Symbio

USER MANUAL

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1 Overview of changes in the new version

Please note that the new features described here in chapter 1 can only be used with the latest Symbio version. There are three different feature flag periods: Experimental and Preview features are mainly available in testing environments, whereas Released features are subject to productive environments.

For more details, please refer to our Continuous Delivery approach.

Through the modeling optimizations in the Manager, several convenience features will be provided to expedite and simplify the process of modeling.

1.1 Method - Extend Scope Filter functionality

In IT implementation projects involving business expertise, scoping repository objects (such as user requirements and systems) at the occurrence level becomes necessary. This allows for the generation of distinct user requirement specifications using a unified process definition. The ability to manage this is facilitated by enabling the "Method: Scope Filters for Tasks and Task/Process-Requirement/Application-Edges" feature activation.

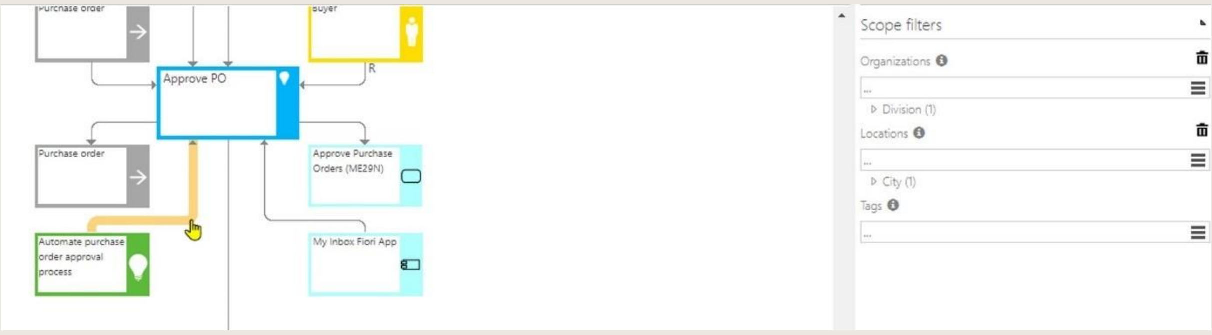


Figure 1 – Scope Filter

Applying the Scope Filter as usual, will have effect on tasks and connected requirements/applications:

- Graphic: element is greyed out
- Detail Content: element is not shown anymore

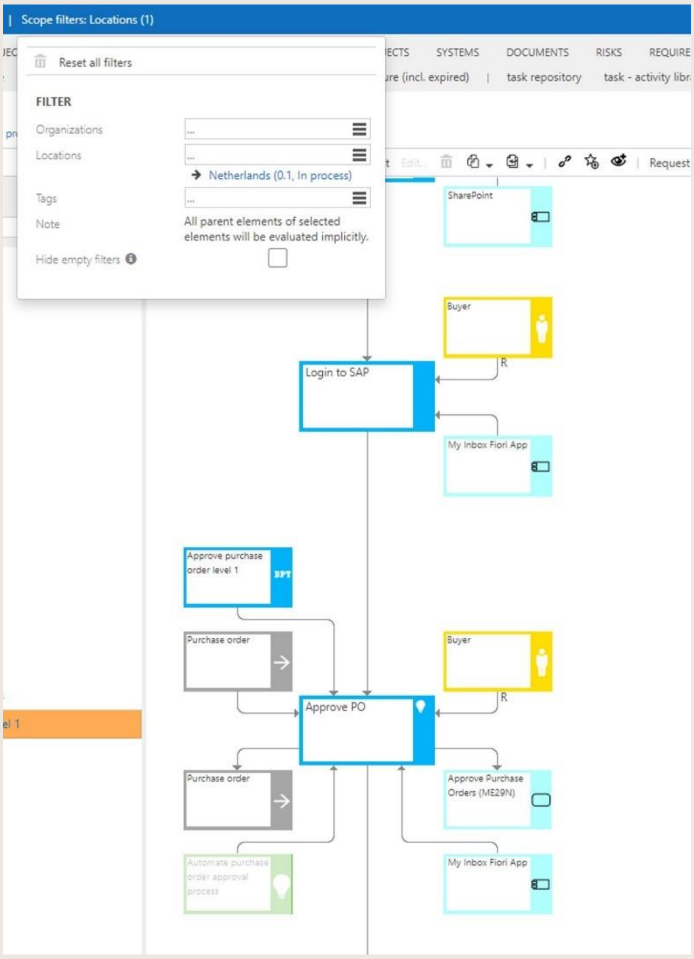


Figure 2 – Scope Filter Location

1.2 Optimization of modelling for Authors

1.2.1 Move Swimlane

- Allows to move swimlanes, which is saved in all swimlane views (horizontal / vertical).
- Available for Organization/Role and System swimlane.

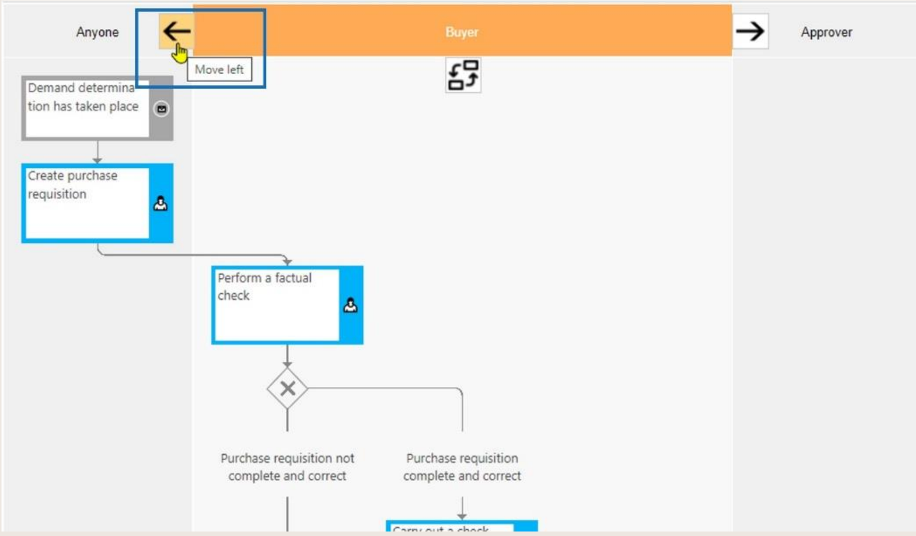


Figure 3 – Move Swimlane position

1.2.2 Replace Swimlane Objects

- Allows to replace all objects in a swimlane.
- Available for Organization/Role and System swimlane.

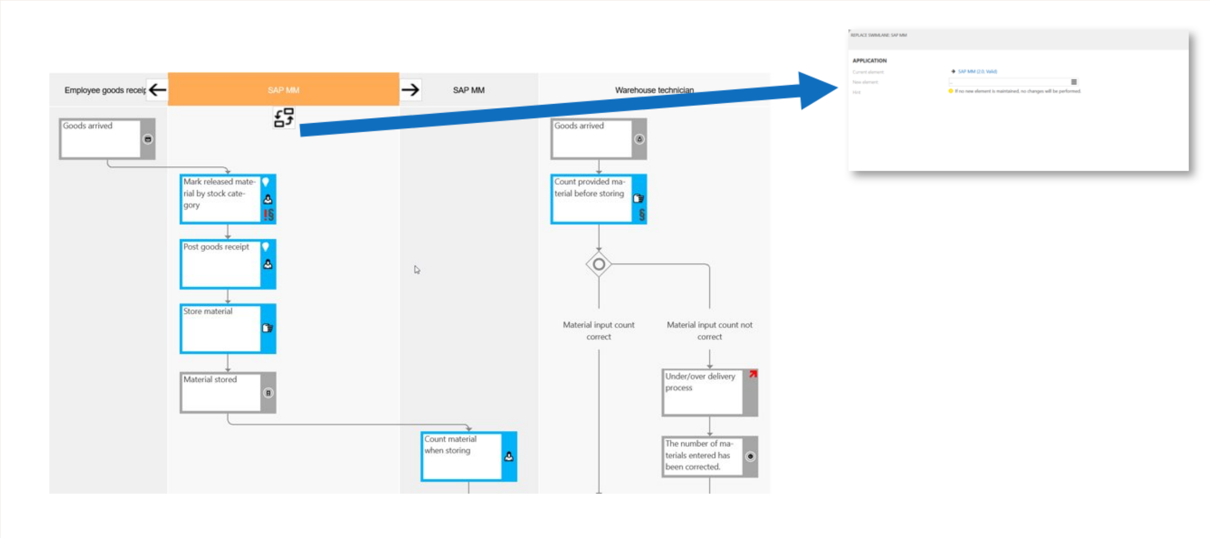


Figure 4 – Replace Swimlane Objects

1.2.3 Change Gateway Types

- Allows changing gateway types directly in the flow without changing the layout.

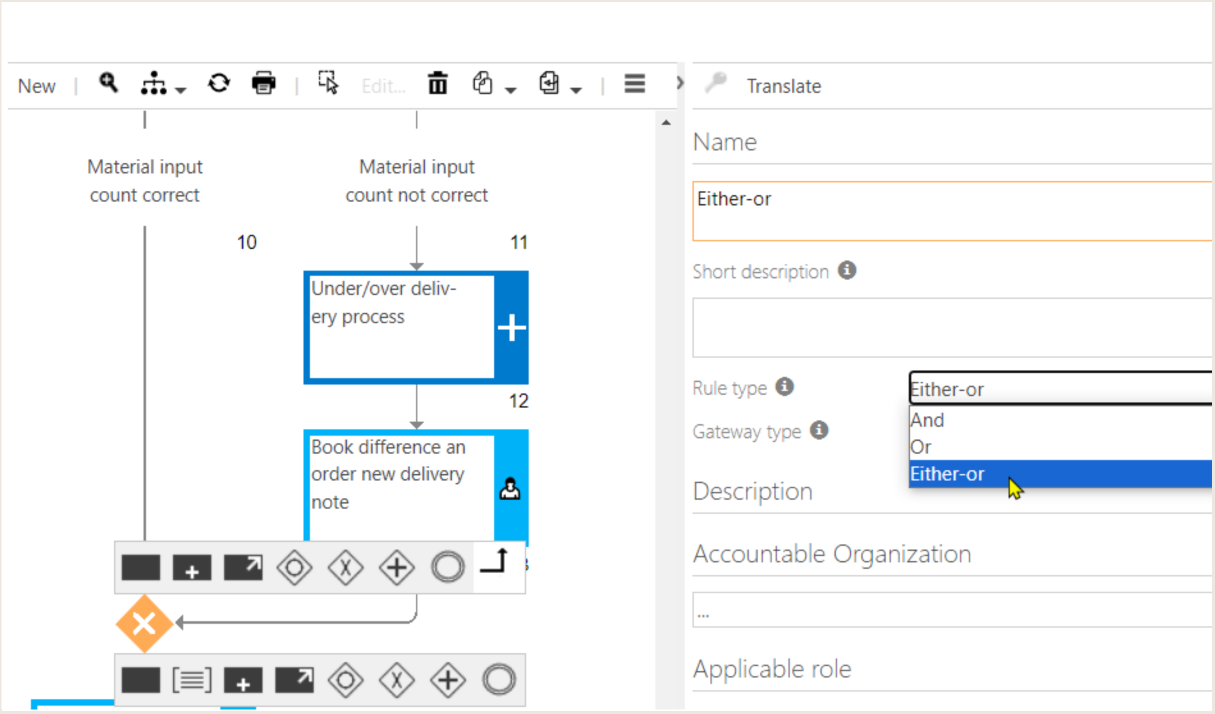


Figure 5 – Changing of Gateway Types

1.3 Mass Edit in Sub Process Flow

Mass edit for tasks in the Sub Process Flow to maintain all the related objects and attributes

The working time has been reduced for user with architect/admin application role by enhancing the “Mass edit” feature. When this feature is activated, the user has now the possibility to maintain/remove all related objects and attributes of the selected object via the dialogue, which brings you to faster modeling.

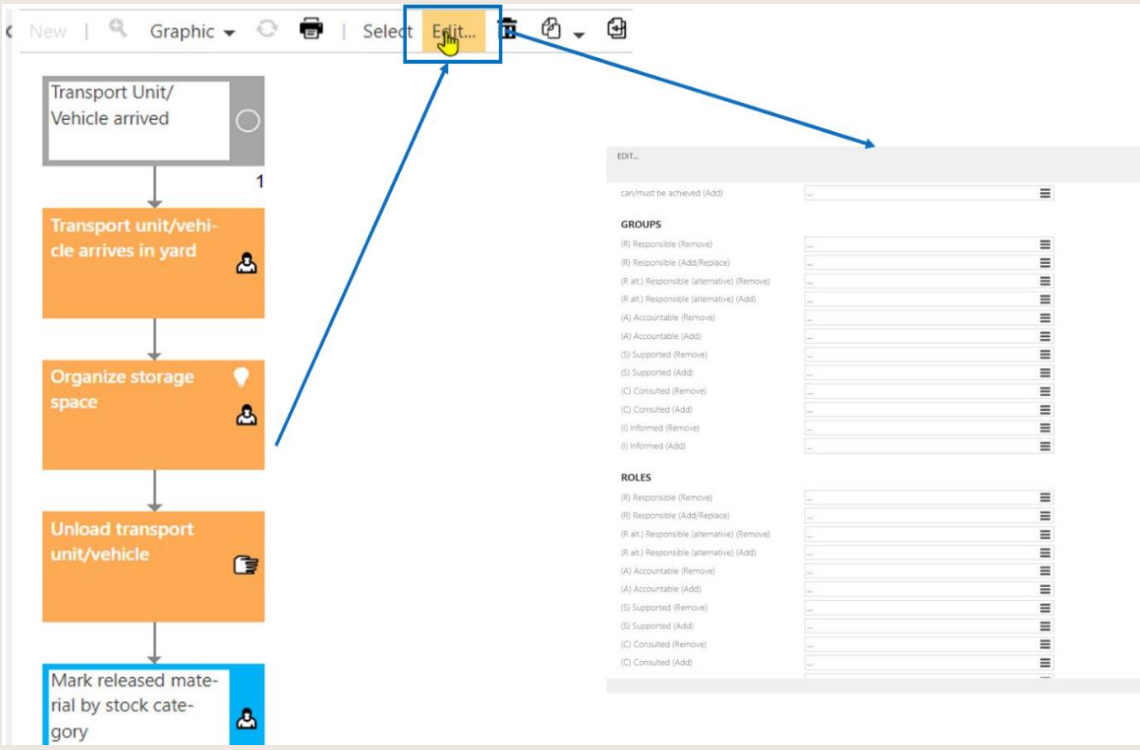


Figure 6 – Editing of Attributes

1.4 Mass Edit for Processes Edges

- Allows to select multiple edges or objects to change the scope filter in also in released processes.
- Available for Architects with activated Mass-Edit Feature

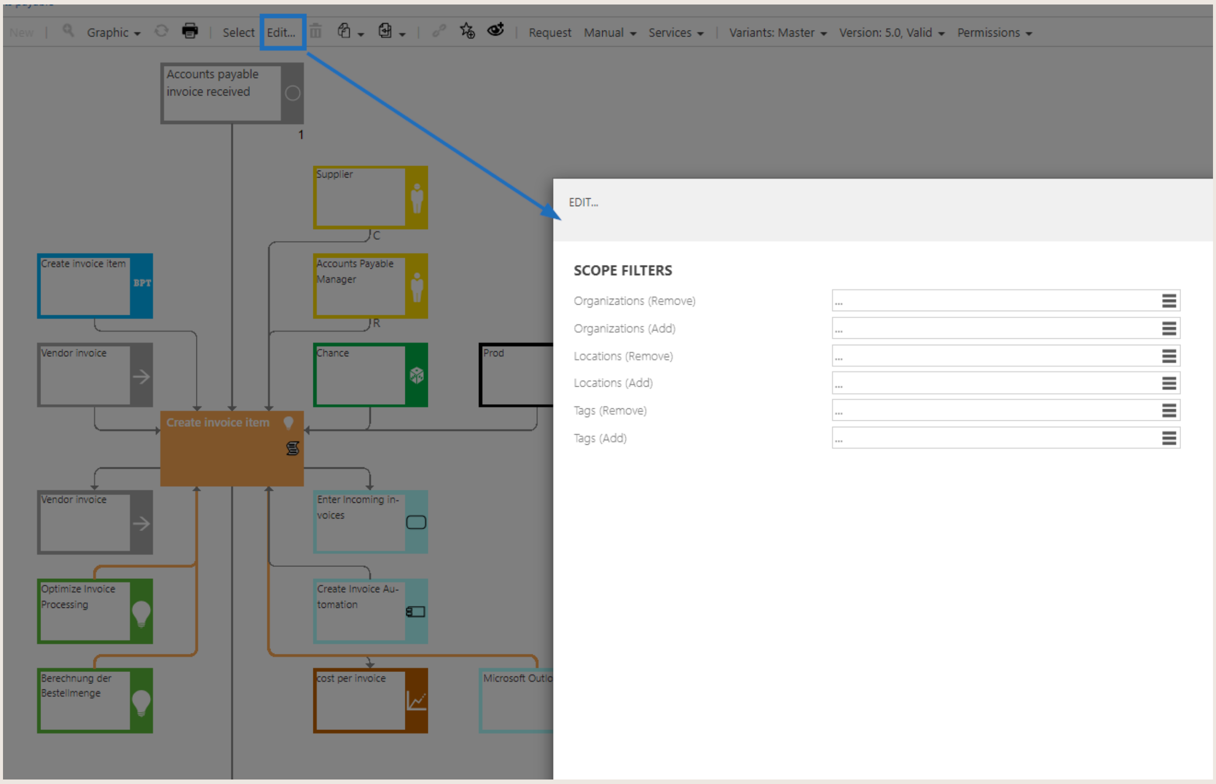


Figure 7 – Edit of Process Edges

2 Introduction

2.1 Purpose of the document

This document is intended for all users of Symbio and aims to support the various user roles in using the tool efficiently for research purposes and individual requirements. The manual is aimed at both new users, who are getting started with the tool and require an overview of the various options, and experienced users, who are looking for solutions to specific questions.

2.2 Scope

This document applies to the standard version of Symbio. Personalized customer configurations may differ in contents and visually from the functionality and options described in this document.

2.3 Structure

This manual is designed to give you an overview of Symbio's most important basic functionalities and navigation options, which are important for every user role. Based on this, the specific functions for each user role are examined in detail in individual chapters.

2.4 User roles

The general role concept is based on a hierarchic approach, i.e. the higher-level role includes all the permissions of the lower-level role plus additional permissions.

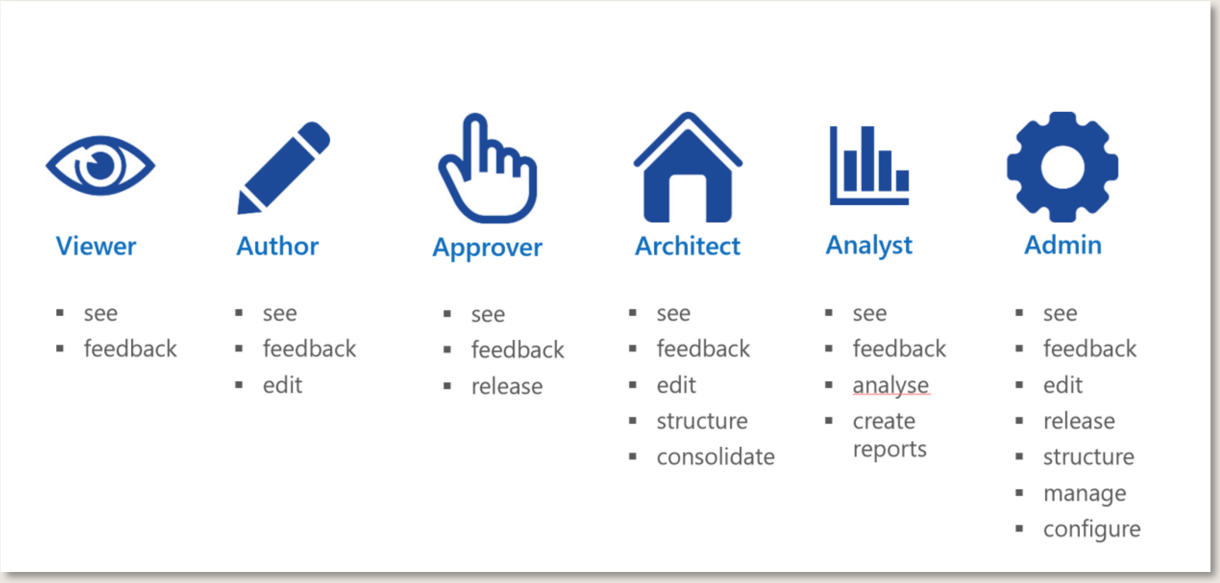


Figure 8 – User roles and permissions

3 Basic functions

3.1 Login

All user roles log into Symbio via the following login page:

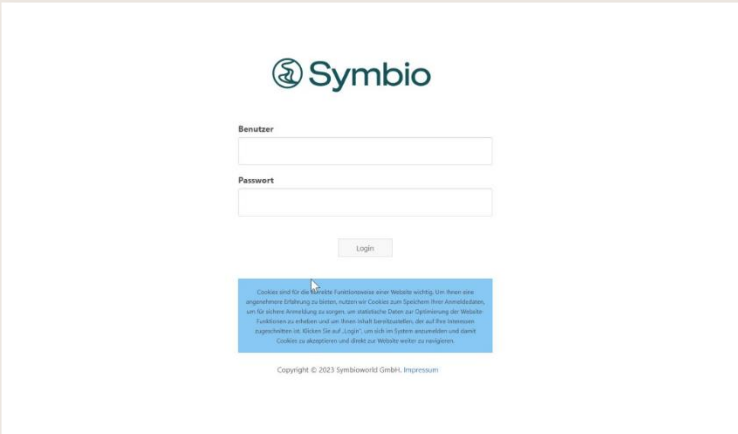


Figure 9 – Login page

Users receive the link to the login page and their required credentials (User name and password) from the administrator.
No login dialog is displayed if automatic authentication is enabled, such as SAML authentication.

A new OAuth Authentication Provider was introduced which allows login via LinkedIn and Microsoft Account. The documentation to set this up was added here:
https://docs.symbioworld.com/admin/installation-guide/oauth-configuration/setting-up-oauth/

The new provider ensures that only users of type OAuthUser can login and only if the maintained email address matches the one provided by LinkedIn/MS during login.

3.2 Get started

After you log in, Symbio HOME displays:

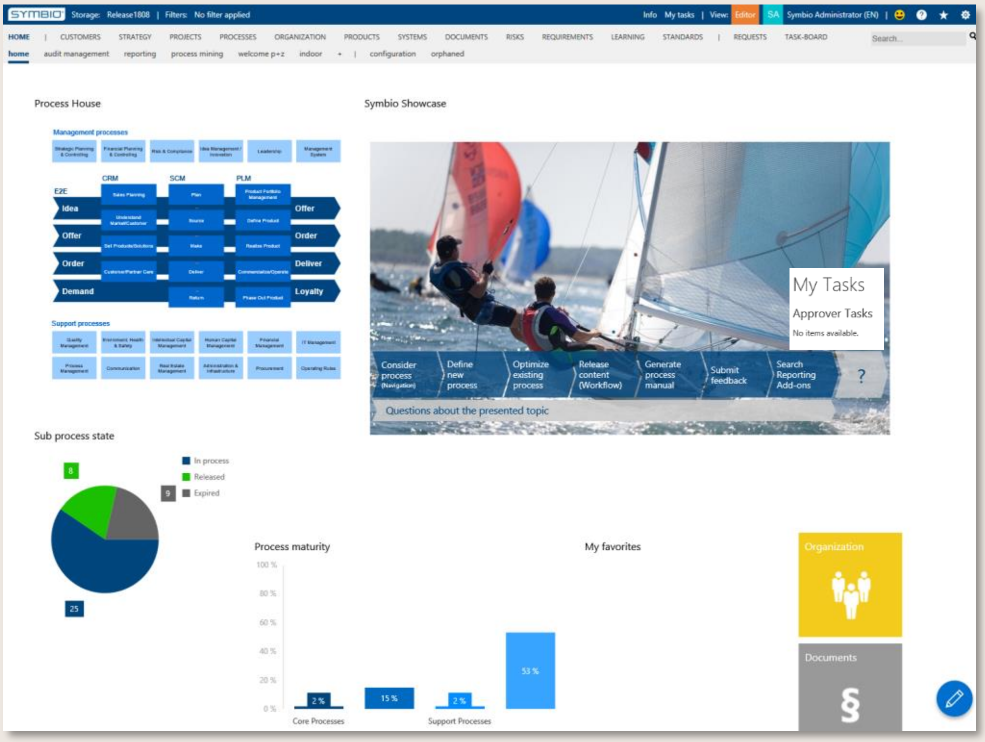


Figure 10 - Symbio HOME

You can access your process landscape using the corresponding buttons on the HOME page. The administrator determines the structure and content of the start page. Design and content of the homepage are determined by the administrator.

The user can directly access the process house / architecture, the organization or various objects such as systems, documents or risks.
Use the quick links like “My last changed processes” to open recently modified processes or objects.

The feature Method: Additional column ‘Reason for revision’ for News Lists allows Administrators to create a list on the HOME page listing the most recently released processes or documents. The function adds a new piece of information next to the ‘Type of change’ column to these lists: it additionally shows the attribute 'Reason for revision', which explains why the new version of the item was created.
This feature is only available after activation by the Admin.

In the header, users can set a filter to see specific processes or objects that are only valid for certain organizations, locations, or tags. ⍰ Select Scope filters

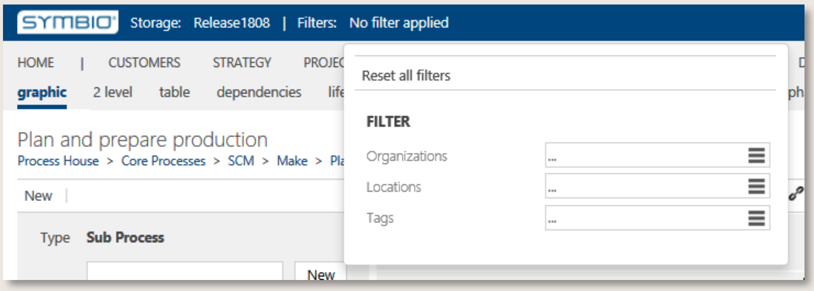


Figure 11 – Selecting filter criteria

Users will then only see content related to the selected elements.
The user information also contains information about the user´s authorization and their contact data.

Use the Search feature to access the required processes and objects directly. Enter the search term into the text box to open an advanced search window ⍰ Search for content

3.2.1 Data language

The data language is shown directly in the Header Bar next to the User name.

Figure 12 – Language code

3.2.2 Layout

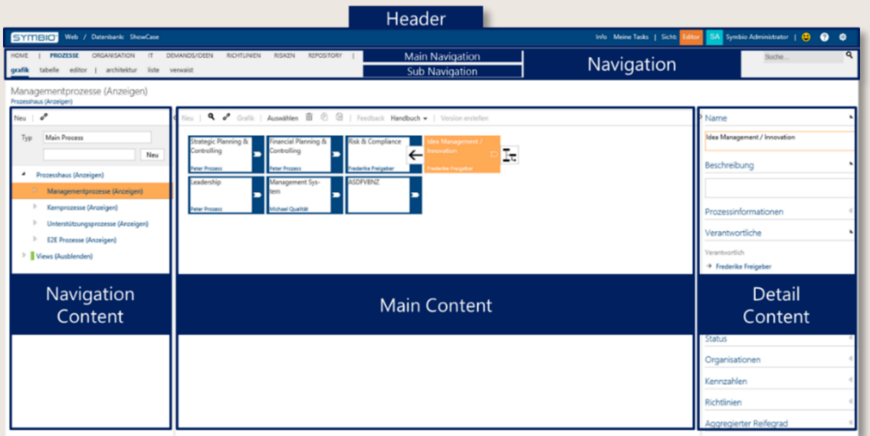


Figure 13 – Workspace layout

3.2.3 Header

The Header contains some basic information and functions for users. The left pane shows the name of the database which the user is logged into.

Click Info to open the info page for the taskboard. Generated process documents and feedback is stored here. If new information is available for the user, the number of info items is displayed next to “Info”.

Use My Tasks to navigate to the open tasks within the taskboard, for example process approvals. If multiple tasks are pending, the number of outstanding items is displayed.

You can change the view from Viewer to Editor and vice versa, provided you have the relevant permissions.

The initials and the User name are displayed to the right of the view. Click the User name to open a window in which you can select the language and disconnect from the database. This window displays additional information, such as assigned user roles.

We are always happy to receive feedback: Please feel free to click the smiley button to submit feedback about Symbio (optional).

Click the question mark button to open the Help menu. The help provides assistance with key questions and Symbio features.

Favorites and subscriptions to certain processes or objects are displayed and managed by clicking on the star button.

3.2.4 Navigation

The top row of the Navigation section (Main Navigation) is fixed. It doesn’t change regardless of the selected Sub Navigation or features.

The Main Navigation area consists of the following elements:

HOME - Launches the home page
CUSTOMERS – Displays the Customer Experience Management
STRATEGY – Displays to the strategy view
PROJECT – Displays to the project view
PROCESSES - Displays the process view
ORGANIZATION - Displays the organizational structure/chart
PRODUCT – Displays the product view
SYSTEMS - Displays the IT architecture
DOCUMENTS - Displays the guidelines
RISKS - Displays the risks
REQUIREMENTS - Displays demands/idea management
LEARNING – Displays the learnings and trainings
STANDARDS – Displays the norms and standards
REPORTS – Displays the role entry and specific reports
REQUESTS - Displays received and created requests
TASKBOARD - Displays pending tasks and information

The line at the bottom of the navigation bar (Sub Navigation) is context-dependent and offers different options and views depending on which main navigation item was selected.

3.2.5 Contents

The content of the process world is divided into three areas. Please see introduction of Viewer.

The Navigation Content shows the process architecture. Click the grey arrows to open the lower levels of the tree.

The Main Content section displays the contents of the defined main processes and sub-processes in graphics or tables, depending on the selected view or sub navigation.

The Detail Content section includes details on the main process or sub-process level, for example descriptions, responsible parties or objects that have been previously created through the Main Navigation area or in the Sub Navigation of relevant management views.

You should now have an insight into the key basic features of Symbio. The following chapters provide a comprehensive overview of typical application scenarios for the various user roles.

4 Viewer

Typical application scenarios for the Viewer user role include:

- Navigate through the Process Landscape in the Process Portal
- Search for content
- Provide feedback to update and optimize processes
- Generate process manual or graphic(s)
- Review a process or object when the author invites to review

4.1 Navigate the Process House

There are several ways to access the process landscape:

- Click the Process House in the Graphical Views or click the Processes tile in the Tabular Views on Symbio HOME.
- Click Processes in the Main Navigation area.
- Enter a process name into the Search text field ▯ Search for content
- Navigate to role entries in REPORTS navigation ▯▯Role entries

4.1.1 Navigation Content

Use the tree in the Navigation Content area on the left to navigate through all levels of the process house, right down to the lowest sub-process.

By default, the Symbio Process House is divided into three categories:

- Management processes
- Core processes
- Support processes

Architects can rename and expand these categories at any time.

Click the grey arrow to expand the tree and display the level below. Arrows indicate that more processes on lower levels exist.
The different process and object types are colour-coded. Main Processes, for example, are marked with a dark blue bar, sub-processes with a light blue bar.

Please make sure that clicking on the process name (underlined) activates the link and displays the process in the graphical view. If you only want to mark the process, please click on the line outside the name.

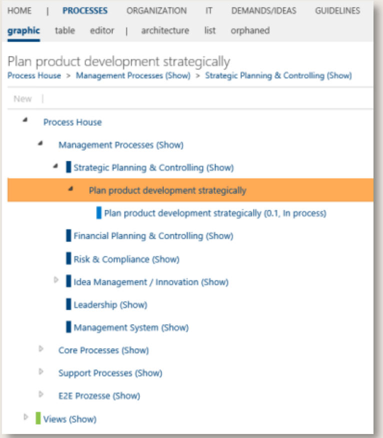


Figure 14 - Navigation Content

4.1.2 Main Content

The Main Content pane shows a visual representation for the contents of the defined process house.

The Graphic sub navigation area also allows the user to navigate through the various levels of the process house and sub navigation in the management view. Click or double-click the graphic object, such as a main process, to open the main or sub-process on the level below.

If a process or object is displayed in light grey, it is not shown in the Navigation Content pane. This means that this process or this object has the status “Hide” and cannot be displayed for the user role Viewer.

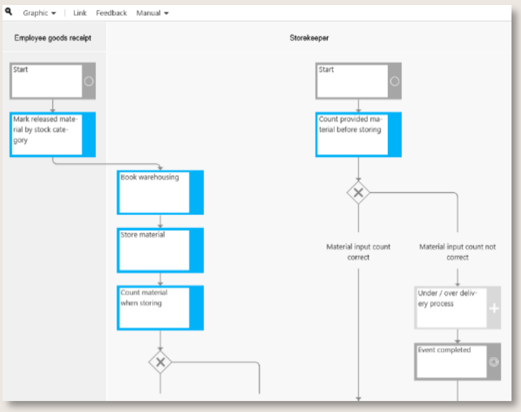


Figure 15 - Main Content / Sub Navigation graphic

The Toolbar at the top gives access to a variety of settings and additional features. Use the mouse-over function to view details about each item.

Figure 16 - Toolbar

Zoom - zooms in or out of the Main Content view
Graphic - changes the display to horizontal/vertical or with/without details, Role swimlane (the default setting is swimlane vertical), Application swimlane, process matrix or configurable fact sheet; for Main Processes, the Block-layout option is also available
Refresh - refreshes the diagram contents (for Editors only)
Print - prints the current view
Link - copies the current process link to the clipboard
Favorites - defines the current process as favorite
Subscription - adds a link of the selected element to the subscription
Request - allows users to submit a comment to the author of the process or object. The request is always visible in the Detail Content
Manual - generates a process manual for the selected process or object level
Version - shows the current released version of this process
Comparison - allows to compare the current version with the previous version

If you reduce the Main Content window this toolbar symbolism appears:

Figure 17 - Toolbar symbolism

The use of 2 level view is useful if the selected Sub Process contains an interface or a Sub Process. The main content is divided into two windows. If you click on one of the embedded objects of the Sub Process in the first window, the respective content is displayed in the second window.

The Table sub navigation area shows the visual representation and lists all process flow objects and linked objects for the relevant level in a table.

Simply enter a search term into the grey box above each column to search for a specific object.

To show or hide each individual table column: Click the hamburger button and enable/disable the corresponding checkbox in the dialog box.

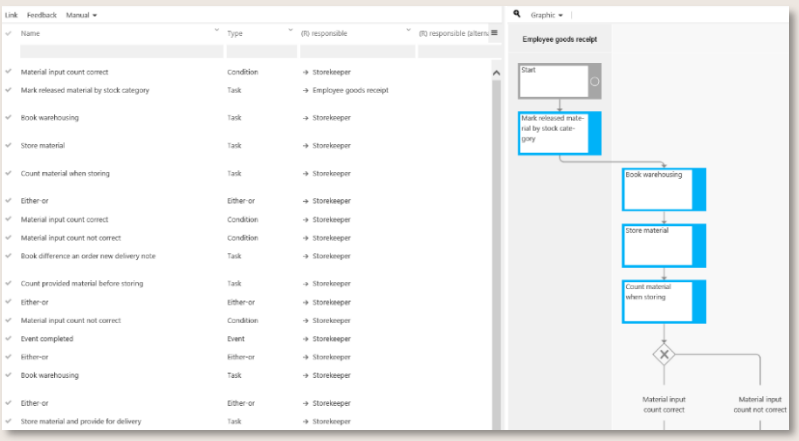


Figure 18 - Main Content / Sub Navigation table

4.1.3 Detail Content

The right pane shows the Detail Content pane which varies in response to the context – depending on which level of the process house has been selected in the Navigation Content.

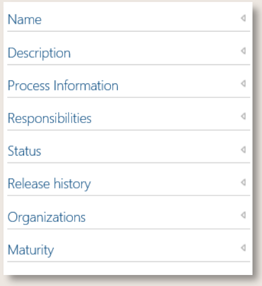


Figure 19 - Detail Content

The Detail Content pane displays detailed information about the selected process, task or object. This includes a comprehensive description, process owners, the status of the process including its period of validity and release history as well as linked organizational units.

4.1.4 Open attachments by navigation symbols

››› This feature is only available after activation by the Admin.

With the help of this feature, attachments to process steps (tasks) or linked objects (e.g. inputs/outputs or documents) are also displayed visually in the graphic „Detailed“ view. By clicking on the corresponding navigation symbol, the respective attachment is opened directly.
If a single attachment is stored, the symbol usually adapts to the respective file type. If several attachments are available, you can navigate directly to the desired element via a list.

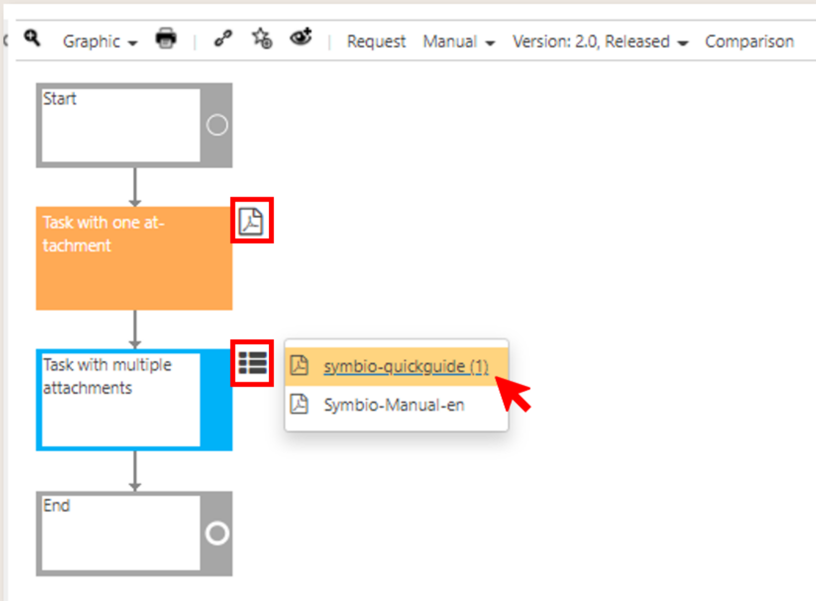


Figure 20 – Navigation symbols for attachments

Please note that this functionality is only available in Viewer mode and in released processes.

4.2 Navigate Repository object structures

Not only can users navigate the process portal, they can also navigate the organizational units and objects that were created by the author or architect.

The repository is used to enter detailed information that can be associated with main or sub-processes. These details include the company's organizational units, persons responsible for implementation, applied IT systems/guidelines, input/output for process steps and more.

Just like in the process house, viewers can navigate through all levels of the structured objects.

Please note: some changes have been made in the SYSTEMS navigation, e.g. 'System' has been renamed to 'Application', 'Transaction/Service' to 'Application service' ... and many more.

There are three ways to access objects:

- Click the Organization tile in the Graphical Views or click the relevant tile in the Tabular Views on Symbio HOME
- Click ORGANIZATION, SYSTEMS etc. in the Main Navigation area
- Enter an object name into the Search text field → Search for content

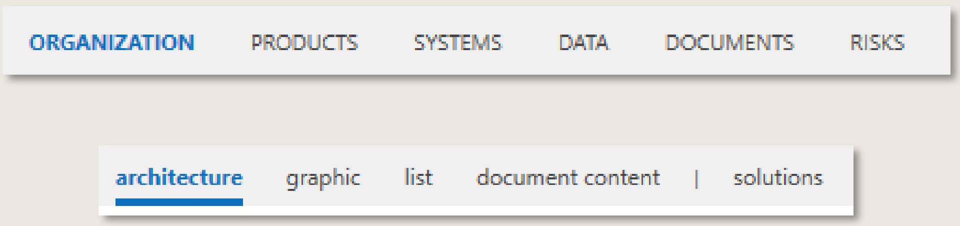


Figure 21 - Main Navigation / Sub Navigation

The following sub navigation options are available for the main navigation items ORGANIZATION, PRODUCTS, SYSTEMS, DOCUMENTS and RISKS etc.:

hierarchy/architecture - shows the relationships (child/parent)
graphic - shows a visual representation of the objects and their structure
list - displays all items for one level in a list
document content - shows the document that was created to content

In addition for Editors only:
editor – enables manual graphic design → Defining Views in the editor
orphaned - lists objects that are not yet assigned to the hierarchy, e.g. after an import

The sub navigation of relevant main navigations also lists further objects such as solutions, roles, input/output and key performance indicators -separated by a vertical line.
You can enter search terms into the grey box at the top of each column to look for specific objects.

4.2.1 Navigate from organizational elements to processes

Information about the selected elements is displayed above the Detail Content area on the right side of the screen.
This information is used to connect the organizational elements with process models.
For example, if you click on an input, the Detail Content area shows in which processes this input is used. Click the process to access the process model.

For example, if you click a role in the list of roles, all information about this role displays in the Detail Content area. If you expand the views for the role characteristics (e.g. Responsible), you can see the processes in which the role is involved. Click this link to display all tasks connected with this role within the process. Click a task to open the graphical view of the process.

4.3 Search for content

Viewers can use the search function to look for specific processes and keywords.
The search function is available on Symbio HOME and in each view in the upper right corner of the Navigation area.

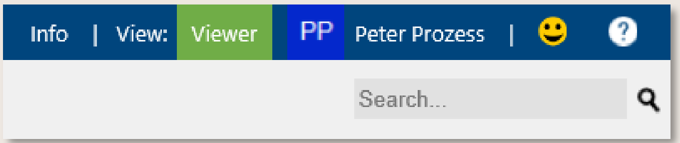


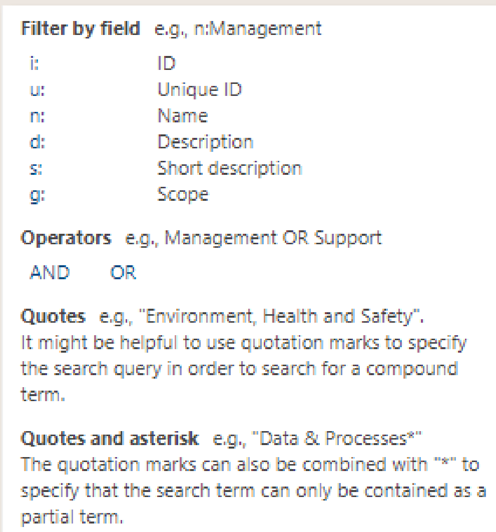
Figure 22 – Search function

When you enter a search term and press Enter to confirm, an advanced search window opens where you can use AND/OR operators to enter multiple search terms for more precise search results. Words with binding marks are replaced by a blank in the search. For example, the search for "BPMN-Method" is carried out as a "BPMN Method".

The search results are shown in a list. The Detail Content area on the right shows the associated data. Click the appropriate references or links to navigate directly to the required process or object.

This list search can be further detailed. By click on the search field on top left, a dropdown opens to specify the field where the desired term should occur, e.g. in the ID, the name, the description or similar.

Just add the required field before the search term, e.g. 'd:' for 'description' and confirm by return to obtain an appropriately filtered list. Please make sure not to place a whitespace after the colon (see example).
AND/OR operators, quotes and asterisks can also be used (see example below).



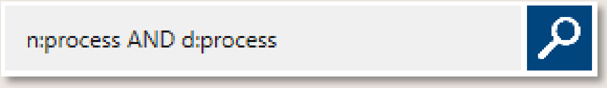


Figure 23 – Apply detailed search function

4.3.1 Use advanced filtering in list views

To find content even easier and faster, any user can use the advanced filtering. With this function, users can easily search for attributes in all list views. In this way, the modeler can filter in the sub process according to certain stereotypes, such as internal documents. The user activates this filtering through the magnifying glass in the toolbar. The user can now search for terms and filter according to criteria such as type or author. The term search is possible for the description, name and ID. Filtering can be used in all list views.

