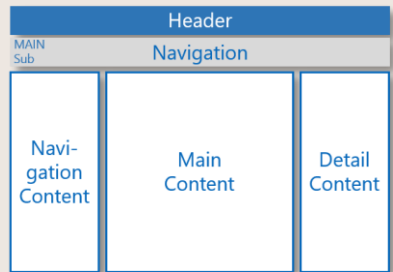
Log In

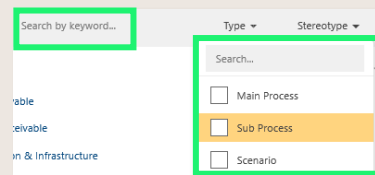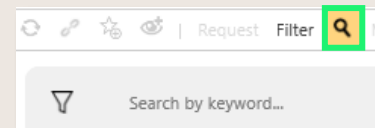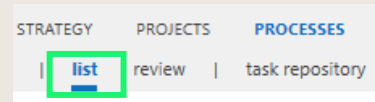Log in with access data received by mail

Get familiar with Symbio work area

Navigate to one of the following search functions
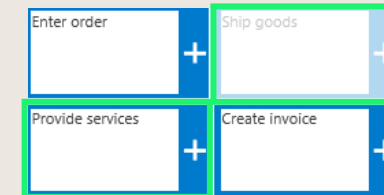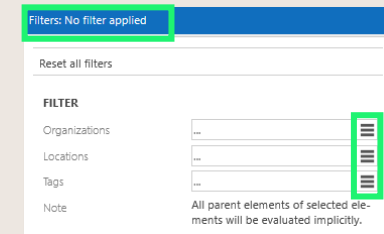
OPTION 1
Enter search terms
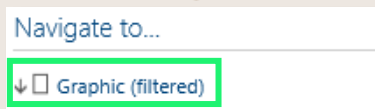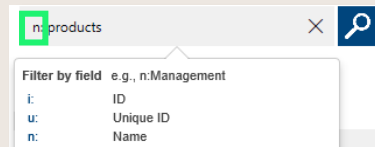
Go to Header

Enter term (use AND/OR)

Filter by field (option)

Select searched term in list

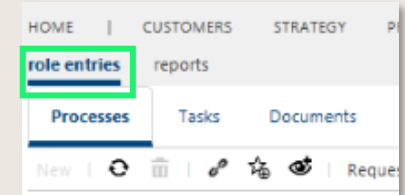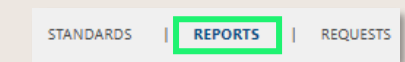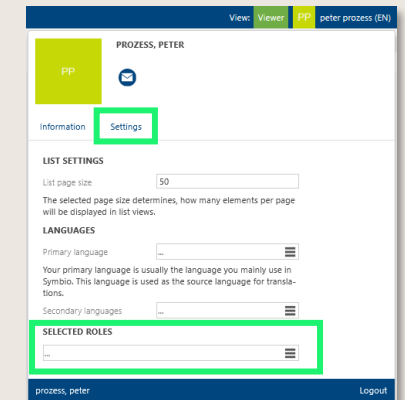Open link in Detail Content

OPTION 2
Search list content

Navigate to PROCESSES in list view

Click on magnifier icon

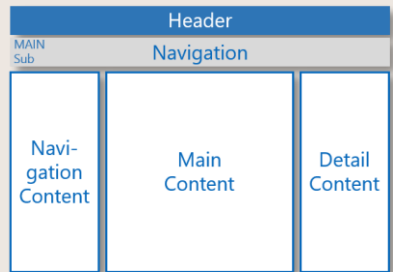Search by content

OPTION 3
Select scope filter

Set Scope filter(s) in Header

See appropriate processes

Non-applicable processes are greyed out

OPTION 4
Enter by role

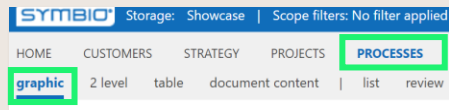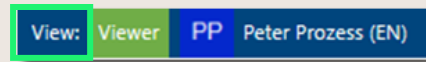# Model Process

STEP 1
Log In

Log in with access data received by mail

Get familiar with Symbio work area

See user information in Header

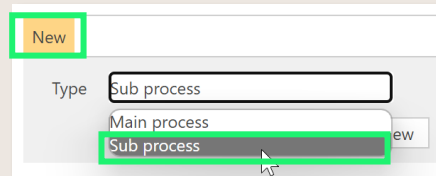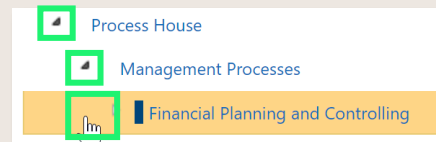## STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode

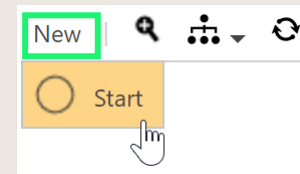Navigate to PROCESSES to create a new process
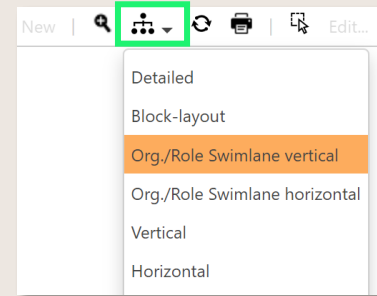
STEP 3
Create process
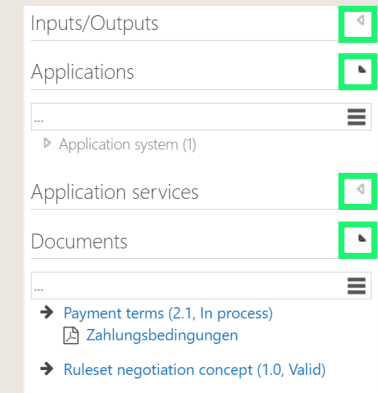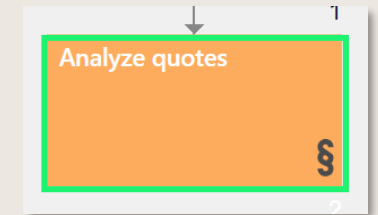

