

# **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.





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.

New   🍳 🏤 🗸 🏵 🖷	🛉   🧏 Edit 💼 🖄 🗸 🕒 🗸	. ≡ →	🔎 Translate	
 Material input	 Material input	*	Name	
count correct	count not correct		Either-or	
10	Under/over deliv-		Short description 🕄	
	ery process			
	12		Rule type 🚯	Either-or And
	Book difference an order new delivery		Gateway type 😈	Or Either-or
	note		Accountable Orr	<b>w</b>
+ 7				ganization
			Applicable role	

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:

S Cyrriolo	
Benutzer	
Passwort	
togin	
Content on other for and important productions are the balance working. On these data anguanteeness before aga as beings, extension of content and particular, the content dataset, und Co shifters developed against and and the balance and particular and the balance factorized and a state and a state of the balance and particular balance angundentities in Coher-Factor and a state of the balance and particular and and Constitution and angularized and the state of the state of the state of the Constitution and participant of the balance and participants.	
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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: <a href="https://docs.symbioworld.com/admin/installation-guide/oauth-configuration/setting-up-oauth/">https://docs.symbioworld.com/admin/installation-guide/oauth-configuration/setting-up-oauth/</a>

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.

**W** 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. 2 <u>Select Scope filters</u>

SYMBIO' Storage: Release1808   Filters:	No filter applied		
HOME   CUSTOMERS STRATEGY PROJEC graphic 2 level table dependencies life	Reset all filters		c ph
Plan and prepare production Process House > Core Processes > SCM > Make > Pla	<b>FILTER</b> Organizations		≡
New	Locations		= ~
Type Sub Process	Tags	***	

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





#### 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.

#### Public

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 2 Search for content
- Navigate to role entries in REPORTS navigation **PR**ole 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 mouseover function to view details about each item.



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  $and \equiv able/disable$  the corresponding checkbox in the dialog box.

Link	Feedback Manual •				🔍 Graphic 🕶		
~	Name	Туре "	(R) responsible	(R) responsible (alterna	Employee goods receipt		
~	Material input count correct	Condition	→ Storekeeper	^	Start		
~	Mark released material by stock category	Task	→ Employee goods receipt				
~	Book warehousing	Task	→ Storekeeper		Mark released mate- rial by stock cate-		
~	Store material	Task	→ Storekeeper		gary		
~	Count material when storing	Task	→ Storekeeper			Book warehousing	
~	Either-or	Either-or	-> Storekeeper				
~	Material input count correct	Condition	-> Storekeeper				
~	Material input count not correct	Condition	→ Storekeeper			Store material	
~	Book difference an order new delivery note	Task	→ Storekeeper				
~	Count provided material before storing	Task	-> Storekeeper			Count material	
~	Either-or	Either-or	→ Storekeeper			when storing	
~	Material input count not correct	Condition	→ Storekeeper				
~	Event completed	Event	-> Storekeeper			×	
~	Either-or	Either-or	→ Storekeeper			×>	
~	Book warehousing	Task	→ Storekeeper				
~	Ether or	Either-or	→ Storekeeper			Material input count correct	Material input count not correct
~	Store material and provide for delivery	Task	→ Storekeeper				

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.

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Name	4
Description	٩
Process Information	٩
Responsibilities	٩
Status	4
Release history	٩
Organizations	٩
Maturity	4

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 subprocesses. 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

architecture graphic list document content   solutions	ORGAN	IZATION	PRODUCTS	SYSTE	EMS DATA	DOC	UMENTS	RISKS
architecture graphic list document content   solutions								
		architecture	graphic	list	document co	ntent	solutions	

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 I <u>Defining Views in the editor</u> 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.





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 <u>not</u> to place a whitespace after the colon (see example).

AND/OR operators, quotes and asterisks can also be used (see example below).

Filter by field	e.g., n:Management									
i:	ID									
u:	u: Unique ID									
n:	Name									
d:	d: Description									
S:	Short description									
g:	Scope									
Operators e.g. AND OR Quotes e.g., "I It might be help the search quer term.	I., Management OR Support Environment, Health and Safety". oful to use quotation marks to specify ry in order to search for a compound									
Quotes and as The quotation is pecify that the partial term.	terisk e.g., "Data & Processes*" marks can also be combined with "*" to search term can only be contained as a									

n:process AND d:process



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.