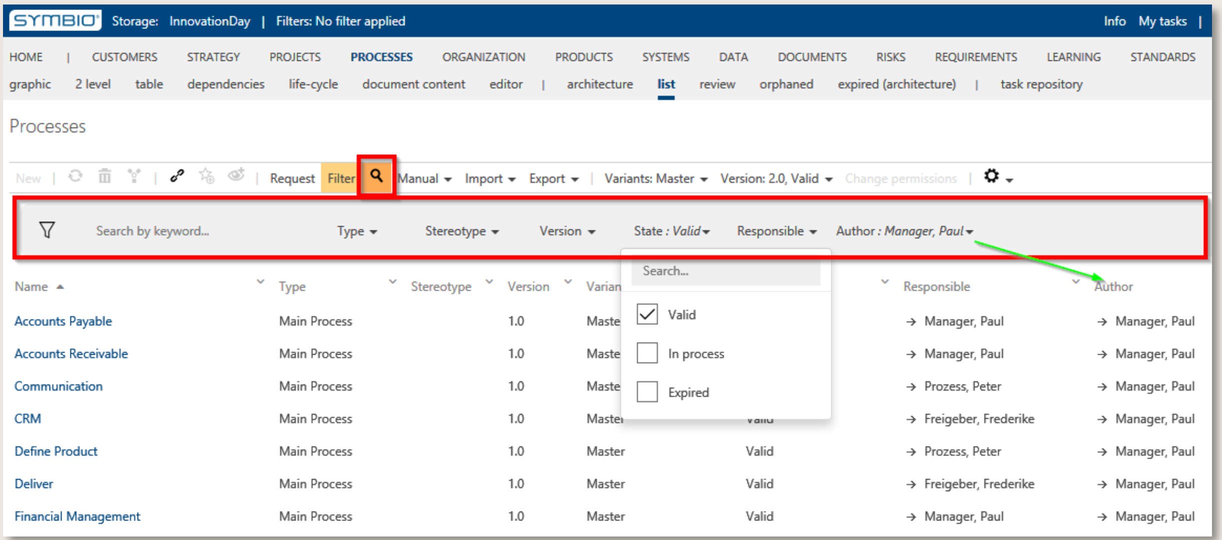


Figure 24 – User filter in list views

Please note that the filter display for list items, e.g. Authors or Responsibles, is generally limited to fifteen (most used) entries.

4.3.2 Select Scope filters

In the header, the viewer selects the filter criteria by the organization, locations and tags.

By using the filter, the viewer determines which content is visible. If several filters are set, all filters must apply to the objects. If no filter has been set by the author or architect, this object will still be published.
A viewer or user with the application role Viewer can only see processes that have been released. The filters must be maintained for a process or other object before they are released.

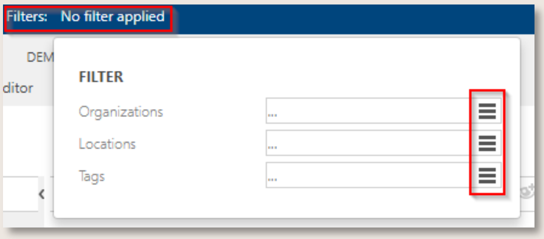


Figure 25 – Set Scope filter criteria

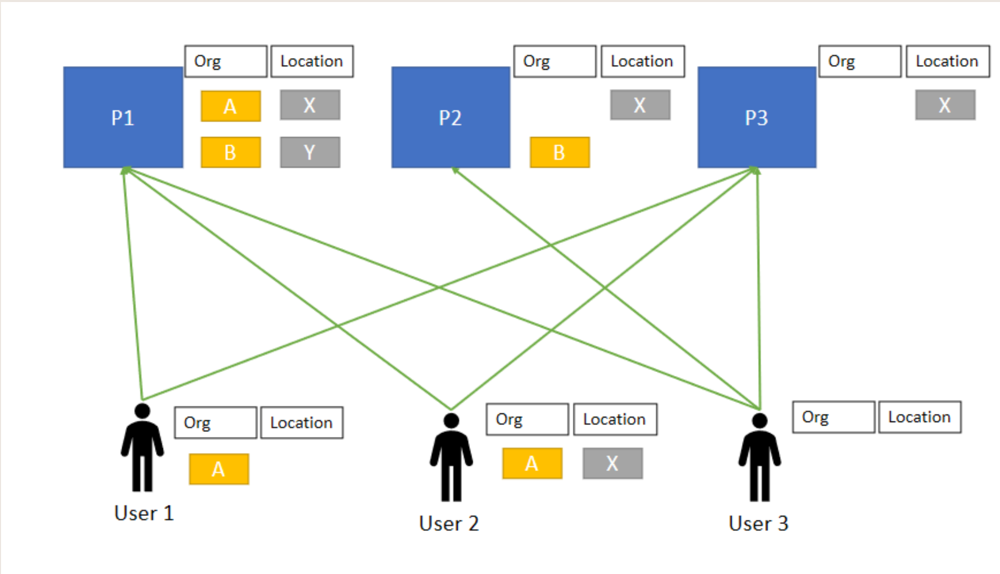


Figure 26 – Filter rules by showing an example

1. Filtering of processes

Symbio creates an adapted process house depending on the filter values. All processes that are not applicable are hidden in the navigation content.

- User 1 has set the filter "Org A". He sees P1 and P3 accordingly. P2 is hidden because the Org filter does not apply.
- User 2 has selected the filters "Org A" and "Location X". He also sees P1 and P3, P2 is not shown.
- User 3 has no filter set, he sees all processes (according to his user rights)

2. Filtering of objects

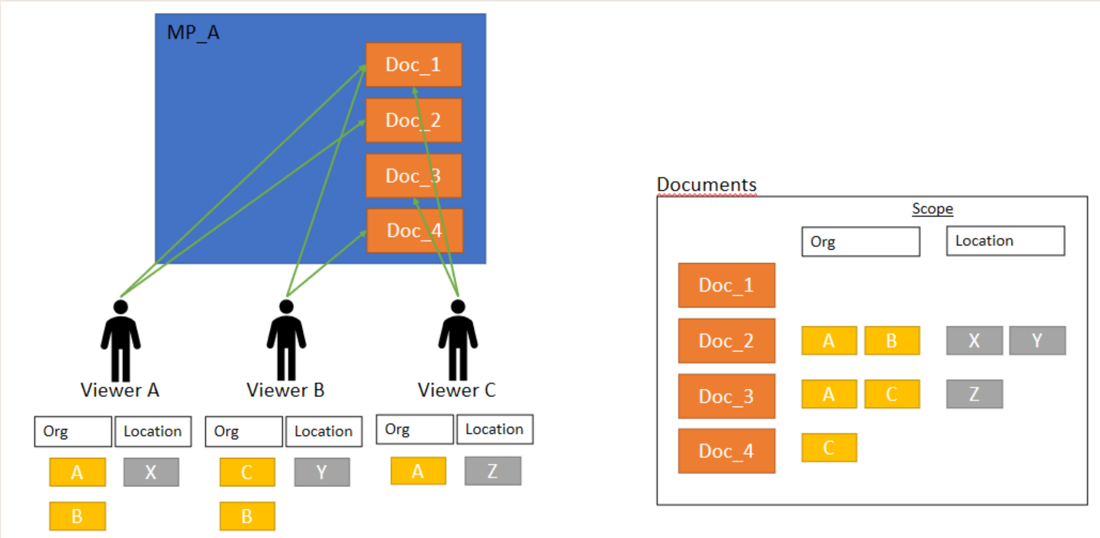


Figure 27 – Example of filtering documents

The display of objects in the hierarchical, graphical or listed view is also adjusted accordingly as soon as filter criteria have been defined.
As shown in the figure, the viewer is shown the documents to which its filter criteria apply.

The filter button in the toolbar can be used to activate or deactivate the filter function in this view.

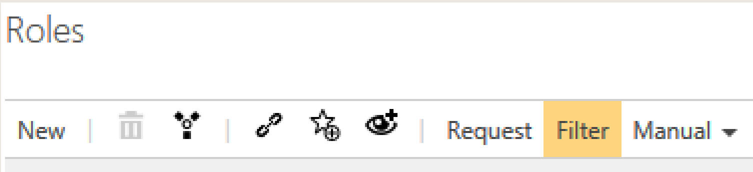


Figure 28 – Filter objects

The filtering also works for the stereotypes. These are displayed in the list as filter criteria and can be filtered by any user.
The global search results are currently not filtered (helps, for example, to find objects that would otherwise be filtered out).

Filtered processes are no longer displayed in the process architecture. Filtered objects that are linked to the process flow are grayed out. The Detail Content on the right remains unchanged.

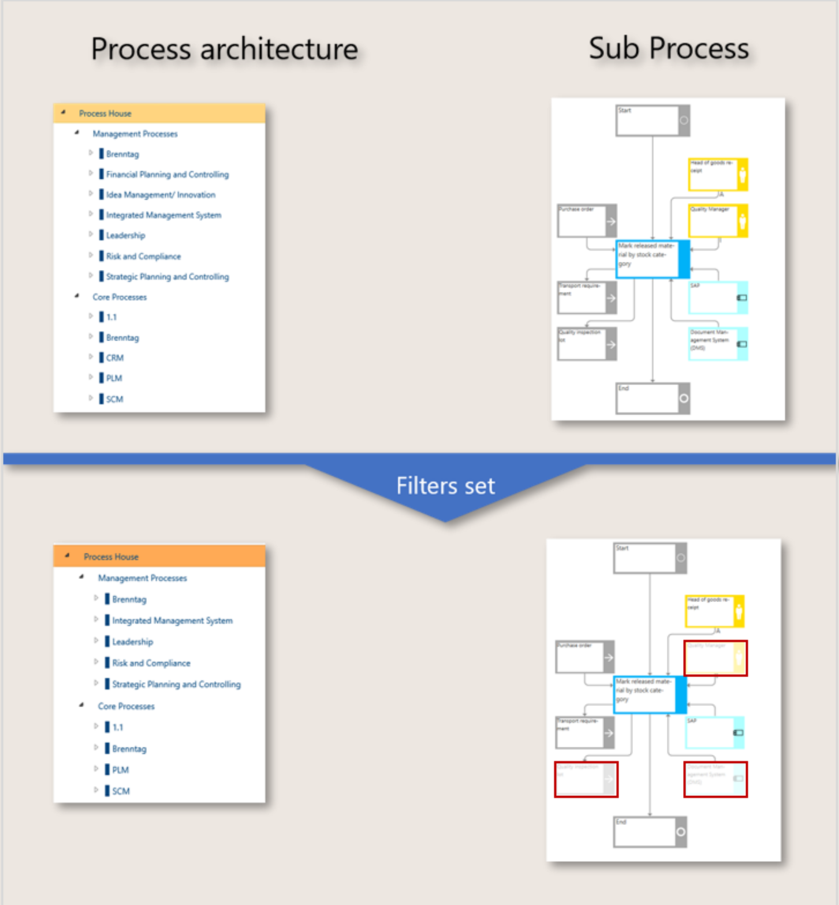


Figure 29 – Effects of the filtering

The filtering of the lists also extends the user's ability to restrict the content in this view.

To use the Scope filter more optimally and to achieve precisely fitting filter results, the behavior of this functionality has been improved. Processes and objects for which no filter criteria are stored in the detail content are considered by default in the filter result, i.e. they are also displayed. By clicking on the Hide empty filters checkbox, elements without filter criteria can now also be hidden.

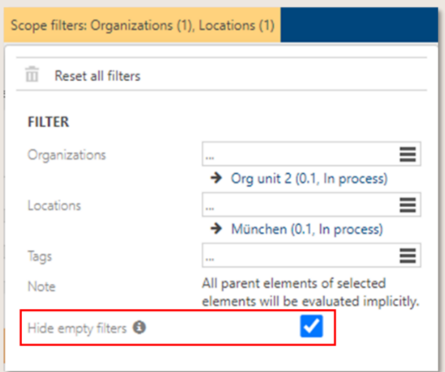


Figure 30 - Hiding empty filters

This behavior applies individually to each set filter criterion, so in this example the empty fields of the organization filter as well as those of the location filter are hidden. All elements subordinate to the selected element are also considered in the filter result.
As before, processes or objects that do not apply are graphically grayed out in the main content and not displayed in the navigation tree on the left. In the list view, the use of the scope filter is activated

by default so that the list corresponding to the filter criteria is displayed. If you want to see the complete list of all processes or objects, the scope filter can be deactivated by clicking on the checkbox.

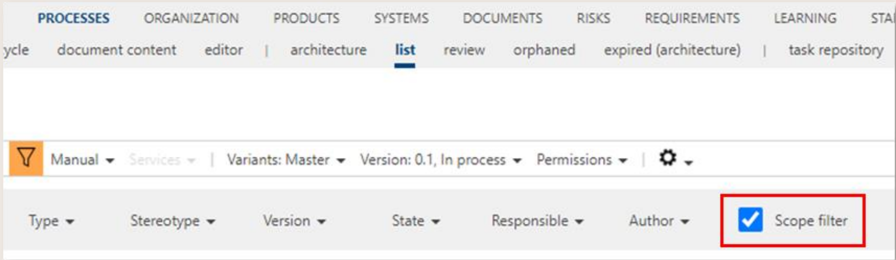


Figure 31 – Scope-Filter in the list view

4.3.3 Use multiple filter selection

>>> This feature is only available after activation by the Admin.

The multiple selection can be used to define the filter criteria organization, locations and tags much easier and faster. For example, the user selects several organizational units in the organization tree and can add more. The same applies to the list of locations and tags, where multiple locations are now selected simultaneously.

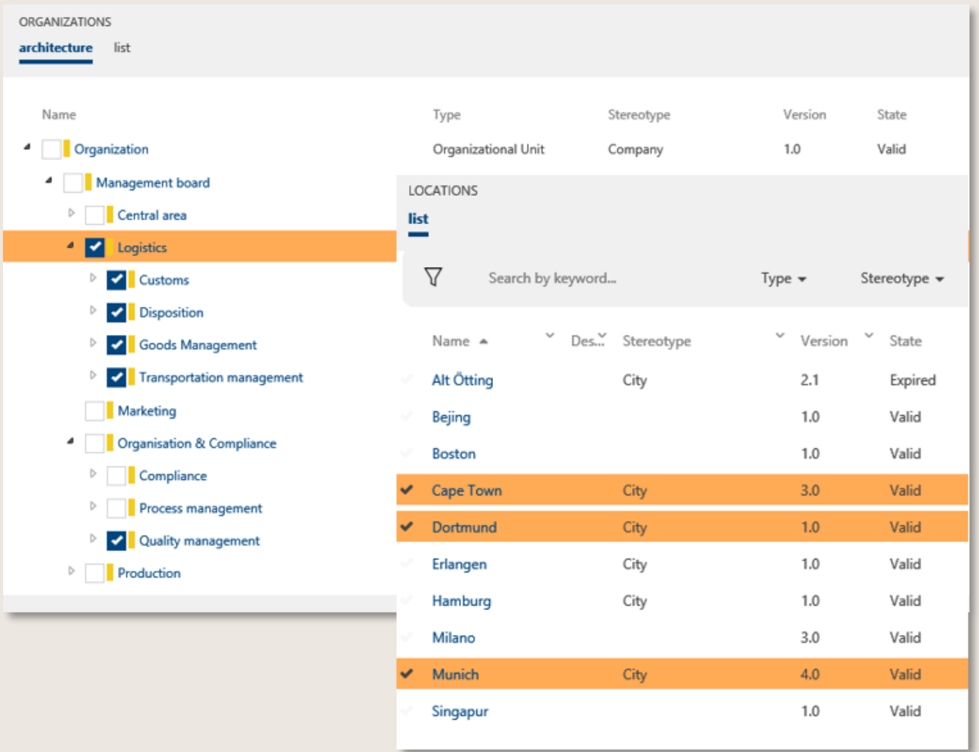


Figure 32 – Multiselect in Lists

4.3.4 Extended filter bar: select individual scope filter

⋙ This feature is only available after activation by the Admin.

This feature allows the targeted filtering according to individual scope filter criteria in the list view of all facets, as well as in the result list of the global search.

In the grey list header, dropdowns appear to filter for Organizations, Locations and Tags whereas only suitable filter criteria are available that correspond to this selected list.

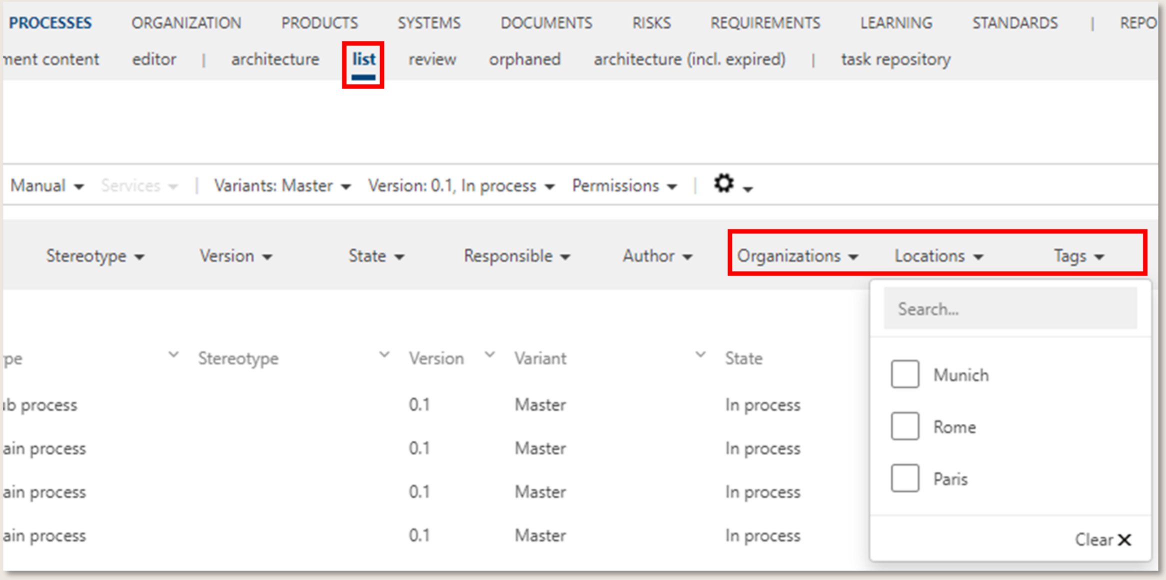


Figure 33 – Individual scope filter selection

NOTE: if the checkbox Scope filter in the grey list header is activated, it may occur that the content of the individual scope filter dropdowns do not represent all actual available data.

4.3.5 Apply role entries

In order to view processes, tasks or objects, such as documents or risks, from the perspective of a specific role, the user selects the sub navigation role entries under REPORT.

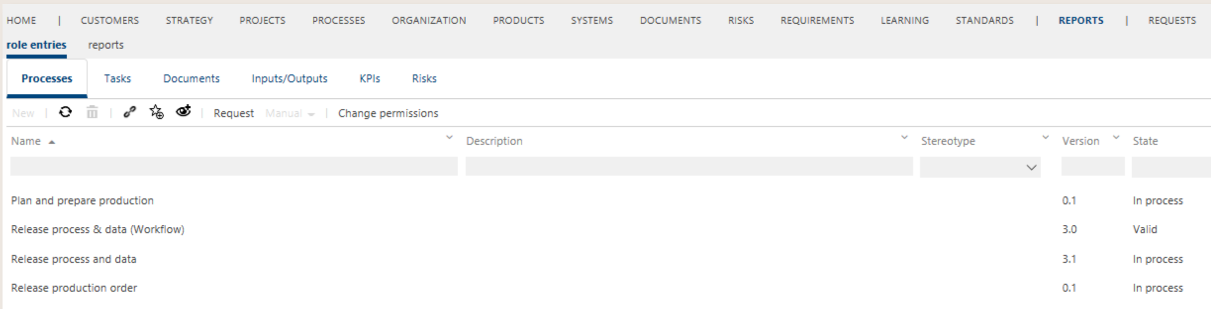


Figure 34 – Role entries

All processes or objects that are linked to the required role are listed here.

The prerequisite is that the user has previously defined one (or more) roles in his settings.

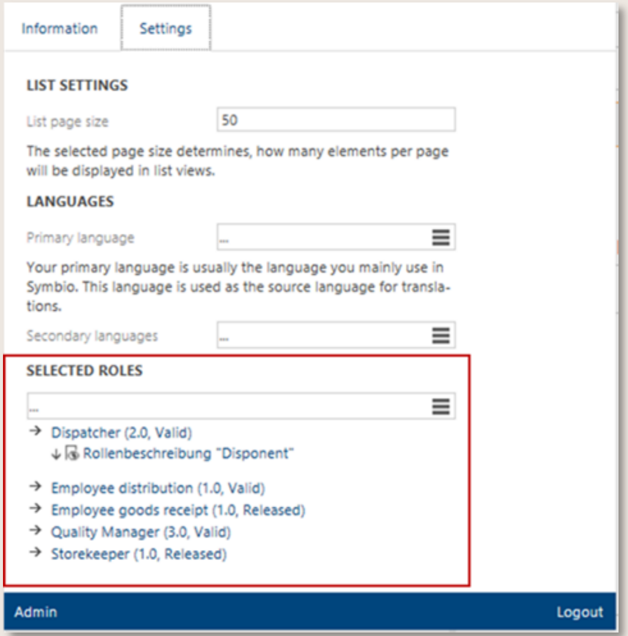


Figure 35 – Select roles for role entries

4.4 Select and print graphical view

In the toolbar of the Main Content, the current graphical view of processes or (hierarchical) objects can be changed by clicking on the graphic.

The current graphical process representation can be printed out immediately. A click on the printer symbol in tholbar of the Main Content opens a new window in which printer settings can be made.

NOTE: Please be aware that this print function is currently not applicable for fact sheets.

4.4.1 Detail View

In addition to the display options of the graphic horizontal or vertical with/without swimlanes, there is also the display with details. This allows you to see all tasks used in the process at a glance, including edges, RACIS and objects.

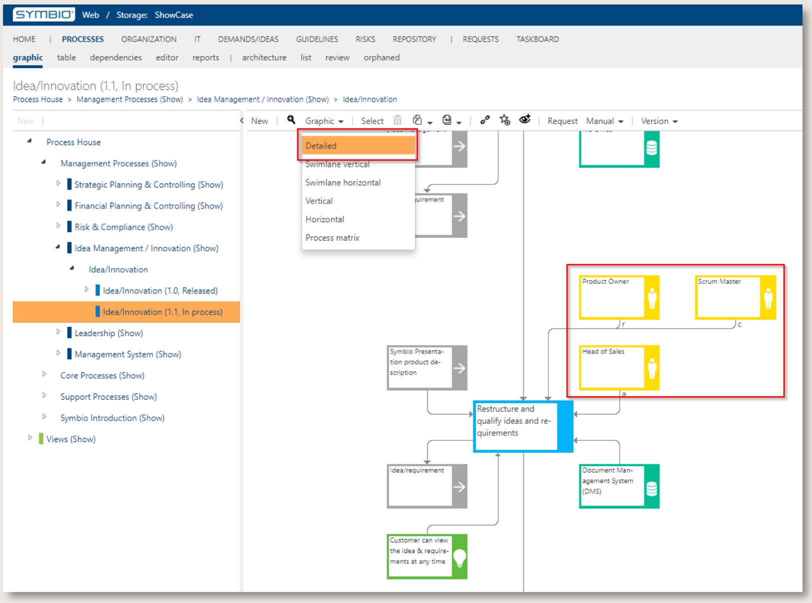


Figure 36 – RACIS-Information in process view

4.4.2 Org./Role Swimlane

The diagram mode can be changed to display Swimlanes by organizations and/or roles. Here there is the possibility to select a vertical or horizontal graphical view. The roles are stored for each process step according to RACIS; a Swimlane is generated here for the "R" (Responsible). If a "Responsible Organization" is defined for the entire sub process in the Detail Content, a Swimlane is generated for this organization at the next higher level..

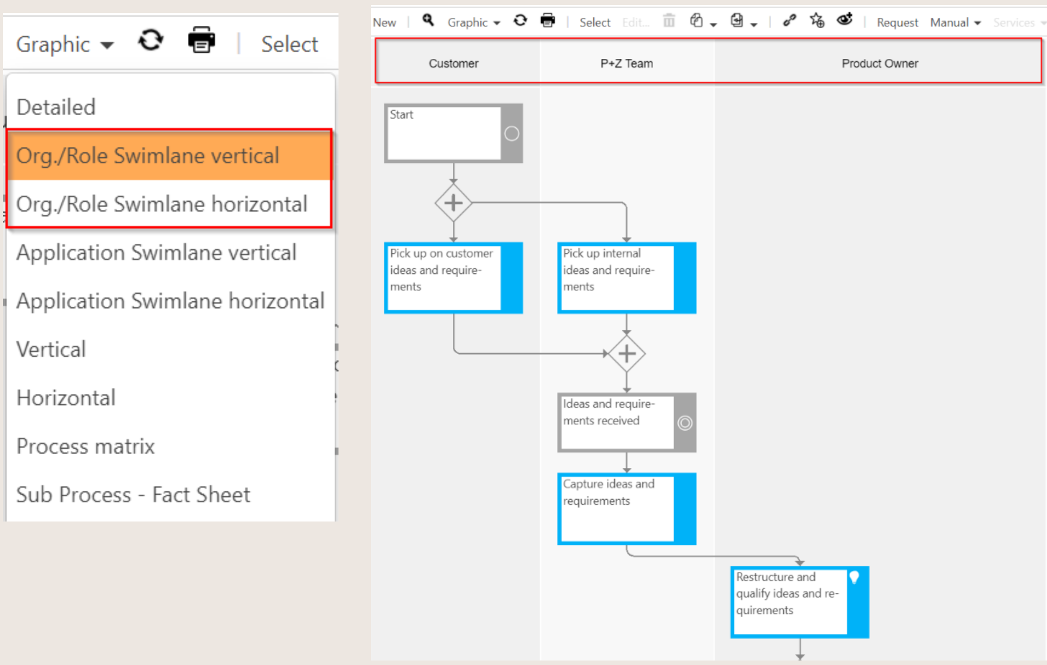


Figure 37 – Diagramm Mode: Org./Role Swimlane

In addition, views without displaying the swimlanes are possible by selecting the diagram mode Vertical or Horizontal.

4.4.3 Application Swimlane

As an option, an Application Swimlane horizontal/vertical view may be added. It shows the process steps sorted by Applications in vertical or horizontal Swimlanes. Just add Applications to the respective Tasks and select the new graphical view in the Toolbar. For each Application, a specific Swimlane is created. If there are no Applications maintained, a Swimlane is generated for the entered role, as usual.

- This Preview feature is only available after activation by the Admin.

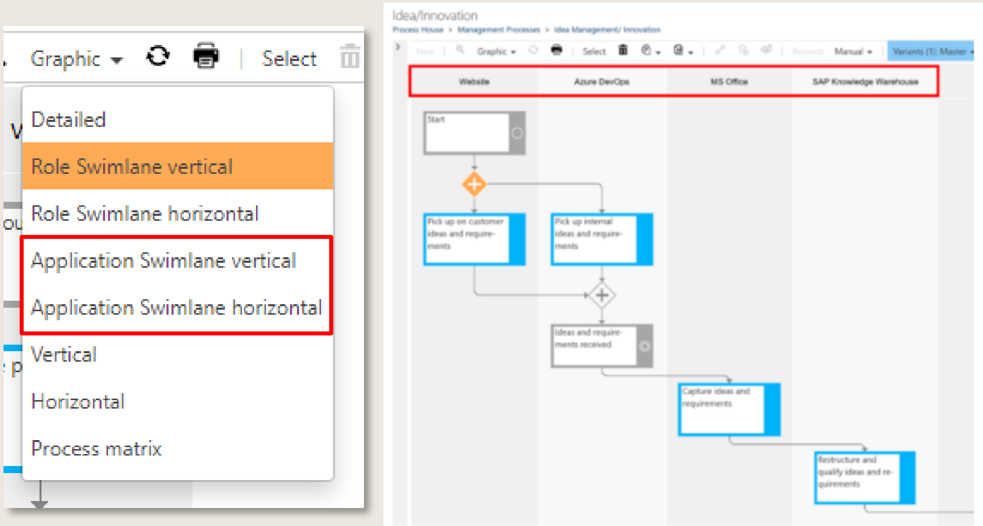


Figure 38 – Diagram mode: Application Swimlane

4.4.4 Process Matrix

In the Process matrix the viewer finds a clear, aggregated representation of the process flow as well as all relevant information.

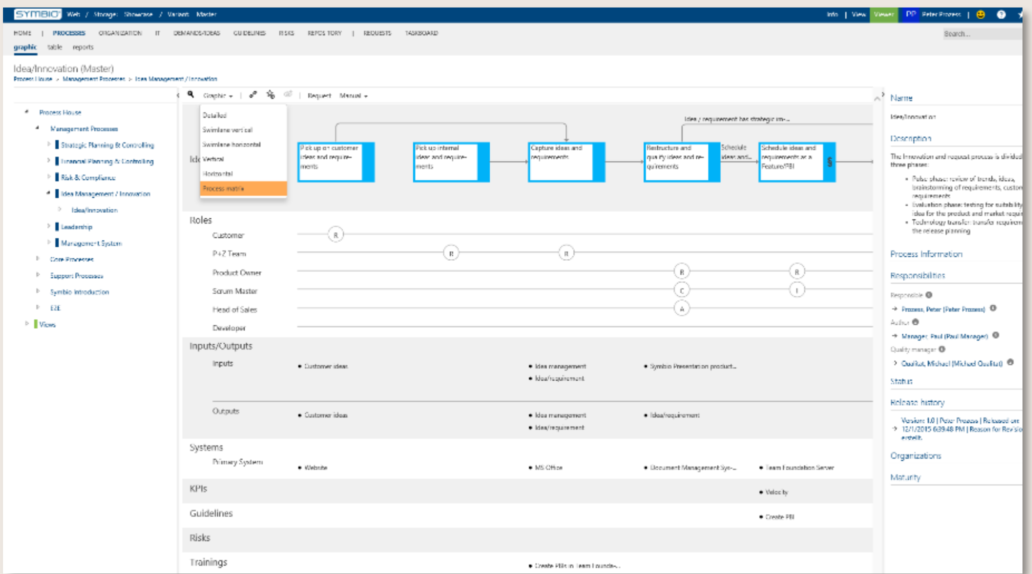


Figure 39 – Process matrix

4.4.5 Fact Sheets

In addition, Viewers can select profiles or Process fact sheets predefined as graphics. This can be individually designed by the Admin and is then made available to the Viewers.

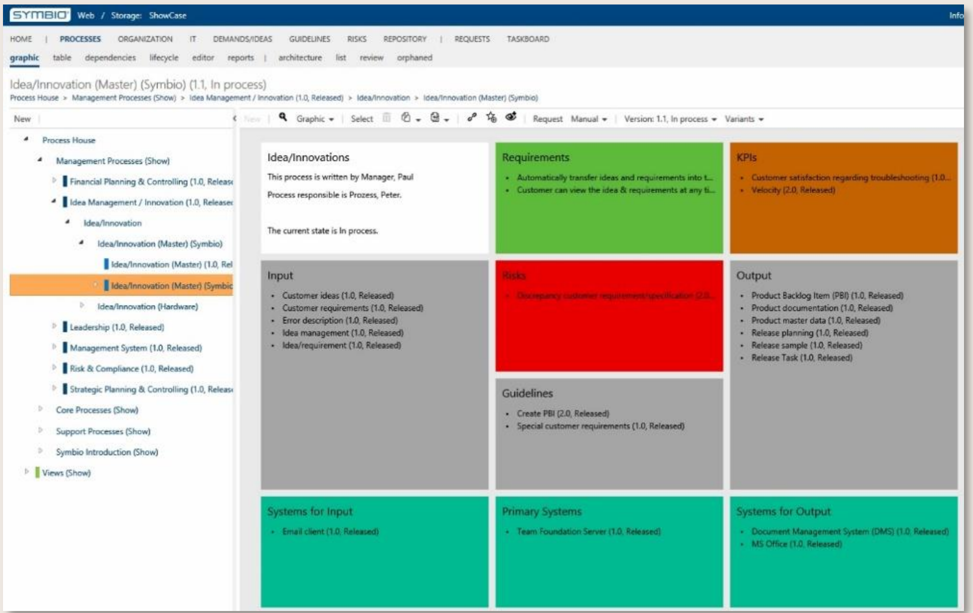


Figure 40 – Process fact sheet

If a specific view of a Fact sheet with global related objects right above the process flow is required, the layout can be specified by the Admin – just like with a conventional Process fact sheet.
❯❯❯ This feature is only available after activation by the Admin.

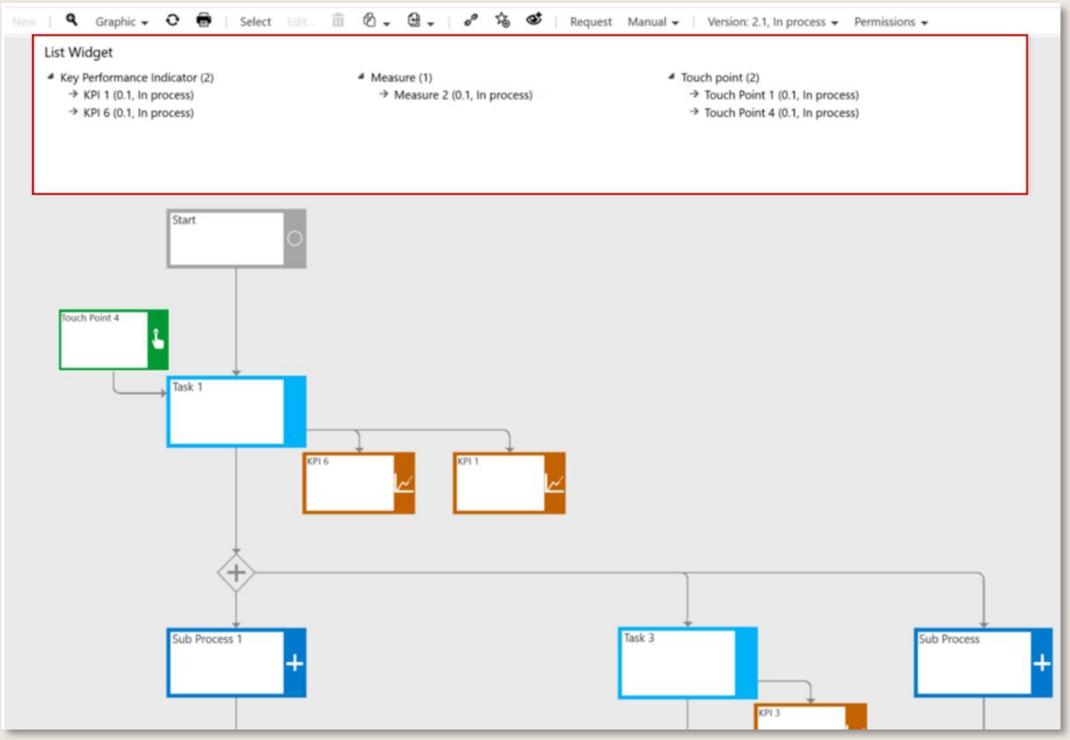


Figure 41 – Fact Sheets: Global related objects

In order to be able to see the various views, they must not be hidden for the Viewer. The Admin can either hide or show the different views.

The individual design options of the fact sheet for processes and scenarios have been expanded. Through configurable table widgets, customized views of process contents as well as their relationships with linked attributes can be freely designed.
»» This feature is only available after activation by the Admin.

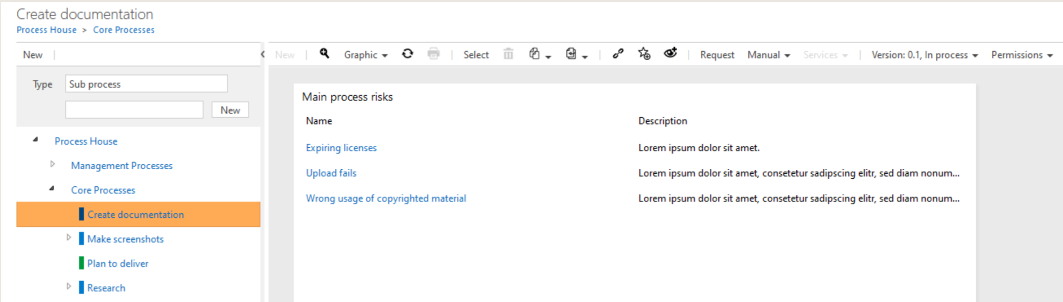


Figure 42 – Custom views for fact sheets

For example, all relevant information for scenarios can be presented in the form of an overview: the listed Main or Sub Processes are contrasted with definable contents in freely definable table form. Alternatively, it is also possible to assign linked objects, such as inputs/outputs, to the processes.

Further information is available here.

4.5 Submit a request (feedback)

The request/feedback feature allows every Symbio user to comment on processes or (hierarchical) objects at every level. By pointing out errors or changes or proposing optimizations, users contribute actively to the continuous improvement of the process landscape.

Click Request in the Toolbar to open a dialog box in which to select the type and urgency via drop-down menus (and enter a desired delivery date, if required). Feedback is entered in the free text field.

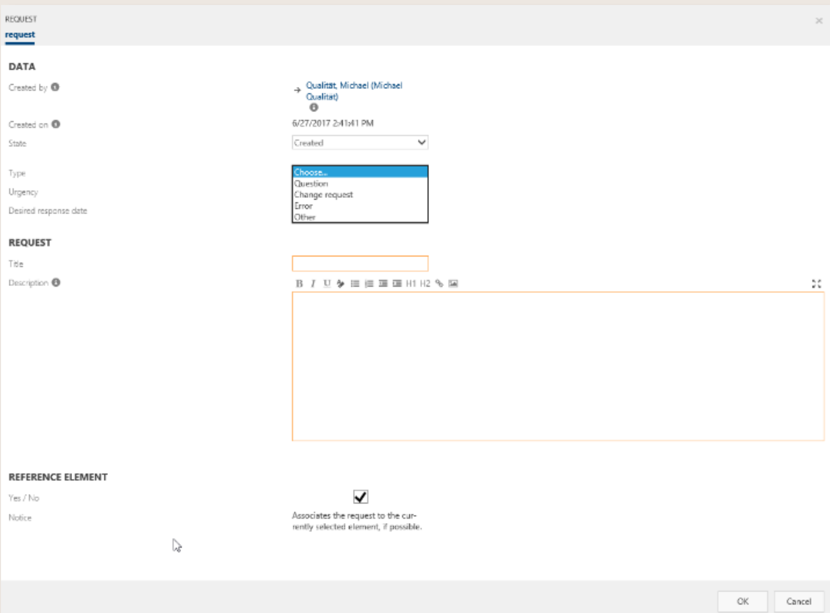


Figure 43 - Request dialog

By default, the request is automatically forwarded to the Responsible who defines the further processing of the request with the responsible Author. If a Quality Manager is set, he or she receives the request and controls the further procedure.

The details of the request are visible in the Detail Content. The responsible person can approve the request or complete it (reject). The sender of the request is informed about approval or rejection via the message Info (1) in the header.

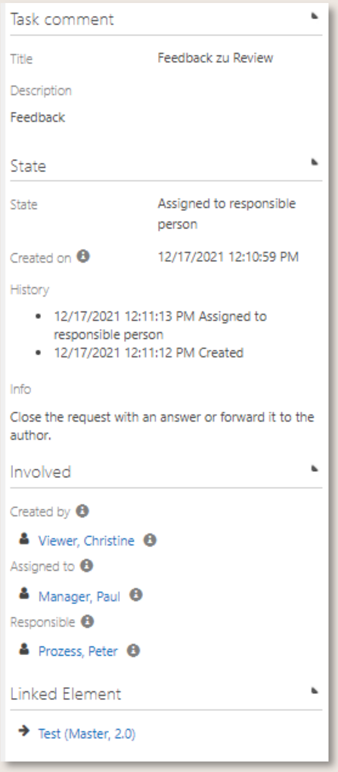


Figure 44 – Request details

In the navigation REQUESTS, all parties involved can find a list of existing requests as well as their status and contents at any time.

4.6 Sending Request (Using Action Center)

In Business Manager, the feedback workflow has been adapted. In the request dialog, you can now see the new "About" field, where you can enter additional relevant employees who will then be informed about the request (for more information, see e-mail notifications).

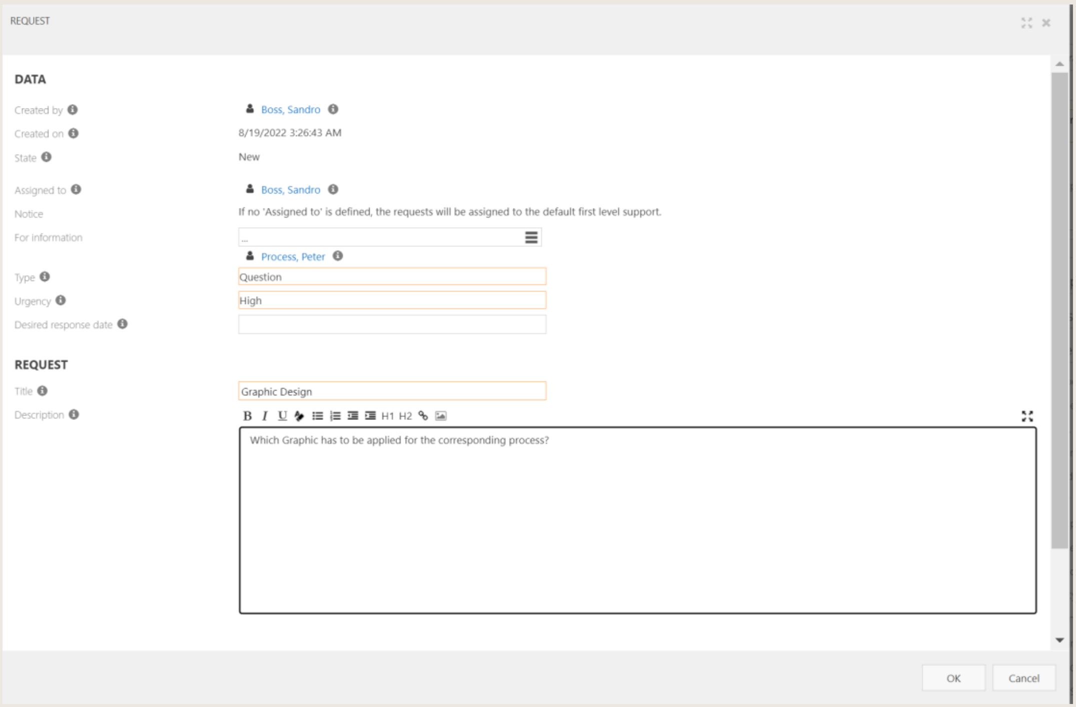


Figure 45 – Sending Request

4.7 Email notifications (Using Action Center)

Once you have sent your request, the person entered under "Assigned to" will receive an email. The "For info" users will be informed about every change in the collective mail. Thus, you will receive a mail every day informing you about all changes in all requests that concern you. As a requester, on the other hand, you will be informed directly of every change.

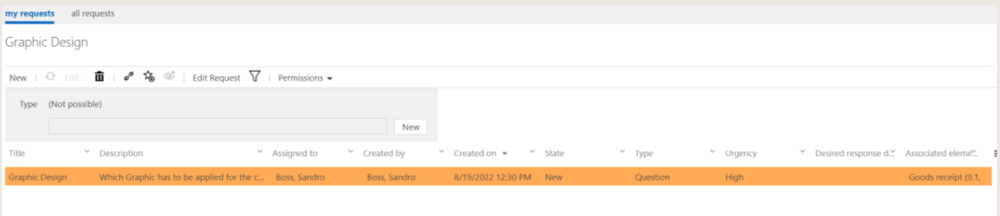


Figure 46 – Email Notifications

4.8 Compare process versions graphically

⋙ This feature is only available after activation by the Admin.

To compare different process versions, the viewer can select the current version and open the comparison directly in the toolbar. The editor has this function in the version toolbar. The new window shows the previous version on the left and the current version on the right.

OR (for Editors only):

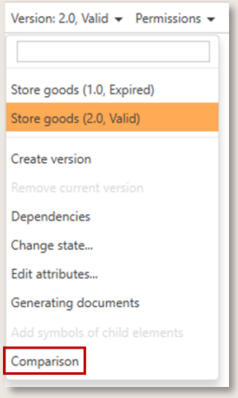


Figure 47 – Graphical version comparison

The colour coding indicates which changes have been made.

- Green: Additional process step in the new version
- Yellow: attribute (e.g. input/output) changed
- Red: Process step removed

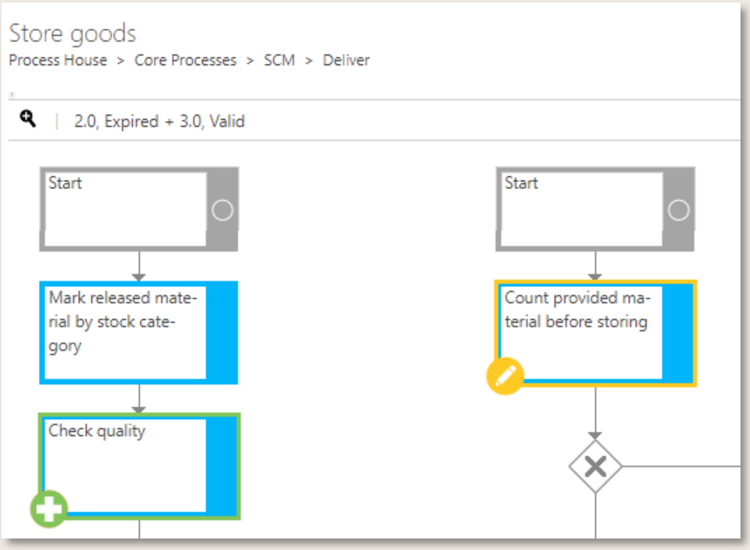


Figure 48 – Example version comparison with additional and changed content

Please note that the Comparison for Editors can be called up via the version dropdown (last menu item). If several process versions exist in parallel, some of which are subsequently deleted, there is no complete traceability of all parallel versions that ever existed.