Select Main Process in Navigation Tree

Create Sub Process (BPMN2.0-Diagram)

Start modelling in Main Content

STEP 4
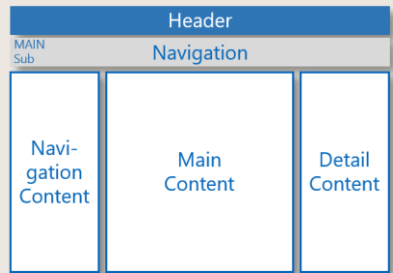### Model process

STEP 5
Store information

Add further information in Detail Content

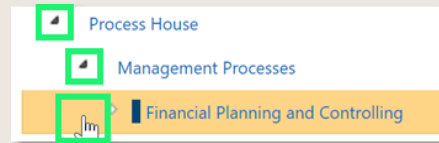Update by refresh button
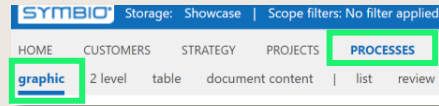
Select Views

STEP 1
Log In

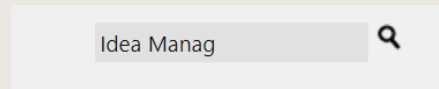Log in with access data received by mail

Get familiar with Symbio work area

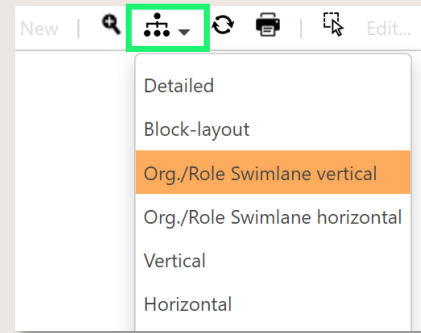See user information in Header

STEP 2
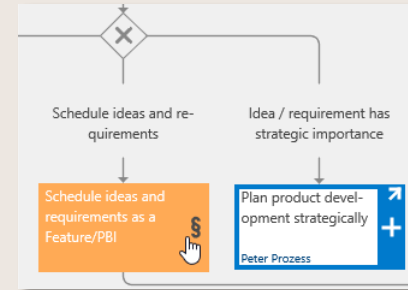## Navigate to process

OR

STEP 3
Select view

Automated views can be selected

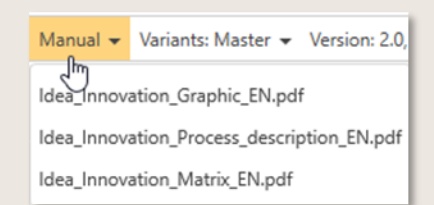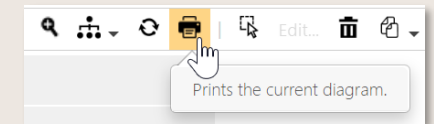Different views show the process on a various perspective

STEP 4
Get information

STEP 5
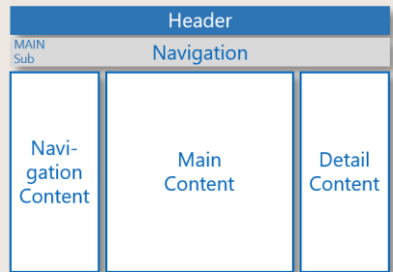## Work with the view

OR

Select to get the process view as pdf

Select to get the process manual

Print out the selected view
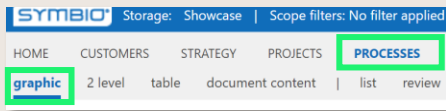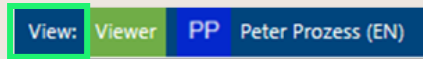
Store Roles

STEP 1
Log In

Log in with access data received by mail

Get familiar with Symbio work area

See user information in Header
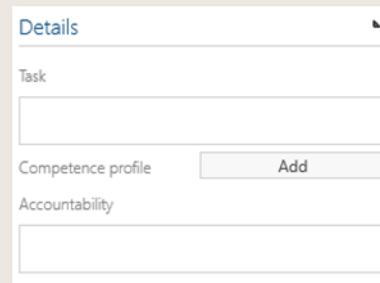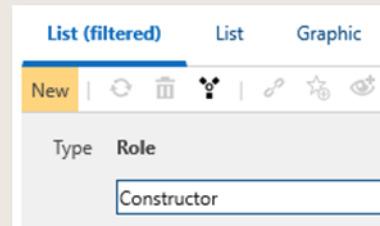
STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

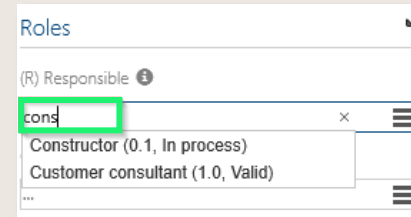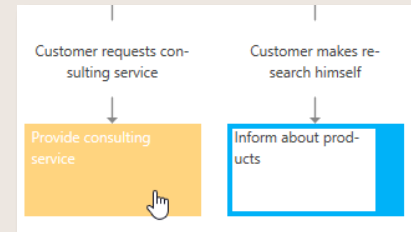Click on 'Viewer' to change to 'Editor' mode