SYMBIO' Storage: InnovationDay	Filters: No filter applied					Info My tasks
HOME   CUSTOMERS STRATEGY graphic 2 level table dependencies	PROJECTS <b>PROCESSES</b> ORGANIZA life-cycle document content ex	TION PRO ditor   ai	DDUCTS SYSTEMS DA	ATA DOCUMEN v orphaned	ITS RISKS REQUIREMENTS LEAR expired (architecture)   task reposito	INING STANDARDS
Processes						
New   😌 🛅 🚏   🧬 🎲 📽	Request Filter A Manual - Impor	t 👻 Export 🖣	🗸 🛛 Variants: Master 👻 Ve	ersion: 2.0, Valid 👻	Change permissions   🗘 🗸	
Y Search by keyword	Type 👻 Stereotype 👻	Versio	n ▼ State : Valid <del>▼</del>	Responsible 👻	Author : Manager, Paul 🗸	
Name 🔺	Type Štereotype Š	Version ~	Search Varian		Kesponsible	<ul> <li>Author</li> </ul>
Accounts Payable	Main Process	1.0	Maste 🗸 Valid		→ Manager, Paul	→ Manager, Paul
Accounts Receivable	Main Process	1.0	Maste In process		→ Manager, Paul	→ Manager, Paul
Communication	Main Process	1.0	Maste Expired		→ Prozess, Peter	→ Manager, Paul
CRM	Main Process	1.0	Master	valiu	→ Freigeber, Frederike	→ Manager, Paul
Define Product	Main Process	1.0	Master	Valid	→ Prozess, Peter	→ Manager, Paul
Deliver	Main Process	1.0	Master	Valid	→ Freigeber, Frederike	→ Manager, Paul
Financial Management	Main Process	1.0	Master	Valid	→ Manager, Paul	→ Manager, Paul



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.

DEM			
itor	FILTER		_
	Organizations	***	=
	Locations	***	≡
- 1	Tags		





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.

Process House		Start
Management Processes		°
Brenntag		
Financial Planning and Controlling		maail of groots re-
Idea Management/ Innovation		
Integrated Management System		Purchase order
Eadership		
Risk and Compliance		fall by stock cate- gory
Strategic Planning and Controlling		Terreport require
Core Processes		eet ⇒ □
> 11		
Brenntag		or Speed Speed
CRM		
Р РИМ В SCM	Filters	set
» Рол Э вол	Filters	set
<ul> <li>Р.М.</li> <li>в.С.М.</li> <li>В.С.М.</li> <li>Россез Ноше</li> </ul>	Filters	set
<ul> <li>PAM</li> <li>SCM</li> </ul> Process House Management Processes	Filters	set
PAM     SCM     SCM  Process House  Management Processs     Benntag	Filters	set
PAM     SCM     SCM  Process House  Management Processes     Benning     Benning     Benning	Filters	set
PIM SCM SCM Process House Management Processes Benning Integrated Management System Islandnubp Ladenbip	Filters	set
PIM     SGM     SGM	Filters	set
P.M.     SCM     SCM     SCM  Process House  Management Processes     Brenning     Indeparted Management System     Leadership     Indeparted Management System     Leadership     Indeparted Management System     Scharberger Management     Scharberger Management System	Filters	set
PM     SCM     SCM     SCM     SCM     Concest-Invace     Management Processes     Brenting     Markgenent System     Ladorhip     Rak and Compliance     Stategic Panning and Controlling     Core Processes     Sub-	Filters	set
	Filters	set
	Filters	set
	Filters	set

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.

ILTER	
Organizations	
	<ul> <li>Org unit 2 (0.1, In process)</li> </ul>
ocations	
	<ul> <li>München (0.1, In process)</li> </ul>
ags	
lote	All parent elements of selected elements will be evaluated implicitly.
ags lote	<ul> <li>München (0.1, In proce</li> <li></li> <li>All parent elements of select</li> </ul>

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.

P	ROCESSES	ORGANIZ	ATION	PRODUCTS	SYSTEMS	DOCUME	NTS RI	SKS R	EQUIREMENTS	s	LEARNING
le	document	content	editor	architecture	list	review o	orphaned	expired	(architecture	:)	task reposi
$\nabla$	Manual 🗸	Services 👻	Vari	iants: Master 👻 V	ersion: 0.1	In process	<ul> <li>Permissi</li> </ul>	ons 👻	٥.		

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.