4.9 Open a manual

Symbio offers the possibility to display pre-generated documents in PDF format.

In the navigation PROCESSES you can open process descriptions for individual sub-processes.

To open the manual, the desired process is selected and displayed in the manual.

By clicking on the manual in the toolbar and selecting the appropriate action in the dropdown menu, the manual is immediately opened as a PDF file.

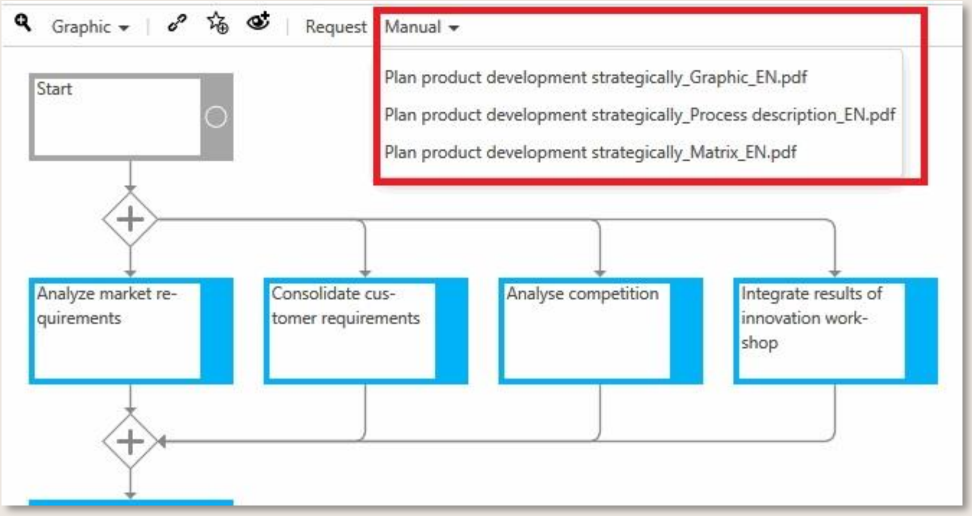


Figure 49 – Open pre-generated manuals

4.9.1 Release information in process manual

Additional to the release history, the Sub Process manual now also lists other information about the release process.

1.3 Change history information

Version	Released by	Released on	Reason for Revision
1.0	Prozess, Peter (Peter Prozess)	12/1/2015 6:39:48 PM	Initial erstellt.
2.0	Prozess, Peter (Peter Prozess)	10/11/2017 10:47:31 AM	Done

Table: Change history

1.4 State

Version	State	Start of Validity	End of Validity
2.0	Released	12/1/2015 6:39:48 PM	3/31/2016 12:00:00 AM

Table: Release state

1.5 Release information

There are no approvals (related to the current release process or the highest released version) maintained.

Figure 50 – Information about release

4.9.2 Template process handbook: content

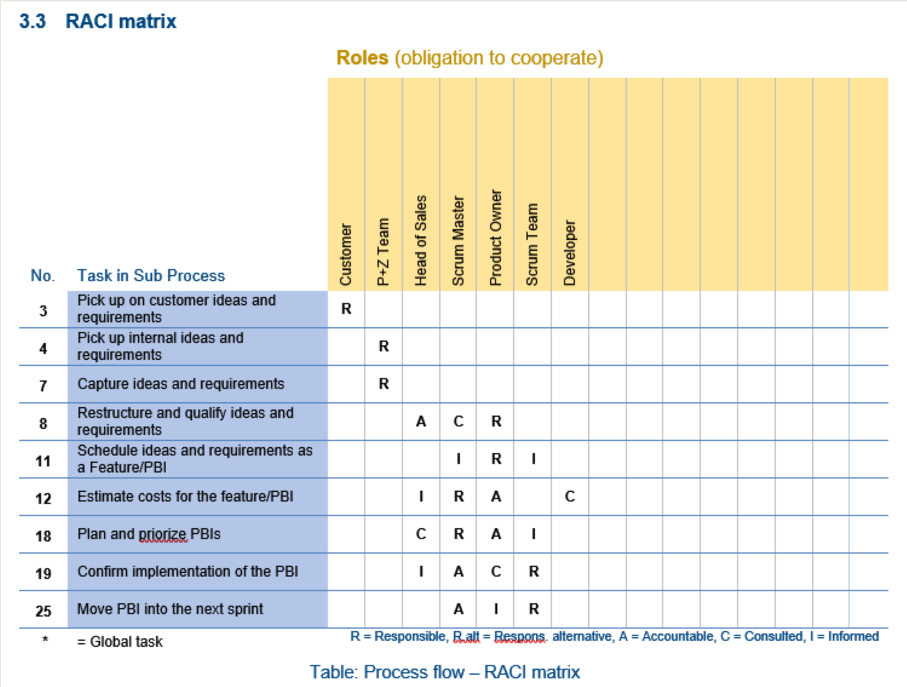
In the process manual, all the contents of a process are presented in a structured way.
The manual is structured according to general information, process flow and details, evaluation, appendix, information on Detail Sub Processes and interfaces to other Sub Processes.

2.2 Task details

No.	Name	Description	Roles	Inputs	Outputs	Guidelines
3	Pick up on customer ideas and requirements		▪ Customer (R)	▪ Customer ideas	▪ Customer ideas	N/A
4	Pick up internal ideas and requirements		▪ P+Z Team (R)	▪ Customer ideas	N/A	N/A
7	Capture ideas and requirements		▪ P+Z Team (R)	▪ Idea management ▪ Idea/requirement	▪ Idea management ▪ Idea/requirement	N/A
8	Restructure and qualify ideas and requirements		▪ Head of Sales (A) ▪ Product Owner (R) ▪ Scrum Master (C)	▪ Symbio Presentation product description	▪ Idea/requirement	N/A
11	Schedule ideas and requirements as a Feature/PBI		▪ Product Owner (R) ▪ Scrum Master (I) ▪ Scrum Team (I)	N/A	N/A	▪ Create PBI
12	Estimate costs for the feature/PBI		▪ Developer (C) ▪ Head of Sales (I) ▪ Product Owner (A) ▪ Scrum Master (R)	▪ Idea/requirement	▪ Idea/requirement	▪ Create PBI
18	Plan and priorize PBIs		▪ Head of Sales (C) ▪ Product Owner (A) ▪ Scrum Master (R) ▪ Scrum Team (I)	▪ Idea/requirement ▪ Project planning	▪ Idea/requirement ▪ Project planning	N/A
19	Confirm implementation of the PBI		▪ Head of Sales (I) ▪ Product Owner (C) ▪ Scrum Master (A) ▪ Scrum Team (R)	▪ Idea/requirement ▪ Product Backlog Item (PBI) ▪ Release planning	▪ Product Backlog Item (PBI)	▪ Create PBI
25	Move PBI into the next sprint		▪ Product Owner (I) ▪ Scrum Master (A) ▪ Scrum Team (R)	▪ Product Backlog Item (PBI)	▪ Product Backlog Item (PBI)	N/A

R = Responsible, R.alt = Responsible alternative, A = Accountable, C = Consulted, I = Informed

Figure 51 – Task Details



3.3 RACI matrix

Roles (obligation to cooperate)

No.	Task in Sub Process	Customer	P+Z Team	Head of Sales	Scrum Master	Product Owner	Scrum Team	Developer
3	Pick up on customer ideas and requirements	R						
4	Pick up internal ideas and requirements		R					
7	Capture ideas and requirements		R					
8	Restructure and qualify ideas and requirements			A	C	R		
11	Schedule ideas and requirements as a Feature/PBI				I	R	I	
12	Estimate costs for the feature/PBI			I	R	A		C
18	Plan and priorize PBIs			C	R	A	I	
19	Confirm implementation of the PBI			I	A	C	R	
25	Move PBI into the next sprint				A	I	R	

* = Global task

R = Responsible, R.alt = Respons. alternative, A = Accountable, C = Consulted, I = Informed

Table: Process flow – RACI matrix

Figure 52 – RACI Matrix

4.9.3 Role manual

All information about a role can be read out in the manual after it has been generated. To do this, you first have to select the corresponding role and the manual can be found in the toolbar. This is then generated and stored in the taskboard. The user can open, save and print it.

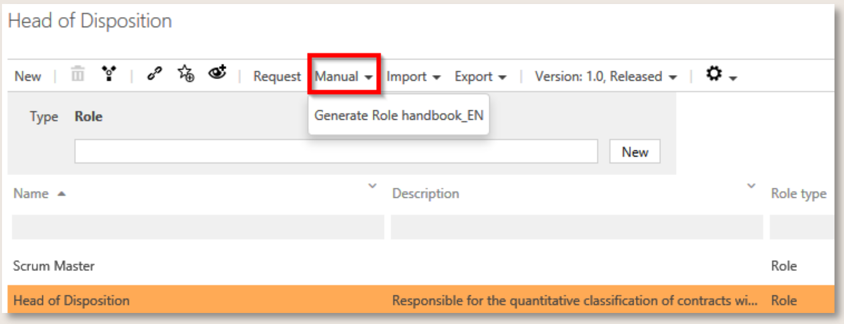


Figure 53 – Generate role manual

4.10 Copy a permanently valid link

The functionality Link Service enables Symbio users to communicate about processes or recent changes.

Via the Main Content toolbar users can generate links to processes.

Figure 54 – Creating permanently valid links

You can

- create links independent of versions
- create links dependent of versions
- create links to a selection in a version, e.g. task

By clicking the button Copy the link is generated and immediately displayed. The green checkmark indicates that the link has been successfully copied to the clipboard. Please close the window then. You can send the link to another User or open it in a separate browser window.

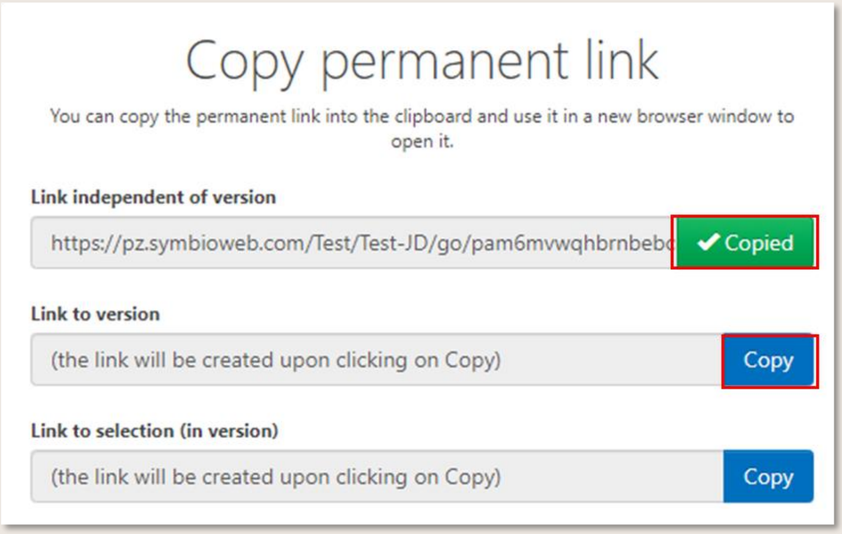


Figure 55 – Copy permanently valid link

4.11 Manage favorites

- The feature Favorite management: Grouping of favorites is now activated by default and no longer visible in the feature list of the admin area
- The feature Favorite management: Sharing favorites has no influence on the new favourites manager. Existing sharings with individual users will be taken over by the new favourites manager, sharings with user groups will be possible again at a later date (existing information remains stored in the system).

The favourites and subscription functions are combined in the Favorite Manager, which is available across all databases and apps. The subscription icon (eye) of previous Symbio versions will be removed and only the favourites icon (star) will remain. Existing subscriptions are converted into favourites.

The integrated Central Mail Service proactively informs the user when a new version is available for one of his favorite elements.

With the Central Mail Service, the user now manages when he wants to be informed about news in Symbio. He defines the time interval (daily or weekly) of the incoming mail, in which all pending tasks or changes are clearly listed.

››› This feature is only available after activation by the Admin.

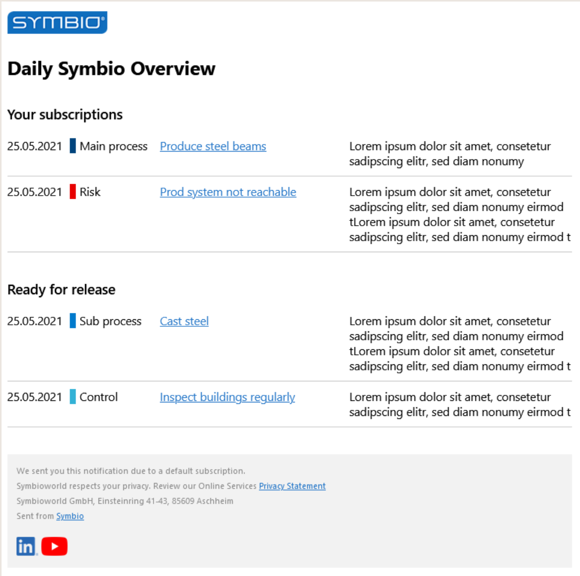


Figure 56 – Central mail service

NOTE: For favorites set on process or document categories, the peculiarity applies that the user is also informed if an element on the direct level below has a new version.

4.11.1 Define and open favorites

To define processes or objects as favorites, the user navigates to the corresponding item and clicks on the star icon in the toolbar.

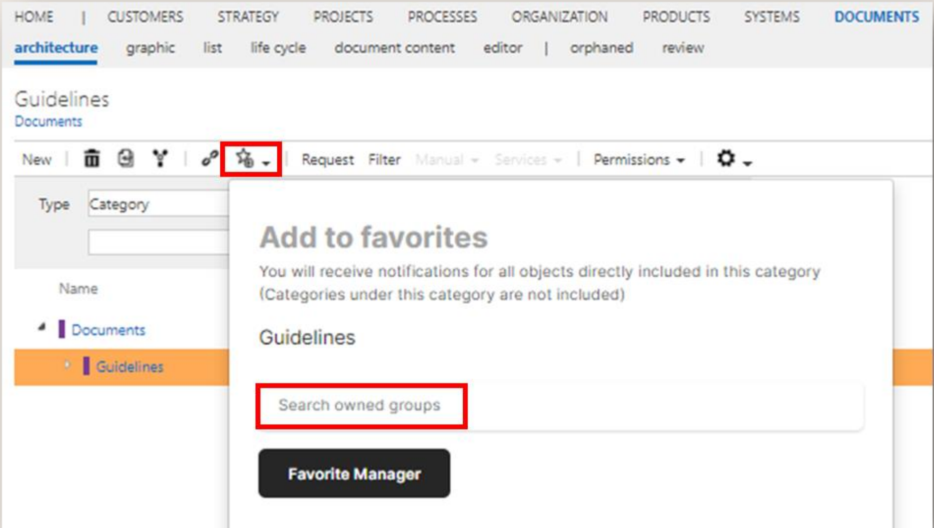


Figure 57 – Define favorites

In the dialog box that opens, enter or select the group to which the favorite is to be added in the Search own groups field. The favorite can also be assigned to several groups. If the feature Multiselect in lists is activated, it is possible to assign several favorites to a group at the same time (or to delete them).

If you want to make changes to the existing groups at this point, you can navigate directly to the Favorite Manager by clicking on it.

The previously defined favorites can be opened by clicking on the star symbol in the header.

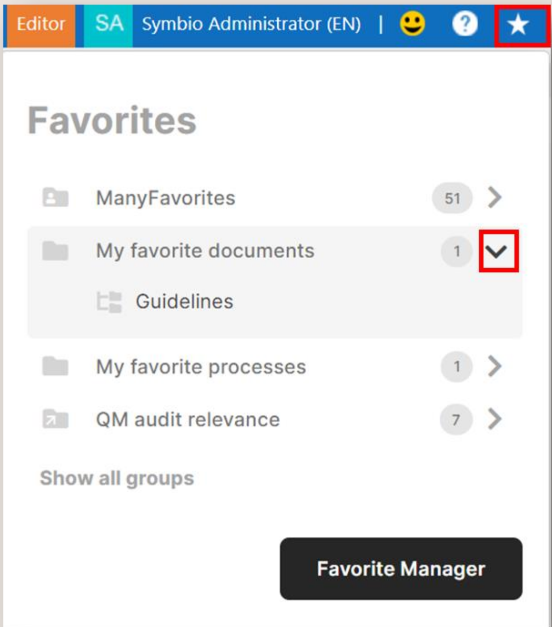


Figure 58 – Open favorites

The group structure created in the Favorite Manager opens, including the links assigned to each, which can be used to navigate to the favorites that have been set.

Here, it is also possible to jump directly to the Favorites Manager if changes are to be made immediately.

NOTE: It is possible to switch between the languages German and English, the favorites themselves are also stored in multiple languages. New favorite groups can only be created in one language, existing groups are transferred in multiple languages.

4.11.2 Administrate and share favorites

The basic settings (language, client, etc.) can be made by clicking on the user name in the header on the right.

In order to use the Favorite Manager efficiently, the Groups to which the respective favorites will later be assigned must first be created.

Clicking on the "+" symbol opens a dialog in which the name of the new group is entered. If several clients are used, the corresponding one must be selected from the drop-down list. Then confirm with Save.

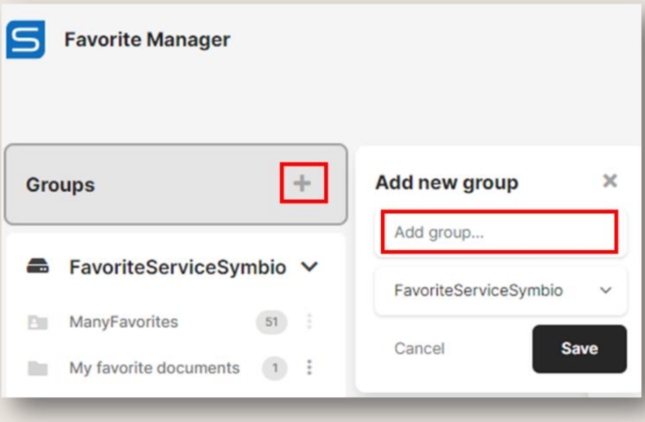


Figure 59 – Create favorite groups

As soon as favorites are assigned to this group, their number can be read in the gray circle behind the respective group.

NOTE: The order of the groups cannot be changed. We recommend a prefix (abbreviation) in front of the name, e.g. a consecutive numbering or letters in alphabetical order.

By clicking on the group, the current contents are displayed in the Main Content. The corresponding object type, e.g. Main Process or Category, is displayed in the form of a preceding gray symbol. The corresponding object type is also displayed when hovering over it.

Using the filter function, specific search terms or subwords can be found quickly in the list.

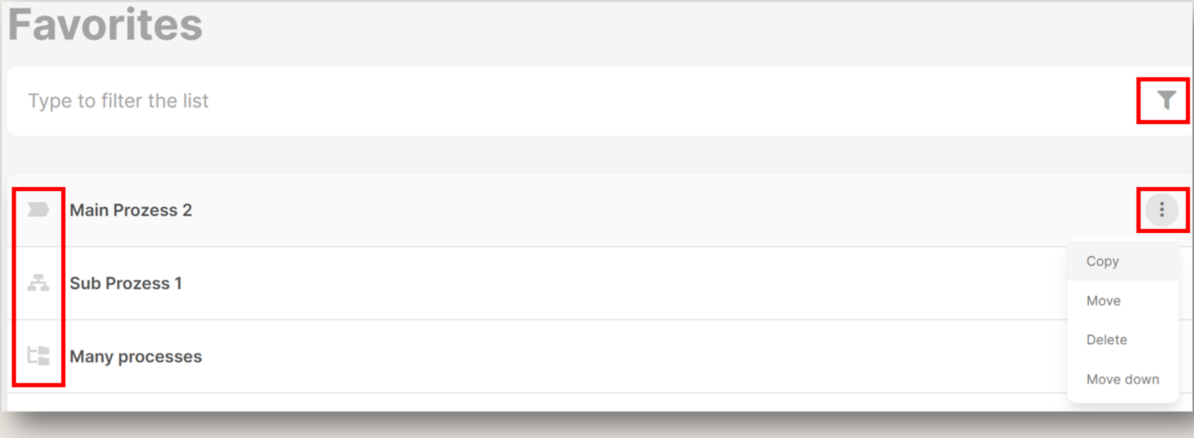


Figure 60 – Administrate favorites

By clicking on the 3-dot symbol, the selected favorite can be edited, i.e. it is possible to

- Copy to another favorites group
- Move to another favorites group
- To delete
- Move up or down in the list

The groups themselves can also be edited by clicking on the 3-dot icon. There are the following options to edit the groups

- To edit (rename)
- Remove (including the contained favorites)
- Share (with other users)

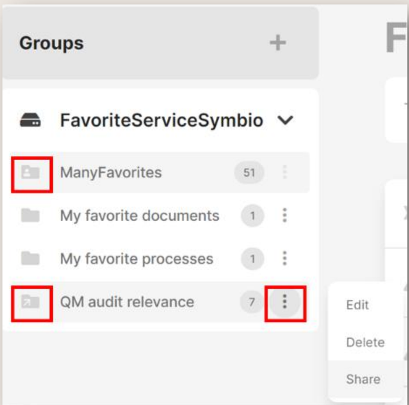


Figure 61 – Manage favorite groups

Sharing groups allows regulatory requirements and policies to be communicated easily and quickly to affected employees. Relevant processes or documents are defined as favorites and shared.

After clicking on Share, the first letters of the user with whom the favorite group is to be shared must be entered and the corresponding user selected from the dropdown.

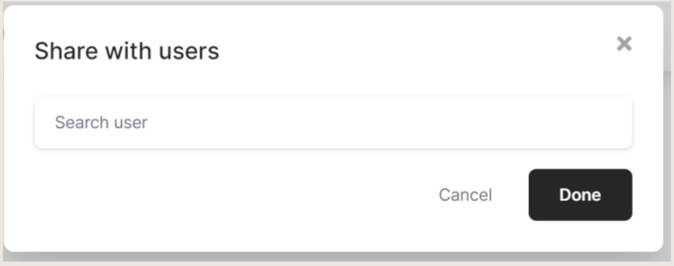


Figure 62 – Share favorite groups

The gray folder icon of the group now gets a small arrow or if favorite groups are received, a small person icon is displayed. There is also a hover function that shows the users in the form of tags with whom the group is shared.

4.12 Old Symbio versions: Create favorites and subscriptions

4.12.1 Define favorites

The user sets the favorites for content (processes and objects) and can view these in the personal favorites and subscriptions. The user does not receive any notification of favorites.

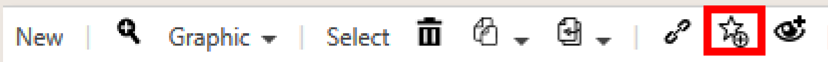


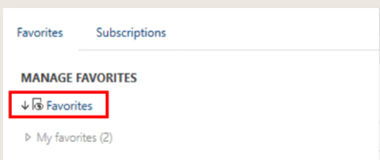
Figure 63 – Set favorites (old version)

NOTE: Please be aware that favorites are added in their respective language!

4.12.2 Group favorites

››› This feature is only available after activation by the Admin.

With this feature Favorite management: Grouping favorites, defined favorites can be organized by groups. In Navigation Content, create a new group and confirm. Move or copy favorites by help of common symbols in the Toolbar. Thus, a favorite can be assigned to several groups. Sorting of group structure or within the groups is also possible.



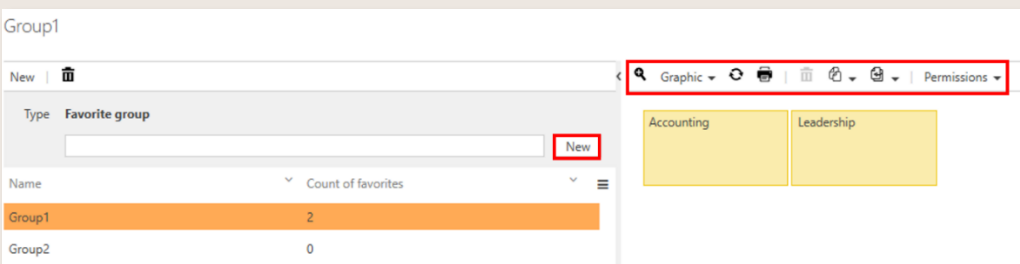


Figure 64 – Favorite management: Grouping favorites (old version)

4.12.3 Share favorites

This Preview feature is only available after activation by the Admin.

The feature Favorite management: Sharing favorites allows to share your favorite groups with other Users or User groups.

We recommend creating your own favorite group first before any group is being shared (to ensure smooth functionality).

Just click on the 'star' symbol in the Header to NAVIGATE TO FAVORITE MANAGEMENT and select your favorite group that you want to share. By click on the 'share' symbol, a window opens to define Users or User groups via hamburger dialog.

Changes to the favorite groups are automatically applied to the Users or User groups with whom you shared your favorites. Shared favorite groups cannot be modified by the recipient.

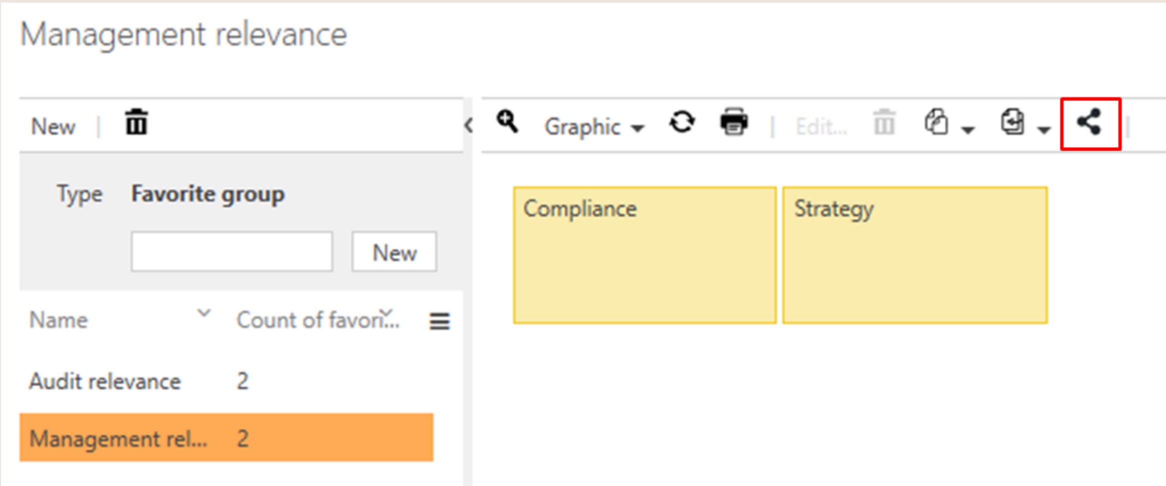


Figure 65 – Favorite management: Sharing favorites (old version)

4.12.4 Make subscriptions

The subscription feature allows you to follow processes and objects. As soon as you have subscribed to an element you will be notified when the element is released again.

Figure 66 – Subscribe (old version)

Open your favorites and subscriptions made by click on star symbol in the Header on top right. Select corresponding tab to see links of favorites and subscriptions listed.

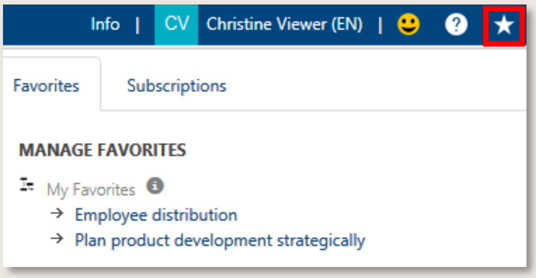


Figure 67 – Open favorites and subscriptions (old version)

4.12.5 Subscriptions on categories

This feature is only available after activation by the Admin.

This feature allows to subscribe to a 'Category' of the DOCUMENTS facet. In case of any new release of a document in this category, the user will be automatically notified by eMail - which corresponds to the usual behavior of the favorites function. However, if documents are only moved within the hierarchical structure, no notification is triggered. This feature is currently only applicable for document categories.

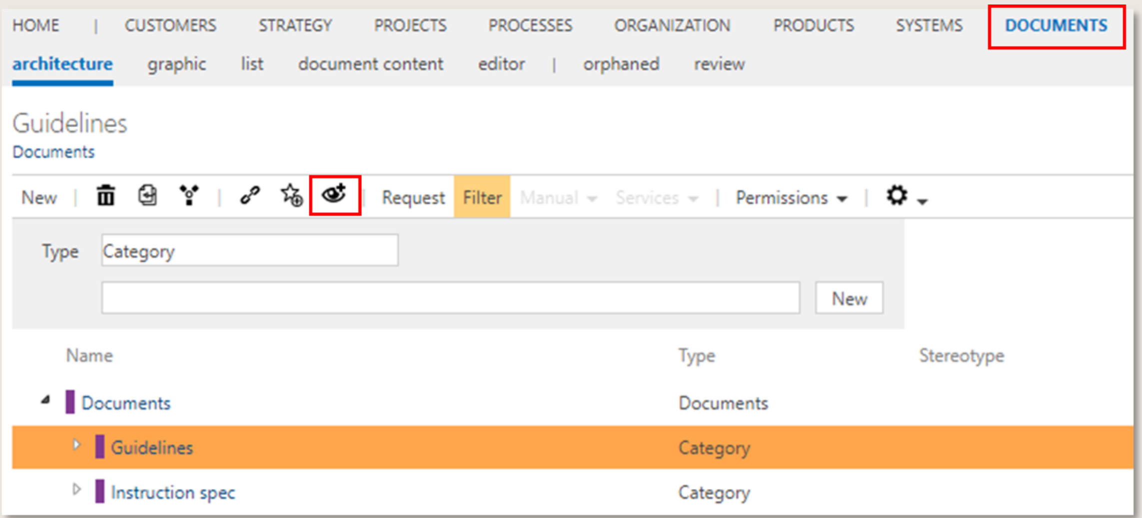


Figure 68 – Subscriptions on categories (old version)

4.13 Review process

Viewer can receive Tasks from Authors which ask them to review processes before they are sent into release.

In the header the incoming request for review is displayed as Info (1). In addition, the administrator can configure that the Reviewer is informed by eMail.

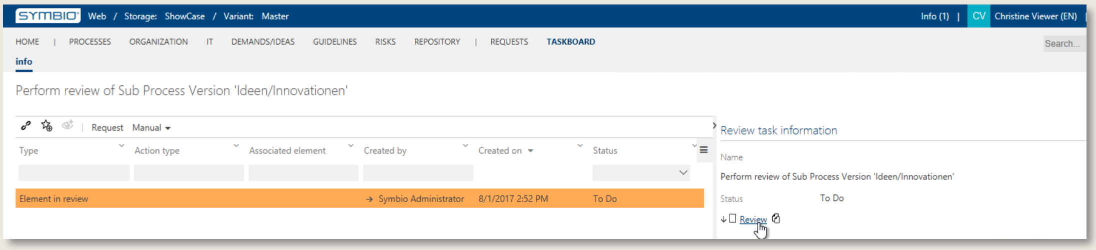


Figure 69 – Access process in info board

Clicking on the Review link in the Detail Content will get the Viewer to the process to be reviewed.

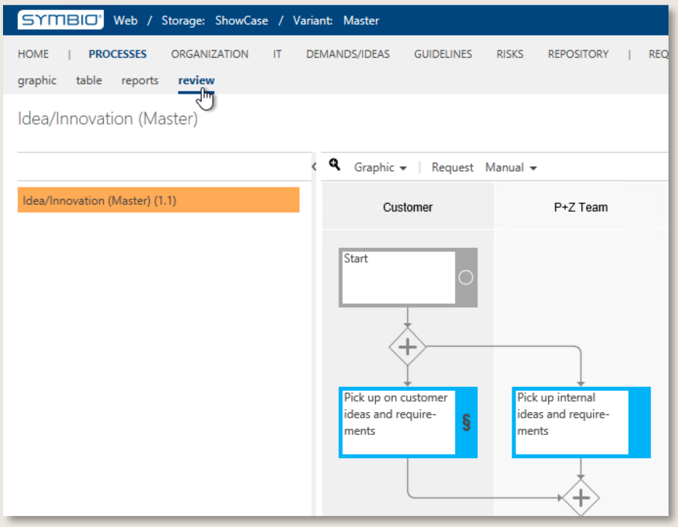


Figure 70 - Access review process

After a technical check, the Reviewer can report his comments and suggested changes back to the author or responsible person via the Submit request (feedback) function - or alternatively use conventional communication channels.

4.14 Use Training Assistant (as an employee)

The Training Assistant app informs employees about upcoming training sessions. Information on specific technical knowledge or regulations/legislation to be fulfilled is thus forwarded by the manager to his/her affected employees. Once the training has been completed, the employee confirms it actively in order to comply with the legal obligation to provide proof.

After login, which usually works via SSO, the Training Assistant (TA) shows an overview of all open trainings on the start page. If no items are listed, all currently available courses have already been completed and confirmed.

For optimal clear display, the individual tasks of a process are listed in an overview. Linked roles are displayed according to the RACIS method used. Clicking on the blue info symbol of the process opens a window in which the reason for the revision is displayed. This allows the user to see at a glance why which changes were made.

To see the complete process in the database, click on the button Full element.

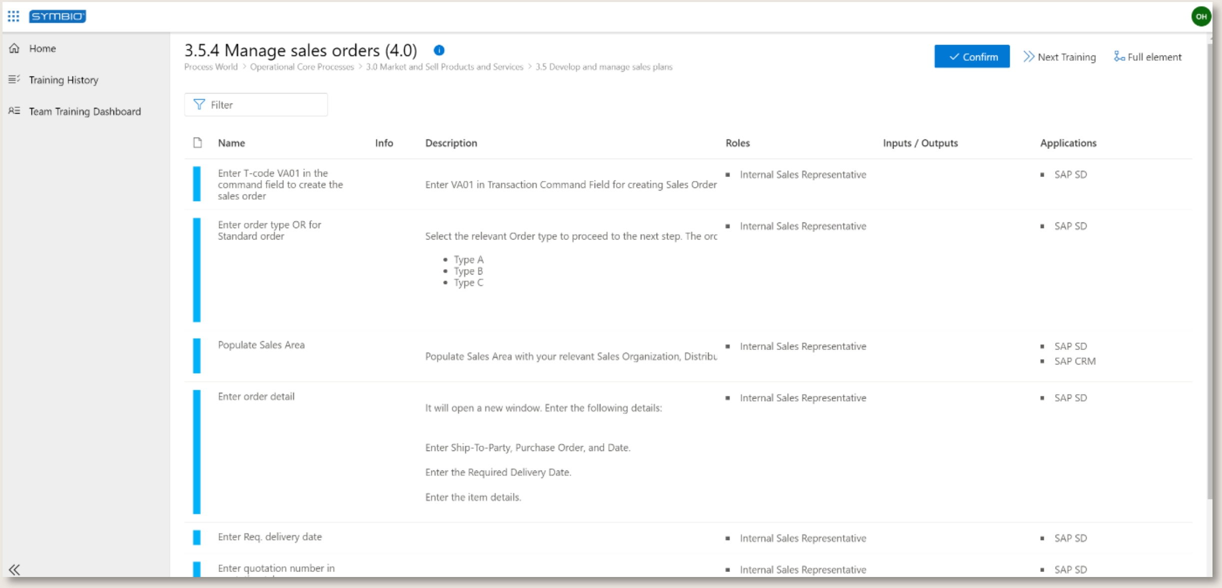


Figure 71 – TA List of Tasks

If the user has access to several Symbio databases, the required database (tenant) as well as the language can be selected accordingly by clicking on the user icon.

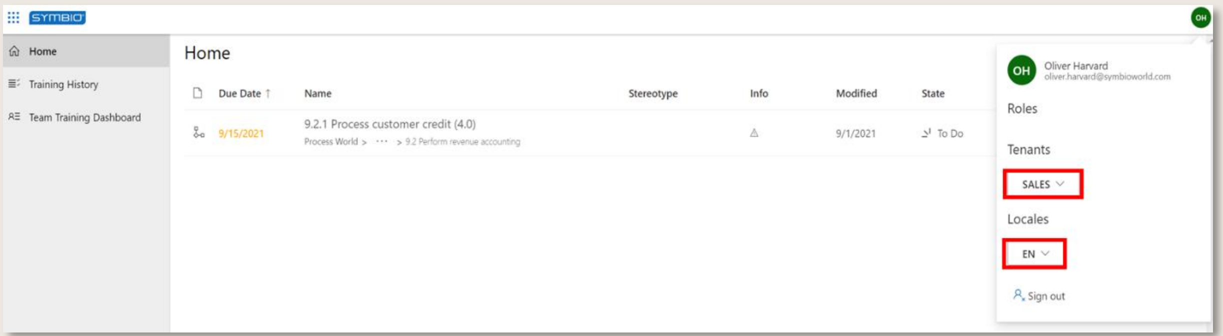


Figure 72 – TA Start page and settings

To perform the training, the user selects the corresponding training process (or object). Further details are shown after activating this button .

Once the training has been completed the employee confirms his/her participation by click on the blue “Confirm” button and entering his/her e-mail address in the dialogue window.

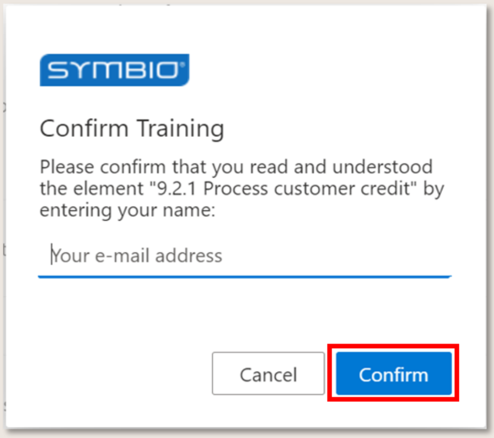


Figure 73 – TA Training confirmation

After click on the training history on the left handside, an overview of all the completed trainings is displayed.

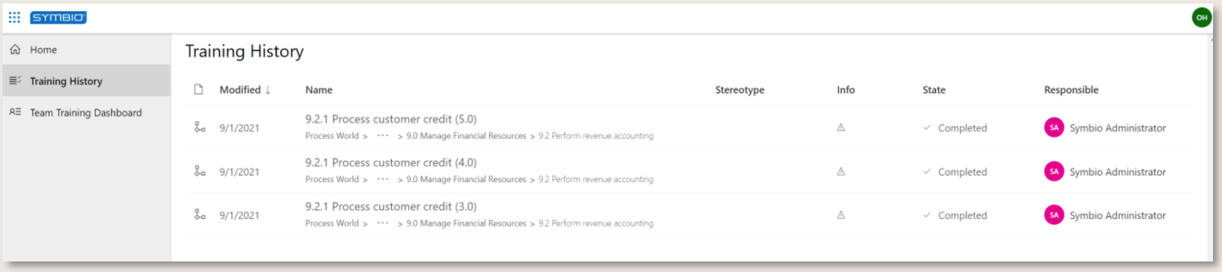


Figure 74 – TA Training History

5 Author

The user role Author includes the following tasks:

- Model sub processes
- Make sub processes and objects available for release
- Incorporate feedback into a new version

To perform any of these tasks, an architect must have created the process with Categories and Main Processes. Sub Processes can also be set under Sub Processes.

The first step is to change the view from Viewer to Author by clicking that option in the header.

5.1 Define a Sub Process

5.1.1 Model a Sub Process

By default, Symbio offers modeling according to the BMPN 2.0 methodology.

Symbio provides automated, efficient process sequences. The program offers the selection of only those process flow objects that allow process modelling using the correct methodological approach.

NOTE: Please make sure before modelling that no Scope filters are set – just to avoid discrepancies or redundancies!

1. Modelling processes in the graphical view

To access process modelling, click the Process House tile in Graphical Views on Symbio HOME or select the graphic sub navigation in PROCESSES.

The author is authorized to create a new subprocess on the left side of the Navigation Content. To do this, the author selects a process in the navigation tree under which the new Sub Process is to be created. He or she enters the name and clicks New.
Now a process can be modelled.
Click New on the Main Content toolbar to create the first process flow object Start . 

p is mandatory for each sub-process, and you can use multiple Start objects.

Proceed to create additional process flow objects. Click Start to display a process toolbar for selecting available subsequent process flow objects: task, sub process, interface shape, gateways and events. Use the mouse-over function to view details about each item.

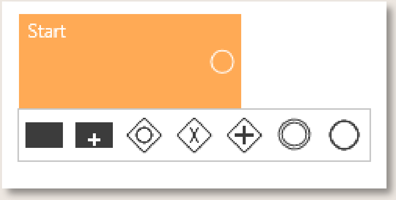


Figure 75 - Process Toolbar after clicking Start

Task - Process step/individual activity within a chronologically logical process sequence
Sub Process - serves to embed a further, self-contained sub-process, which is automatically placed one level below in the navigation tree
Interface Shape - refers to another existing Sub Process of the Process house and also serves as a placeholder if the reference does not already exist. To learn how to create a process reference, please refer to Edit a Sub Process
Or gateway - Allows one or more paths (for each condition)
Either-or gateway - Splits the process into two or more mutually exclusive alternatives
And Gateway - All subsequent paths are executed in parallel
Event - Marks the achievement of a defined condition within the process, such as a milestone
End - Ends the process sequence and is mandatory; can be used multiple times

If multiple process flow objects have been created and you click an object, the Process toolbar is displayed at the top and the bottom to offer various modelling options for predecessors and successors.

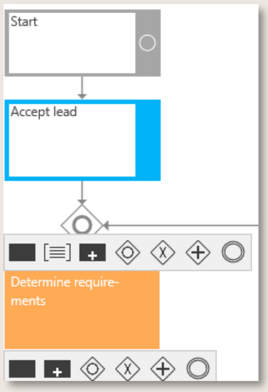


Figure 76 - Process Toolbar within a Sub Processes

Symbio automatically arranges the process flow objects and their connection objects.

The process flow object End equired at the end of a sub-process. It is also possible to use multiple End objects.

2. Modelling in the table view

Process flows can also be modelled quickly and efficiently in Sub Navigation table. This is particularly recommended for structurally simple process flows that have few branches.

For modeling, tasks, events or gateways are also created in the toolbar via New. Objects to be linked, such as roles, can be selected in the same line.

If process flow objects are to be added within an existing process, the line under which the new object is to be created must first be selected.

The graphical implementation of the process flow is displayed in the window to the right.

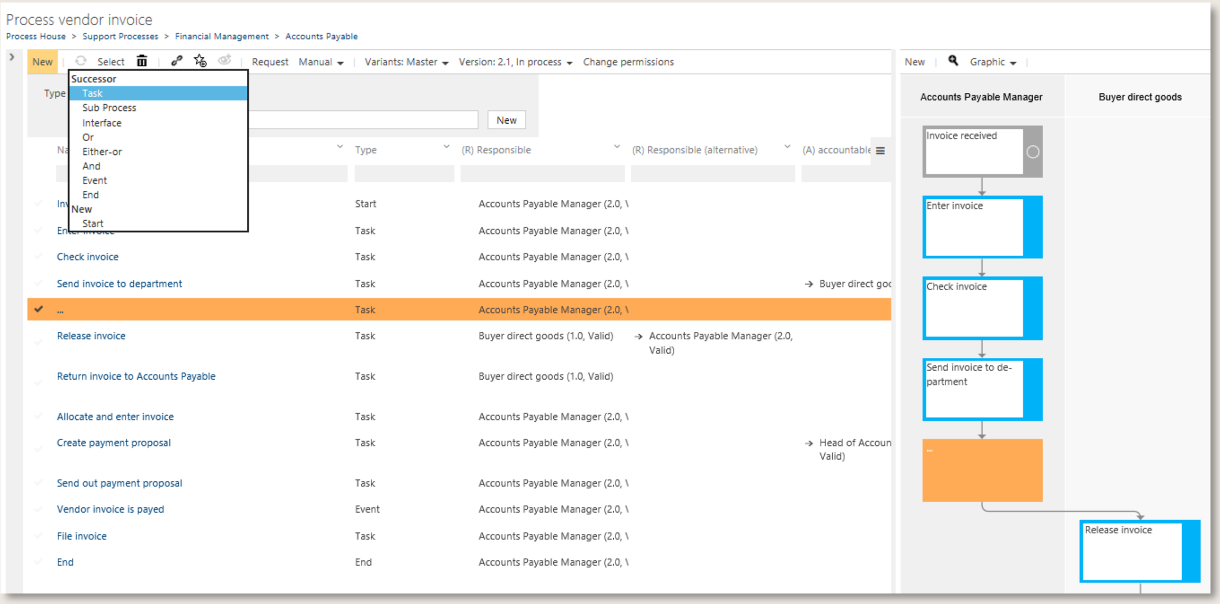


Figure 77 – Table view of process modelling

5.1.2 Edit a Sub Process

The icons of the Toolbar in Main Content are available for editing process flow objects. Use the mouse-over function to view details about each item.