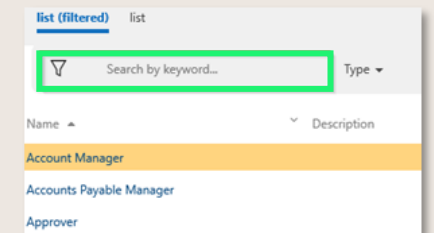Navigate to PROCESSES to create a new process
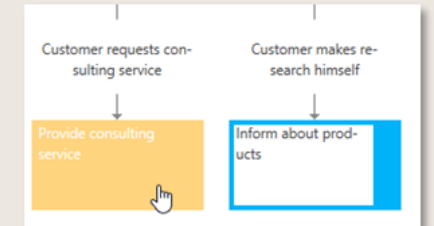
STEP 3
Create roles

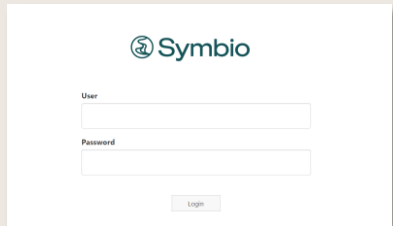Detailing Roles is done in the Detail Content

STEP 4
Apply known roles

A swimlane is automatically generated for each Responsible (R) role
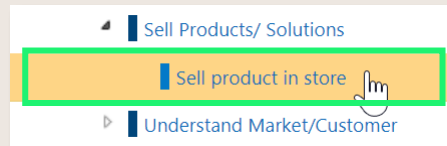
STEP 5
Apply unknown roles

Release Process

STEP 1
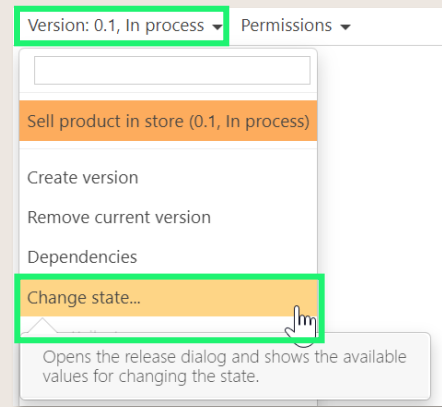### Log In

Model Process

Store Roles

STEP 2
Apply participants

By including a Quality Manager, the process will be first released by him

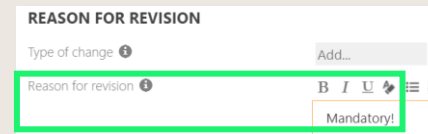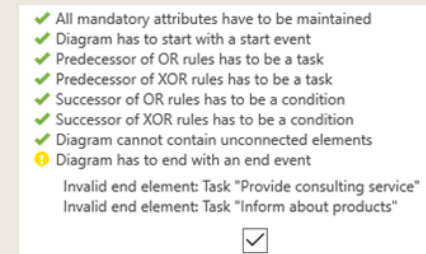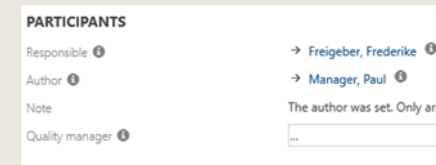Responsible is always the last one releasing the process

STEP 3
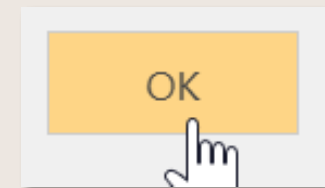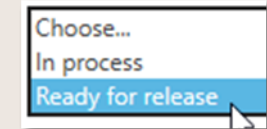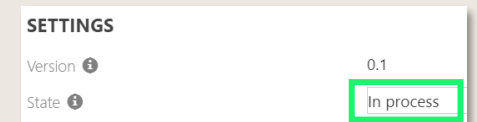### Initiate release cycle

Go to Version dropdown in Toolbar of Main Content

Select 'Change state'

STEP 4
Check mandatory fields

STEP 5
Release process

In case a Quality Manager is set, the state first changes into "Ready for QA"

FIRST STEPS → TEST ENVIRONMENT → EXPERIENCE → REQUIREMENTS → START TRIAL

BEGINNER
TEST BASIC FUNCTIONS

Search process

Model process

Select views

Store roles

Release process

ADVANCED
APPLY FUNCTIONS

Build a Process House

Make process changes

Store information and objects
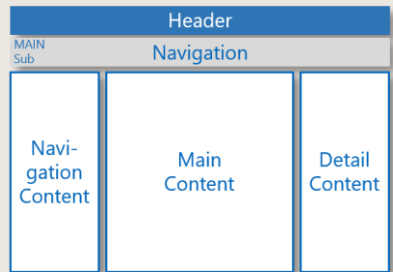
Design an organigram

EXPERT
LEARN MORE FUNCTIONS

Create variants

Apply filters/stereotypes

Create process maps

Mapp end-to-end processes

Assign permissions

Define Customer Journeys

Build a Process House
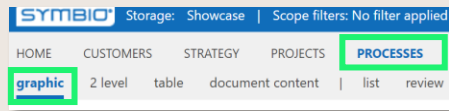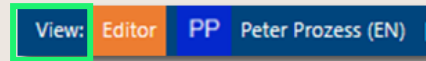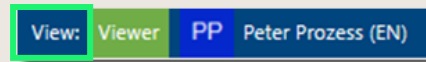
STEP 1
Log In