ORGANIZATIONS								
architecture list								
Name	Туре	Stereotype	Version	State				
Organization	Organizational Unit	Company	1.0	Valid				
Management board								
Central area	list	list						
<ul> <li>Logistics</li> </ul>	-							
Customs	Search by key	yword	Type 👻	Stereotype 👻				
Disposition								
Goods Management	Name 🔺 💙	Des Stereotype	✓ Version	✓ State				
Transportation management	<ul> <li>Alt Ötting</li> </ul>	City	2.1	Expired				
Marketing	Bejing		1.0	Valid				
<ul> <li>Organisation &amp; Compliance</li> </ul>	Boston		1.0	Valid				
Compliance	✓ Cape Town	City	3.0	Valid				
Process management	A Destroyed	Chu	10	M-Ed				
Quality management	♥ Dortmund	City	1.0	valid				
Production	Erlangen	City	1.0	Valid				
	Hamburg	City	1.0	Valid				
	Milano		3.0	Valid				
	<ul> <li>Munich</li> </ul>	City	4.0	Valid				
	Singapur		1.0	Valid				

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.

PROCESSES	ORGAN	ZATION	PRODUCT	IS SY	STEMS	DOCUMENT	S RISKS	REQUIREME	ENTS L	EARNING	STANDARDS	- I	REPO
ment content	editor	archit	tecture		eview	orpnaned	architecture (	inci, expirea)	tasi	k repository			
Manual → Ser	vices 👻	Variants	: Master 👻	<ul> <li>Version</li> </ul>	n: 0.1, In	process 👻 Pe	ermissions 👻	٥.					
Stereotype	•	Version 🗸	•	State 👻	Re	sponsible 👻	Author 🗸	Organi	zations 👻	Locations	• 1	ags 👻	
										Search			
ре	$\sim$	Stereotyp	e	~ V	ersion	<ul><li>✓ Variant</li></ul>		⊻ State		Mun	ich		
ıb process				0	.1	Master		In proces	55	Rom	e		
ain process				0	.1	Master		In proces	55	Paris			
ain process				0	.1	Master		In proces	55				_
ain process				0	.1	Master		In proces	55			Clear	×

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.

HOME   CUSTOMERS STRATEGY PROJECTS PROCESSES ORGANIZ role entries reports	ATION PRODUCTS	SYSTEMS	DOCUMENTS	RISKS	REQUIREMENTS	LEARNING	STANDARDS	I.	REPORTS	REQUESTS	
Processes Tasks Documents Inputs/Outputs KPIs Risk											
New   🖸 🏛   🥔 🏂 💇   Request Manual   Change permissions											
Name 🔺	└ Description					≚ Stere	eotype	~	Version ~	State	
								$\sim$			
Plan and prepare production									0.1	In process	
Release process & data (Workflow)									3.0	Valid	
Release process and data									3.1	In process	
Release production order									0.1	In process	



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.

	S				
LIST SETTING					
List page size		50			
The selected p will be display	age size deter ed in list views	rmines, how many ele 5.	ments per page		
LANGUAGES					
Primary langua	ge		≡		
tions					
Secondary lang	uages	***	Ξ		
Secondary lang	uages ILES		=		
Secondary lang SELECTED RO	tes		=	]	
Secondary lang SELECTED RO  → Dispatcher ↓	LES r (2.0, Valid)		=	]	
Secondary lang SELECTED RO  → Dispatcher ↓  Roller → Employee	(2.0, Valid) nbeschreibung distribution (1	" "Disponent" .0, Valid)	=	]	
Secondary lang SELECTED RO  → Dispatcher ↓	LES r (2.0, Valid) nbeschreibung distribution (1 goods receipt		=	]	
Secondary lang SELECTED RO  → Dispatcher ↓ @ Roller → Employee → Employee → Quality Ma	r (2.0, Valid) beschreibung distribution (1 goods receipt anager (3.0, Va		=	]	

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 the olbar 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.