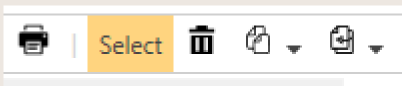


Figure 78 – Toolbar of Main Content

If you want to edit multiple process flow objects simultaneously, click Select and click each required process flow object.

To delete process flow objects, click the required object and then click the Delete icon in the Toolbar.

You can swap paths to achieve more clarity of the process flow or of the graphical display to prevent lines from overlapping. Click a Condition and then click the arrow icon . The selected path is moved to the left (vertical) or up (horizontal).

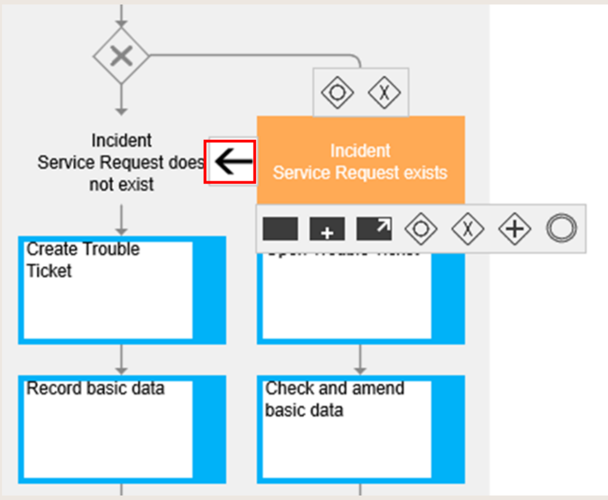


Figure 79 – Swap paths

An interface shape references to another existing Sub Process. Go to Detail Content > Name > Process reference and click Create. Select the required process in the window that appears (Process House).

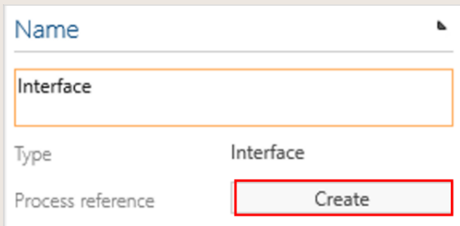


Figure 80 – Create process reference

NOTE: Please note that process references are only possible to processes on the same level, e.g. from a Sub Process to another Sub Process.

If there is not yet a process that can be referenced to, an interface placeholder is used. If this placeholder can already be specified in more detail using inputs / outputs and KPIs, the method feature: KPIs and inputs / outputs at interfaces placeholder must be activated.
By activating this feature, KPIs and Inputs/Outputs can be added to the Detail Content of interfaces.
››› This feature is only available after activation by the Admin.

The possibility for Modeling: copy and move shapes may also be provided. Please note:
››› This Released feature is only available after activation by the Admin.

To copy process flow objects: Select the required objects. Then select the Copy icon in the Toolbar and click the predecessor object behind which you want to insert the copied objects.

To move process flow objects: Select the required objects and then select the corresponding icon in the Toolbar. Again, click the predecessor object. The selected objects are moved to the specified place.

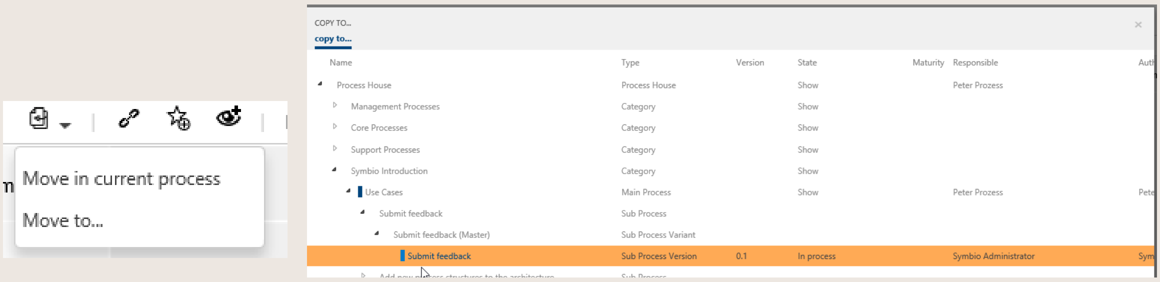


Figure 81 – Modeling: copy and move shapes

For reasons of clarity and to facilitate communication between the process experts, the individual shapes can be given consecutive numbers (can be selected for all graphic views). For this, the feature Method: Numeration of process flow objects is to be activated as well as settings in the extended configuration to be made.
»» This feature is only available after activation by the Admin.

5.1.3 Use Gateways

Please note the following when using gateways:

- Condition: You must specify a condition after using an Or or Either-or Gateway to be able to clearly distinguish between potential paths. No condition is used after an And gateway.

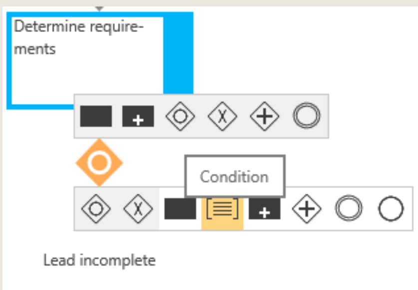


Figure 82 - Using conditions

- Converging gateway: The previously used gateway is inserted to merge split paths and continue the process sequence. This applies to all gateways.

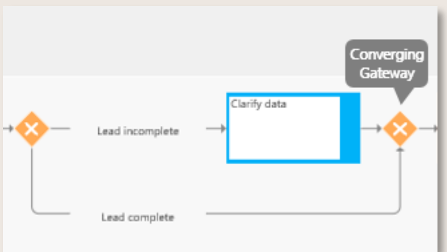


Figure 83 - Using converging gateways

- Back Loop gateway: An additional gateway is inserted and connected to the last task for the path in order to include a loopback. This applies to all gateways. To create the connection object, first click the Back Loop gateway, then select the arrow icon in the process toolbar and finally select the object that is the desired starting point.

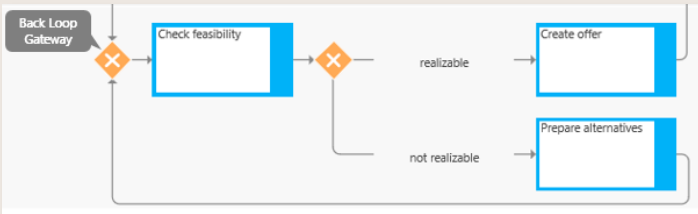


Figure 84 - Using Back Loop Gateways

If a placeholder shape has been linked to an unreleased process or if the placeholder is empty, the process can still be released!

5.1.4 Add global tasks

Global Tasks are tasks that occur more than once in the same form in different processes
There are two ways to create global tasks:

- as an object directly in the sub navigation task repository
- Select a task during the definition of a sub-process and click the Transfer to Repository button under Task Repository in the Detail Content (the transfer takes place automatically).

A global task is inserted into a Sub-Process as follows:

- create a normal task in Sub Process
- In the Detail Content of this task, click Reference - Create and select the required task from the dialog that opens.

5.1.5 Provide details and roles

You need to enter information in the Detail Content area for each Sub Process or Process flow object.

Highlighted fields are mandatory! You can only change the status once the mandatory fields have been completed!

Modify the process name or a detailed description or enter as free form text. Symbio automatically stores your entry when you exit the text field.

The Sub Process can only be made available for release when the fields Responsible and Author in the Responsibilities section have been completed. Click the hamburger button and select the required person from the list.

In order to submit Sub Processes to the release workflow, the mandatory fields Responsible and Author in the Detail Content must be completed.

As long as no author has been defined, all editors can edit this process. To edit a process with an author, it is necessary that the other authors are entered. The additional authors for the process can be maintained in the Additional authors field. In order to avoid discrepancies with the actual author, the other authors have only limited options for action; e.g. they cannot start the release workflow nor create a new version.

If one of the other authors wants to take over the author's activity, he/she should be set as author and deleted as additional author. Now all author rights are available as usual. If required, the initial author may be set as additional author.

Please note: as soon as the Author(s) of the process are maintained, only they can edit the process.

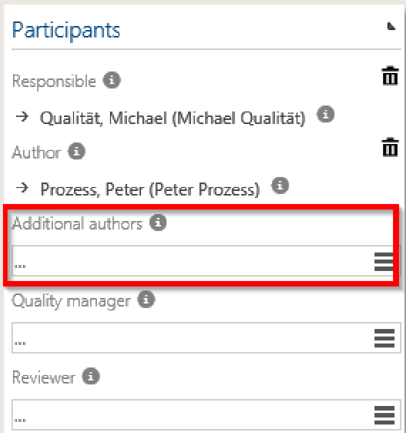


Figure 85 – Define additional authors

You can also use this section to connect previously created and released objects.

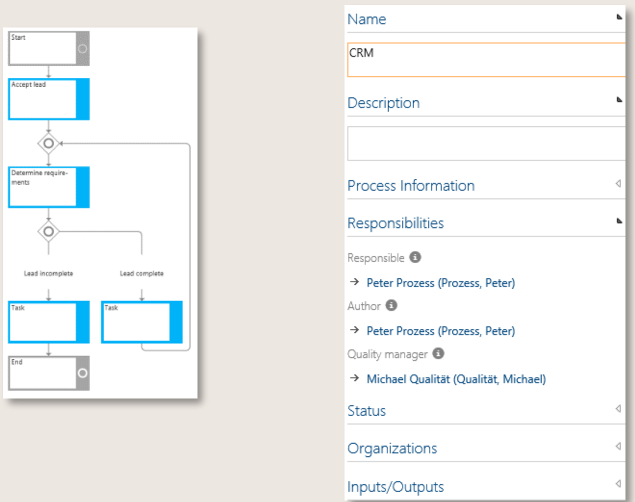


Figure 86 - Detail Content Sub Process (except)

Normally, objects are created by the Architect and connected to each process by the Author. Symbio also gives the Author permissions to create his/her own objects and make them available for release.

To do this, simply enter the name of the new object into the relevant text box (for example, enter "Project Leader" as the role). The new object is automatically saved when you exit the text box. In the Sub Navigation of ORGANIZATION the new object is displayed below roles where it can be made available for release.

To delete a selected repository, move the cursor onto the required element until the Delete icon appe Click the Delete icon and confirm with OK.

It is recommended to specify the responsible (R) person in the Roles section. You can add more roles in line with the RACI method. If a shortening to the RACI method (without S = “supported”) is required, please contact your Admin.
››› This feature is only available after activation by the Admin.
Symbio automatically generates a swimlane for each responsible (R) person.

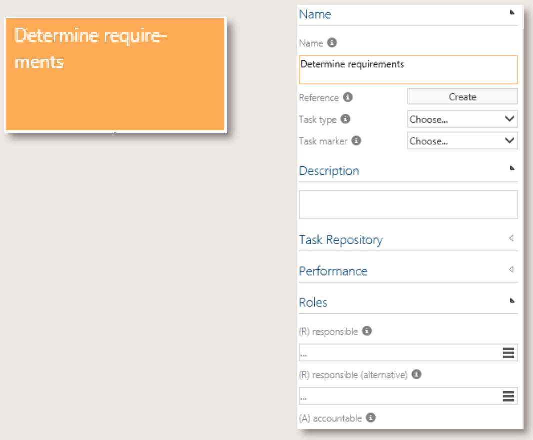


Figure 87 - Detail Content Task (excerpt)

For optimization reasons oft he swimlane nominations, it is possible to define global responsible roles. Thus, for Sub Processes which are referenced within another Sub Process (in the form of an interface), another global responsible role can be linked in the Detail Content. This is then used to generate the Swimlane view - instead of the responsible role (global) originally assigned to the process.
››› This feature is only available after activation by the Admin.

Roles, groups and positions can be further detailed by required Method: skills. With this additional Sub Navigation of ORGANIZATION different stereotypes (education, languages etc.) can be created and then linked to the corresponding object.
››› This feature is only available after activation by the Admin.

Optionally, the Method: classification of information for documents can be applied, i.e. documents may by further classified by selectable values (internal, confidential, strictly confidential) from dropdown. If no value is selected, the document is considered public.

- This feature is only available after activation by the Admin.

In order to define a detailed description for inputs/outputs and roles, modeling in Symbio supports the maintenance of edge attributes in the detailed view. It is important to limit the name of the edge attributes and to use keywords. By clicking on the edge, the Detail Content allows to add a name for the edge.

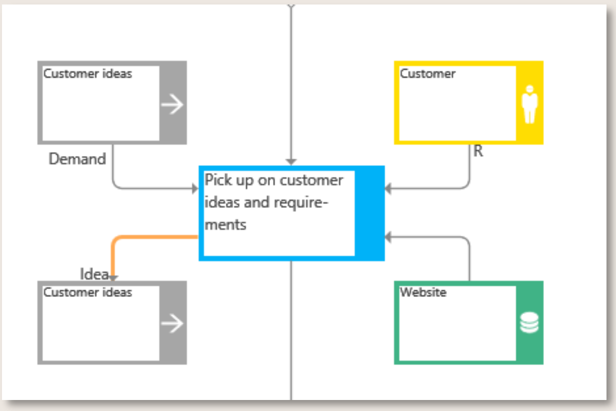


Figure 88 – Example of edge attributes

There are multiple options available for Status:

- In process indicates a process that is being worked on (default setting).
- Select Ready for release to make the process available for release.
- Expired indicates a process that is no longer valid and whose version number has expired.

As with the other objects, global tasks should have been created and approved before modeling a Sub-Process.

After detailing a Sub Process, click on the refresh button to have the process graphic updated. This manual update trigger allows to accelerate process modelling as well as object creation/maintenance, as the detailed process modeling is no longer interrupted by automated graphical updates. Modelling or deleting processes or objects, however, are still updated automatically, since these changes have consequences for the structure of the process.
››› This feature will be automatically enabled in all future versions and cannot be disabled.

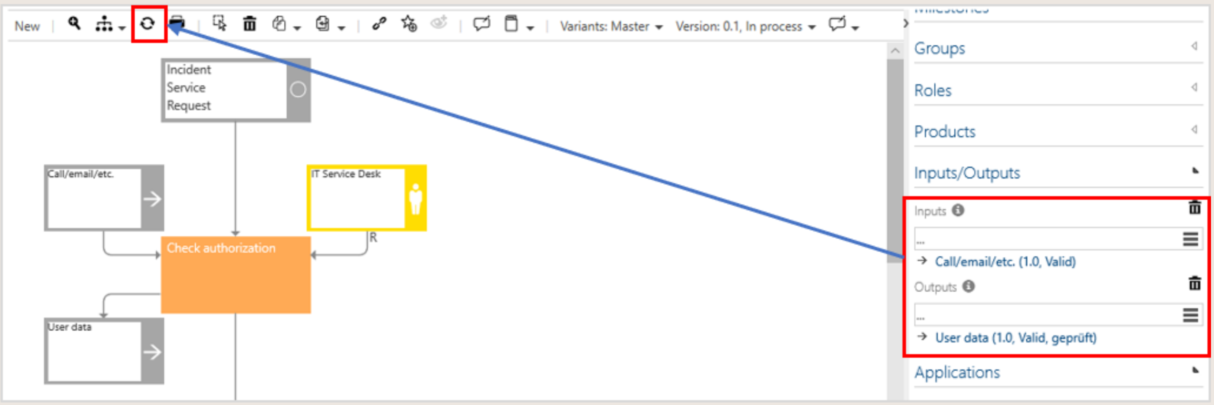


Figure 89 – Performance: Accelerate loading time of process graphics

By activating the feature: Show “contained elements” in processes, the section ‘Occurs in’ appears in the Detail Content of the PROCESSES facet. Here, processes or scenarios are listed in which the currently selected process occurs, thus usually as a process reference or an interface. The listed items are clustered by type, i.e. Main processes, Sub processes or Scenarios.

››› This feature is only available after activation by the Admin.

Figure 90 – Changed evaluation groups for processes

5.1.6 Use BPMN2.0 and ArchiMate 3.0 nomenclature

››› This feature is only available after activation by the Admin.

According to the BPMN2.0 methodology, tasks end events can be further specified in the Detail Content by defining triggers, markers and types. In case if types are set, the corresponding BPMN2.0 icon is now depicted graphically on the process flow object.

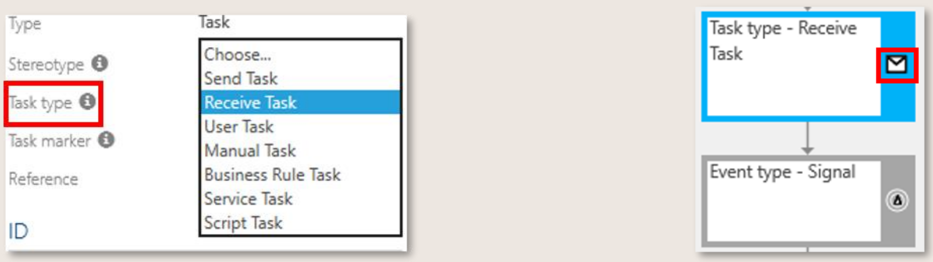


Figure 91 – BPMN Icons shown on Process flow objects

The ArchiMate 3.0 methodology offers a standard modeling language to design the construction and operation of business processes, organizational structures, information flows, IT systems and technical infrastructure.

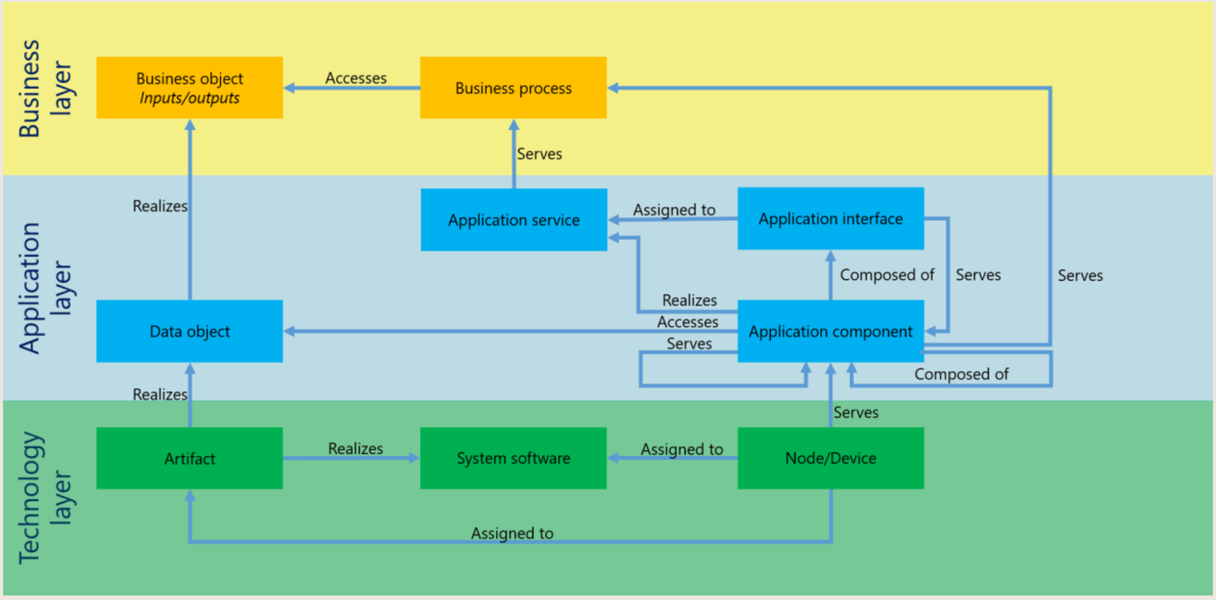


Figure 92 – Enterprise Architecture (example)

This feature allows to depict the IT landscape by the ArchiMate 3.0 nomenclature and thus takes an important step towards the design and control of a comprehensive Enterprise Architecture (EAM).

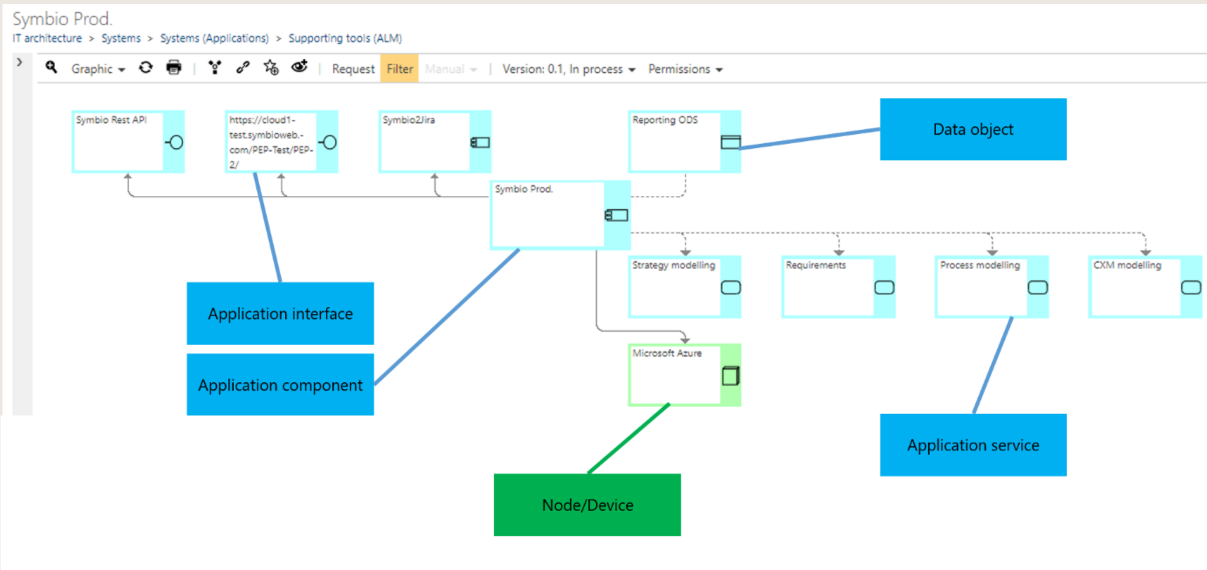


Figure 93 – Method: System ArchiMate Converting

→ This feature is only available after activation by the Admin.

The conventional Symbio system/system component objects and stereotypes can be converted to ArchiMate3.0 types. Objects assigned to processes remain unchanged. Please contact your Administrator if you plan to perform this conversion.

5.1.7 Activate exclusive process editing

»» This feature is only available after activation by the Admin.
NOTE: this is a fundamental change of the process modelling procedure!

This feature intends to prevent multiple Authors from editing a Main or Sub Process at the same time.

In order to work on a process, the Author first clicks the blue button Enable editing in the Toolbar of the Main Content. If another Author is currently editing the process, a warning message occurs, however, he can still take over – whereas a prior consultation with the colleague who is modelling the process is of course recommended.

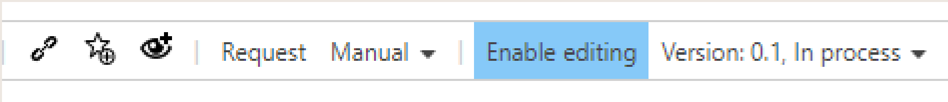


Figure 94 – Modelling: Exclusive process editing

As soon as the processing is completed, please click the blue button again which has now changed into Disable editing, otherwise the process remains locked.

For the other authorized Users the process is then read-only during this time. Assigned permissions for process modelling remain unaffected.

5.1.8 View dependencies and life cycle

In the navigation PROCESS you will find a list of all objects linked to a process under dependencies. The functionalities of the toolbar are also available in this view, so the author can, for example, also create new versions here or trigger release.

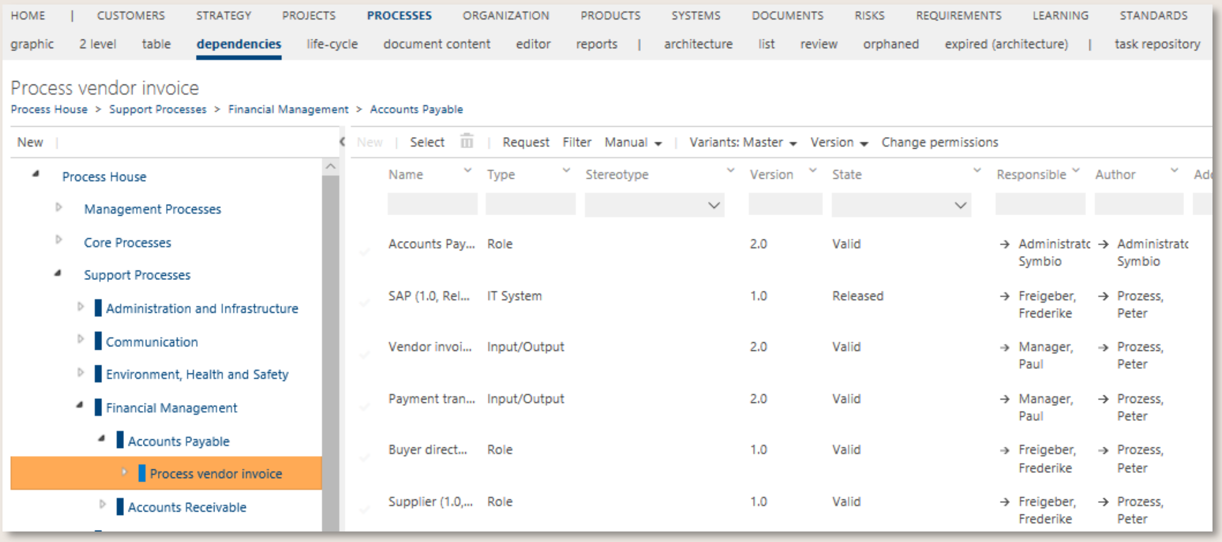


Figure 95 – Sub process dependencies

The "lifecycle" of a process is clearly displayed under the navigation life-cycle. For this purpose, a second window opens to the right of the process in which all status changes can be tracked.

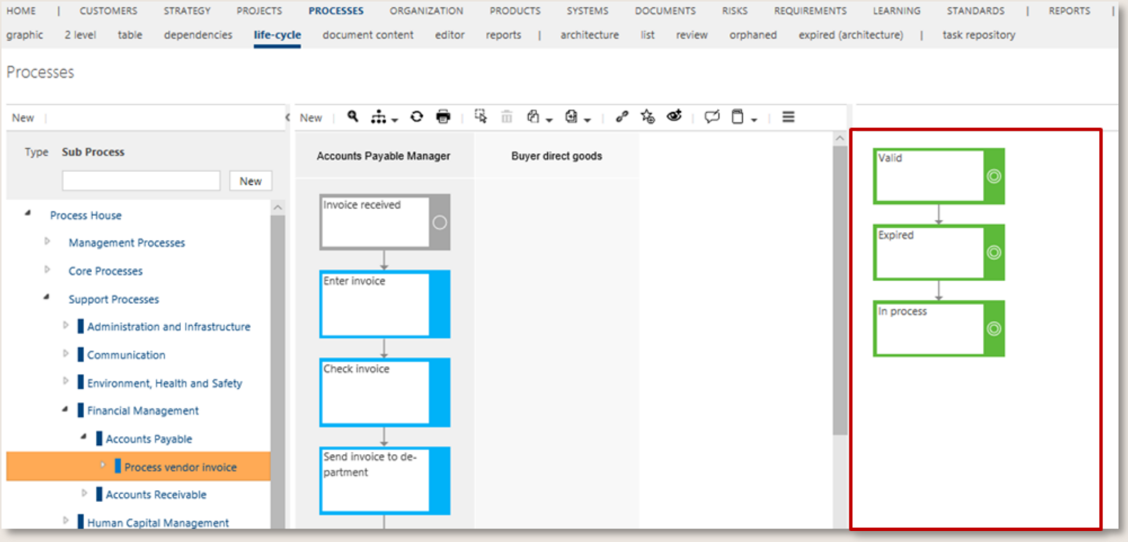


Figure 96 – Sub Navigation life cycle

5.1.9 Use translation support and translation service

The translation support is located in the Detail Content and opens a window in which the primary language (always on the left side of the window) and all other secondary languages are listed next to it. It is important that the languages are defined beforehand by the administrator and that the languages are selected in the user dropdown.

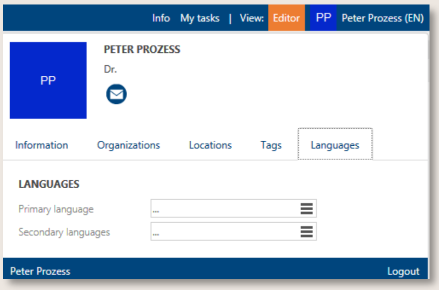


Figure 97 – Select languages

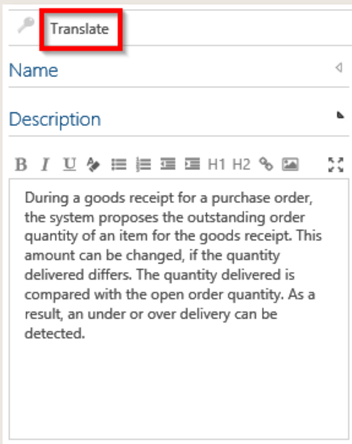


Figure 98 – Opening Translation Support

The Translation Function will be activated after the service is embedded in Symbio. Afterwards there will be an automatic translation for selected languages. If the Symbio installation administrator has activated the translation feature, attributes are automatically translated. The user can automatically translate empty attributes using the translate dialog. Please note that only the default language can be used for automatic translation.

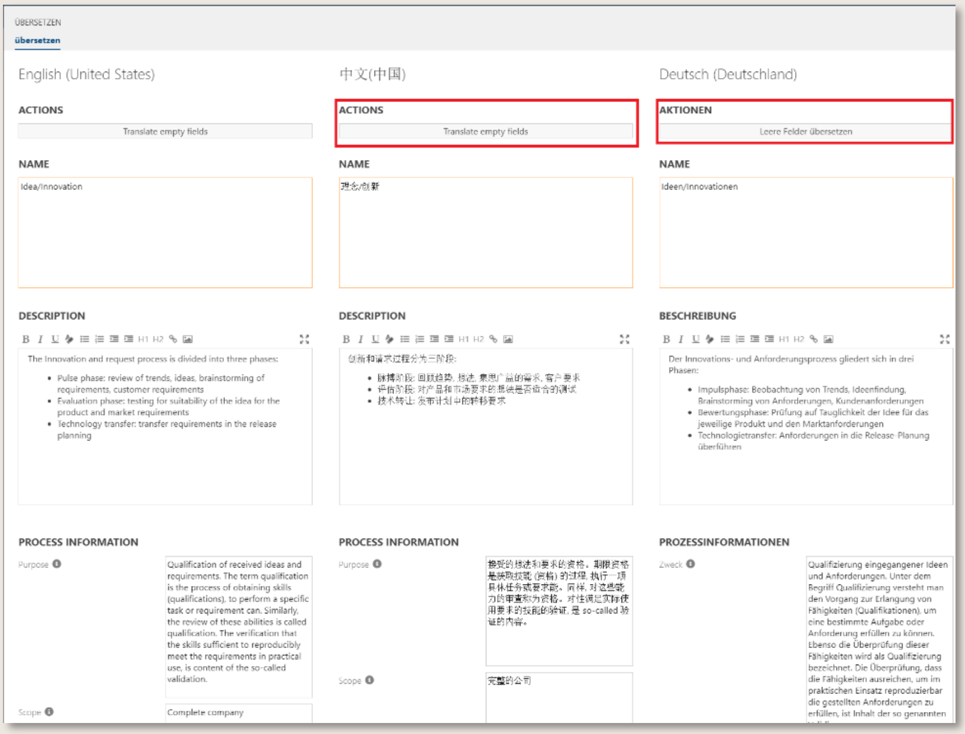


Figure 99 – Embedded translation service

5.1.10 Define Scope filter criteria

In the detail content in Scope filters the Author defines the filter criteria for the respective object.

Authors define these for Sub Processes whereas Architects can set filter for the whole process house and for the objects. The contents of the organization, locations and tags can be used. Tags are pre-defined by the Administrator and the organization as well as the locations is taken from the already existing objects. You can also use several criteria for an object. More filter applies therefore as followed: “at least one criteria must apply for filtering."

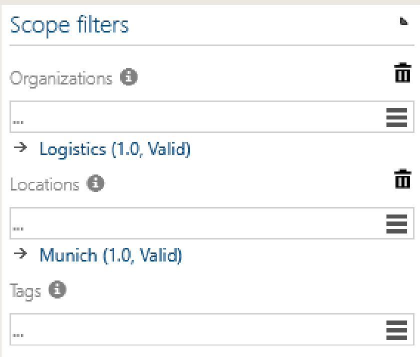


Figure 100 – Set Scope filter criteria

For the filter criteria, the multiple selection function may be implemented. Please note:

››› This feature is only available after activation by the Admin.

This applies for the organization tree as well as the location list and the tags list. To use the multiple selection, the user can select in the tree the parent organization to have all the units selected below. But the user can also only select one in a parent element and another one in other units.

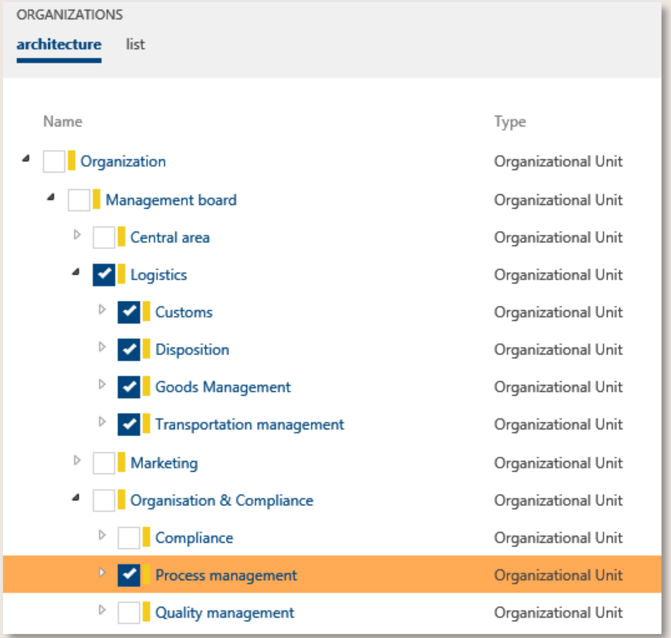


Figure 101 – Select multiple organization filter

For the location or tags, the user selects on the left side the criteria he needs and can also select some further criteria. After accepting this, the detail content is filled with all the criteria which was chosen.

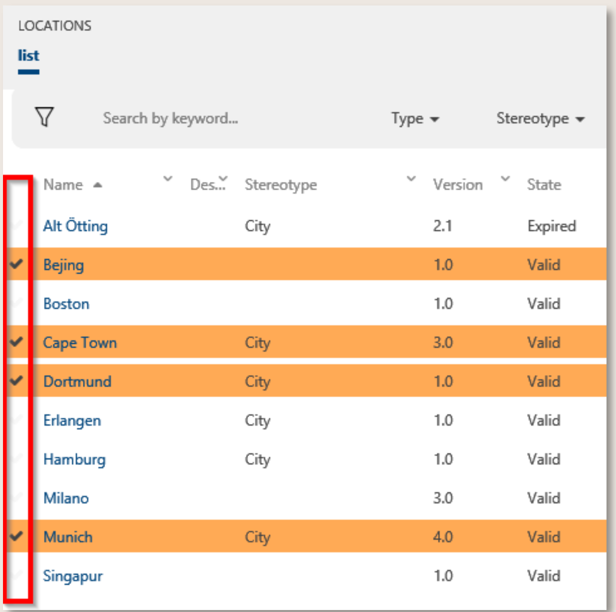


Figure 102 – Select multiple location filter

Additionally by deactivating "Method: Tags as a List (Instead of Architecture)" feature, administrators can maintain tags in a hierarchical structure, similar to how organizational units are managed.

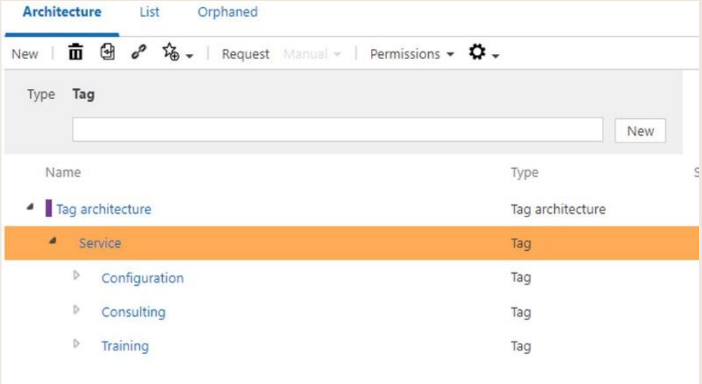


Figure 103 – Tags hierarchy

This impacts the logic of filtering. The hierarchy of tags is considered, ensuring that filters align with the established tag structure.

5.1.11 Create glossary entries

→ This feature is only available after activation by the Admin.

The feature Method: glossary enables the creation of an individual glossary to save the terminology used in the process database centrally and to add explanations and further details.
After activation, the navigation Glossary appears in the header.

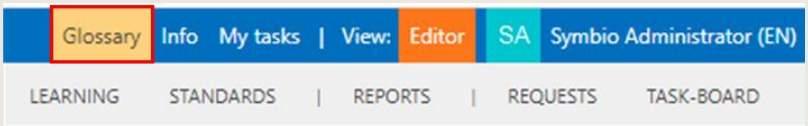


Figure 104 – Method: Glossary

A list opens in which the authors can make glossary entries as soon as you click on it. Entries in this list cannot be versioned but can be displayed or hidden for viewers.

The stored glossary terms are then linked in the detailed content of processes or objects as usual in the corresponding category.

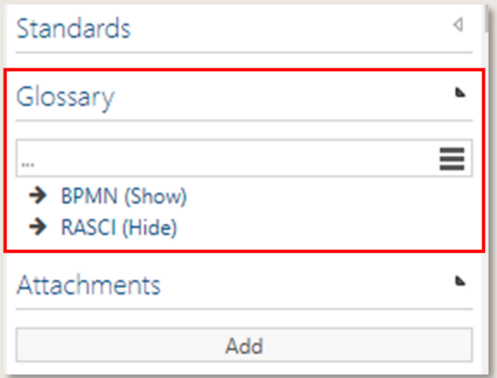


Figure 105 – Glossary in Detail Content

In the future: abbreviations and terms stored in the glossary are automatically identified as an additional chapter in the Symbio Manual. So manual creation and maintenance becomes obsolete.

5.1.12 Set Review date

Symbio Standard has been enhanced with the new Review date attribute for Main and Sub Processes. It appears in the Detail Content under the Status section and is automatically dated to +365 days when the process is created, although this can of course be adjusted manually.

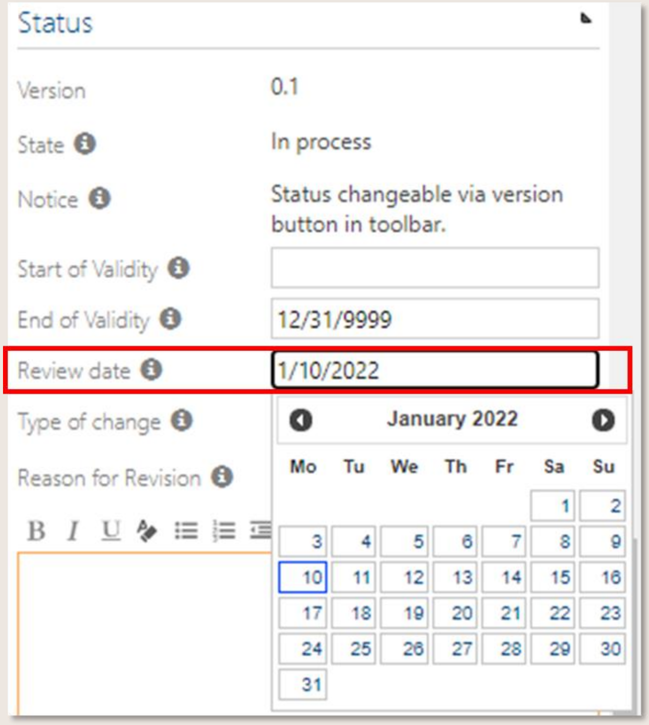


Figure 106 – Review date for processes

A corresponding list widget is available for the HOME site, which displays all processes sorted by review date.

This attribute can be hidden or renamed via the Extended Configuration. At present, there is no automatic mechanism when the review date is reached.

5.1.13 Show technical IDs

››› This feature is only available after activation by the Admin.

If this feature is activated, the section Technical ID is displayed in the Detail Content of all versionable processes or objects. This information can be used for further processing by Admins to synchronise individual elements with other systems or to clarify specific questions.

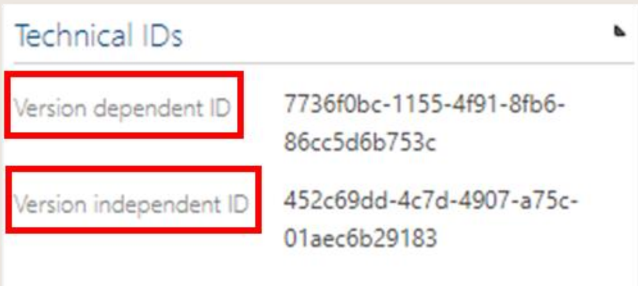


Figure 107 – Technical IDs

5.1.14 Synchronize trainings with SAP Enable Now®

⋙ To use this functionality, an interface to SAP Enable Now® is to be set up. Please contact your Account manager.

➪ Doku Sahin integrieren!!!

SAP Enable Now courses can be synchronized with Symbio. Learning units created in Symbio are transferred to SAP Enable Now, where the corresponding learning content is generated depending on the selected type, e.g. in the form of books, audio or quizzes.

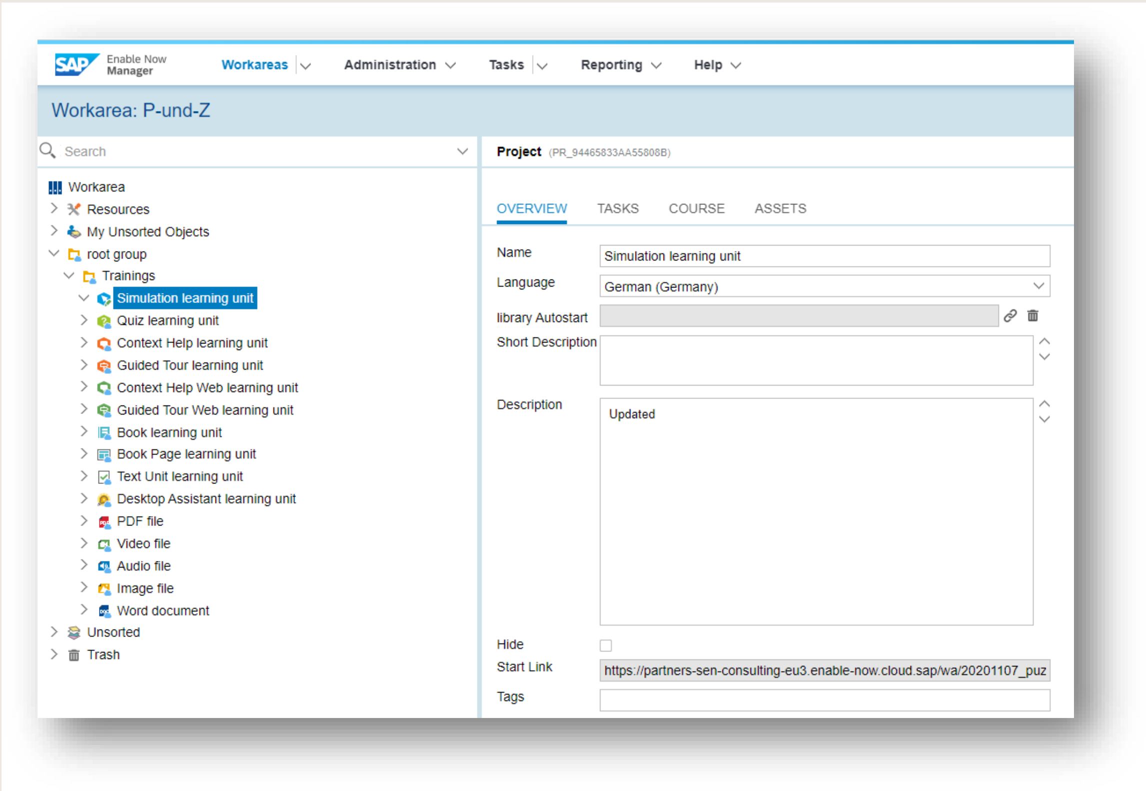


Figure 108 – Learning content in SAP Enable Now

The completed learning content is published in SAP Enable Now and can be accessed there via a link in the detail content of the respective learning unit after automatic synchronization with Symio.