Log in with access data received by mail

Get familiar with Symbio work area

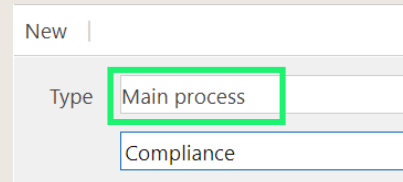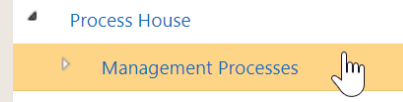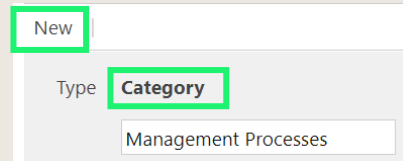See user information in Header

STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode
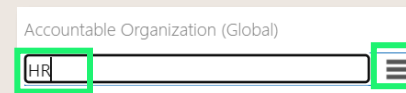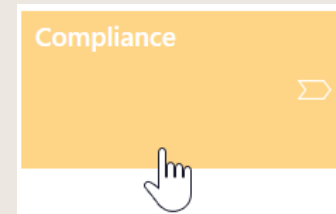
Navigate to PROCESSES to create a new process
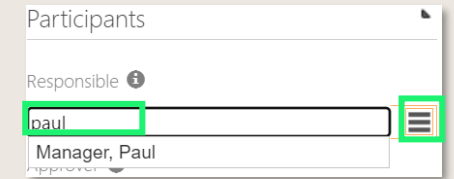
STEP 3
Create first levels

STEP 4
Store information

STEP 5
Release Process House

Release process Step 3-5
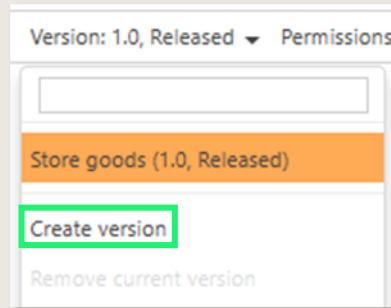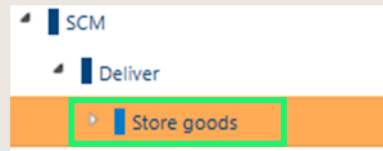
Make process changes

STEP 1
Log In

STEP 2
Create new version

STEP 3
Select multiple objects

STEP 4
Modify process flow

STEP 5 (OPTIONAL)
Create favorite/link

Model Process

Store Roles
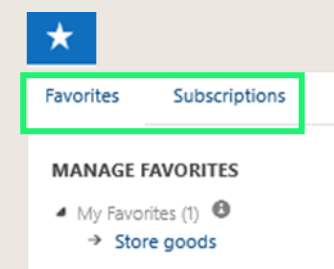
Highlight process flow objects that should be modified
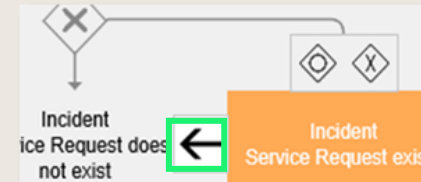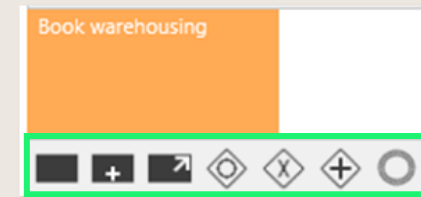
Copy/move selected objects (Feature only available after activation)

Delete selected objects
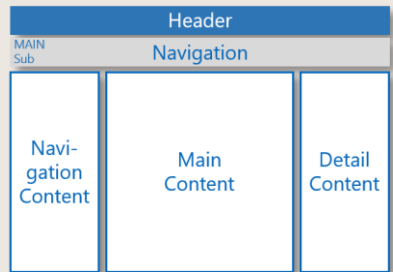
Add further objects

Swap paths for better layout

Define a favorite or subscribe to process to be informed by mail in case of changes

Create a link to share process with other users
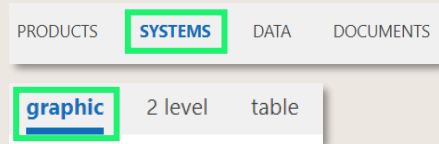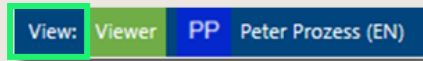
Store information and objects

STEP 1
Log In

Log in with access data received by mail

Get familiar with Symbio work area

See user information in Header

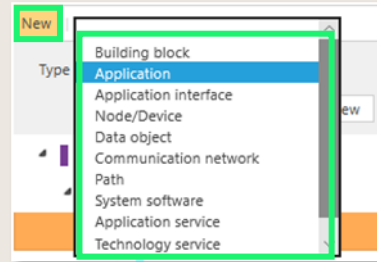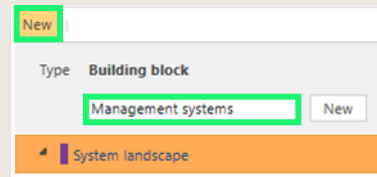## STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

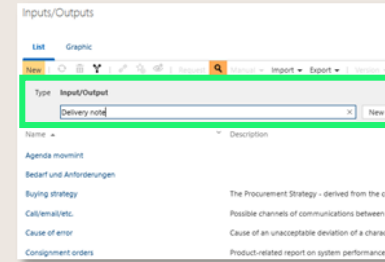Click on 'Viewer' to change to 'Editor' mode

Navigate to SYSTEMS

STEP 3
Set object architecture

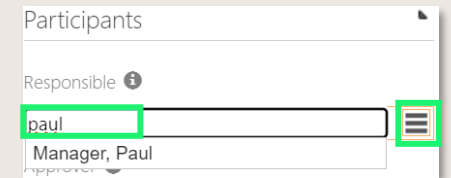Define further object architectures for DOCUMENTS, RISKS, REQUIREMENTS etc.

STEP 4
Define listed objects

Create further objects in a list like roles, locations etc.

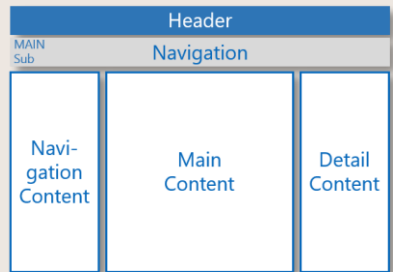Consolidate objects if they are redundant

STEP 5
Release objects

Release process Step 3-5

ADVANCED

Design an organigram

STEP 1
Log In

User

Password

Login

Header

MAIN
Sub
Navigation

Navi-
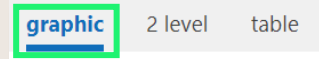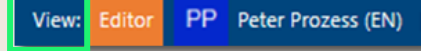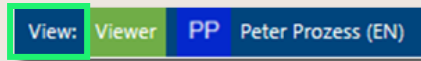gation
Content

Main
Content

Detail
Content

Log in with access data received by mail

Get familiar with Symbio work area

See user information in Header

STEP 2
Start editing

View: Viewer   PP   Peter Prozess (EN)

View: Editor   PP   Peter Prozess (EN)

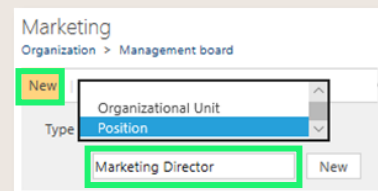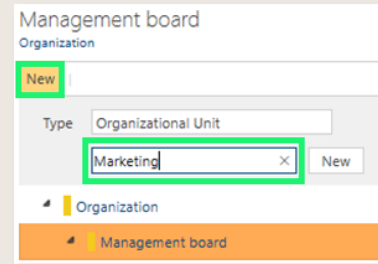PROCESSES   **ORGANIZATION**   PRODUCTS
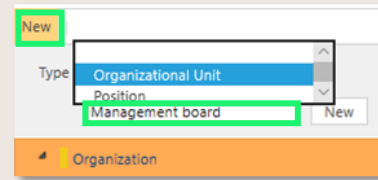
graphic   2 level   table

In 'Viewer' mode, only released processes are shown

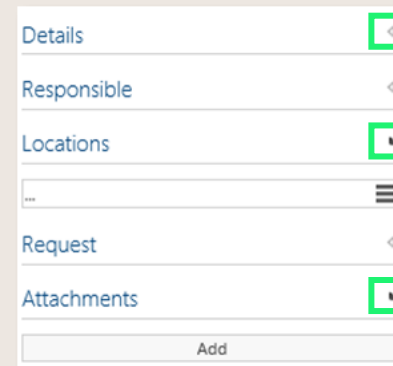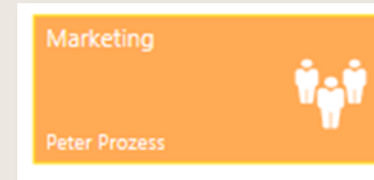Click on 'Viewer' to change to 'Editor' mode

Navigate to ORGANIZATION

STEP 3
Set up org structure

New

Type   Organizational Unit
       Position
       Management board   New

Organization

Management board
Organization

New

Type   Organizational Unit
       Marketing   New

Organization
Management board

Marketing
Organization > Management board

New

Type   Organizational Unit
       Position
       Marketing Director   New

STEP 4
Store information

Marketing

Peter Prozess

Description

B I U ✿ ≔ ≔ ≔ ≔ H1 H2 % ⛰ ⤢

Details

Responsible

Locations

...

Request

Attachments

Add

STEP 5
Release organigram

Participants

Responsible ⓘ

paul

Manager, Paul

Approver

**Release process
Step 3-5**

FIRST STEPS → TEST ENVIRONMENT → EXPERIENCE → REQUIREMENTS → START TRIAL

BEGINNER
TEST BASIC FUNCTIONS

Search process

Model process

Select views

Store roles

Release process

ADVANCED
APPLY FUNCTIONS

Build a Process House

Make process changes

Store information and objects

Design an organigram

EXPERT
LEARN MORE FUNCTIONS

Create variants

Apply filters/stereotypes

Create process maps

Mapp end-to-end processes

Assign permissions

Define Customer Journeys

Create variants

Prerequisite: Variant options are available (created by Admin)

STEP 1
Log In

Model Process

Store Roles

STEP 2
Create variant
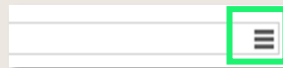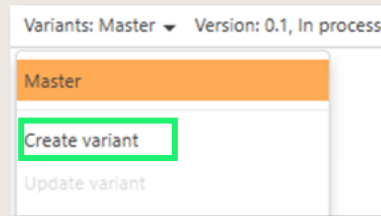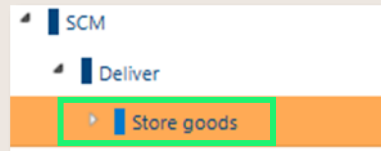
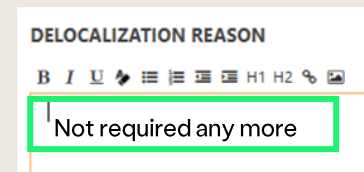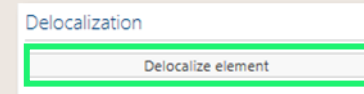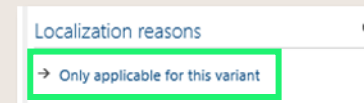Select variant via hamburger button