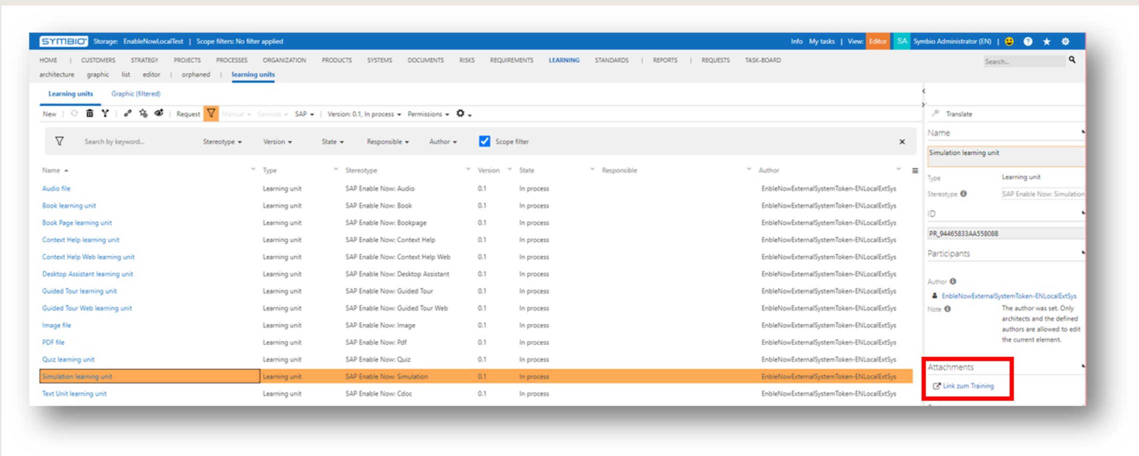


Figure 109 – Learning units in Symbio synchronized with SAP Enable Now

The Symbio author automatically recognizes changes made in Enable Now by the updated status of the respective learning unit as well as any changed text fields.

5.1.15 Integrate ALM Projects by Atlassian Jira interface

- To use this functionality, please contact your Account manager.
-

From now on, you can integrate Atlassian Jira into your project with Symbio. ALM projects are thus mapped from process to implementation, provided you have linked your project workflows to processes.

The interface to the popular project management tool Jira supports the realization and implementation of optimization potentials, measures and IT requirements in agile teams. The connection of the systems ensures transparency and a clear overview of all completed and upcoming project steps.

Symbio's integrated requirements management supports you in capturing, organizing and prioritizing all types of requirements in a structured way. Symbio's data model allows you to link the user story to existing objects and roles. Defined requirements in Symbio are instantiated in Jira for execution. Items created in Jira are automatically transferred to Symbio and serve as the basis for linking processes to tasks.
The connection of the systems ensures that you can easily navigate from the process to the Jira user story and back. Every user has an overview of the project progress – for efficient development and more transparency.

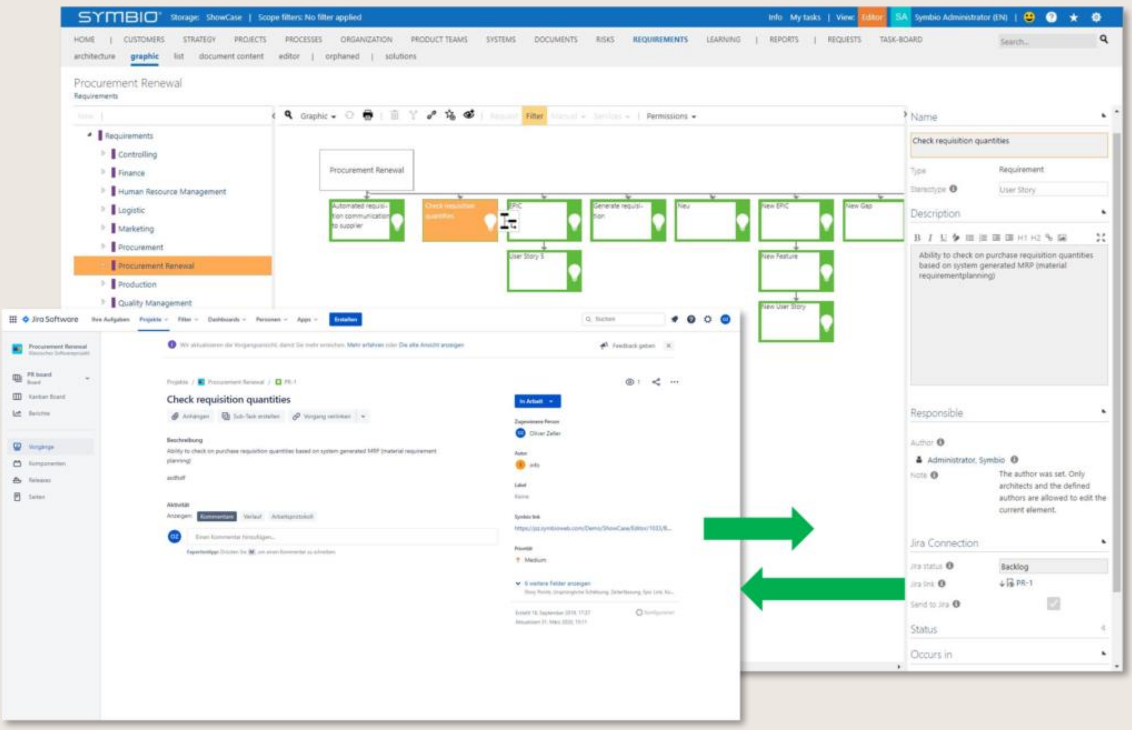


Figure 110 – Interface Atlassian Jira to Symbio

You can find more information about the Atlassian Jira interface on our website or on the Atlassian Marketplace.

5.2 Prepare a Sub Process for review

A sub Proces can be sent to a Reviewer for verification. This can be any Symbio user, including viewers.

To prepare the Sub Process for review, the Author fills in the field Reviewer in the Detail Content.

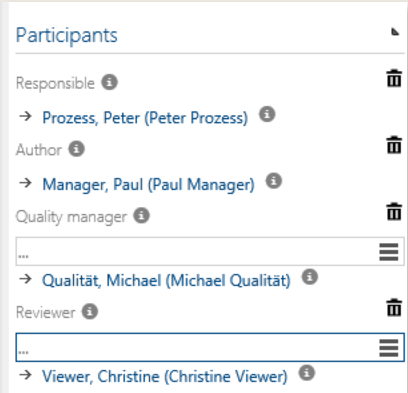


Figure 111 – Select Reviewer

The Review cycle can be started by changing the status to In review.

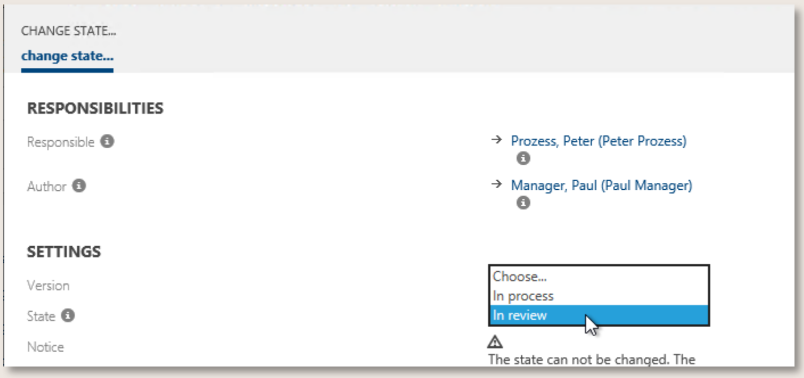


Figure 112 - Change review status

The same validation rules apply as in the release cycle. The status "In review" can be set despite error messages or warnings; further editing by the author is also possible.

The reviewer only has access to the process as long as the status remains "In review".

If the author creates a new version of the process, this must also be set to the "In review" status so that the reviewer has access accordingly.

After receiving feedback from the reviewer via the feedback/request function or conventional communication channels (e.g. email), the author sets the process back to the "In review" status and makes final changes before making the process available for release.

5.3 Make a Sub Process available for release / expiry

Please note that only the user entered as Author and the Administrator can start a release or expiry workflow. Users who are set as Additional Author or Approver/Architect only get the status "Ready for release" or "Request to expire" in the status dropdown when they delete the existing Author and set themselves. In this case, it is recommended to include this initially set Author in the section Additional authors.

5.3.1 Start release workflow

Selecting Ready for release in the Status drop-down menu initiates the release workflow. The approver is automatically notified via e-mail and through their Symbio taskboard about the pending release task ⮕ Approver

Symbio uses Validation rules to check whether the process complies with the predefined rules. A distinction is made between a warning and an error. If the validation detects an error, the user can click on it to see exactly which element violates it. The detected errors must be corrected in order to be able to initiate a status change.
By selecting the error/warning, the dialog shows exactly which object is wrong. This can be checked immediately by the author.

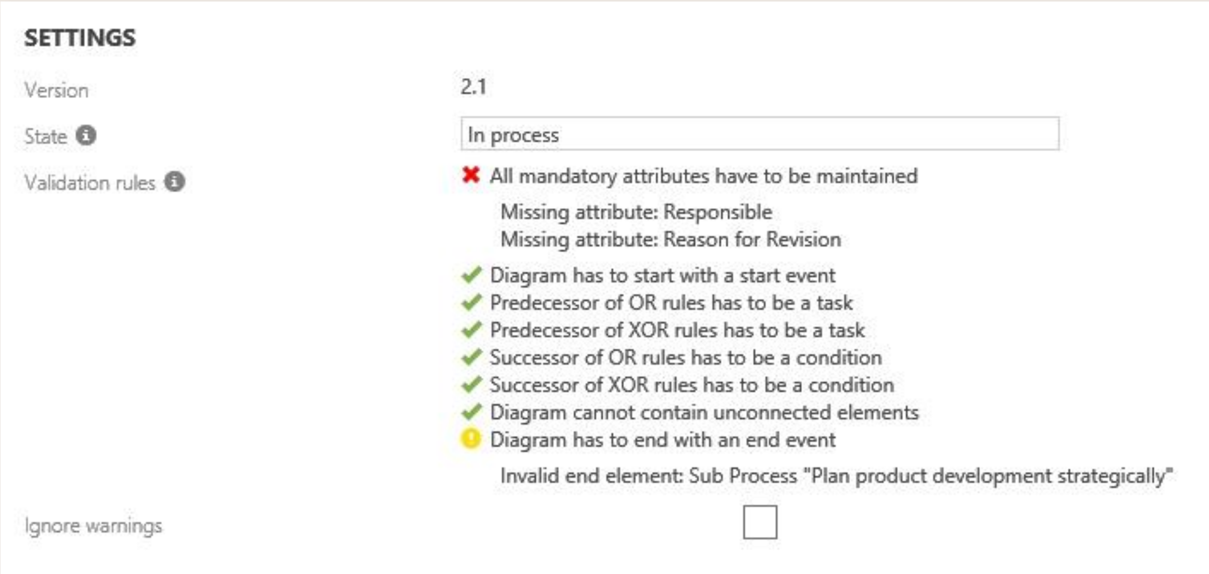


Figure 113 – Process validation with warnings and errors

Warnings, on the other hand, are hints that can be ignored by activating a check box without affecting the status change.
Warnings are marked with a yellow exclamation mark. Errors, on the other hand, are marked with a red X.

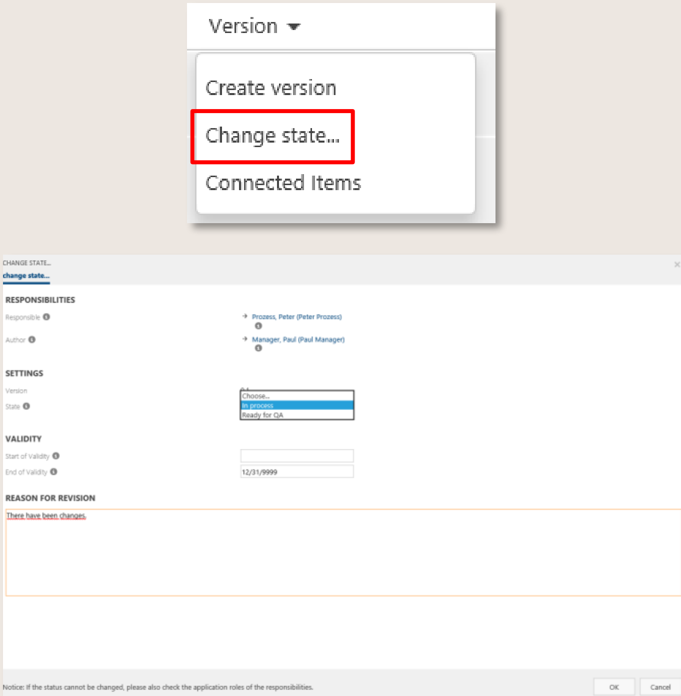


Figure 114 - Selecting the status in the Detail Content

The same procedure applies for initiating the release workflow for Sub Processes. Again, the Detail Content mandatory fields Responsible and Author must be completed before you can change the status to Ready for release.

However, if the author of a process is also responsible for the process, the author can immediately change the status to Released.

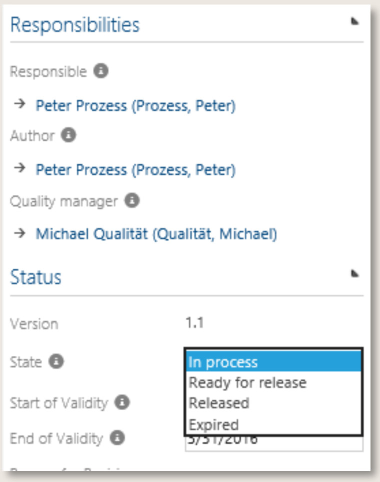


Figure 115 – Simplified release

If the Detail Content of the process includes a Quality Manager the release cycle will include the Quality Manager.

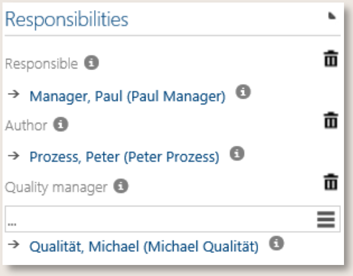


Figure 116 – Two-level release cycle

The release cycle consists of two levels, then:

- the Author sets the process to Ready for release
- the Quality Manager is informed. He can accept or reject the process or assign it to another person
- if the Quality Manager has released the process the process will then have to be approved by the person responsible for the process. He/she can also assign it to another person.

When there is a status change, the author can select the reasons for the revision as multiple selection. As soon as the workflow is triggered for QA or ready for release, the person responsible receives the release task with the selected reasons.

Instead of a single quality manager, a group of quality managers can also be configured - as well as the number of necessary approvals by this group before the request is forwarded to the next instance for approval. As soon as the required number of approvals is reached, the release task is automatically deleted from the other users in this group.
››› This function is only available after it has been set up by the Admin.

As an option, the release cycle can be extended by additional Approvers or Approver groups. After selecting one or more Approver/Approver groups in the Detail Content, the new status Ready for Approval is selected. All Approvers first approve before the Responsible receives a request for approval. In case a Quality Manager has been added to the release cycle, the sequence of approval is as follows: QA - Approver/Approver group - Responsible. As with the group of quality managers, the number of necessary approvals can be configured. Once this is reached, the release task is deleted from the other users in this group.
››› This function is only available after it has been set up by the Admin.

If a quality manager has been added to the approval cycle, the order of the approval cycle is as follows: Author - QA - Approver/Approver Group - Responsible.

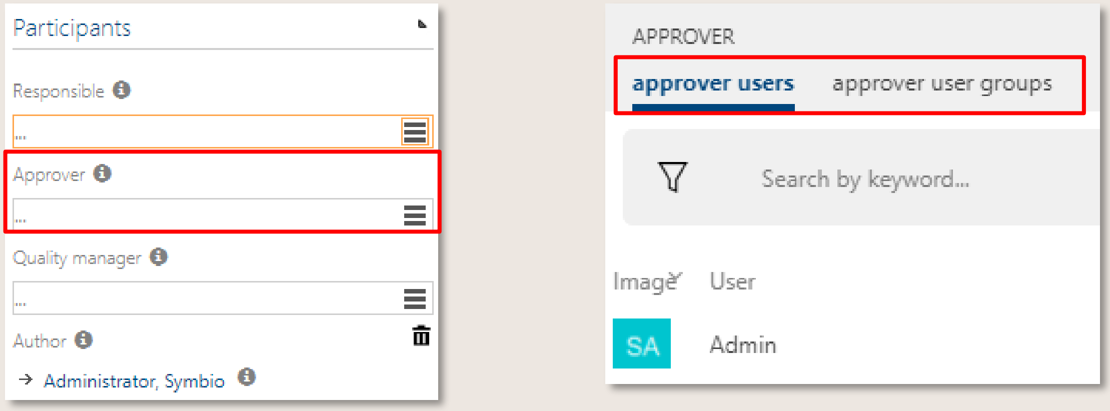


Figure 117 – Release cycle: Configuration of an additional Approver Workflow phase

Please find more details about the Admin's configuration here: https://docs.symbioworld.com/admin/administration/user-management/users/#configure-user-groups-for-release-cycle

5.3.2 Submit request to expire

If a process is no longer valid, the author selects the state Request to expire from dropdown, so this request follows the same workflow as the release workflow and is subject to the approval of all Participants. Alternatively, if the author is the responsible, he sets the state Expired himself.
When the author linked objects that have not yet been released to the process, the release dialog informs him that these objects will be visible in the process once they have been released. In this way, the author can release the processes, even if non-shared content is linked. Expired objects are still shown for Viewers.

The notification is displayed in the release dialog.

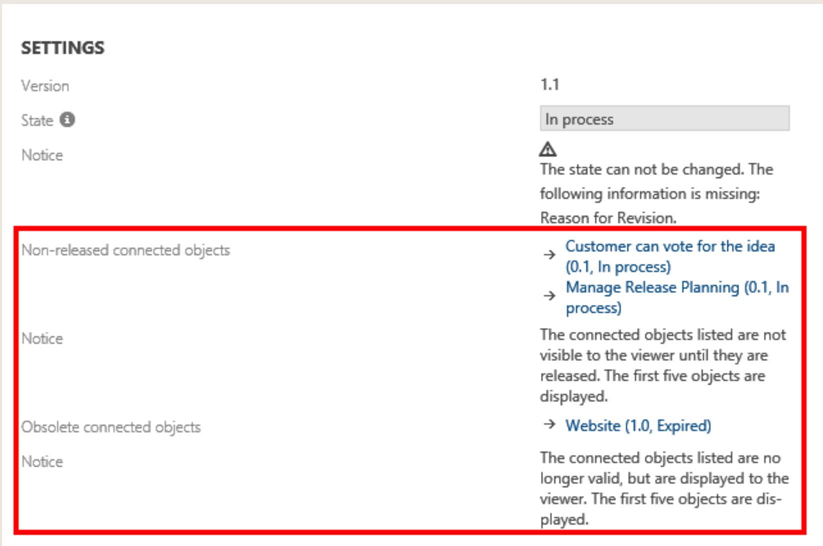


Figure 118 – Notification for non-released/expired objects

If an approver rejects a process or object, the Status reverts back to In process and the author is notified by e-mail that the process or object was rejected. A brief notification also appears in the TASKBOARD under Info.

5.4 Optimize a Sub Process

5.4.1 Create or remove versions

To change or optimize the sequence for a sub-process or a object, the author needs to create a new version of the existing process or object.

Open the required process and generate a new version. The version number is automatically updated according to the following logic: the number before the decimal point increases to indicate the release version and the number after the decimal point increases to indicate interim releases.

To delete a current version that is currently being edited, select remove current version.

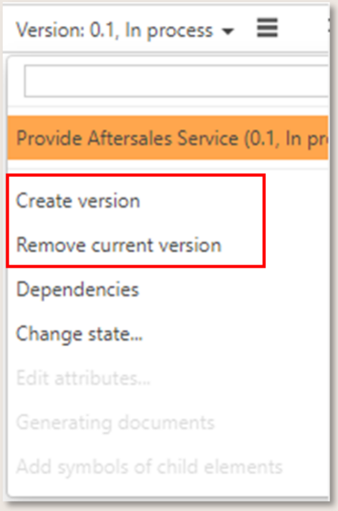


Figure 119 – Create or remove process versions

Please note that general changes of the Process House itself (creation and deletion of Main/Sub Processes etc.) are the responsibility of an Architect.

5.4.2 Edit a request (feedback)

Via the feedback/request function, every Symbio user has the possibility to comment on processes or objects at all levels. They can report errors or changes and make suggestions for optimization in order to actively contribute to the continuous improvement of the process landscape.

By default, the request is forwarded to the Responsible or (if stored) to the Quality Manager. He or she then approaches the Author with this request to clarify the further procedure.

The recipient is made aware of the receipt of the request via the Info (1) note in the header. If configured, an automated e-mail notification is also sent.

The details of the request are visible in the Detail Content. The responsible person can approve the request or complete it (reject).

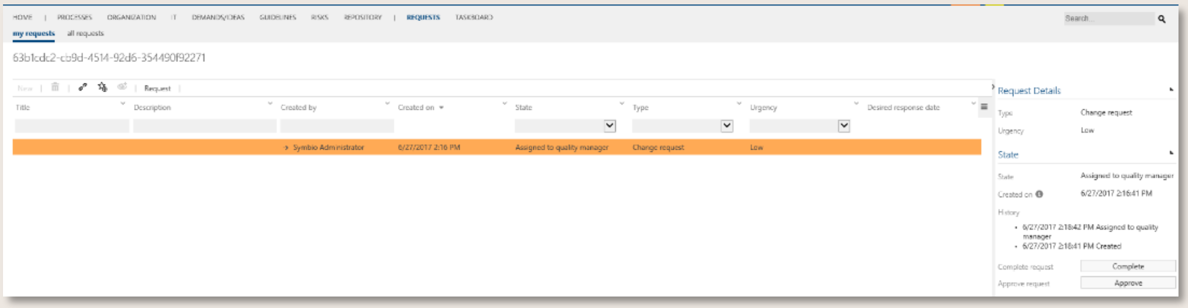


Figure 120 – Request workflow

In the navigation REQUESTS, all parties involved can find a list of existing requests as well as their status and contents at any time.

5.4.3 Modify requests (Using Action Center)

In the facet “Requests” users can edit their requests. A new feature is that a “change note” must be entered. This is then visible in the Detail Content. The status can be changed as desired, e.g. from “In process” to “New”. Among other things, this is useful when the assigned person is changed, as a new person receives this request for the first time.

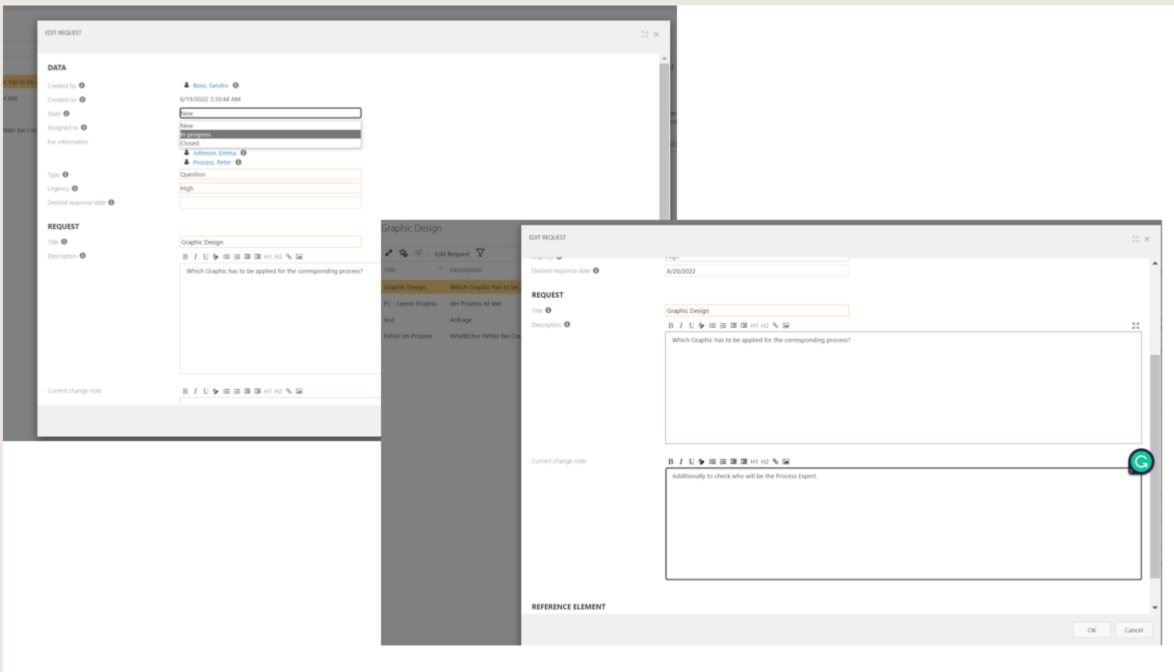


Figure 121 – Modify Request

5.4.4 Generate manuals

Symbio offers a large varity of manuals that are available for all processes as well as for some repository objects.

Especially the Sub Process Manual provides a usefull overview of customer specific and strategy relevant information, such as touchpoints or milestones. Further evaluations in a clear matrix format (e.g. opportunity-risk-control matrix, standard matrix, etc.), process performance analysis, and a list of glossary entries round off the optimized presentation of all Sub Process-relevant information.

By clicking on the corresponding link, you can navigate directly to the selected element in Symbio. Customised adjustments, such as displaying the company's own logo, are also possible.

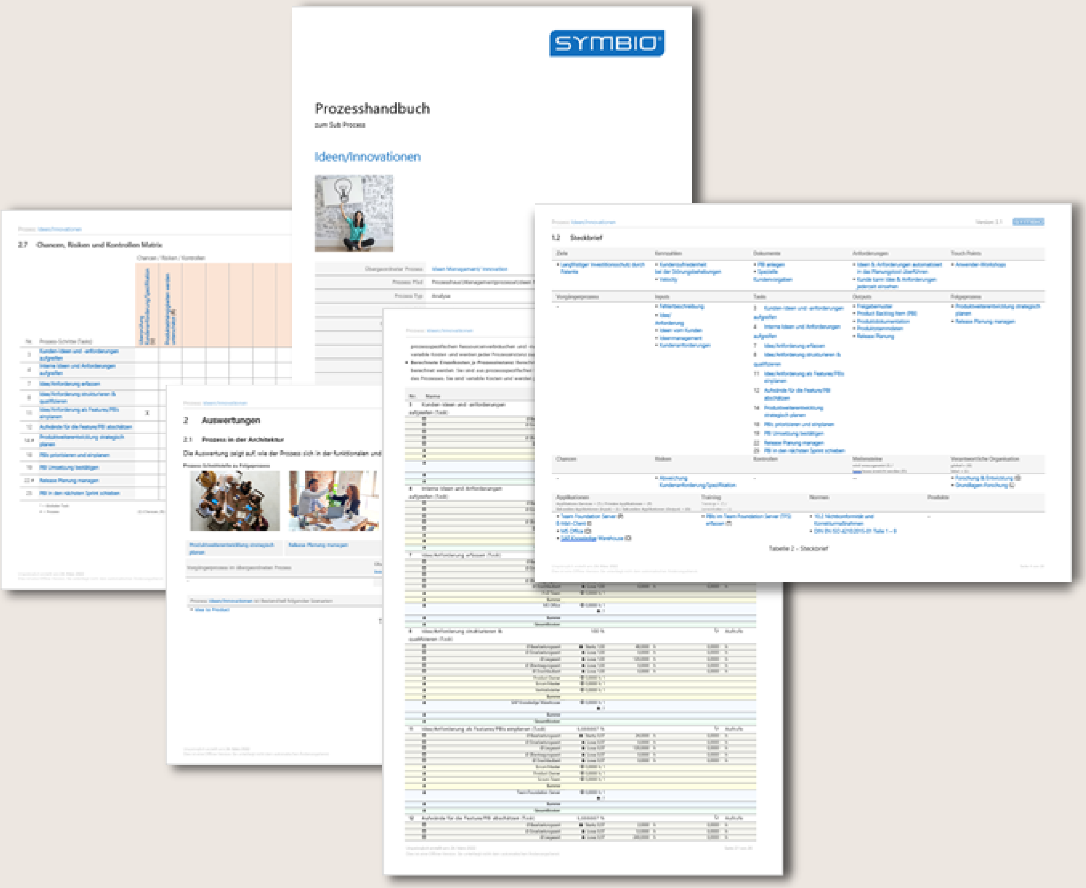


Figure 122 – Manuals for Sub Processes

The user has the following use cases for generating manuals:

1. Generate manuals for review in advance manually

If the author wants to check a manual before the process release, he has the possibility to generate it manually in the toolbar:

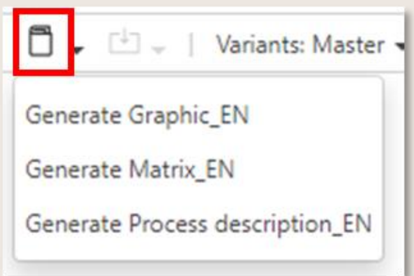


Figure 123 – Generate manuals

After selecting the manual, the export is initiated. When the process is completed, this is displayed under Info (1) in the blue header. The manual is available for download as a docx file in the Detail Content.

2. Automatically generated manuals upon process release

After a process has been released, the manuals are automatically generated as a pdf document and are available in Detail Content in the Editor mode. Viewers (or Editors in the Viewer mode), on the other hand, call up the manuals directly via the toolbar. Please refer to Open a manual.

3. Generate new manuals after process modification

In the following cases it is recommended to regenerate the pdf manuals for Viewers via the function "Generating documents" (in the Version dropdown) for released processes:

- Metainformation of the released process has been updated via "Edit Attributes"
- Assigned elements (such as roles, documents, etc.) have changed and have been re-released
- Assigned elements were not yet released at the time of the process release; this has been done in the meantime

The old versions of the manuals are automatically deleted or replaced by the new versions.

5.5 Manage validity of elements

By assigning validity start and end, the Author can define which version is valid for the Viewer. The Author can make the setting before a status change.

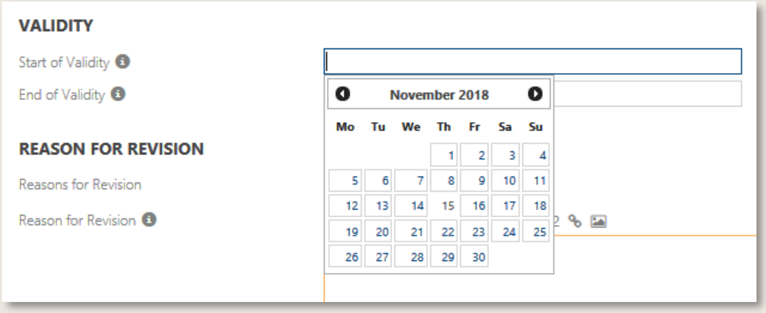


Figure 124 – Set validity date for processes

The validity of the process/object starts when the date is reached. From this point on, the state of the element changes from Released to Valid.

Attention: if the field remains empty, Symbio automatically sets a validity start of two weeks in the future after release.

Scenario 1: Release new process but release for a future point in time:
The Author can release another version and set it to Valid at a later time. The previous version has expired when the new version has reached the validity start date.

Scenario 2: Set several objects to Valid at the same time:
The Author can release his processes at the first of the next quarter, for example, by means of a uniform validity start. Symbio automatically sets these processes to Valid as soon as the time is reached.

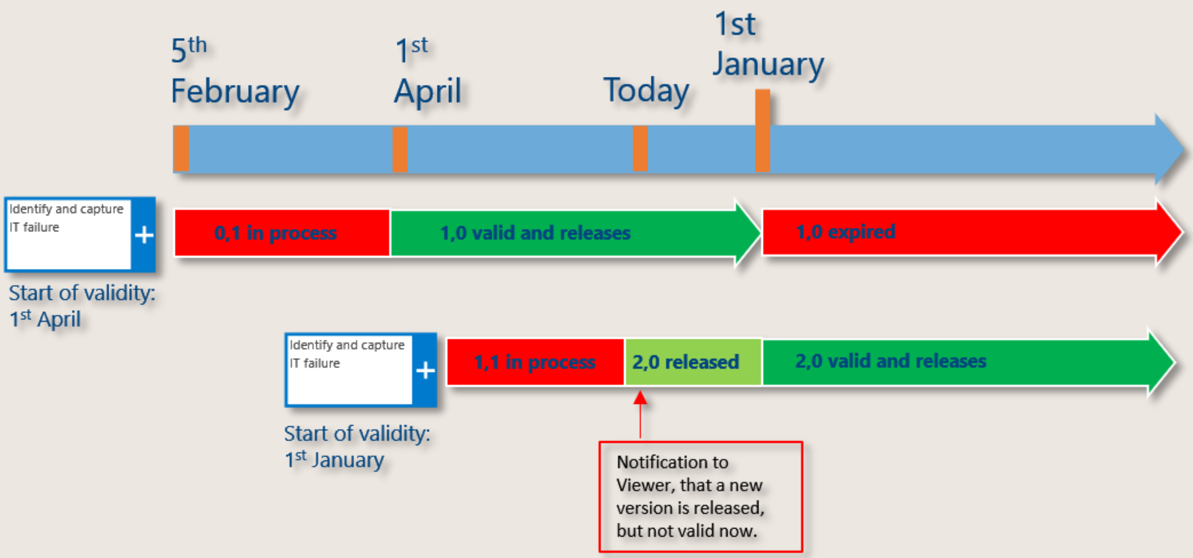


Figure 125 – Pre-releasing a released process

The Viewer will be notified with a hint when:

- a version is "in effect" and there is a new version "released" that has a validity start in the future.
- the process is in the "released" state, but not yet in the "in effect" state.

Please note the following:

- There should be a suitable time period between release and in effect.
- Only one version can have the status "Valid".

Click here for more Admin information.

5.6 Create a Scenario

Scenarios are defined in order to map the entire value chain across functions and areas. These scenarios, also known as end-to-end processes, consider the process from the customer inquiry to the delivery of a service or product to the customer. The aim of this presentation is to examine the process flow on an aggregated level and to identify optimization potentials and control mechanisms.

In Navigation Content, the author selects the element Scenario from the dropdown, enters a name and confirms by clicking New. Scenarios consist of interfaces. In Main Content, interface elements are created using New. You assign existing processes to an interface element in Detail Content by choosing Create.

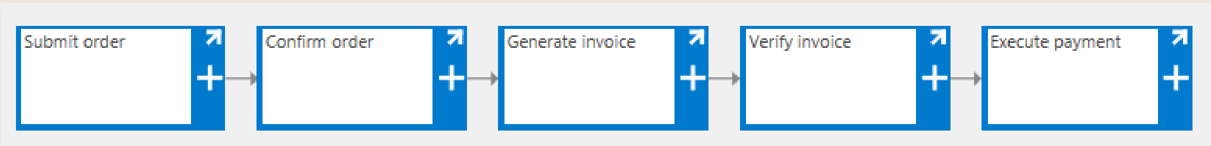


Figure 126 – Scenario "Purchase to Pay"

5.7 Manage a Variant

5.7.1 Create variants

The author can map variants for Sub Processes.
Users create the variants with local definitions. Based on the localizations, process access can be controlled in the publication.
To create variants, the administrator must first create all country- and product-specific variants in the settings.

To create a variant, click on Create Variant in the Main Content Toolbar of the released Sub Process and select the desired variant from the list that opens. The existing process automatically becomes the master, the new process becomes the variant. The same applies to the Main Process.

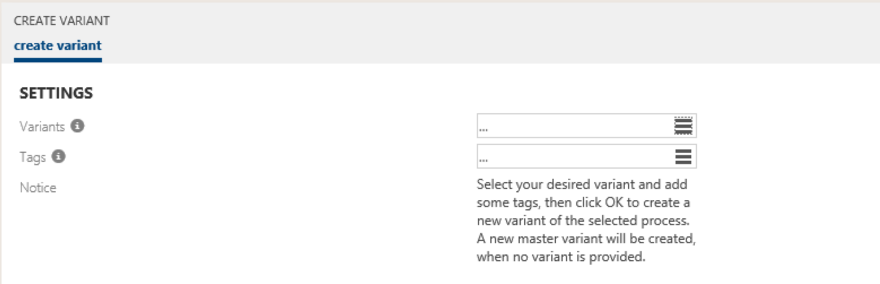


Figure 127 – Create variants

If the master process has been edited, e.g. tasks have been added or entries have been changed in the detail content, the Update Variant dropdown is automatically activated in the variant. All elements of the variant are updated automatically. The released (and valid) Master version will serve as a basis for the update.

In addition, the variants to be selected are displayed in the dropdown. These are now displayed in the toolbar below the variant and not in the process tree as before.

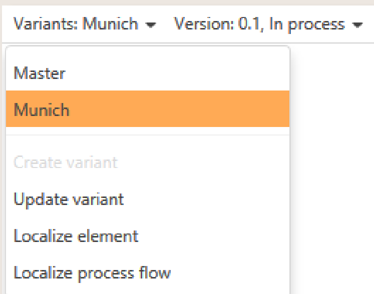


Figure 128 – Select variant and update

5.7.2 Authorize variants alternatively

In order to authorize Sub Processes for different locations, for example, there is another approach for the simultaneous application of variants and authorizations. c
First, a Main Process is defined and the navigation option is activated in the Detail Content (see picture). This means that the Main Process cannot be opened and only the Sub Processes can be selected.

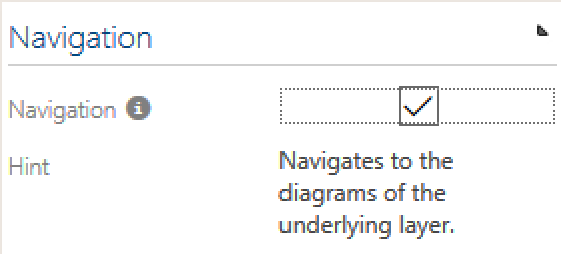


Figure 129 – Provide Main Process for variants

Then you create a Master Sub Process and detail it with objects. Copy the contents of the Master Sub Process manually into the variants Sub Processes by selecting them in the Toolbar.

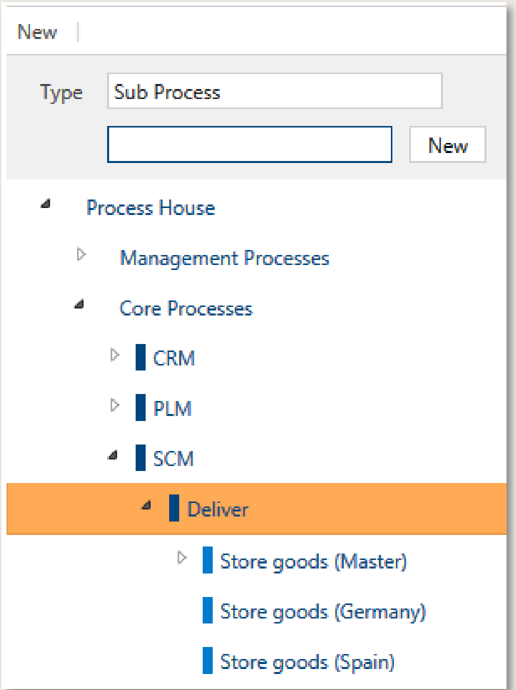


Figure 130 – Create Sub Processes for variant permission

The next step is to release of the Sub Processes. Then you authorize the Sub Processes for the respective user group.

After you have assigned the permissions, the Spanish group can only see the Spanish variant and the German group can only see the German variant. Alternatively, you can also authorize the Master Sub Process for both and enable it as a further selection.

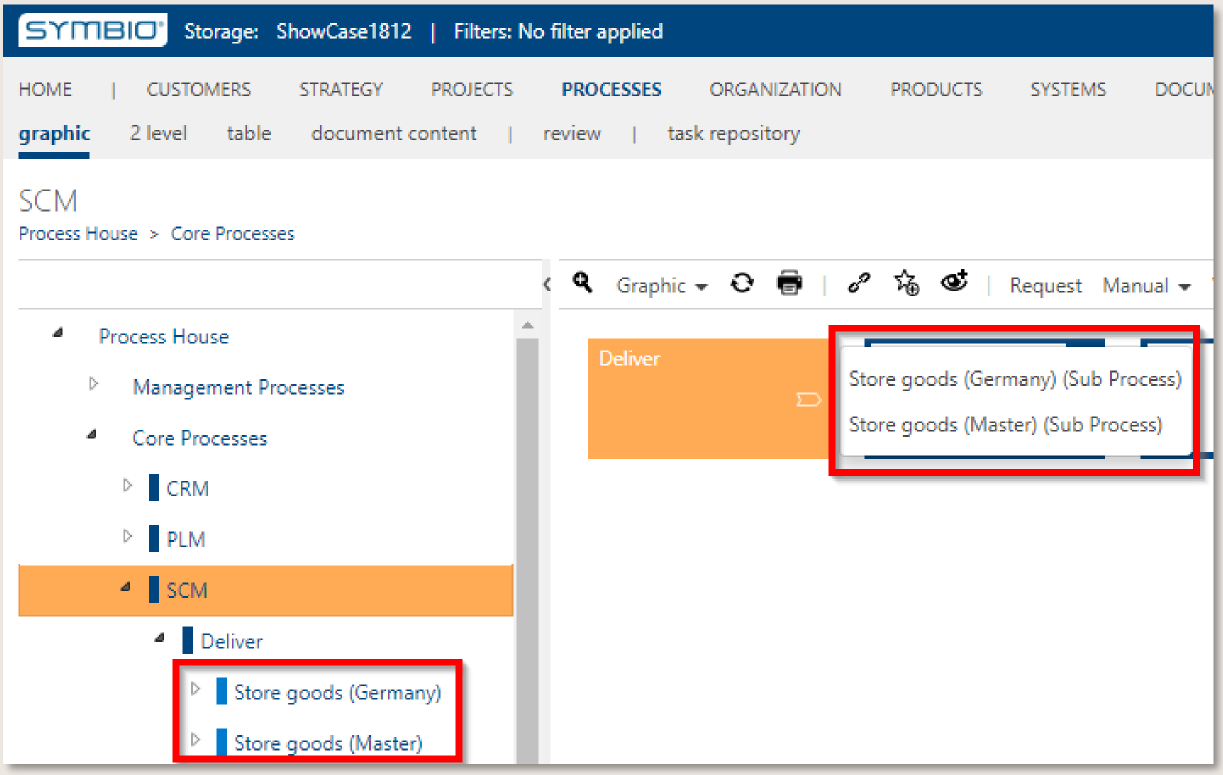


Figure 131 – Selectable variants for locations

5.7.3 Localize elements

Various information can be localized in the variant:

- individual elements, e.g. process step
- the entire process flow
- the general process information

To locate an individual element/individual process step, it is selected first and then the "element is localized" under the variant display is used. A dialog opens asking you to describe a localization reason. The confirmation allows the author to edit this element.

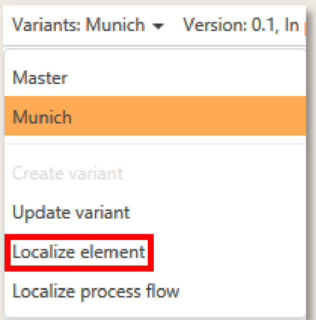


Figure 132 – Localize elements

The process flow is localized after the variant and the entire process have been selected and the "Localize process flow" field has been activated in the variant display. The author then activates modeling within the process and a note is displayed in the process. The new process steps can be freely edited and linked to objects. This localization is permanently valid in this variant version.