Go back to Toolbar

STEP 3
Set up localizations
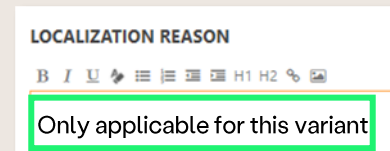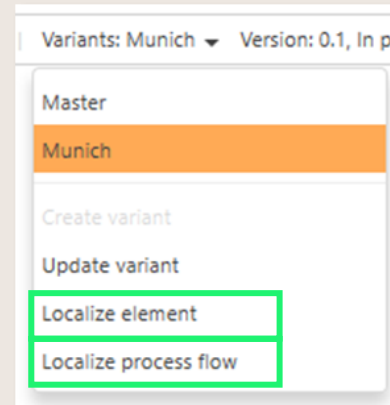
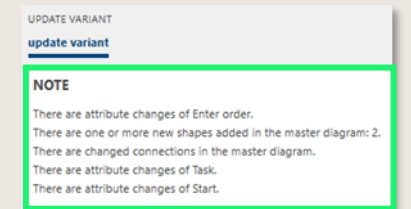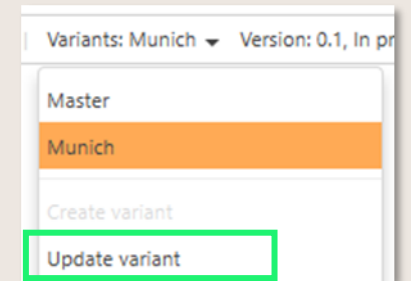Mark task to localize a single element OR

Localize entire process flow

STEP 4
Delocalize

Go to 'Localization reasons' in Detail Content

Click button to delocalize task or process

STEP 5
Update variant

Update only if Master has been changed

Localized element or process flow remain unchanged

Apply filters/stereotypes

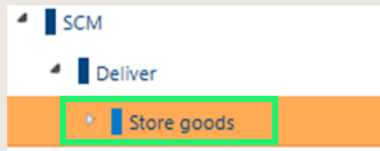Prerequisite: Stereotypes and Tags are available (created by Admin)

STEP 1
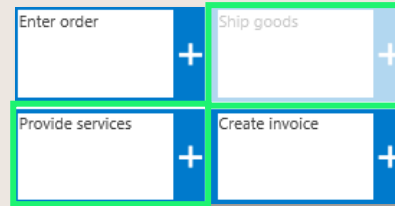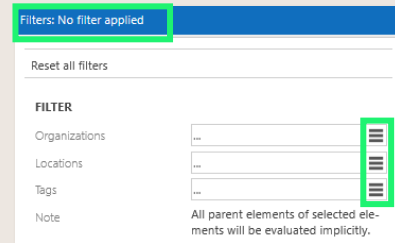### Log In

Model Process

Store Roles

STEP 2
Set up Scope filters
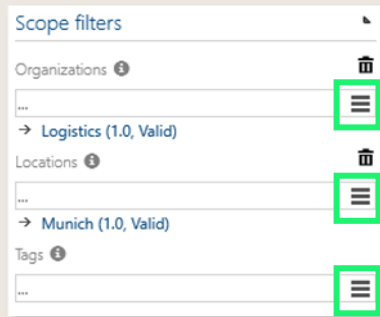
Select Scope filter options via hamburger button

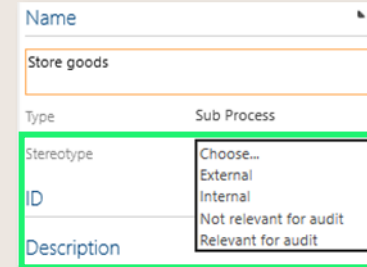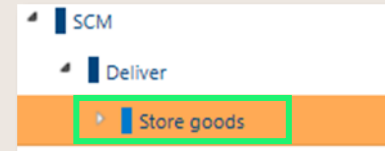If no filters are set, process or object are displayed in any query

STEP 3
Apply Scope filters

Set filter(s) in Header
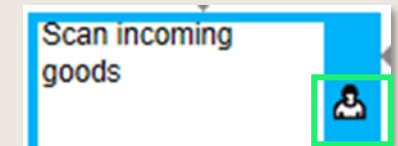
Non-applicable processes are greyed out

STEP 4: OPTION 1
Set up stereotypes

Go to 'Localization reasons' in Detail Content

Click button to delocalize task or process

STEP 4: OPTION 2
Set task type/marker
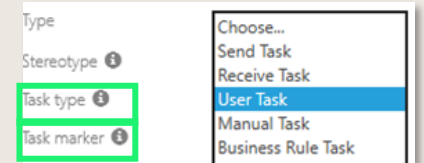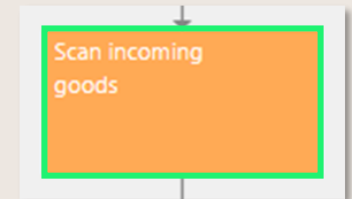
Go to Detail Content

Choose task type and/or task marker from dropdown

See BPMN2.0 icon on task (only available after feature activation)
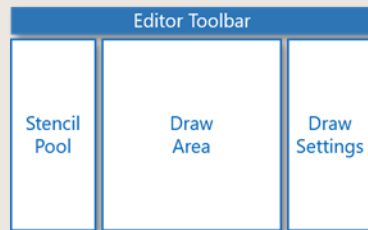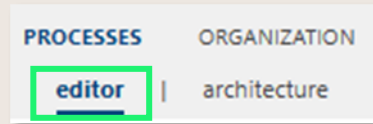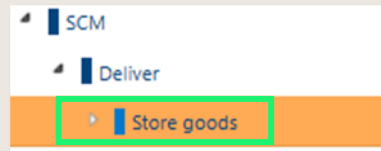
Create process maps