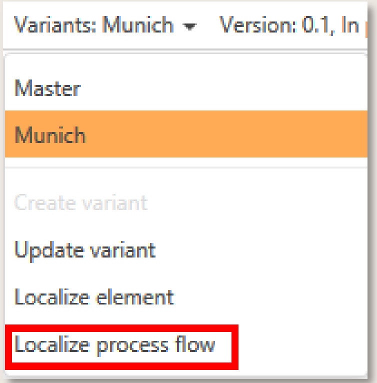


Figure 133 – Localize process flow

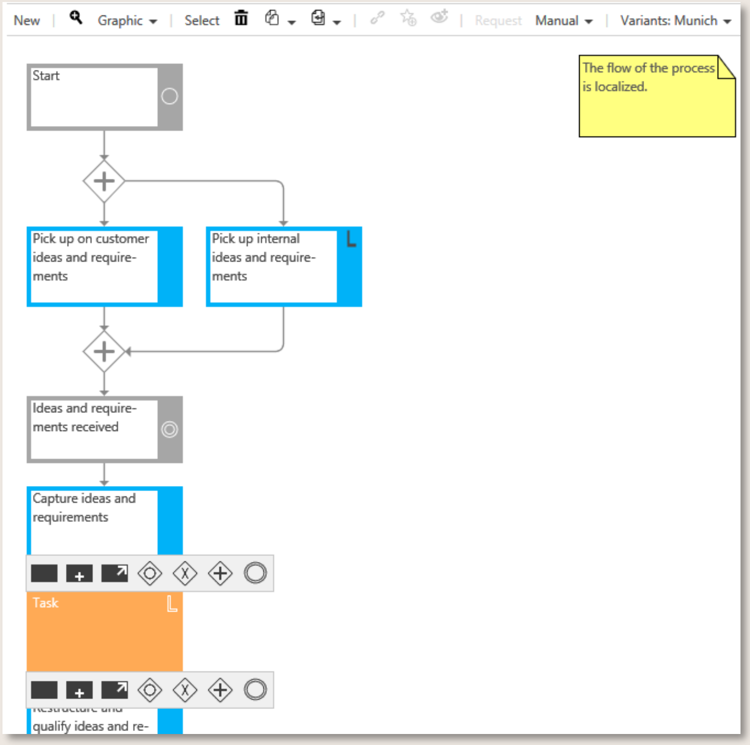


Figure 134 – Graphical note for localized process flow

The Author localizes the cross-process information identically to the process steps. In this case, however, the entire process is marked and localized as an "element". After the process has been localized and confirmed with a reason, the author can change, remove or extend the general information.

Localized elements remain unchanged when the variant is updated.

Localized elements are graphically marked with L and all localization reasons are displayed in the detail content of the variant.

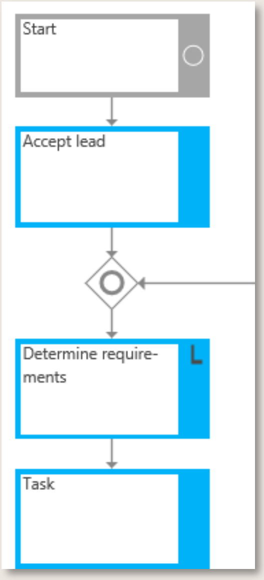


Figure 135 - Localize elements

5.7.4 Delocalize elements

To undo a localization, navigate in the Detail Content to the section Localization Reasons. By clicking on the link to the respective localization reason that was entered for the process properties, the entire process or the selected object at the time of localization, the display changes and the button Delocalize object appears.

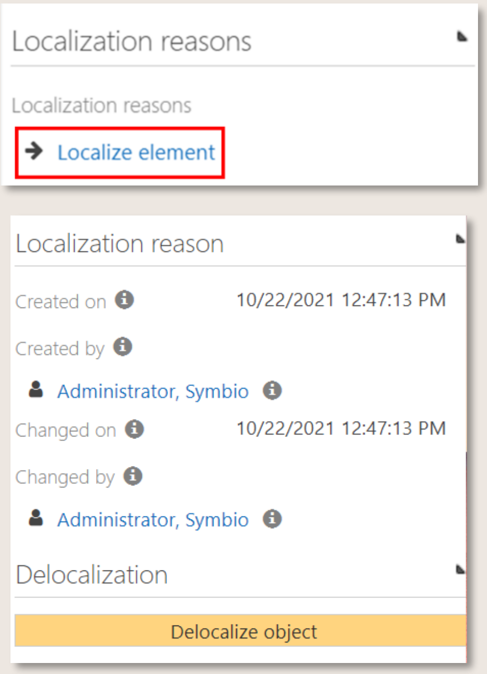


Figure 136 – Delocalize elements

After entering a delocalization reason (mandatory field) and confirming with OK, the formally set localization is undone.

5.8 Create a Customer Journey Map

In the "Customers" facet, Symbio enables the realization of a Customer Experience Management.

The Customer Journey is a marketing method that aims to make the behaviour of the customer comprehensible and transparent in order to optimally align one's own actions with the requirements.

In a Customer Journey Map all steps (Customer Journey Steps) are presented from the customer's point of view, which he goes through when dealing with the company. This usually begins with the sales phase and ends with the service/consulting phase. All Touchpoints between the customer and the product or service, e.g. through advertisements, commercials, the Internet, as well as the opinions of third parties in rating portals or user forums, are relevant. Other relevant factors to consider are the Sales channels and the different types of customers (Personas).

Please contact us for an individual offer to establish your Customer Journey.

In Symbio, the Customer Experience Management is structured hierarchically and can be set up by the architect. Under a respective CEM (Customer Experience Management), the author adds a new Customer Journey Map.

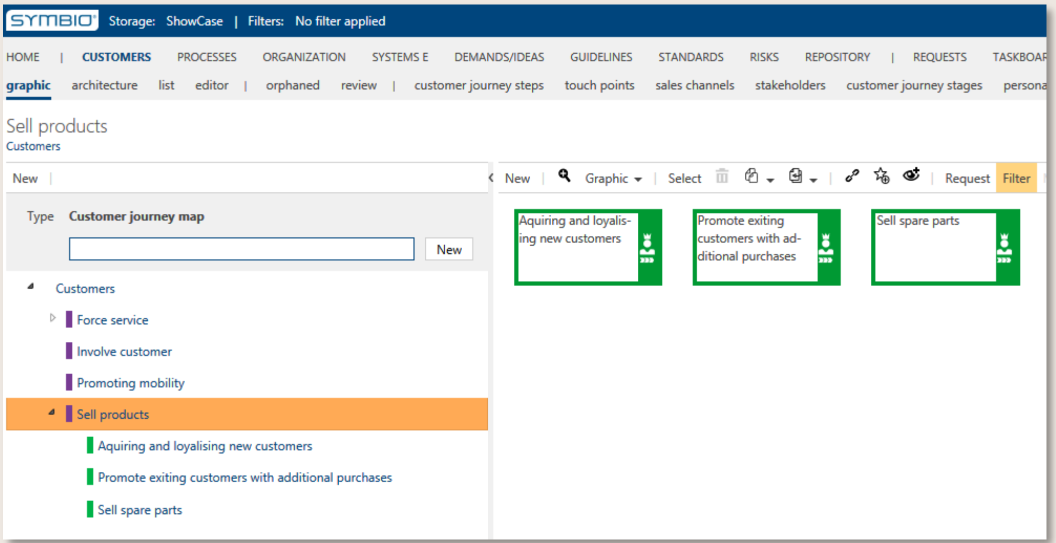


Figure 137 – Navigation tree of the Customer Journey Maps

5.8.1 Create new Customer Journey Steps

The Customer Journey Steps are set up in the same way as the process. Customer Experience Management is structured hierarchically which can be set up by the architect. A connection to processes is also possible with the interface function.
Furthermore, the author can also install logical connectors (and, or, either-or).

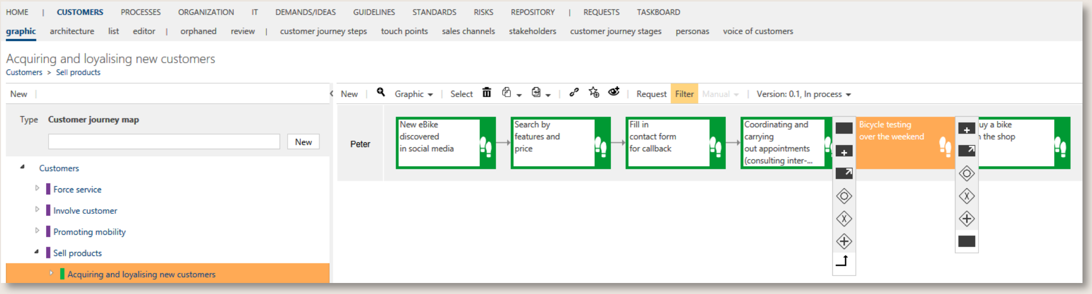


Figure 138 – Create Customer Journey Steps

5.8.2 Detail Customer Journey Map

All Customer Journey Maps and Customer Journey Steps will be extended in detail with further Customer Journey objects. Among other things with the persona, which represent the swim lane. The details can be found in the detail content under the relevant tab (touch points, stakeholders, sales channel, etc.).

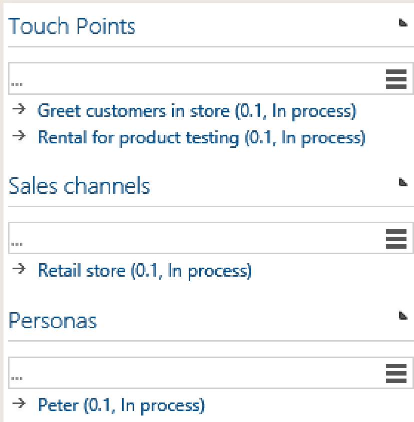


Figure 139 – Example for Detail Content

Further information can be defined in the HTML field of the detail content. There are several fields that the author can edit.

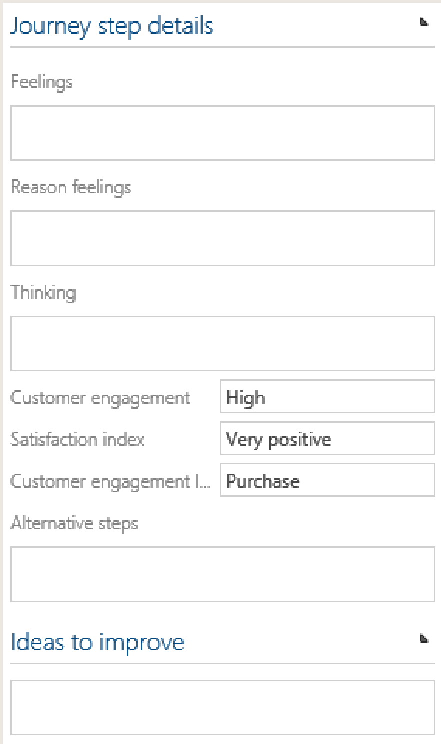


Figure 140 – Define more information for the Customer Journey Step

5.8.3 Release Customer Journey Map

The Approver carries out the release of the Customer Journey. This is maintained by the author when the status changes. The person responsible then receives the task of checking the customer journey map and approving or rejecting the release.

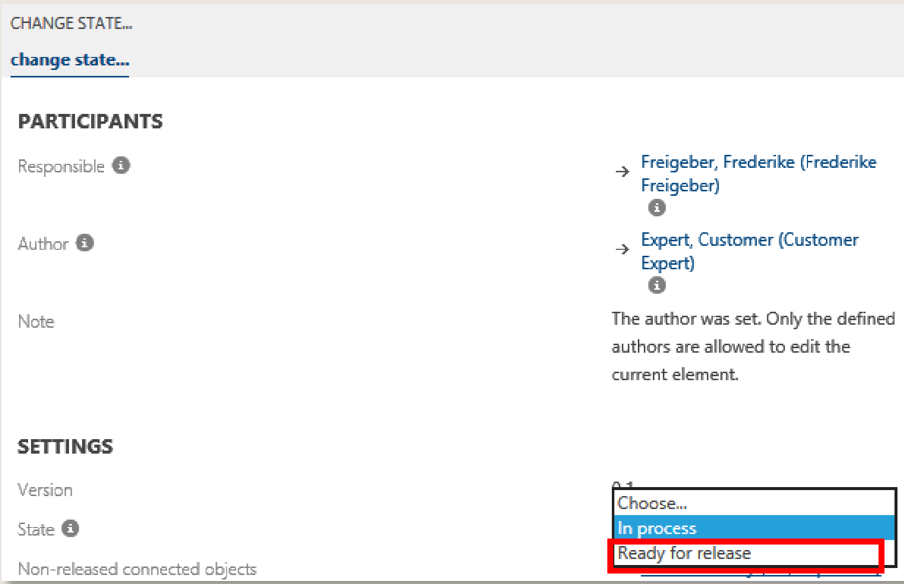


Figure 141 – Customer Journey Map ready for release

5.9 Set up a Project structure

This navigation allows to capture and document an extensive project portfolio and assign them directly to processes within the system. The functionalities have now been extended so that hierarchical project structures can be depicted accordingly. With the new Key Figures Symbio enables a more precise detailing of the project contents, project duration and further specific information. This allows you to define your projects in Symbio and assign them

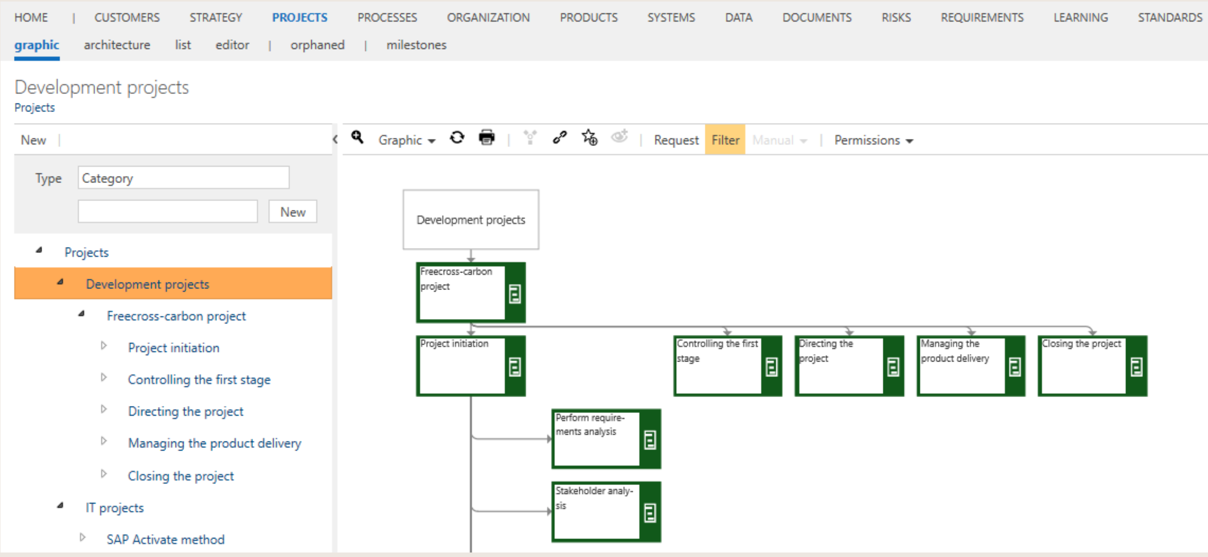


Figure 142 – Example for Project structure

5.9.1 Make extensions for process analysis on projects

››› This feature is only available after activation by the Admin.

This feature significantly supports the efficient implementation and tracking of internal or external audits; including the support of internal control systems and revisions. Defined auditing contents and their results are created as projects and linked to processes of the process house. After activating the feature, the new section Analysis Results is available in the Detail Content of the PROJECTS facet.

The recommended procedure is as follows:

- Create a project for the upcoming audit
- Define Main/Sub Processes and link them as Project process scope (in the „Details“ section)

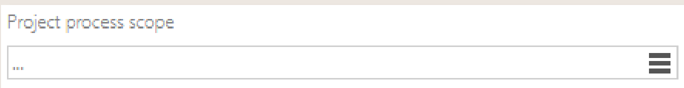


Figure 143 – Project process scope

- Add further relevant attributes, as for example project risks or success criteria
- In the „Analysis Results“ section, link new processes to be created that document the audit procedure and the audit results, if required
- Select Result type from the dropdown
- Enter an Observations summary as free text and
- Describe Recommendations/improvements (mainly relevant for internal audits)

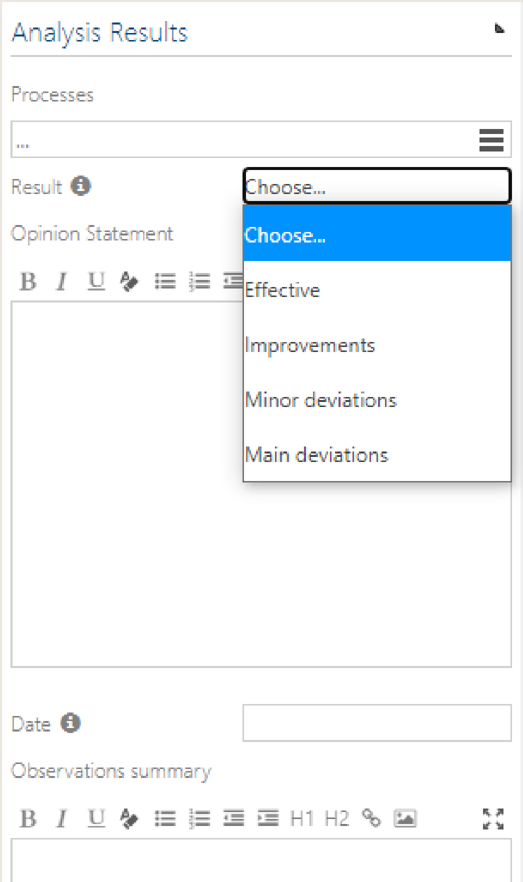


Figure 144 – Process analysis in PROJECTS facet

Optionally, customised reports can be created based on this data. The full integration of the Celonis Process Mining Tool into Symbio is also possible in order to connect Symbio with process mining results and to further accelerate the as-is process documentation. Thus, the long-term goal is to establish a comprehensive Business Navigation System.

5.10 Use a Document template

The Author can use the Document templates created by the Administrator and maintain the document contents based on them. Using the selected element (e.g. document) in the document content view, the author can select the document template by choosing Create Document and edit the document after confirming.

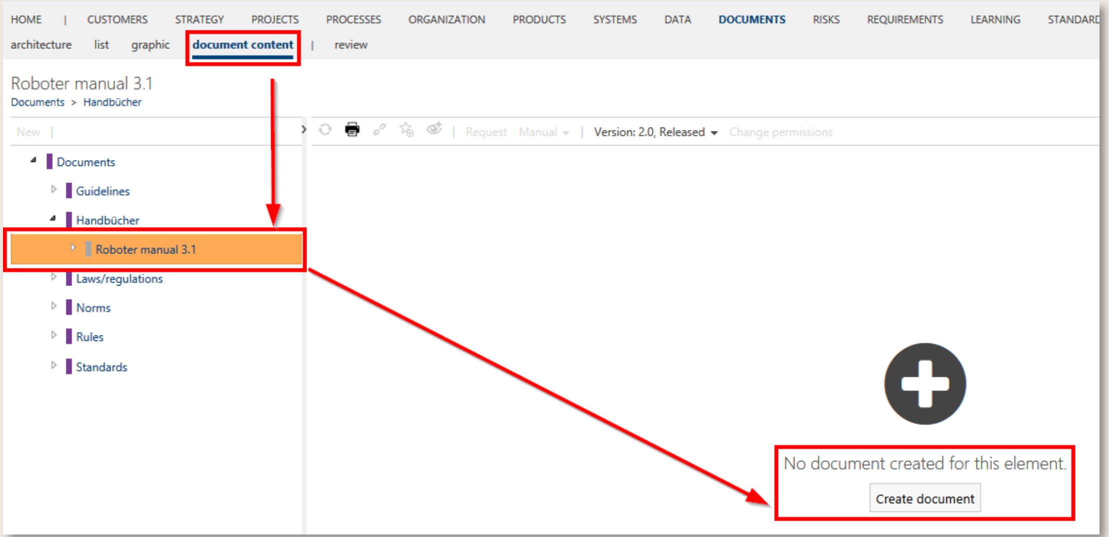


Figure 145 – Create a new document

In the text elements, the author can extend the content as free text and format it in the HTML editor. Descriptions, passages or the like can be added here as free text.

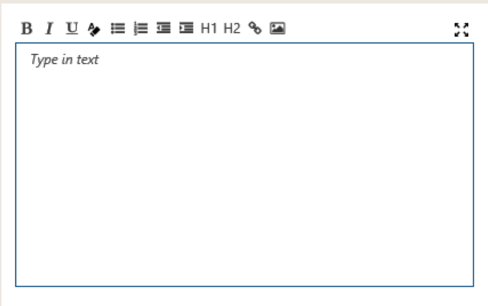
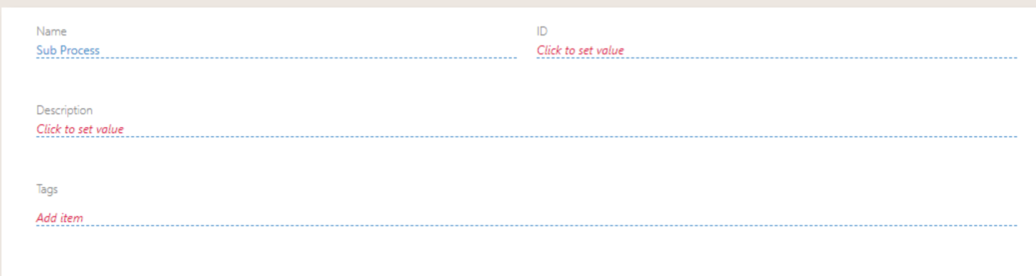


Figure 146 – Add free text in the document

Properties can be edited by the author. To do this, the author selects the underlined field and can then change values or add existing and new objects.



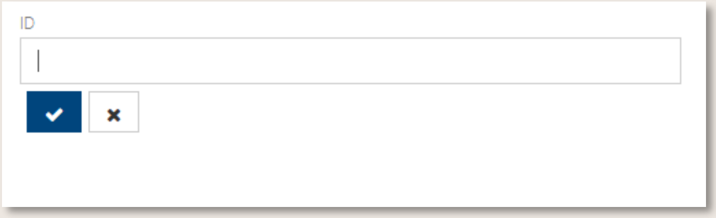


Figure 147 – Add properties to documents

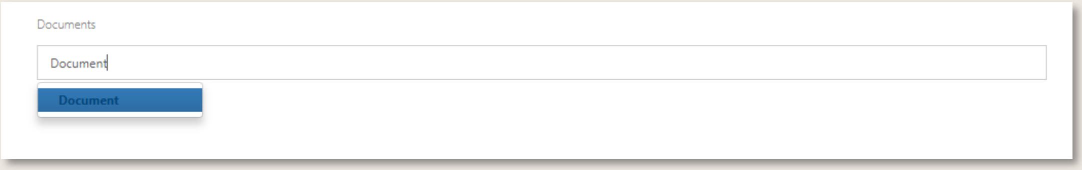


Figure 148 – Add new object in document

After completion of the document contents, the associated element must be released so that viewers can view the document and print it in the form of a manual.

››› This feature is only available after activation by the Admin.
By activating the feature Document digitalization on all facets, it is possible to define document templates for all further facets. It is thus an extension to the existing feature Document digitalization, which is only applicable for PROCESSES and ORGANIZATION. This allows Editors to add additional content to processes and objects.

6 Approver

Typical application scenarios for the approver include:

- Review and evaluate processes/content
- Comment on processes/content
- Release or reject processes/content

6.1 Check processes or objects

The approver is notified by e-mail if a process or object in their area of responsibility is ready for release. This e-mail contains a direct link to the Symbio TASKBOARD.

Pending tasks are also listed on Symbio HOME under My tasks to show

- that a process release is pending,
- who created the process
- and when.

The number of currently pending tasks is also displayed in the header at the top of the screen

. 

Open the task in the TASKBOARD via the My tasks sub navigation. The Detail Content pane on the right displays detailed information about the tasks.

The following options are available:

- Assign the decision about releasing or rejecting a process or object to another person (delegation)
- Reject the release
- Accept the process or object to release it

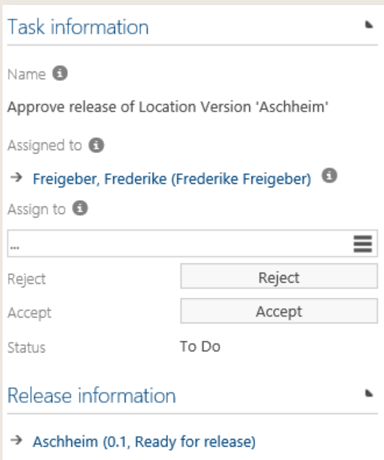


Figure 149 - TASKBOARD Detail Content

Click the link in Release information to access the process or object directly in form of a linked element for a detailed review.

6.2 Reject and release processes and objects

After reviewing the process (or object) for release, go back to the TASKBOARD and either accept or reject the item.

If the approver does not agree with the pending release, they will select Reject and enter a comment for explanation into the displayed dialog window.

The status of the process or object is reset to In process and the author is notified about the rejection via e-mail. A brief notification about the rejected process also appears in the author's TASKBOARD under Info and the task is no longer shown in the approver's taskboard.

To approve the process, the approver clicks Accept.

The process now has the status Released. As soon as the previously defined start of validity is reached, the status Valid is set. Previous versions of the process or object automatically receive the status Expired then.

Note: if no start of validity has been defined by the author, the status Valid is automatically set to two weeks after release.

7 Architect

The architect is responsible for the design, structure and administration of the business process model as a whole.

7.1 Dos and Don'ts in overview

7.1.1 Dos

- Administrate the process architecture
    - Set up and modify categories (including permissions)
    - Create, modify and version main processes
    - Release and expire main processes and sub processes
    - Delete and move main and sub processes within their architecture
    - ! Modify Responsibles who are automatically inherited from level above !
- Administrate objects
    - Create, modify and version objects in tabular or hierarchical structure
    - Release and expire objects
    - Delete and move objects within their hierarchy
    - Consolidate objects (NOTE: only objects in version 0.1 can be consolidated)
- Change attributes in released processes without versioning (audit proof)
    - Attributes that can be edited without re-release are: responsible, author, start/end of validity, scope-filter (responsible organizations, locations, tags)
- Set up Customer Experience Management
    - Create, modify and delete touch points
    - Create, modify and delete sales channels
    - Create, modify and delete stake holders
- Apply sorting function
- Create or generate uploaded documents for guidelines / manuals as pdf
- Maintain ID Provider
- Clean up processes, objects and hierarchy to keep them up to date
- Clean up 'orphaned' view (should be empty)
- NOTE: we recommend not to create more than 50 elements per level in hierarchies (processes/objects)

7.1.2 Don'ts

- No more than one architect should consolidate objects in the same navigation at the same time, otherwise there is a risk of consolidating objects mutually, which can lead to data inconsistencies
- No more than one architect should move or delete elements in architectures/hierarchies (of processes or objects) at the same time (e.g. categories or processes/objects that have not yet been released) - under no circumstances should elements be moved in parallel in the same branch. This also applies to moving from the 'orphaned' view
- When deleting subtrees (processes, objects, categories or similar), all child elements should have been deleted or moved before. The same applies to setting the status to 'expired'

7.2 Administrate the process architecture

Process architecture administration includes the following tasks:

- Administration of categories
- Setting up the process house (structure and levels for main processes and sub-processes)
- Updating the process house

By default, the architect works under PROCESSES in the architecture sub navigation. They may also work in the graphic or table views if required.

7.2.1 Administrate Categories

The default categories in Symbio standard are:

- Management Processes
- Core Processes
- Support Processes

The architect can modify the names and the number of categories.

To rename an existing category: Select the required category and change the name in the Detail Content on the right.

7.2.2 Set up the Process House

The Symbio standard supports any number of main process levels. The bottom level consists of sub-processes. For reasons of clarity and maintenance, we recommend to include a maximum of five levels.

To create a new process house or process: Select the process category (or the main process) for which the new process will be created.

The graphic sub navigation offers two ways of setting up a process:
In the Navigation Content section, click “New” and select the required process type from the drop-down menu: Main Process or Sub Process. Enter a name for the process into the text field and confirm with New (or ENTER).

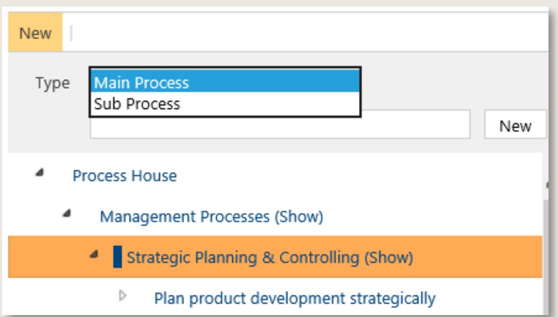


Figure 150 - Setting up a process via Navigation Content

If processes already exist where you are trying to set up a new process, you can set up a new process as a graphic in the Main Content area.

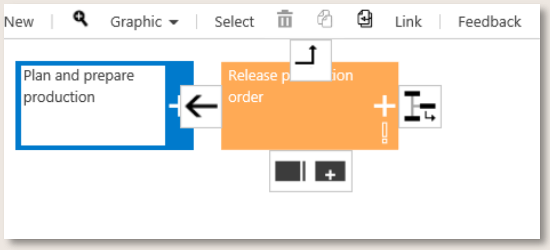


Figure 151 - Setting up a process via Main Content

Click an existing process object and select the or the new process type (main process or sub-process). The process is created on the same level.
To set up a process on the level below: Click the button, then click New and select the required process type from the drop-down menu.

You can also link the process objects using arrows or change their order.

In order to delete a Main Process, navigate to architecture, select the process to be deleted and click on dustbin icon.

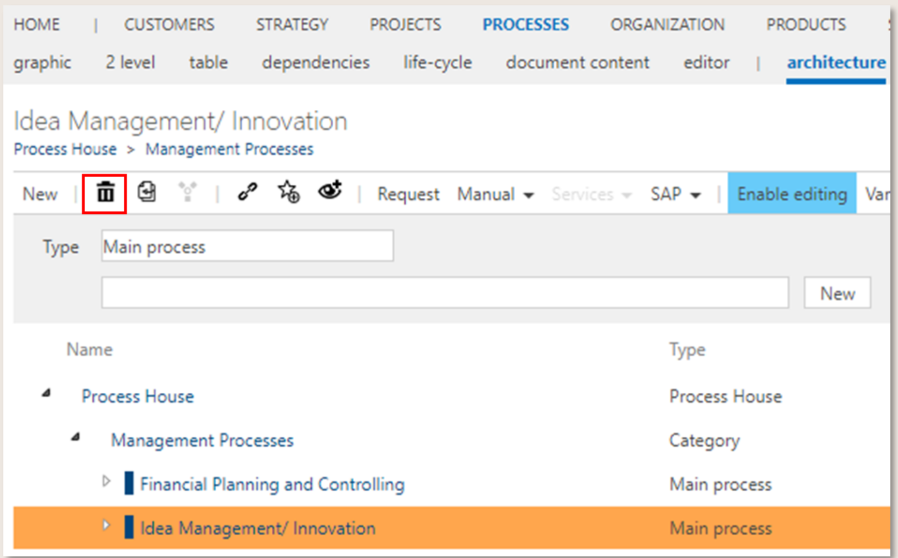


Figure 152 – Delete Main Processes

As an option, dynamic architecture permissions enable to split up the Architect's role individually for different users of specific areas, e.g. Authors may be authorized to create or modify the Main Process structure (see Admin Manual).
››› This feature is only available after activation by the Admin.

7.2.3 Update the Process House

To change the name of a newly created process, click the process object in the graphic sub navigation and modify the name in the Detail Content on the right. Your input is saved automatically when you exit the text box.

To change the sequence of processes in the structure: Select the process that you want to move and click the Move button. This opens a window showing the structure tree of the process house. Select the category or process to which the selected process will be moved.

Proceed as described above to add new processes to the enterprise architecture ⮚ Setting up the process house

7.2.4 Model in Main Processes

Symbio supports the modeling and creation of logical links in Main Processes. Functionally, the modeling in Main Processes is identical to the Sub Processes. The process types Main Processes, Interfaces, Sub Processes can be modeled with connectors.

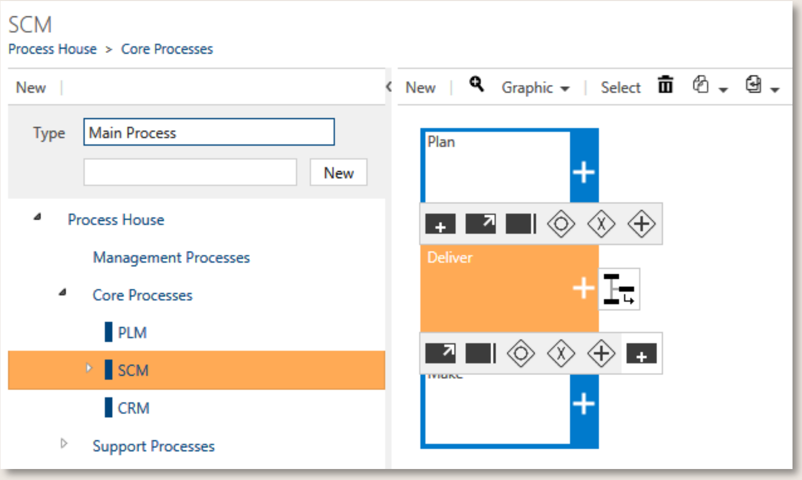


Figure 153 – Modelling in Main Processes level

7.2.5 Archive the Process House

The Process Portal Exporter Service is an additional Symbio service that allows to archive the current status of the Process House. It will then be available as a zip file for offline use.

Please contact us for your individual offer. Details may be found in our online Admin Manual: https://docs.symbioworld.com/admin/services/process-portal-exporter/install-service-manual/

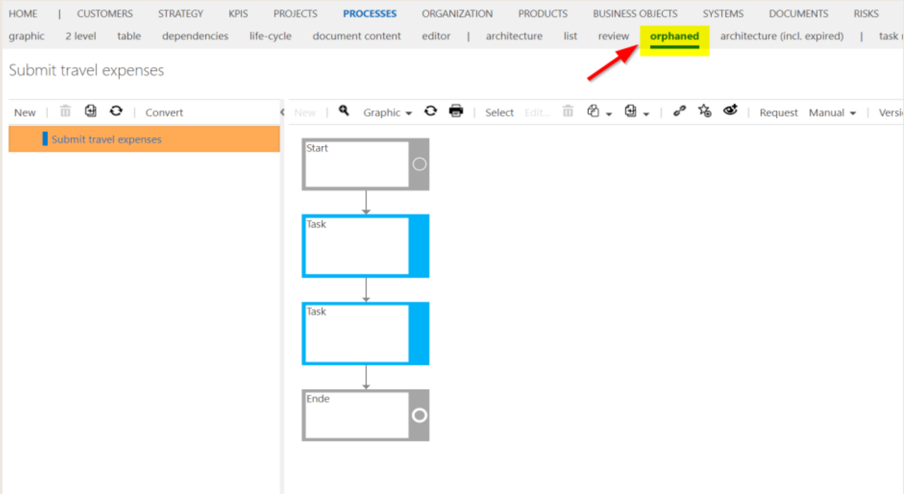
7.2.6 Add Requirements to Main Processes

→ This feature is only available after activation by the Admin.
The Method: "Requirements" for main processes allows to maintain the 'Requirements' section in the Detailed Content of the Main Processes. You can select existing requirements or create new ones.

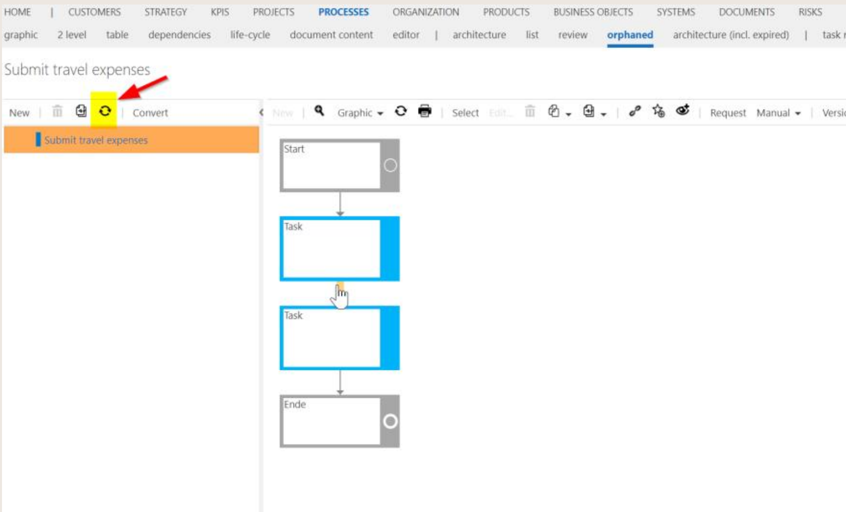
7.2.7 Bringing Processes back from Orphaned to Process Tree

→ Orphaned Processes can be moved back to process house structure in the architecture view with these steps:

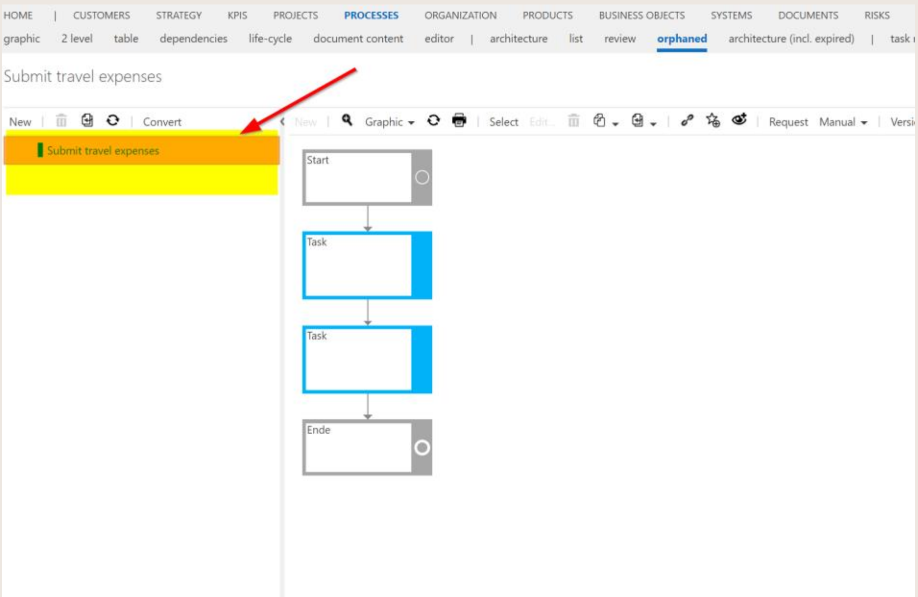
1. Go to the orphaned view of processes (works for all objects the same way):



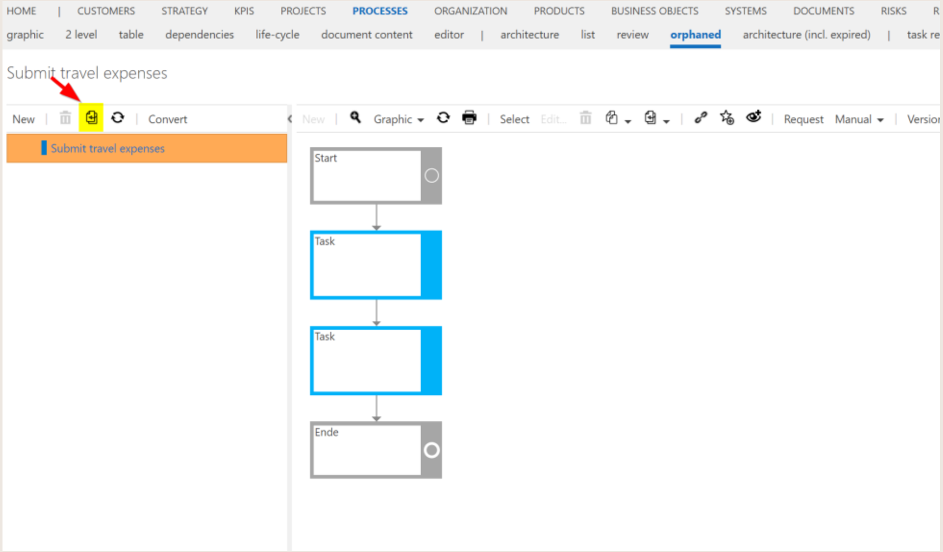
IMPORTANT: please be aware always to use the “Refresh” button to see the updated list of Processes in the Orphaned List



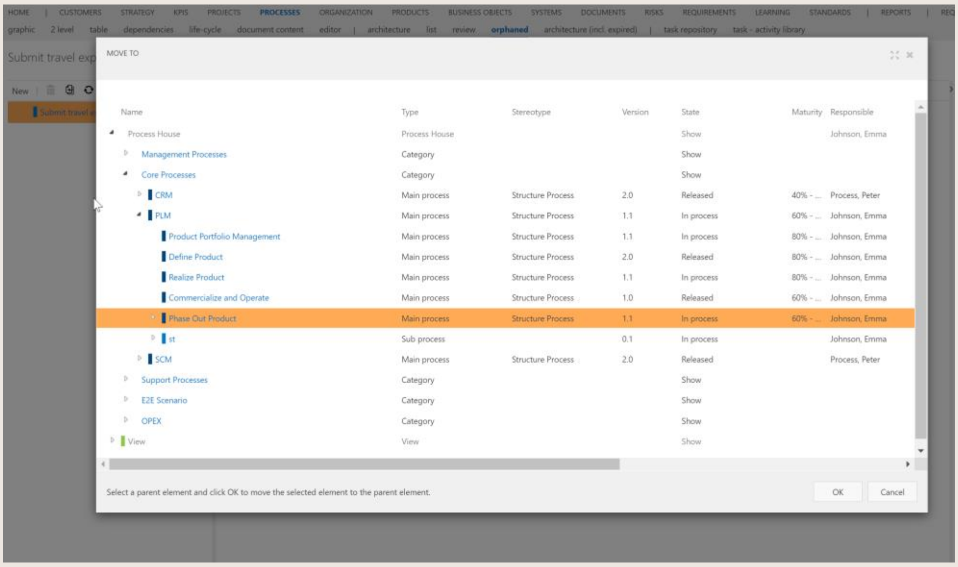
2. Select the process (or object) in the list on the left side:



3. Press the button “Move the selected element”:



4. Select the process or category underneath you want to have the orphaned item appear in the structure:



REMEMBER: All orphaned views should be empty all the time, temporary exceptions are possible.

IMPORTANT: If you have deleted a whole sub structure (subtree), search for the highest node (highest Main or Sub Process) and move this process back to the architecture. With this, the whole structure will be moved back at once.

7.3 Create Customer Experience Management

In the "Customer" facet, the architect builds up the structure and content of Customer Experience Management and maintains the individual types.
The customer is on the highest level. This is the starting point for all further experiences. As a subordinate level, the architect builds up Customer Experience Management.

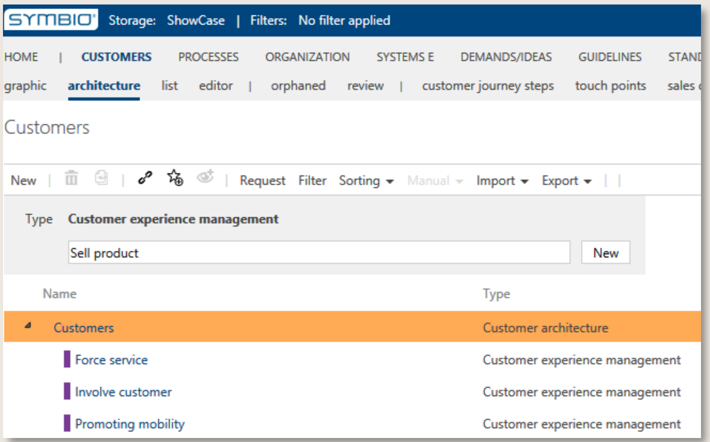


Figure 154 – Create Customer Journey Maps

Then a Customer Journey Map is created under the respective type. see chapter 5.8.

7.4 Set permissions

7.4.1 Use standard permissions

Permission sets defined in Admin area can be assigned to object in every element, as for example Category, Process, Sub Process etc. on all types of objects in Symbio.
Selecting desired element for what Permissions should be changed, in toolbar button Change permissions will be shown. After clicking on it, new dialog box will be open, and it will be possible to changes permissions for that selected element.

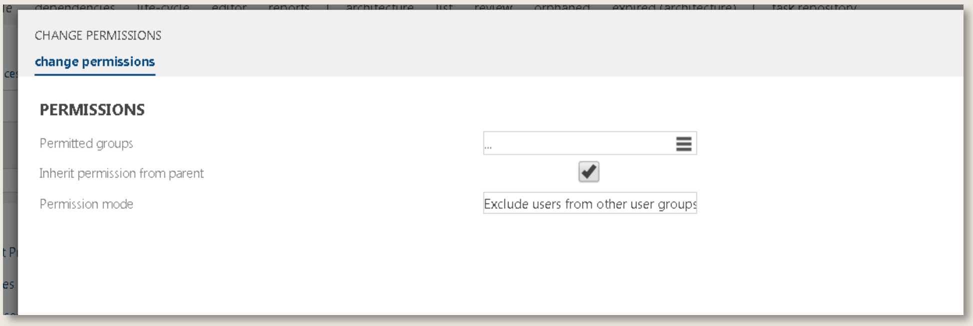


Figure 155 – Change permission on one element

There are three options that can be set in Change permission of an element.