STEP 1
Log In

Build a Process House
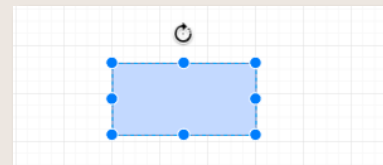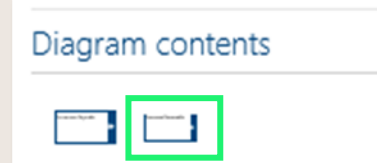
Log in with access data received by mail

Model Process House
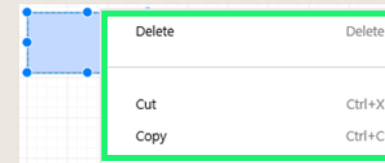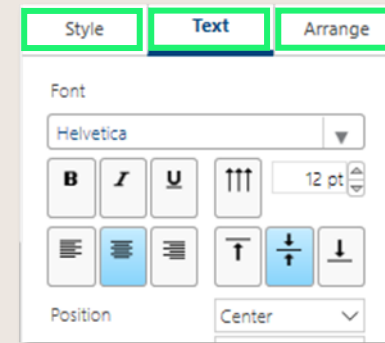
Go to Navigation Content

STEP 2
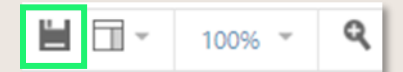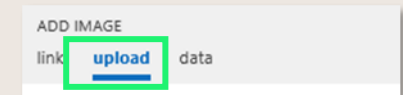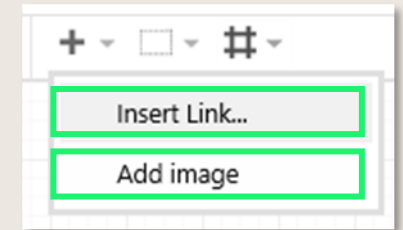## Open editor

STEP 3
Select objects

Drag&drop from Stencil Pool to Draw Area

STEP 4
Edit objects

Edit in Draw Settings area and in right mouse button menu

STEP 5
Insert link/add image

Don't forget to save your changes!!!
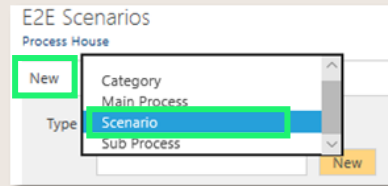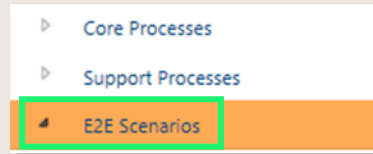
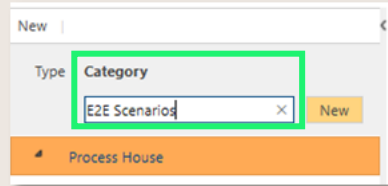# Map end-to-end processes (scenarios)

STEP 1
Log In

Model process
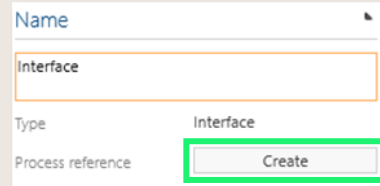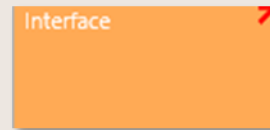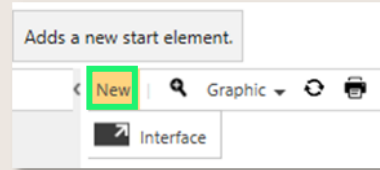
- Log in with access data received by mail
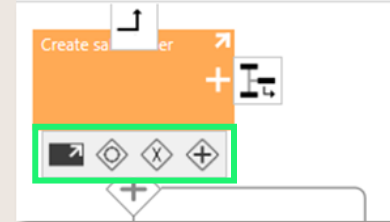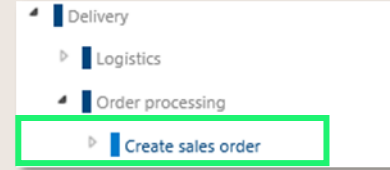- Model Sub Processes
- Go to Navigation Content

STEP 2
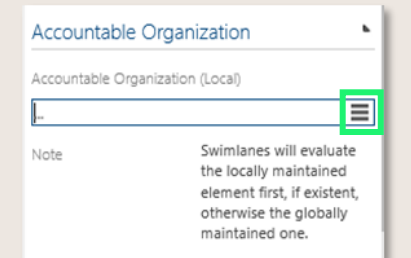## Create scenario
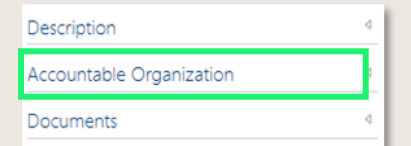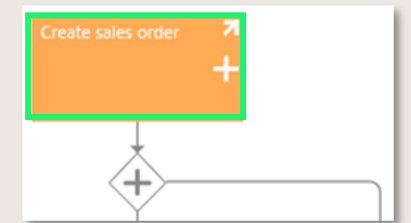

STEP 3
Insert interfaces

STEP 4
Develop E2E process

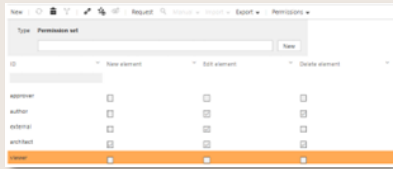Model end-to-end process by using interfaces to existing processes