Permitted groups - Here User groups, with specific Permission sets and Users, can be assigned. It can be added more User groups. Users in those groups will have Permissions from that User group, on that selected object.

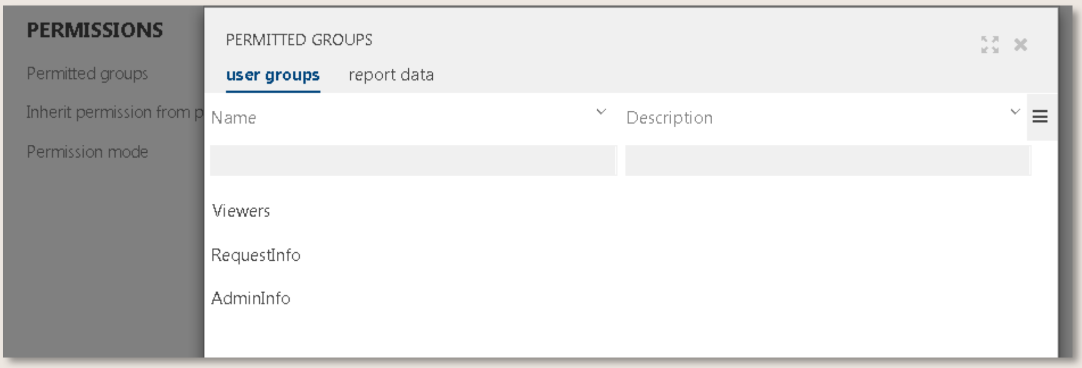


Figure 156 – Add user groups

Inherit permission from parent - This option can be selected or deselected. By selecting this option, the inheritance of the current object from its parent is controlled. If a user group is set and this option is set, all users in the user group get the permissions of the user group plus the permissions that would inherit from the parent, i.e. the permissions they would have without any permission setting at the current object.

If the option is not set, the users of the user group get *only* the permissions from the permission set of the user group, i.e. the permissions from the parent object have not influence on the current object for the users in the current user group.

Permission mode – For this option, one of two options can be chosen. Default option, that is selected when dialog box is opened first time is Exclude users from other user groups. That means that only users from chosen User groups will be able to see selected object. Other option is Standard permissions for other users. If this option is selected, all users (if their rights allow them) will see that object, but only users, from chosen user groups for that object, will have permissions from that are assigned to chosen User group.

In Symbio there are various permission sets, which can be added to user groups.
These are:

	New element	Edit element	Delete element	Show element	Approve Element	Open element
New element	x	x		x		x
Edit element		x		x		x
Delete element			X	x		x
Show element				x		
Approve element				x	X	x
Open element				x	X	

Figure 157- Permission sets

Users with Admin rights have the possibility to verify the currently assigned permissions of a specific process or object. For this, select Effective permissions in the Toolbar of the Main Content and enter a User whose permission sets you want to see.

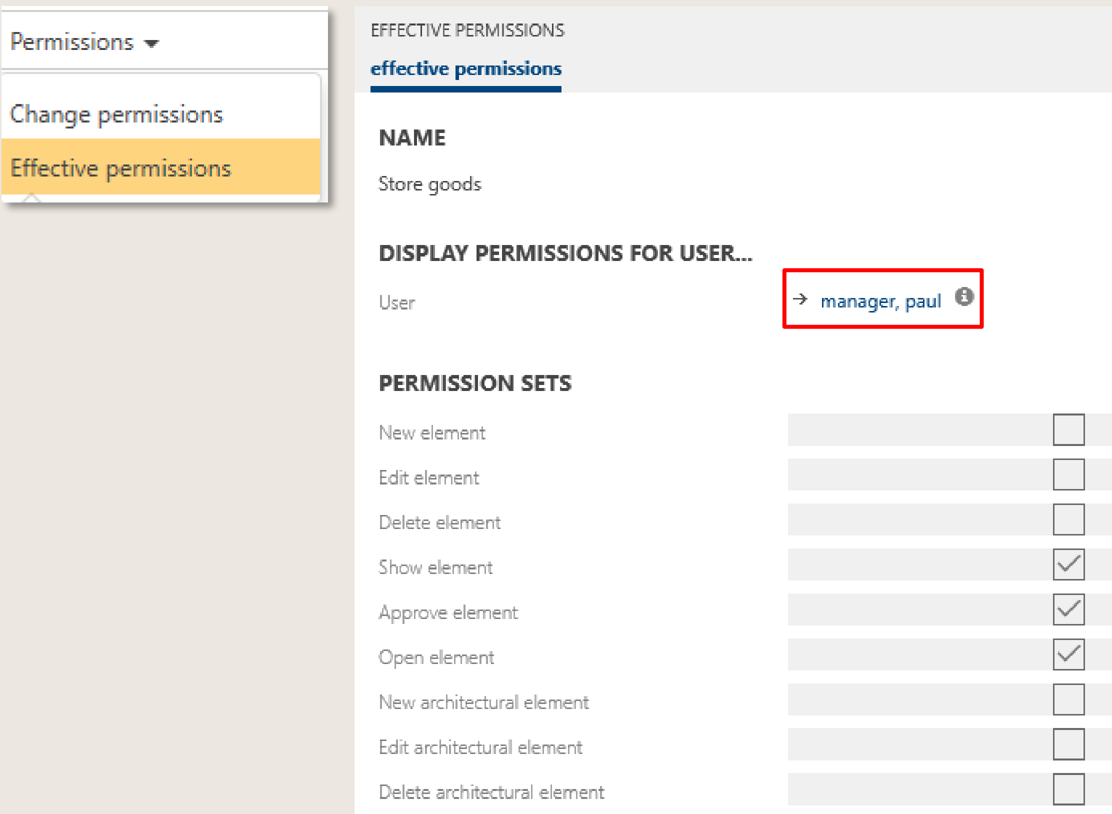


Figure 158- Effective permissions

7.4.2 Activate specific permission features

»» The features described below are only available after activation by the Admin.

NOTE: Please be aware that the activation of this feature leads to a modification of standard permissions and thus existing permission sets are to be adjusted accordingly!

Some features can only be activated, deactivation is not possible!

The Released feature Permissions for architectures allows to assign the Architect's role dynamically to different users for individual areas. It can be defined whether architectural elements (Categories or Main Processes) can be newly created, edited or deleted.

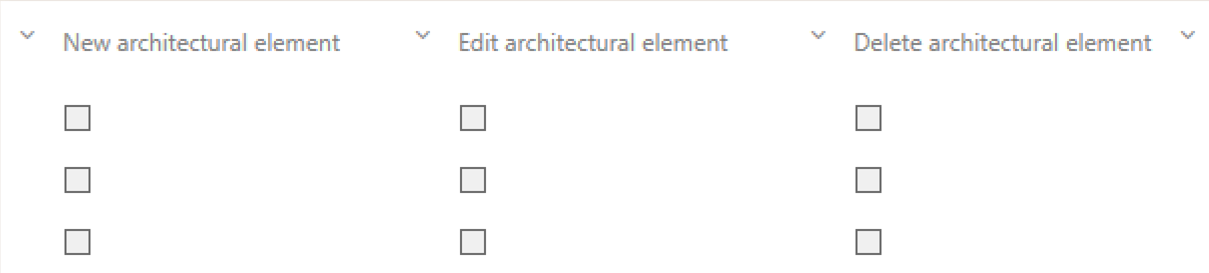


Figure 159- Architectural permissions

The feature Permissions for facets allows to authorize individual facets. For each facet, permission sets can be assigned and Users or User groups defined.

The feature Permissions directly at the process/object allows the targeted assignment of permissions for users or user groups directly at the corresponding element. So users or user groups can have completely different permissions at different processes/objects. In addition, a targeted restriction of the permissions of "all other" users is now possible.

To assign permissions, navigate to the desired process or object and select "Change permissions" in the toolbar.

First, the lower part of the dialogue window is filled, i.e. the Permission sets are assigned, which in this case apply (additionally) to the corresponding Users or User groups.

Then the access of the remaining users is defined, whereby corresponding restrictions are made when selecting "From superordinate element" and "Start from default permissions" - or when selecting "Start without permissions" the permissions of the others are completely redefined.

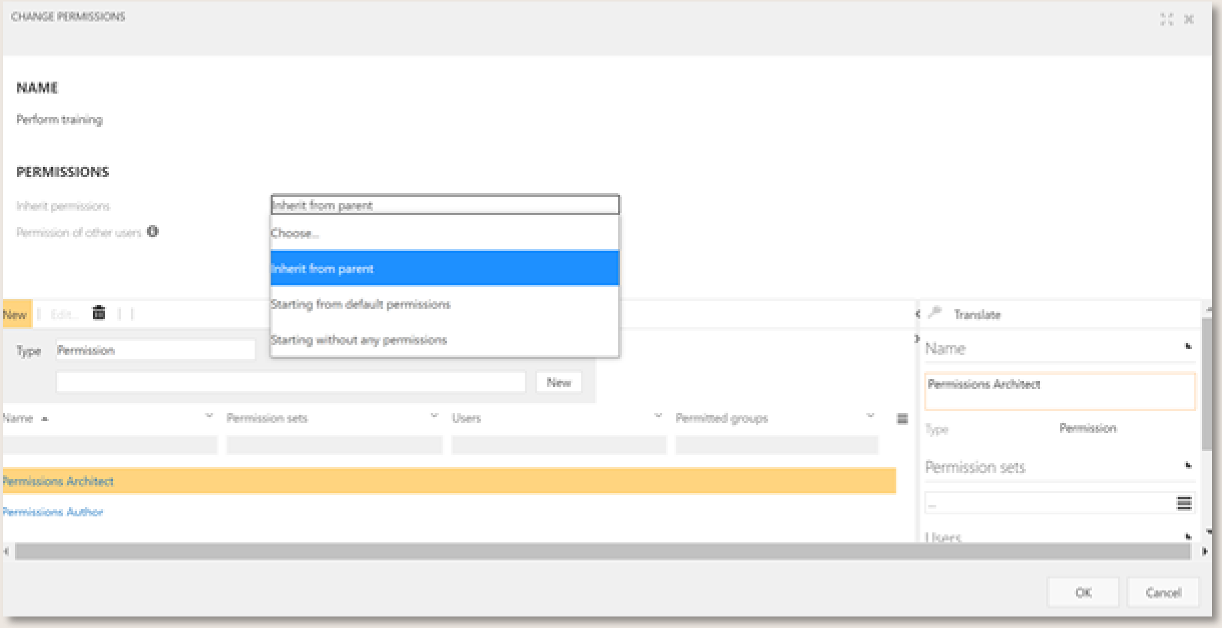


Figure 160 – Permissions directly on process/object

Further information, especially for administrators, is available here.

7.5 Release / expire a Main Process

7.5.1 Release a Main Process

The release of the Main Processes is identical to the release workflow for Sub Processes and objects, as described in the Author chapter. The author assigns a single-stage or multi-level release process by the process owner and optionally the quality manager.
As an architect, the user also has the option of setting the Main Process to immediately "released".
In the toolbar under the version history, the author changes the status to trigger the release workflow.

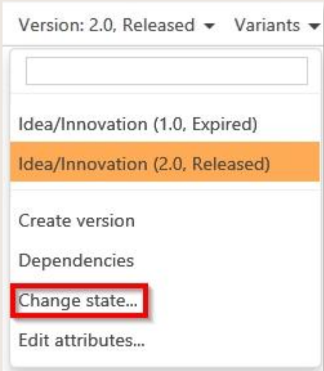


Figure 161 – Release Main Processes

7.5.2 Hide / expire Main Process

The expiry of a Main Process is similar to the expiry workflow for processes and objects, as described in the Author chapter. If the Architect is also set as Responsible, the state Expired can be set directly by himself.

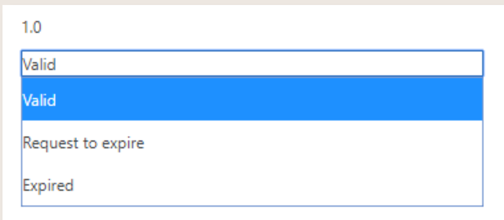


Figure 162 – Changing the state of Main Processes

By setting the „Hide" status, contents of Main Processes are no longer visible, however, the Category is displayed, but greyed out (maybe not available).

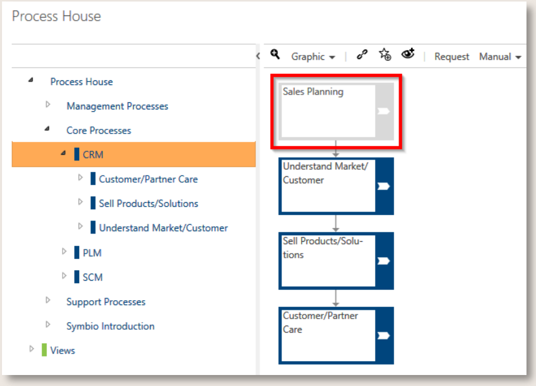


Figure 163 – Hidden Main Processes

If the architect sets the Main Process to "expired", he removes it with all its contents from the process house. The expired Main Process is marked by the clear identification. All expired content is listed for Architects in the sub navigation architecture (incl. expired).

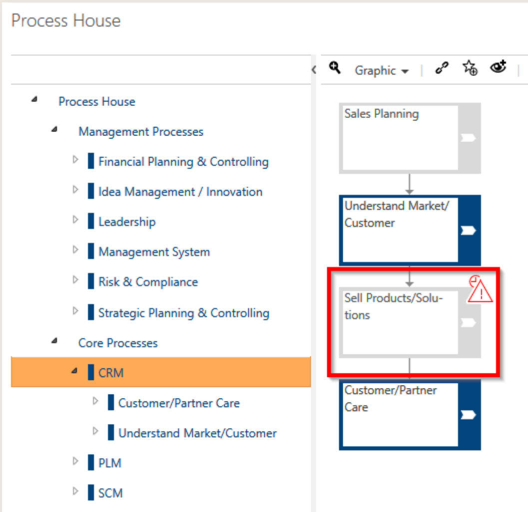


Figure 164 – Expired Main Processes

Recommended procedure: This expiry setting should be done hierarchically from bottom to top because of the following reasons: When the status is changed, the process and its child elements would only be visible in the "architecture (incl. expired)", child elements are not automatically set to expired.

For expired processes a new version can be created to re-use them again, then move them to the Process house afterwards.

Expired processes cannot be seen by Viewers any longer.

7.5.3 Update released Main Processes

The update of released Main Processes takes place in the version history and gives the architect the possibility of renewing documents or embossing child elements (subordinate levels). New Sub Processes in released Main Processes are not displayed until the specification is activated. Otherwise, the status of the main process with the subordinate levels remains unchanged.

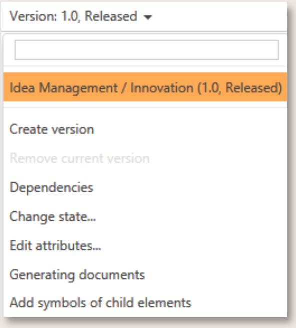


Figure 165 – Update kind elements

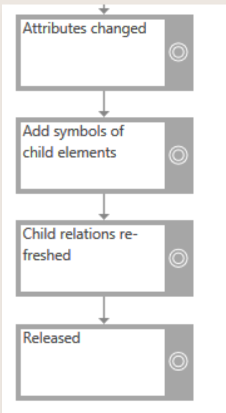


Figure 166 – Main Process lifecycle

7.6 Version a Main Process

Architect can create a new version for Main Processes and optimize the complete Main Process. To create a new version, the Main Process must first be selected. The version is then selected in the toolbar in the Detail Content.

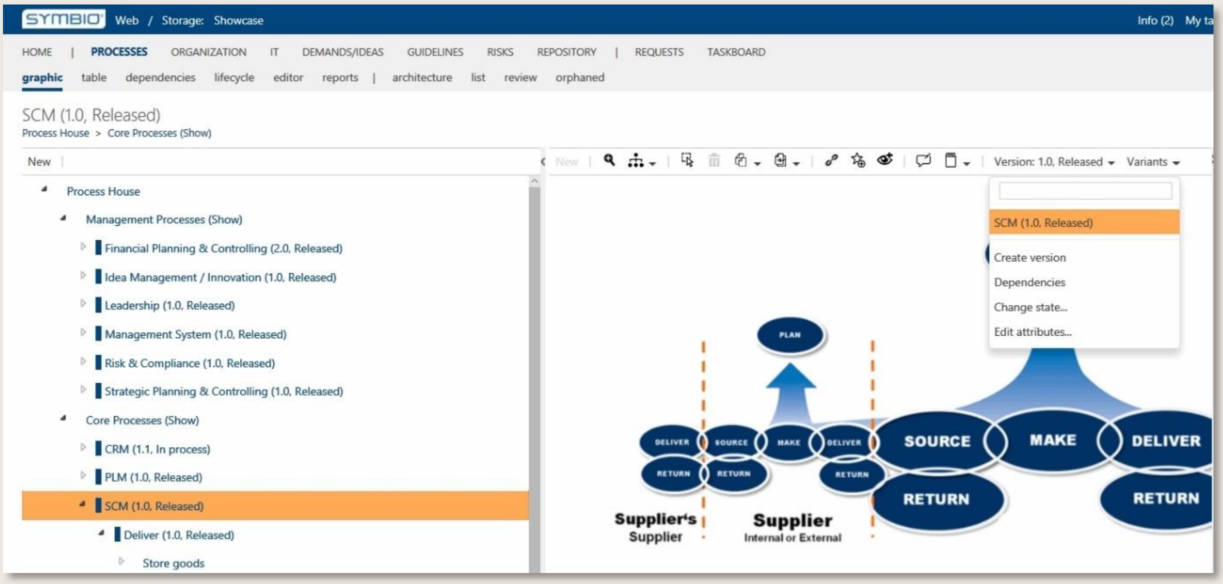


Figure 167 - Select the Main Process for Versioning

After selecting "Create Version", the architect receives the new version for the Main Process and the version number is updated.

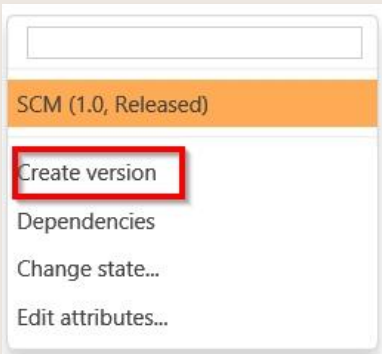


Figure 168 – Create Main Process version

7.7 Define a View in the editor

In the PROCESSES > editor sub navigation, you can graphically model individual Views for your process landscape. You can add pictures or photos illustrating the business model.

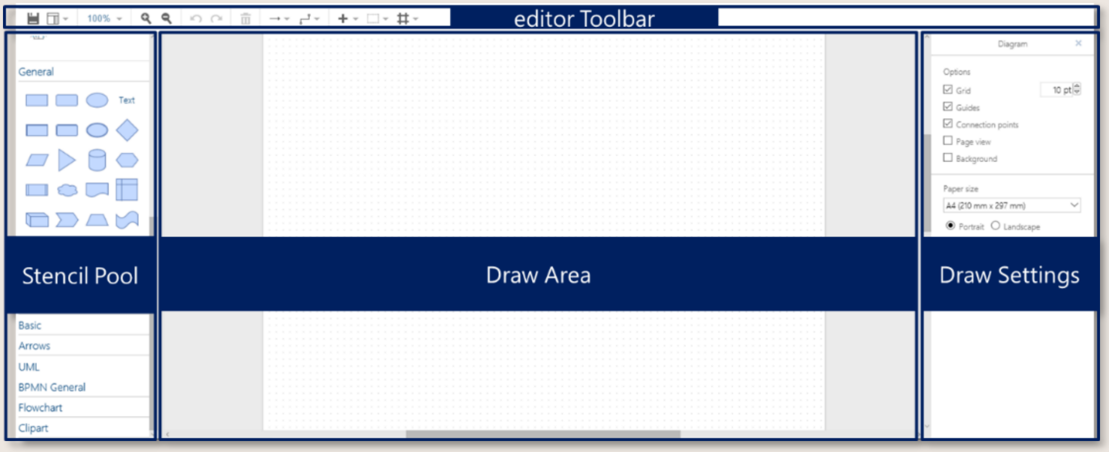


Figure 169 - Designing the workspace in the editor

There are several methods for the graphical modelling of a process:

- You can drag objects from the Stencil Pool on the left, drop them onto the Draw Area and re-model a main or sub-process.
- You can model a main or sub-process in the Graphic sub navigation area and edit it in the editor. The defined objects are individually listed in the Stencil Pool under Diagram contents and contents. You can drag and drop them to merge.
- The main or sub-process defined in the Graphic sub navigation area is shown as one graphic under Complete diagram. You can insert it into the draw area or add additional objects to it (e.g. for expansion or explanation purposes).

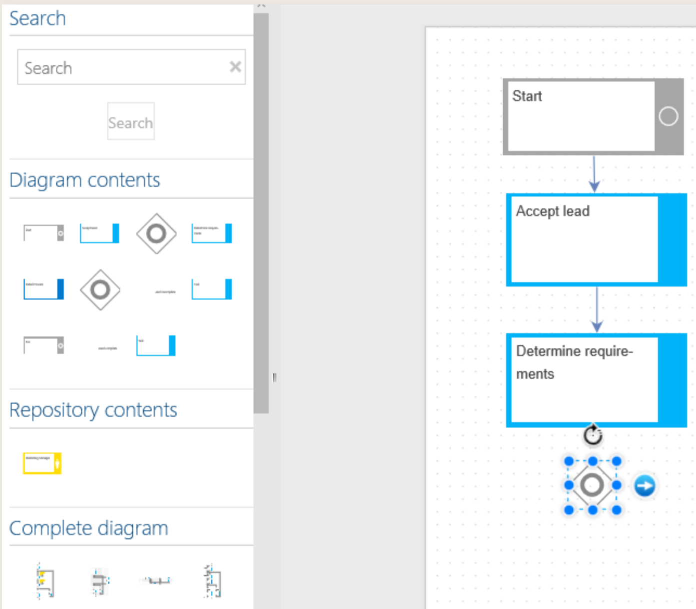


Figure 170 - Process modelling with objects from Diagram contents and Repository

Note:

When you store a process that has undergone modelling in the editor, Symbio deletes a process that was modelled under “Graphic” and replaces it with the new process in the editor!

7.7.1 Edit objects

Use the Draw Area to change the size of objects by moving nodes as desired or rotating nodes with the help of the circular arrow.

The arrow to the right of the object can be used as follows:

Single mouse click - Duplicates the object and connects it automatically
Shift + mouse click - Duplicates the object without connecting it
Drag with mouse - Creates a connection
CTRL + drag with mouse - Duplicates the object and connects it automatically

The editor toolbar provides additional editing options. Use the mouse-over function to view details about each item.

Figure 171 - editor Toolbar

Save - Saves the modelled process and thereby overwrites the process stored in “Graphic”!
View - Select different view options
Zoom in/Zoom out - Increases or decreases the display
Undo/Redo - Undoes/Restores the last step
Delete - Deletes the selected object
Connection - Changes the type of the selected Connecting object
Waypoints - Defines the graphical representation of the connection objects
Insert - Adds images or links

7.7.2 Formate objects

To label an object, click to select the object and enter text. If text was already present, it will be deleted and replaced with the new text.

The Draw Settings pane on the right offers the following design options:

- Style - Select colours and frames for the object
- Text - Edit font size, format, etc. for the entered text
- Arrange - Positions the object

7.7.3 Use link and text elements

With version 1807 the editor has been changed to save graphics in a language-neutral manner. For that reason, we introduced two new elements: Text and Link. Other graphical elements can no longer hold text and references now, delegating this task to these two new objects.

Text allows you to maintain formatted custom text in a multi-lingual way. Drag a text element onto the drawing area and select "Edit free text..." by right-clicking on it. The shown dialog provides formattable input fields for all your database's supported languages.

Link provides a way to reference elements of the process architecture or repository elements used in the current process. The display text of a link element is based on the display name of the referenced element.

Both new elements as well as the elements from "Diagram contents", "Repository contents" and "Complete diagram" (if those three groups have been enabled by your administrator) change their display text on switching the language. Due to that you can now model your graphic consistently for all languages just once and always see the current, language-dependent texts.

<u>Best practices / Usage</u>

It's best to use the new objects by first creating the background by composing the already known graphical elements. Then you place Text and Link objects over those elements where you would have added text and references directly until now.

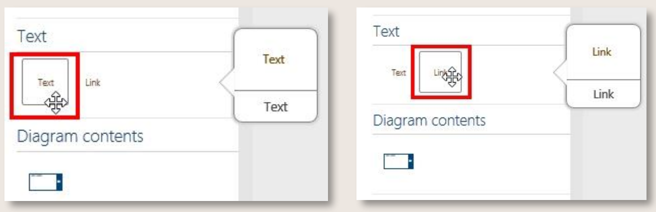


Figure 172 – Choose link or text element

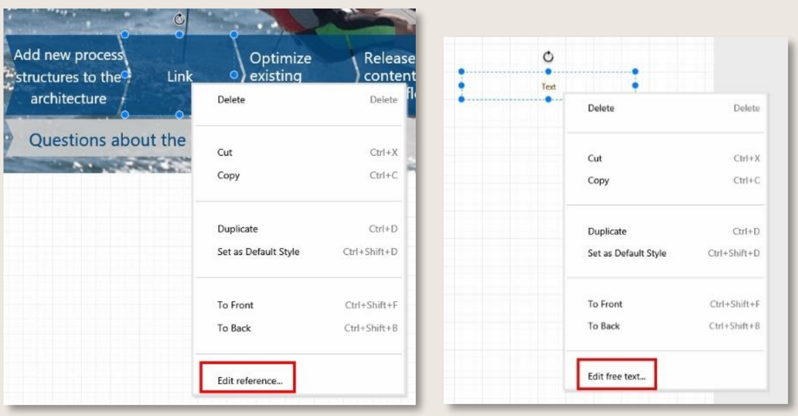


Figure 173 – Edit reference or edit free text

7.8 Change attributes in released process profiles

After process release, Architect can change the responsible person, author, quality manager, validity and organizational assignment by default without having to create a new version of the process. In the toolbar with the version you can open the field with the attributes.

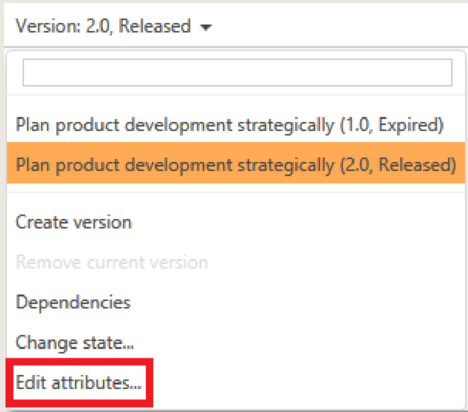


Figure 174 – Change attributes toolbar

Further attributes which are available for maintenance/modification:

- Name – in all languages, to be used for translations when adding further languages, or when typo detected.
- Stereotype - to be used when stereotype is missing or the wrong one has been maintained.
- Additional authors – to be used when an additional author has to be set or changed.
- Attachments – to be used when links to files have changed.

All changes can only be made with an additional comment from the architect/administrator as to why he is making these changes.

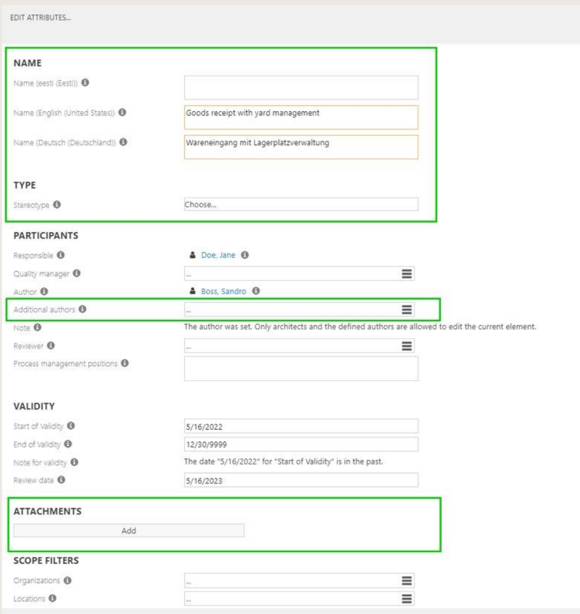


Figure 175 – Edit attributes dialogue – New Attributes

By activating the feature “Release cycle: Reason for change and attachments when editing attributes” Administrators and Architects must add a description for the change of the attributes in the “Edit attributes” dialogue and can also add an attachment containing for example, a confirmation for the performed change.

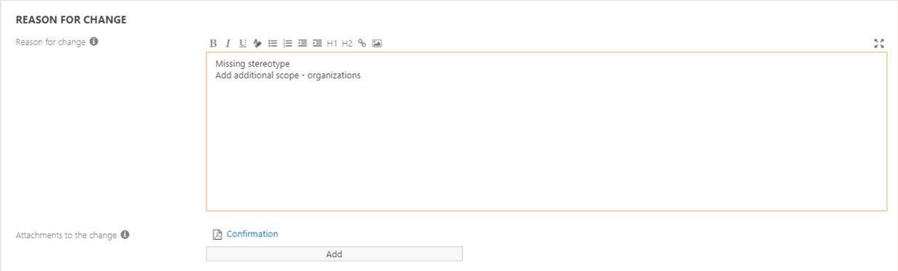


Figure 176 – Edit attributes - Reason for change

The changes made are documented in the life cycle.

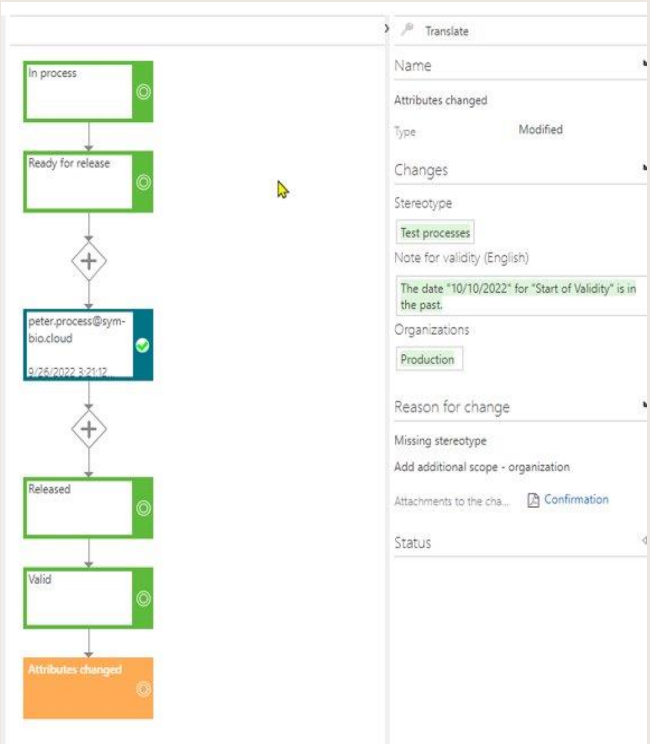


Figure 177 – Documented performed changes

New elements are highlighted with a green color and the changed elements are completely crossed out.
Note: Please note that this changes the modification date of the process.
This is also always the case if the life cycle diagram of the process or certain connected objects change.

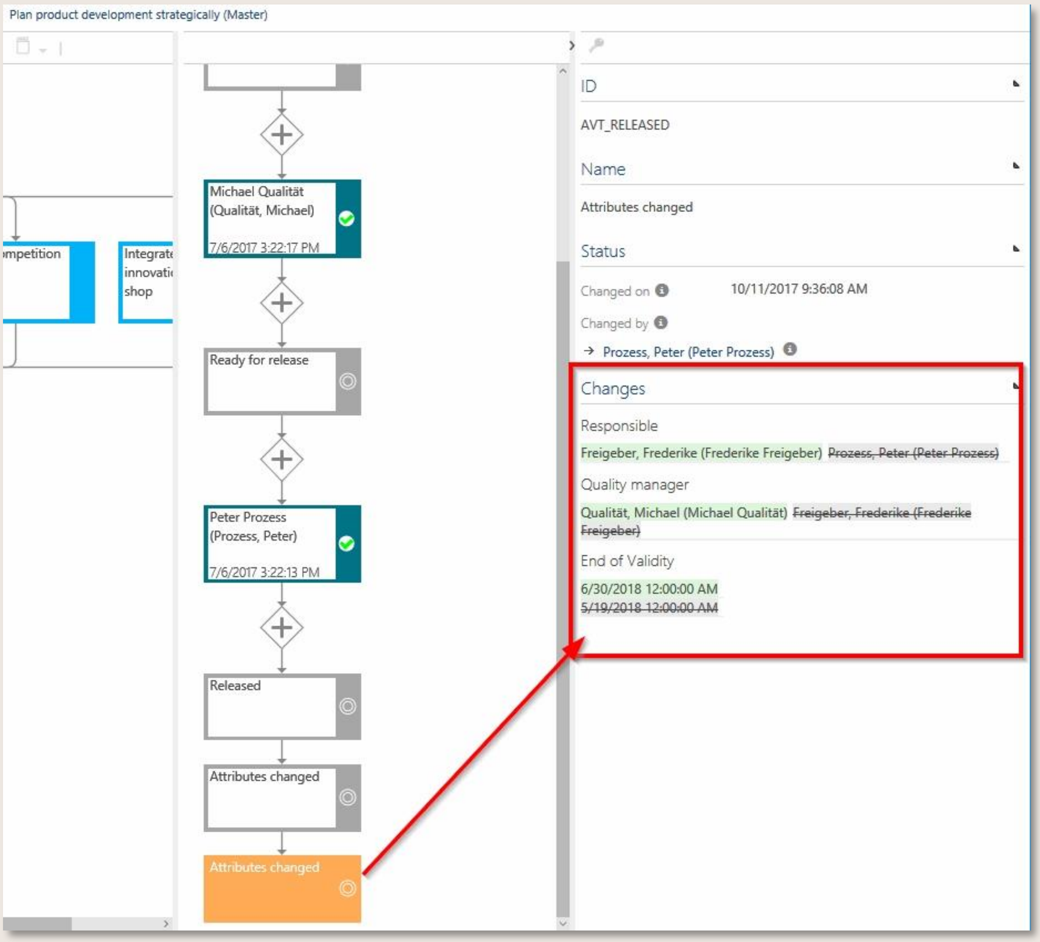


Figure 178 – Life Cycle Diagram

In the release workflow, the automatic setting of the “Start of Validity” date can be deactivated. Depending on the element type, this can be set individually in the admin area under “Set release cycle”. Thus, for example, the validity date is no longer automatically set to the current date (+ 14 days) for configured elements, but can be entered manually if required via “Edit Attributes” dialogue by an architect/admin.

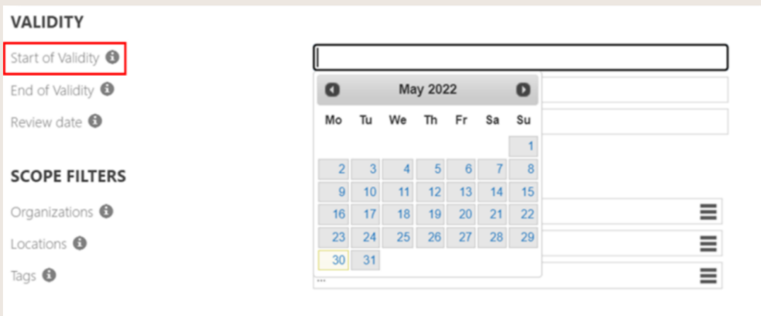


Figure 179 – Deactivation of the Automatic Setting

7.9 Administrate objects

7.9.1 Maintain objects and use further method features

The administration of objects includes the following tasks:

- Creating and updating objects with a hierarchical structure
- Creating and updating objects in a tabular structure (such as roles, input/output)
- Managing global tasks

It is recommended that objects are created and approved via the release workflow before modelling sub processes (which is carried out by the author). This ensures that only unique defined objects are associated with the sub-processes and that redundancies are avoided. A Sub Process can only be released if all linked objects have the status “Released”.

Symbio standard also enables the author to create objects and to submit them into the release workflow Author

Objects are created with a hierarchical structure (except for some object types such as roles, milestones, etc.).

The following sub navigation options are available for the main navigation items CUSTOMERS, STRATEGY, PROJECTS, ORGANIZATION, PRODUCTS, SYSTEMS, DOCUMENTS, RISKS, REQUIREMENTS, LEARNING, STANDARDS:

hierarchy/architecture - Shows the relationships (child/parent)
list - Displays all items for one level in a list
graphic - Shows a visual representation of the objects and their structure

To create objects for the ORGANIZATION: In the hierarchy sub navigation, select the organizational unit under which the new organizational unit will be created.

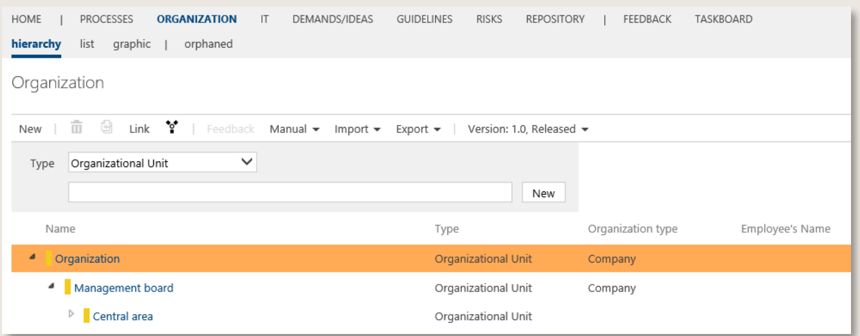


Figure 180 - Set up an organizational structure

Then click New and select the required type from the drop-down menu: Organizational Unit or Position. Enter a name for the process into the text field and confirm with New (or ENTER).

You can link positions with roles through the Detail Content area of a position:
Select the position and in Detail Content under Assigned Roles select the required role in the selection dialog that shows all roles stored in this process model.

Additional information about the object is entered in the Detail Content. Click the hamburger button to select the responsible person from the drop-down list. This field is required in order to make the object available for release.

You can add attachments to the object if required: Click Add to open a new window for attaching links or uploads.

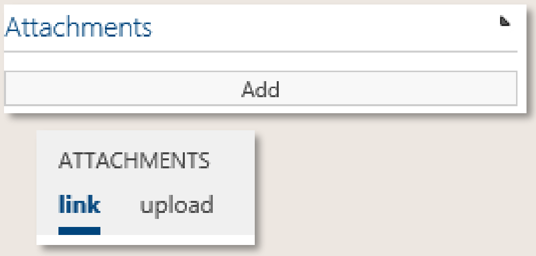


Figure 181 - Adding attachments

To delete objects, select them and click the Delete icon ..

The following Method features may be used if required:

- These features are usually only available after activation by the Admin.

- Method: "Documents to be considered" for organizational units to add the section “Documents to be considered” in the Detail Content of organizational units in order to link relevant documents.
- Method: Systems as a list (instead of Architecture) allows to deactivate the hierarchical architecture of systems. This may be relevant for customers that have created a large number of system objects that results in longer loading times. Once being activated, systems are displayed in a list.
- Method: Statement Attribute: the “Statement” section appears in the Detail Content of a standards chapter in the STANDARDS facet. A statement resulting from an audit report, for example, can be entered in the multi-line text field (this feature is integrated by default, activation by the admin is not required).
- Method: Assignment of documents on process house and sub category level allows to assign documents to the global process house or to a category. This link is also visible in the Detail Content of the respective document under the section “Used by”.
- Method: Location assignment to Main Processes, Scenarios and Documents: For Main Processes, Scenarios and Documents, the “Locations” section in the Detail Content is also available after activating the feature.
- Method: Location assignment to Main Processes, Scenarios and Documents: For Main Processes, Scenarios and Documents, the “Locations” section in the Detail Content is also available after activating the feature.
- Method: Assignment of processes to a document: after activation, the section "Assigned processes" is displayed in the Detail Content of DOCUMENTS to refer to existing Sub or Main processes that are relevant for this document. Also visible in the Detail Content of processes under "Additionally assigned documents", but not editable there

7.9.2 Convert uploaded guideline documents to PDF

Uploaded guideline documents can be converted to PDFs when they are released. Viewers will then see only the PDF document. To generate a PDF, the Author must click on the box shown below.

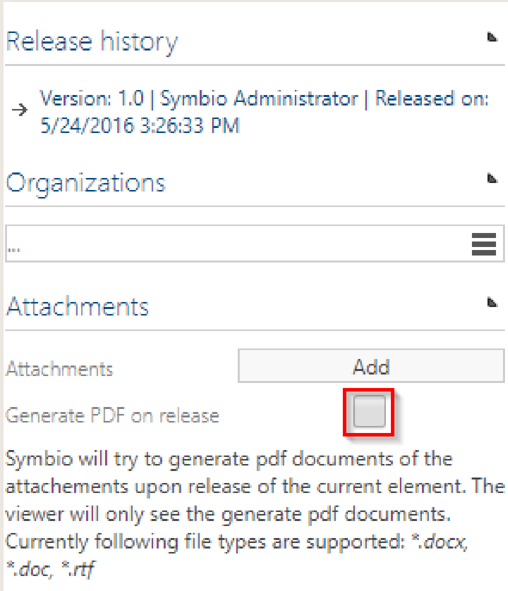


Figure 182 – Generate document as PDF

As an option, the feature Method: Additional relationships for documents can be activated. It enables to add further attributes, e.g. Responsible organization, Inputs/Outputs, Trainings and Learning unites to the Detail Content of the DOCUMENTS facet.
⋙ This feature is only available after activation by the Admin.

7.9.3 Version organizational units

In the same way as with objects you can create new versions of organizational units.

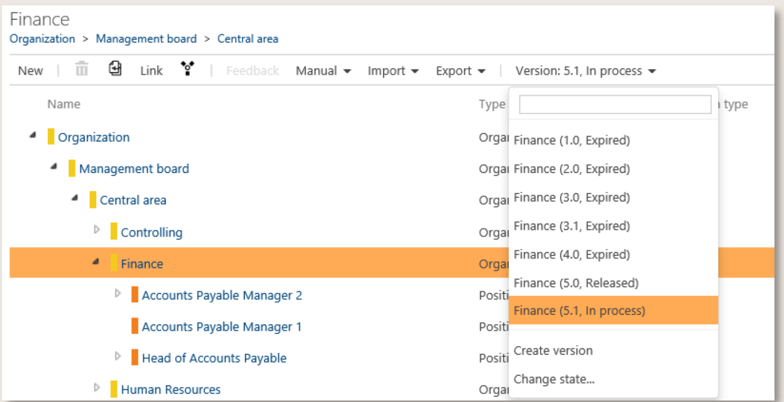


Figure 183 – Versioning organizational units

The new version must be approved by the person responsible after the author has set it ready for release.

7.9.4 Create objects in a tabular structure

The objects in the sub navigation area lists objects such as roles, input/output and metrics in the form of sub navigation elements. You can enter search terms into the grey box at the top of each column to look for specific objects.

Information about the selected elements is displayed above the Detail Content area on the right side of the screen.

To create a role, for example, enter the name of the role into the text box and confirm with New (or ENTER).

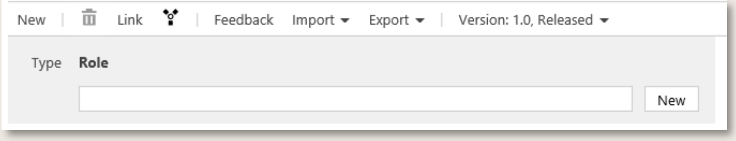


Figure 184 - Setting up roles

All created roles are listed in a table. Simply enter a search term into the grey box above the column to search for and filter specific roles.

Use the same procedure to set up any other object.

7.9.5 Use global tasks

Global tasks are tasks that are used multiple times (in the same version) in various processes.

There are two ways to create a global task:

- As object directly in the Tasks sub navigation area.
- While defining a sub-process: Select a task and click the Transfer to Repository button in the Detail Content area. The task is then automatically transferred.

To insert a global task into a sub-process:

- Create a regular task in a sub-process.
- In the Detail Content area for this task, click Create reference under Name. Select the required task from the dialog box which opens.

Similar to the other objects, global tasks should be set up and approved before modelling the Sub-Process as the release workflow for a sub-process can only be initiated once all objects have the status “Released”.

7.9.6 Create stereotypes

Stereotypes are now defined in the Admin area (formally in the Sub Navigation ‘stereotypes‘).

They may be created for each main type (PROCESS, STRATEGY, ORGANIZATION etc.) and stored with a colored layout. For more details please refer to our online Admin Manual: https://docs.symbioworld.com/admin/administration/stereotypes/creating-stereotypes.

NOTE: Once created, Stereotypes can only be renamed - but not deleted!

7.9.7 Define Measure status

⋙ This feature is only available after activation by the Admin.

With this Method: Maintain "Measures" status, the user can determine the status of a specific measure, deriving from a strategy. In the list view, all measures can also be filtered according to their specific current status.

To this, the attribute ‘Measure status’ is added in the Detail Content of Sub Navigation measures which is located below the STRATEGY navigation.

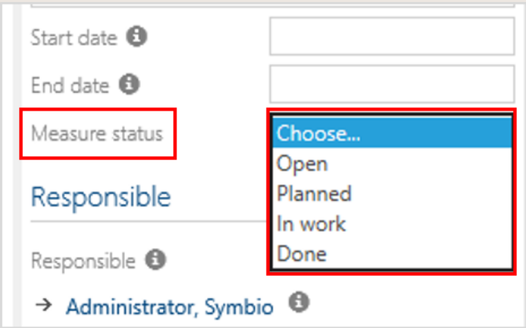


Figure 185 – Measure status

The suitable status value can be selected from dropdown and is also available in the filter bar.

7.9.8 Set up key performance indicators

In the KPI facet company-relevant key performance indicators are defined in a hierarchical structure or as a list and their interaction and dependencies are displayed logically.

The previous representation of KPIs in lists can now be converted to a representation as architecture by deactivating the feature Method: Key figures as list (instead of architecture) Existing KPIs can thus be arranged in a hierarchical structure from the orphan view.

- This Preview feature is only available after activation by the Admin.

If you have created a large number of objects, you are more likely to leave this feature activated for performance reasons.

Each key figure can be assigned specific actual/target values and warning/action limits in the Detailed Content and other monetary aspects are represented in KPIs. Furthermore, driver trees can be formed from key figures, independent of the hierarchy in the architecture.
By storing formulas and the necessary data source and calculation systems, the corresponding key figure is calculated and displayed in selectable cycles.

The creation of KPI-Reports with subordinate KPI-Report chapters enables the clear presentation of aggregated key figures in fact sheet format.

7.9.9 Inputs/Outputs in new architecture

- To use this feature, the deactivation of the feature „Method: Inputs/Outputs as a list (instead of architecture)“ is obligatory. Please contact your Administrator if required.

Inputs and outputs can be organized in a new architecture. In doing so, a new facet called “Business Objects” becomes visible, which contains all typical sub facets or sub navigations.

Objects can be sorted hierarchically and in categories. In the Detail Content, it is also possible to link required inputs/outputs and display the link. The existing objects can be found in the “Orphaned” view in the future. To do this, the view must be refreshed once.

This architecture gives you the possibility to better sort inputs and outputs, and to keep track of connected inputs and outputs.

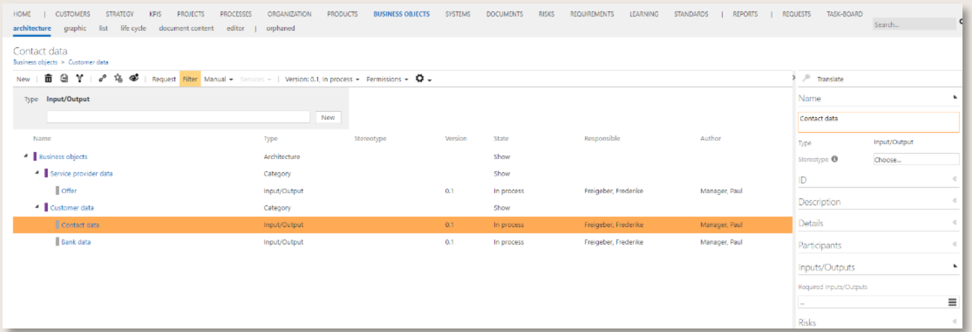


Figure 186 – Inputs/outputs as architecture

7.10 Administrate Customer Journey Objects

The Customer Experience Management in Symbio enables the comprehensive definition of a Customer Journey with further specific objects. The facet of Customers only contains objects relevant for Customer Journey. Creating and managing these objects behaves in a similar way to objects.

Figure 187 – Customer Journey Object Management

The architect maintains all contents of the Customer Journey in the respective facet and defines the further information in the detail content. A new object is created in the relevant facet (e.g. touch ponts, sales channel, stakeholders, etc.). The objects are then detailed by, among other things, their responsibilities and further information.
Every single Customer Journey object facet has content through important links and details in detail.

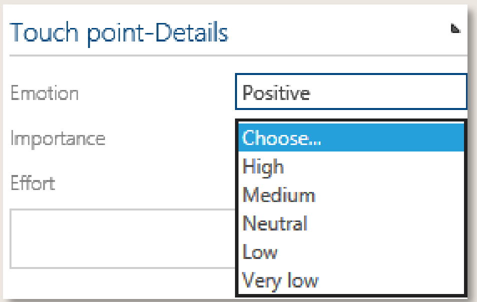


Figure 188 – Touch Point Details

Illustrations/pictures/icons can and should be added to the objects to create a visualization of the created object. These images are also added in detail content, but with the format 220x220 png. or jpeg.

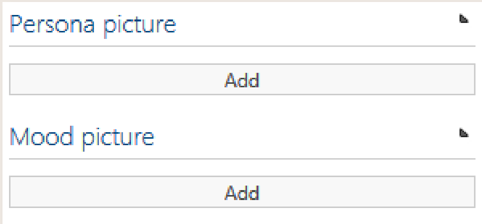


Figure 189 – Add Persona images

The Customer Journey objects are released in the same way as the objects. For more information, see chapter 7.11
For versioning, see chapter 7.12

7.11 Make objects available for release

Once all objects have been defined, each object must be made available for release. The same applies to created or updated processes.

The status of the object is changed after all relevant information has been updated or added in the detail content. First, the architect must define the author and the person responsible.

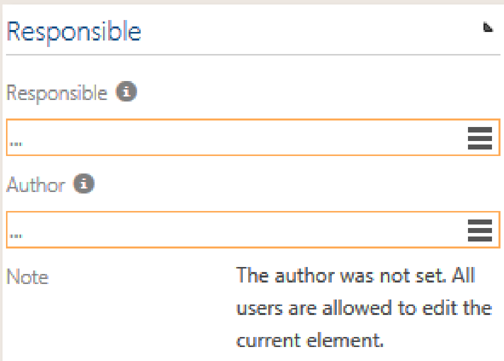


Figure 190 – Define responsible

The status change is then initiated in the toolbar.

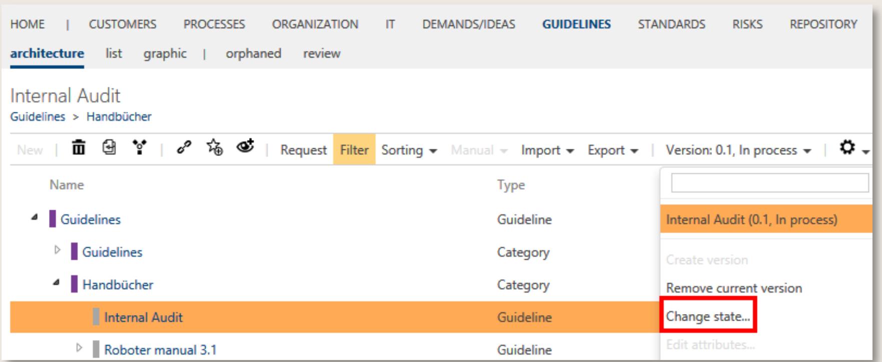


Figure 191 – Change object state

The status change triggers the release workflow.

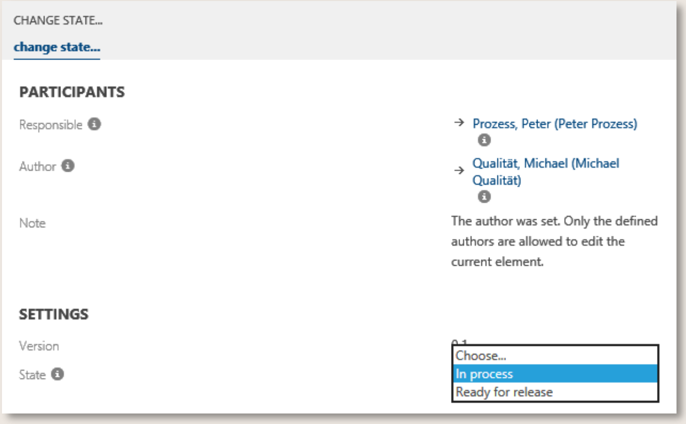


Figure 192 – Ready for release

7.12 Version objects

If an object is changed you can create a new version of this object.
Please select the respective object in the list, click on the Version button in the toolbar and select Create version.

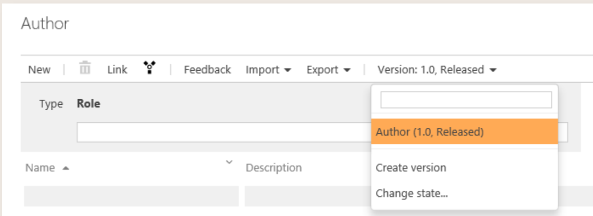


Figure 193 - Versioning objects

With the versioning function, you can trace changes. The new version of the object hast o released, too. The version number is automatically updated according to the following logic: the number before the decimal point increases to indicate the release version and the number after the decimal point increases to indicate interim releases.

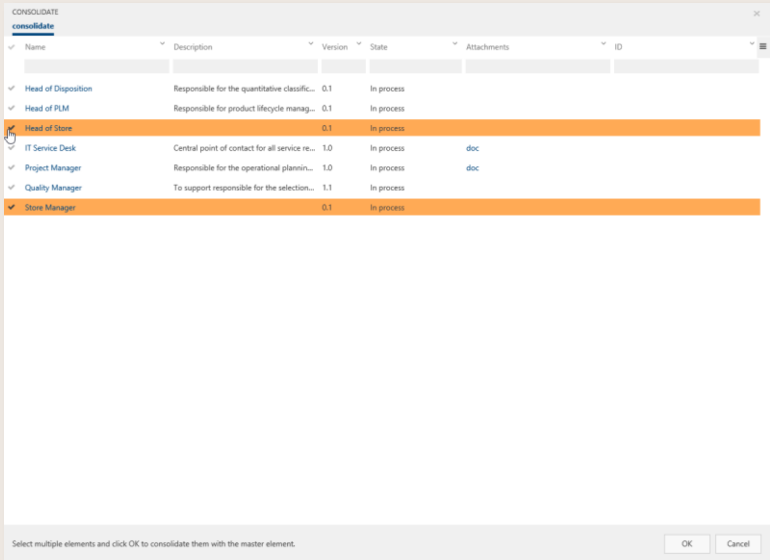
In every process status linked to the objects, the current version of the object is always used and updated immediately after release. This means that all processes are linked to the most recent object versions. All updates are recorded and mapped together in the process life cycle.
This behavior takes effect from version 1803 as soon as a new process version is created. This behavior can be applied to all processes through an automation task.

7.13 Consolidate objects

Objects can be consolidated if there are two or more objects of the same or similar meaning.

To consolidate objects, e.g. roles, please select the target element and click the consolidate button of the tcar. In the following dialogue please choose all source elements you wish to consolidate with the target and click OK. You will be prompted with a confirmation dialog showing information about your selected elements before the actual consolidation will be performed. By clicking OK, the consolidation is executed, clicking on “Cancel” leads you back to the source selection dialog.

Please be aware that only objects of the same type can be consolidated, e.g. risks with risks – not with controls. Architects consolidate objects with state „in process“, Administrators also objects with released or expired state.



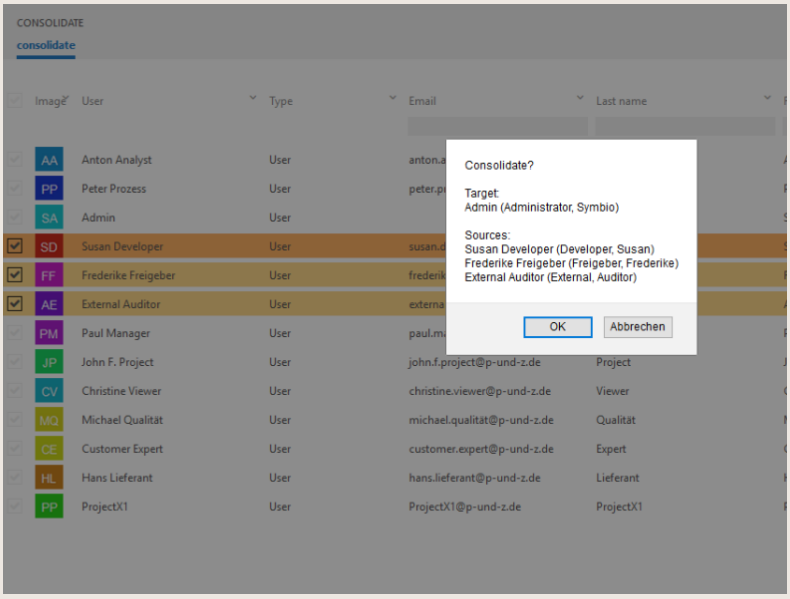


Figure 194 – Consolidating

7.14 Apply sorting function

The sorting function makes it possible to hierarchically optimize the categories, main processes and sub processes in the process architecture. In addition to the process architecture, the elements from the organization, IT, risks, guidelines and requirements management can also be sorted. The implicit sorting in the toolbar sorts all contents alphabetically. All manual sorting is not valid afterwards. If the architect uses a sort index, the explicit sorting is activated automatically. The sorting is only the architect's responsibility and can be changed from explicit to implicit.

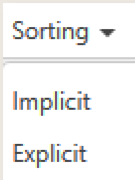


Figure 195 – Activate Sorting function

The attribute "Sorting" is built into the Detail Content and the numeric structure allows the architect to sort any number of objects.
Negative sequence of numbers is also supported. This means that objects with e. g. "-1" in front of an object with the number "5". Number steps are also freely selectable and can be carried out in the same steps (e.g. 10, 20, 30, etc.) or without a fixed structure.
After the number has been entered and the cursor is placed on another field, the order is updated. Elements without numbers move the function to the last position.

Figure 196 – Sorting elements

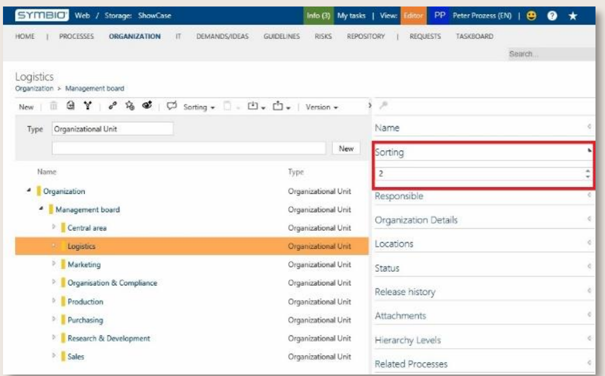


Figure 197 – Sorting organization structure

7.15 Generate Unique ID

The Unique ID Generator creates a unique number for each versionable element in Symbio, which is displayed in the Detail Content. The function is now also available for the Symbio Cloud. In addition, completely new databases can be initiated with IDs.

The ID number to be generated can be defined in such a way that, for example, a prefix also facilitates assignment to the information type. For example, the prefix PRO-123-234 could indicate that it is a process. A sequential number indicates the order in which the information object was created.

Clicking on the key icon assigns an ID and displays it after a refresh.

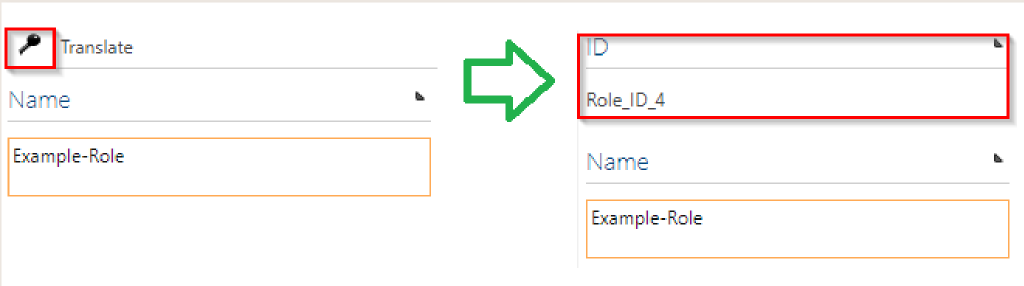


Figure 198 – Unique ID generation

For more information about this feature, please refer to the Admin Documentation.

7.16 Edit mass data

»» This feature is only available after activation by the Admin.
Prerequisite is previous activation of the Multiselection in lists feature!

This feature enables Admins and Architects to edit a large number of linked objects quickly, e.g. mass changes of connected roles, responsible persons or definition of scope filters. Existing elements can be removed or changed as well as new elements can be added.

It is recommended to first increase the list page size to 200 under Settings to have full overview:

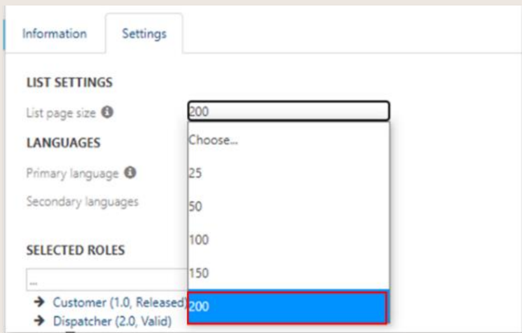


Figure 199 – Set list page size

To edit mass data, navigate to the list view of the respective facet, e.g. PROCESS list. Then all processes or objects whose linked elements are to be edited are selected. The respective status is irrelevant.

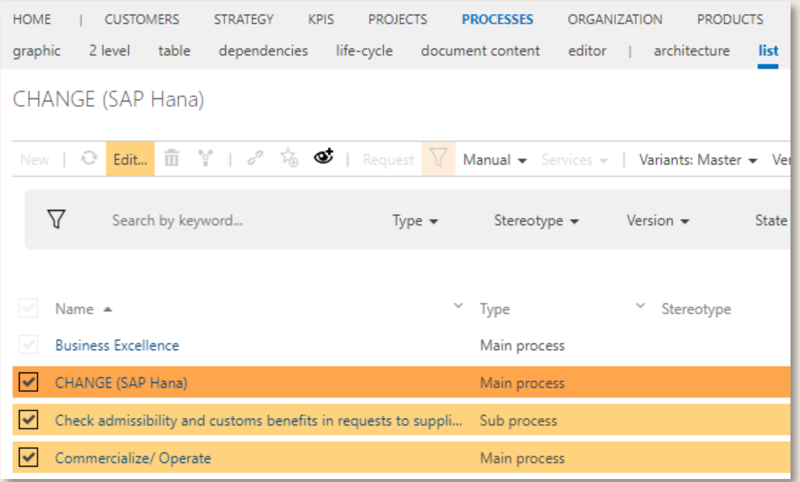


Figure 200 – Selection to edit mass data

Clicking on the (now active) Edit button in the toolbar opens a dialog window for further input.

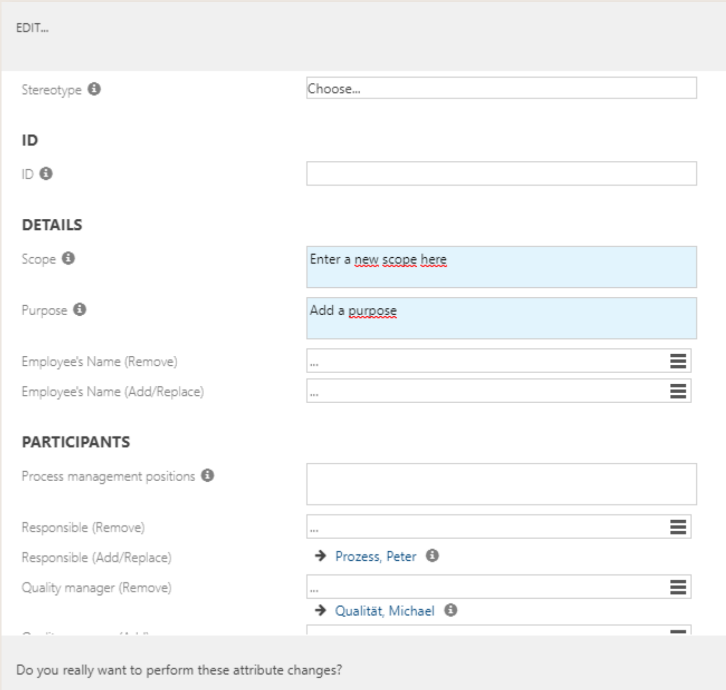


Figure 201 – Dialogue for mass data editing

When all mass data have been processed, a clear change notice appears after clicking OK, in which new / data to be replaced is shown in green and data to be removed is shown in red. Unchanged elements are also listed. The mass data is only actually changed after you have confirmed it again (OK).

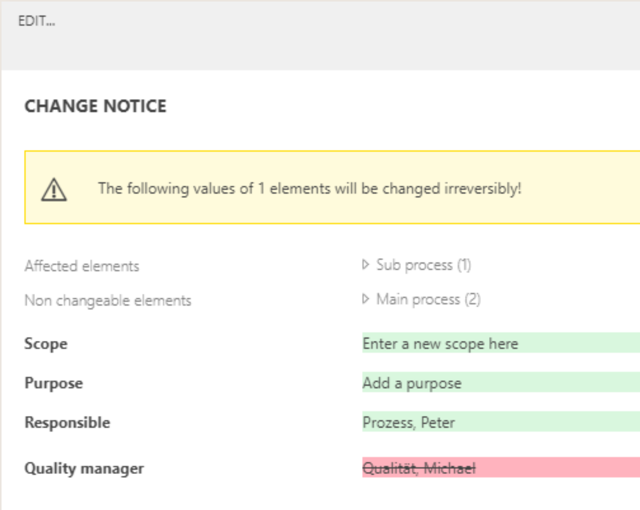


Figure 202 – Change notice for mass data editing

NOTE:

- Changes can only be made by Architects or Admins
- You can only edit processes that have the status "in progress", i.e. no changes are made to released processes
- If the wrong object is accidentally selected which is not linked to the process, it is treated as an element to be removed

7.17 Use Training Assistant (as a manager)

Managers use the Training Assistant App to set up the training courses relevant to their employees. This facilitates the targeted communication of specific expertise as well as regulations/legislation to be complied with in day-to-day business. In addition, the active training confirmation that the employee subsequently submits fulfils the legal obligation to provide proof.

7.17.1 Generate new Training content for employees

In order to create new Trainings automatically when a process or object (e.g. document) relevant to the respective employee is released, the following prerequisites must be met:

1. Set up a hierarchical structure of organizational units in the ORGANIZATION facet.

2. Add “Leader” in Detail Content of Organizational unit

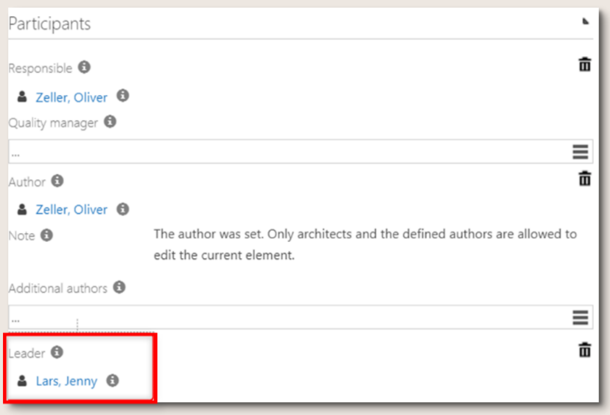


Figure 203 – TA Assignment of a Leader to an Organizational unit

3. Assign employees belonging to this organizational unit in form of „positions“.

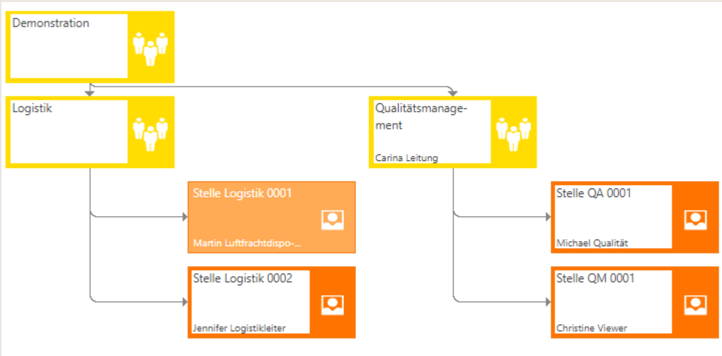


Figure 204 – TA Assignement of a positions to an organizational unit

4. Assign appropriate "roles" to the positions. It is possible to assign several roles to a position.

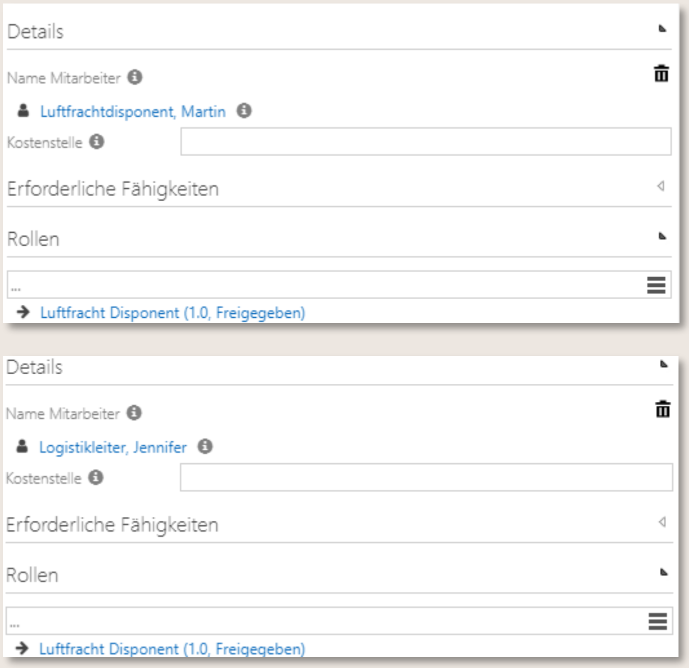


Figure 205 – TA Assignement of roles to positions

In this example, there are two jobs below the Logistics organisational unit. The employee Martin Luftfrachtdisponent was assigned to the first position. For better understanding, the role name was used as the family name. Therefore, the following two values were maintained in the Detail Content under "Details":

- Name employee: Martin Luftfrachtdisponent (First and last name, here roles as last name)
- Role: Luftfracht Disponent

5. In the PROCESSES facet, assign the relevant roles to the corresponding process in the detail content under "Executes".

6. When the process is released, the employee's role and affected positions are then identified. This means that with the process/object release, a training entry is automatically created for Martin Luftfrachtdisponent (in his role Luftfracht Disponentr) and for Jennifer Logistikleiter (in her roles as Logistikleiter).

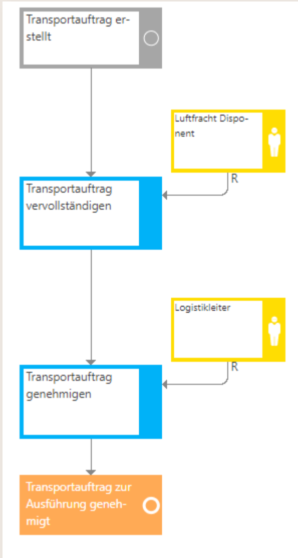


Figure 206 – TA Identification of affected employees on basis of roles

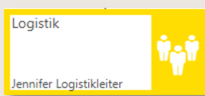
The following training objects are now created on the basis of the stored organizational master data:

Role	Assigned position / employee	Assigned employees to position
Luftfracht Disponent	Position Logistik 0001	Philipp Luftfrachtdisponent
Logistikleiter	Positions Logistik 0002	Jennifer Logistikleiter

In addition, the assignment of an employee (Jennifer Logistikleiter) to the management of the Logistik organizational unit ensures that this unit can also see the trainings of the subordinate positions.

7.17.2 Assign employees to the superior organizational unit

In the superior organizational units of the positions, the employee can be selected in Detail Content as a Leader.
This enables respective Leader to see the training implementation of all subordinate units and their employees.
For this purpose, the organizational element must be selected and the respective employee must be available in the field Leader.



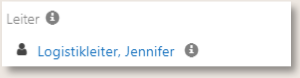


Figure 207 – TA Assign leading employees

7.17.3 Track employee trainings

As described above, each new version of a process or object (e.g. document) automatically generates a new training for the employees concerned. This is visible as an entry in the Team Training Dashboard.

This function allows management to intervene if necessary. In particular, when changes to the process model have to be taken into account promptly by the employee affected.

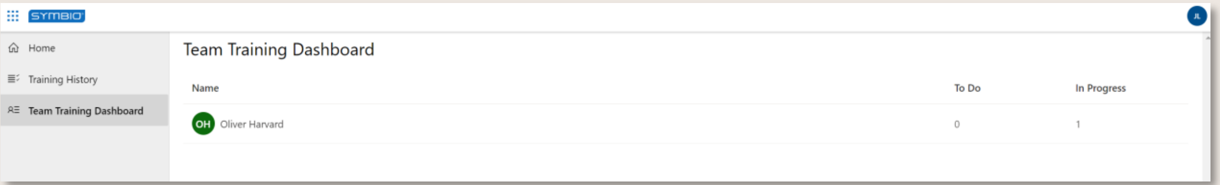


Figure 208 – TA Team Training Dashboard

The status of a training is "ToDo" at the beginning. This means that the employee has not yet opened the corresponding element. As soon as the training is opened, the status changes to "In Progress".

Only when the employee has completed the training and processed the changes relevant to his/her role does he/she confirm this training. This removes the corresponding element from the Team Training Dashboard.

The Report provides managers and administrators with an overview of all available trainings per organizational Leader as well as their respective status and any overdues at any time.

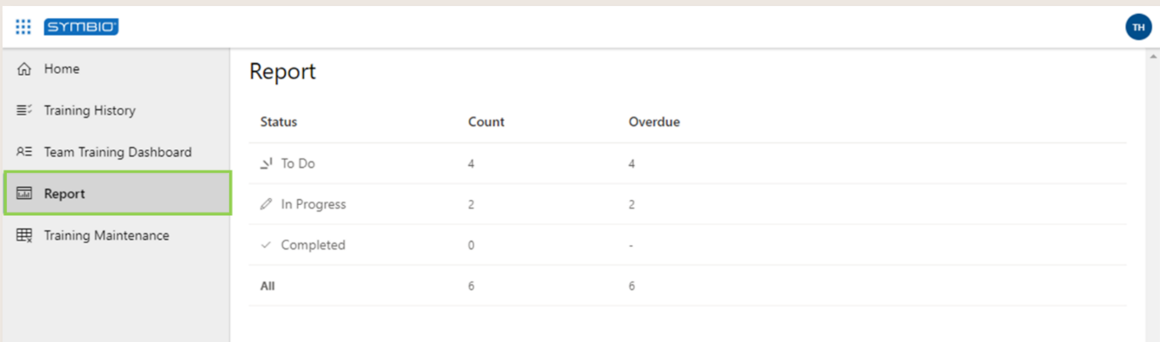


Figure 209 – TA Report

In the Training Maintenance section, training courses can be searched and filtered by User. It is also possible to delete obsolete courses if a new version of a process/object has been generated but is no longer relevant for training.

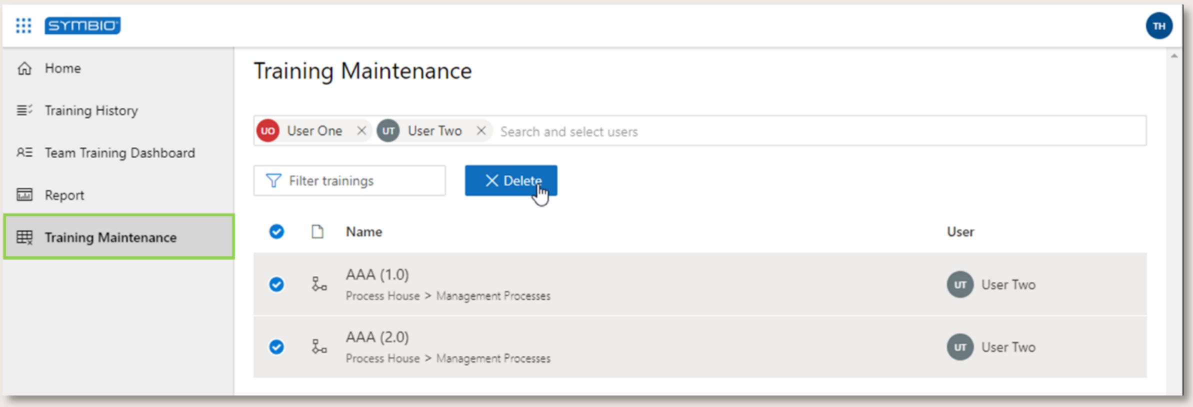


Figure 210 – TA Training Maintenance

8 Analyst

8.1 Get an overview of standard reports

Symbio provides predefined reports in a standardised design that can be generated by both Viewers and Editors according to their permissions.

The reports can be exported for further use in different formats, such as MS Excel. An overview of the basically available standard reports can be found here:

Report name	Description	Content / data
Process Model Structure	Evaluation of the entire process architecture with details on the individual processes. The complete process architecture is also available as an MS Excel export and in other formats.	• Process hierarchy • With few details
Process Model Structure (extended)	Evaluation of the entire process architecture with many details on the individual processes. The complete process architecture is also available as an MS Excel export and in other formats.	• Process hierarchy • With many process attributes • Linked objects
Object Analysis	Evaluation of the Symbio objects/attributes used in all processes. The aim is to ensure the quality and consistency of the process database.	• Object types • Object attributes
Object Analysis – Numbers and Occurences	Where-used list of the various objects and their connections in the company map	• Object types • Evaluation of connected objects
Risk Control Matrix	Assessment of the processes and the associated risks as well as controls. The aim is to check risks and controls for completeness and correct design.	• All levels of the process house, risks, controls and assigned attributes
Process Org Matrix	Evaluation of processes and the related organisational units. The aim is to review responsibilities in the organisation.	• Process house with all levels and assigned organisational units
Process Role Matrix	Evaluation of processes and the associated roles. The aim is to review the duties of participation within the processes	• Process house with all levels and assigned roles

- ⇨ Please be aware that standard reports are considered as an additional chargeable service.
- ⇨ It is also possible to customize these standard reports. Please contact us if you are interested.
- ⇨ Further information, especially for Admins, is available here.

8.2 Generate reports

The Symbio Standard Reports are available in Viewer and Editor mode.

Access to the available reports is via the REPORTS facet, where the role entries are also located (see 4.3.5).

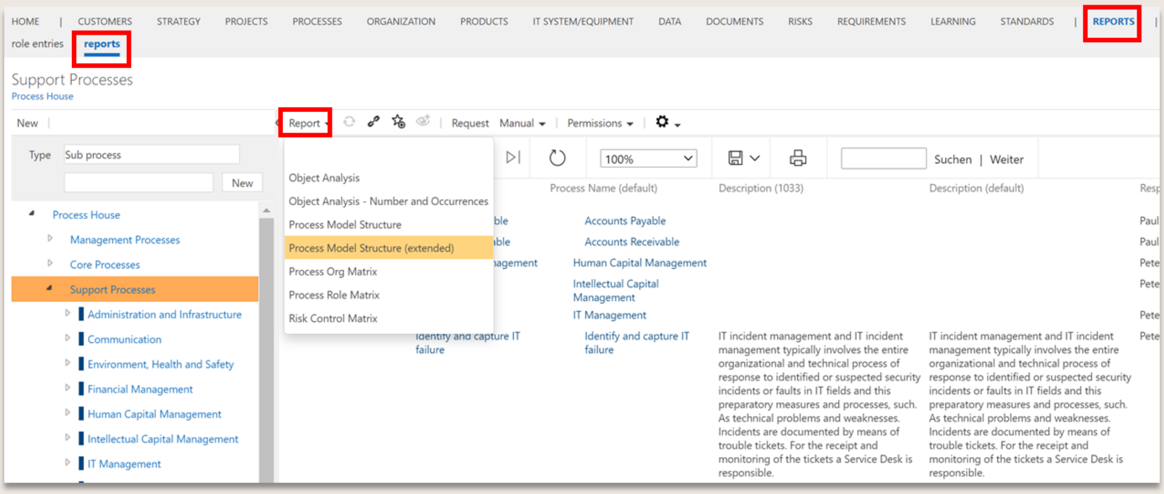


Figure 211 – Access to the reports

There are two types of reports:

1. Navigation tree-dependent reports

Depending on the selection of the level in the navigation tree, the content of the report is adapted accordingly. For example, the Process Model Structure report, which lists all levels below it as well as essential information.

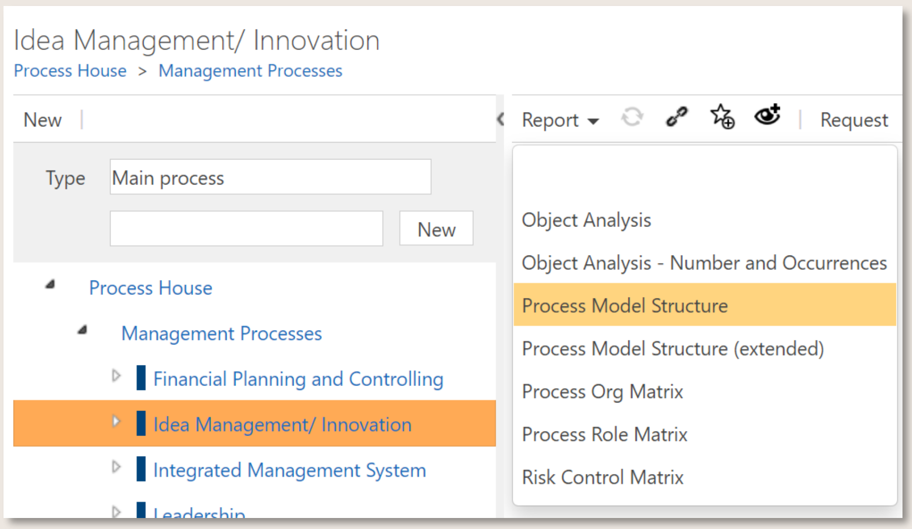


Figure 212 – Report „Process Model Structure“

NOTE: Please note that the generation of high level reports may take some time depending on the database size.

1. Navigation tree-independent reports

Regardless of the navigation tree, these reports list all the data available in the database. For example, the report Object Analysis - Number and Occurrences, which displays detailed information on the previously selected facets, i.e. a listing of the objects as well as with the assigned processes or process steps.

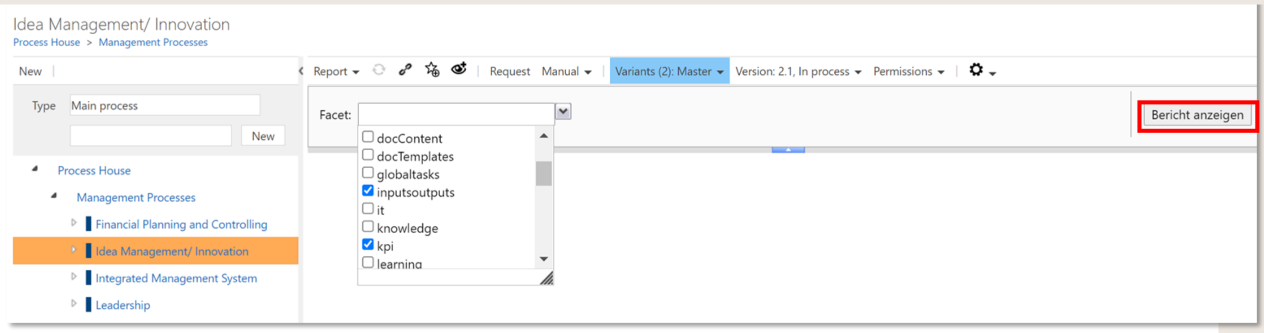


Figure 213 – Report „Object Analysis – Number and Occurrences“

Clicking the Show report / Bericht anzeigen button will generate the corresponding report.

NOTE: Please note that the generation of reports for which a large number of facets have been selected may take some time depending on the size of the database.

Reports can be exported to other file formats, e.g. MS Excel, for further processing or printed directly. To do this, click on the corresponding symbol in the toolbar.

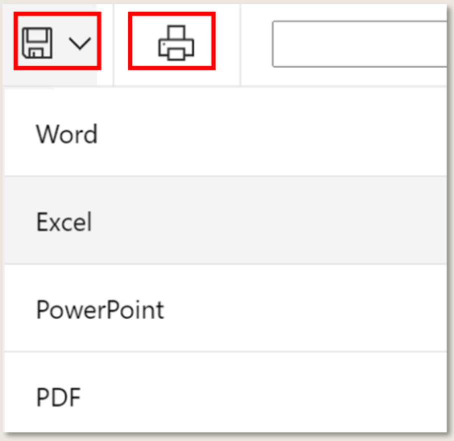


Figure 214 – Export-/Print options of reports

8.3 Connect Data Warehouse

The existing reporting function is supplemented by individual access to the data warehouse with a variety of BI software tools. With the extension, customers gain access to the Symbio SQL data warehouse database and can create and publish individual reports based on the data models. This gives data analysts maximum flexibility in evaluating their process world.

Different data models are offered. From a simple star schema, which can be processed by a skilled BI user, to an expert data model, which contains all the data of the process world, but requires BI expert knowledge for data transformation.

Figure 215 – Data Warehouse enhancements

For more information for administrators and analysts, click here. If you want to use this extension, please contact your Account manager.

9 Admin

Please visit our Symbio Documentation Website on https://docs.symbioworld.com/admin to learn more about the Administrator's role and his activities.

10 Glossary

Termin	Description
And gateway	In the event of branching, all subsequent paths run in parallel.
User role	Role with different permission levels set up by the administrator. Depending on the assigned role, users can either only view processes or they can also actively define and release processes.
Back Loop gateway	A Back-Loop gateway is used to model a loopback.
Condition	Conditions are required for differentiations following OR and Either-or gateways.
Connecting object	Symbio automatically adds connection lines/edges between process flow objects and to objects.
Converging gateway	Converging gateways are used to merge different paths, before continuing the process flow.
Detail Content	The workspace on the right-hand side to enter detailed information about processes, objects or process flow objects.
Draw Area	Central workspace under PROCESSES > editor sub navigation. Used for the graphical modelling of processes or diagrams.
Draw Settings	The workspace on the right-hand side under PROCESSES > editor sub navigation. Used to customize the objects for graphical modelling with regards to position, size, colour, etc.
editor toolbar	Toolbar above the Draw Area. Used to specify different views and provides access to other features (attaching links or images, etc.).
Either-or gateway	Used to differentiate between mutually exclusive alternatives. Depending on the branch conditions, the process flow will continue with one outgoing branch. In the event of a merge, the program waits for the incoming active edge, before continuing the process.
End	Used to end the process sequence. This symbol must be used at the end of each sub-process.
Event	Marks the achievement of a defined condition within the process, such as a milestone.
Manual	Default MS Word document that can be generated in Symbio for processes and organizational units. Represents defined contents with illustrations and tables.

Header	Blue menu bar for basic settings, help, feedback and search.
Main Content	Central workspace which displays the contents of the selected process level, for example as illustrations or tables.
Main Navigation	Upper part of the navigation area. Used to access processes, objects or pending tasks.
Main Process	Main process/object used for structuring the processes. Is used for higher levels and can include other main processes and sub-processes.
Navigation	Grey menu bar used to navigate to the processes, objects and pending tasks in the taskboard. Is divided into a main navigation and a sub navigation area.
Navigation Content	Workspace on the left-hand side. Used to navigate through all levels of the process house.
Or gateway	In the event of branching, one or more path(s) will be followed (depending on the conditions).
Process toolbar	Menu above or below a process flow object. Used to select the predecessor or successor object on the sub-process level.
Process flow object	Object which describes the process architecture and the process sequence: main process, sub-process, start, end, event, task, interface shape, gateways, conditions
Process House	Model containing all main processes and sub-processes on their respective levels. The default categories are: Management Processes/Core Processes/Support Processes.
RACI method	Categorizes responsibilities to describe which role is responsible for which activity. R = Responsible / A = Accountable / C = Consulted / I = Informed.
object	This object describes a main process or sub-process in detail. Objects are accessed via the navigation bar, e.g. ORGANIZATION, IT
Start	Icon to start a process (sub-process) sequence. Required at the beginning of each sub-process.
Stencil Pool	Workspace on the left-hand side under PROCESSES > editor sub navigation. Provides a selection of templates for different object types that are used for the graphical modelling of processes or diagrams.
Sub Navigation	Lower part of the navigation bar. Used to navigate within a previously selected main navigation area with a selection of views/versions.
Sub Process	Object used to structure the processes. It is used at a lower level, can contain other sub-processes and may consist of process flow objects.

Swimlane	Symbio automatically creates a column for each responsible (R) person and assigns tasks accordingly.
Task	Process step/individual activity within a chronologically logical process sequence that is performed by employees.
Toolbar	Menu above the Main Contents area. Allows users to customize views and use other features, such as editing process flow objects or generating manuals.
Views	User-specific, configurable views, such as end-to-end processes.

11 Disclaimer

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