STEP 5
Apply roles

Assign permissions

Prerequisite: Permission sets are available (created by Admin)
Please note that further Permissions features are available (refer to: https://docs.symbioworld.com/admin)
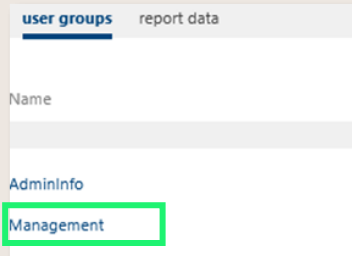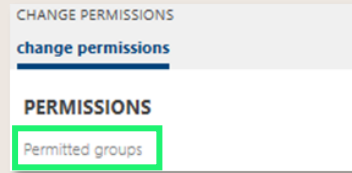
STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	**Select process**	**Permit user groups**	**Set permission mode**	**Verify permissions**

Log in with access data received by mail
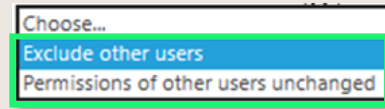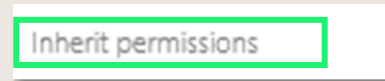
Get familiar with Symbio work area

Go to Navigation Content
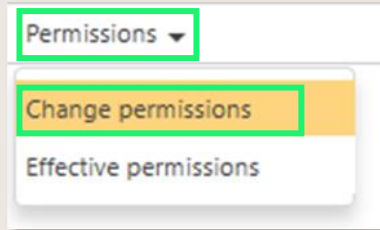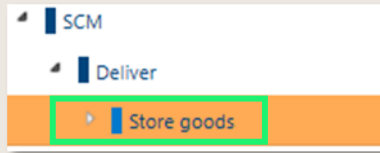
Use 'Permissions' in Toolbar to assign a specific permission set to a selected process

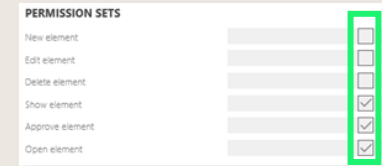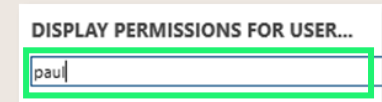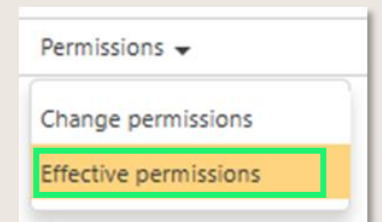Also apply for categories or objects if required

Choose option whether permissions may be inherited from parent process (or not)

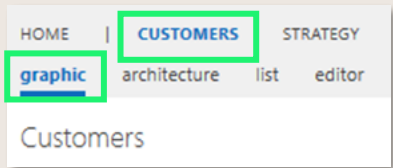Decide whether permission is exclusive or whether standard set remains unchanged

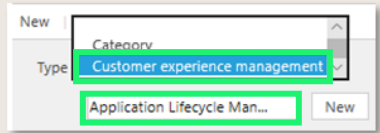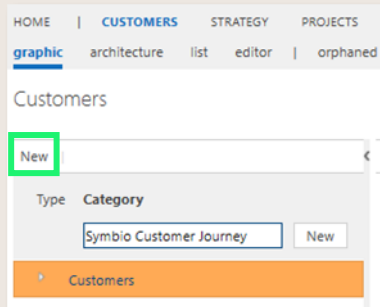See existing permission rights for a specific user

Define Customer Journeys
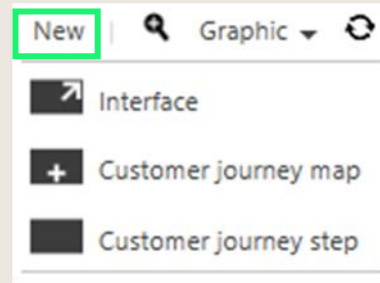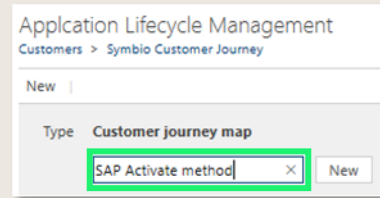
Log In

Log in with access data received by mail

Go to CUSTOMERS navigation

Set up CEM structure
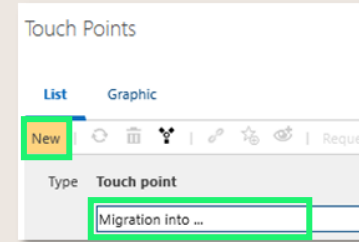

Create a Customer experience management (CEM) consisting of Customer journey maps below
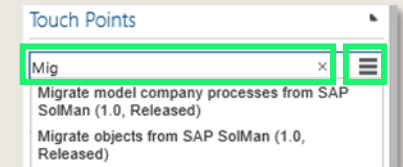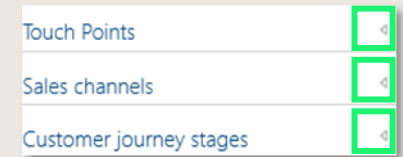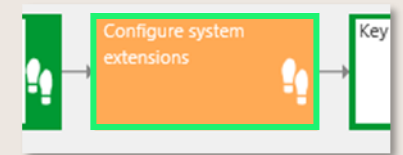
Work out CJM

Design a Customer journey map (CJM) with the help of dropdown objects

Add information

Create all information that is necessary for the design of a Customer Journey, e.g. points of contact of a consumer with the product, sales paths, participants involved etc.

Store information

Find out more in our YouTube tutorials

SYMBIO VIEWER

Login and Navigation → ▶	Different views → ▶	Search, Filter, Favorites → ▶	Feedback, Perma Link, Global Filter & Manual → ▶

SYMBIO AUTHOR

Create process → ▶	Define and detail process → ▶	Optimize process flow → ▶	Initiate release → ▶