SYMBIC: Web / Storage: Showcare / Va	rivert Macter					into   Vie	na Vananz 📴 Peter Prozess   🙂 📀 🤋
HOME   PROCESSES ORGANIZATION IT D	REMANDS/IDEAS CUIDELINES IN	AS REPOSITORY   REQUESTS	TASEBOARD				Search
graphic table reports							
Idea/Innovation (Master) Process Liouse > Management Processes > Ises Managem	ent/incoation						
	🖣 Gophire   🧬 🗞 🤇	🖉   Request Manual +					∧ <sup>3</sup> Name
<ul> <li>Process House</li> </ul>	Detailed				lities / requirement has	finiteour im-a	iden/instation
<ul> <li>Management Processes</li> </ul>	Swimlane vertical						Descaption
Strategic Planning & Controlling	Swimlene horizontal	Pick up on customer	Pick up internal	Capture ideas and	Restructure and Scheckle	Schedule ideas and	The large stars and assess to serve in divided
Intercel Planning & Controlling	lick Veteral	ments	ments		qu'rerrer/s	Pesture PBI	three phases:
Risk & Compliance	Process matrix						<ul> <li>Pake place review of trends, ideas, brainstorming of requirements, custor</li> </ul>
<ul> <li>Idea Management / Innovation</li> </ul>							<ul> <li>Evaluation phase: testing for suitability</li> </ul>
Loss intoversity	Roles						idea for the product and market requi • Technology transfer transfer requirem
Management for two	Customer						the release planning
Con-Encience	P+Z Team						Process Information
Europer: Prospace	Product Owner				(R)	(R)	Responsibilities
Symbic Introduction	Scrum Master				(c)		Barroschie
P 121	Head of Sales				(A)		
Views	Developer						Autor 🕲
	Inputs/Outputs						Manager, Faul (Paul Manager)
	inputs	• Content of the		• Max and a second	• Sometice Decompton on another		County manager      C
		<ul> <li>Laterner stellt.</li> </ul>		<ul> <li>kloa/requirement.</li> </ul>	<ul> <li>aymos monte at product.</li> </ul>		Status
							Talana katan
	Outputs	Customer ideas		<ul> <li>Idea management</li> </ul>	<ul> <li>Idea/requirement</li> </ul>		Recase natory
				<ul> <li>Idea/requirement</li> </ul>			<ul> <li>→ 12/1/2015 6/39.48 PM   Reason for Revisio</li> </ul>
	Systems						Prove.
	Primary System	Webnite		<ul> <li>MS Office</li> </ul>	Document Management Sys	Team Foundation Server	Organizations
	KPIe						Maturity
	10.15					<ul> <li>Velocity</li> </ul>	
	Guidelines					Create PBI	
	Risks						
	Trainings			• Create Plat in Learn Loundes.			

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.

SYMBIC Web / Storage: ShowCase			Info
HONE   PROCESSES ORGANIZATION IT DEMANDS graphic table dependencies lifecycle editor report Idea/Innovation (Master) (Symbio) (1:1, In proc hoces House + Management Processe (Shon) + lies Management New (* 1 * Process House * Management Processe (Shon) * Friancial Ranning & Controlling (18, Release * Idea Management / Innovation (18, Release * Idea/monation	NDEAS GUDELINES RESIS REPOSITORY   REQUES ts   architecture list review orphaned ESS) t/ innovation (L0, Released) > Idea/Innovation > Idea/Innovation ( Comp	ts taste0.AnD Matter(Cymbol)	Variants • KPIs • Customer satisfaction regarding toobleshooting (1.0 • Velocity (2.0. Released)
<ul> <li>Interference (Matter) (Symbol)</li> <li>Istan/Innovation (Matter) (Symbol)</li> <li>Istantegic Planning &amp; Controlling (1.0, Released)</li> <li>Strategic Planning &amp; Controlling (1.0, Released)</li> <li>Strategic Planning &amp; Controlling (1.0, Released)</li> <li>Signost Processes (Show)</li> <li>Signost Processes (Show)</li> <li>Yiews Show)</li> </ul>	Input - Castomer requirement (10, Released) - Castomer requirement (10, Released) - Error derocityon (10, Released) - Idea management (10, Released) - Idea/requirement (10, Released)	Rosks	Output • Product Backlog Item (PB) (10, Released) • Product documentation (10, Released) • Product macrosoft (10, Released) • Release planning (10, Released) • Release Task (10, Released) • Release Task (10, Released)
	Systems for Input - Email client (10. Released)	Primary Systems • Team Foundation Server (1.0, Released)	Systems for Output: - Document Management System (DMS) (1.0. Released) - MS Office (1.0. Released)

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.

Create documentation Process House > Core Processes		
New	🛛 New   🍳 Graphic 🗸 🤨 💮   Select 🏛 🖄 🗸 🗟 🗸   🔗	🐞 😻   Request Manual 🗸 Services 👻   Version: 0.1, In process 👻 Permissions 👻
Type Sub process New Process House Management Processe Core Processe Create documentation	Main process risks Name Expiring licenses Upload fails Wrong usage of copyrighted material	Description Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonum Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonum
Make screenshots     Plan to deliver     Research		

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 dropdown menus (and enter a desired delivery date, if required). Feedback is entered in the free text field.

REQUEST			×
DATA			
Created by O	Qualität, Michael (Michael Qualität)		
Created on O	6/27/2017 2/41/41 PM		
State	Created		
Type Urgency Desired response date	Choose Charge request Charge request Error Other		
REQUEST			
Title			
Description 🖲	B / Ⅲ ◆ Ⅲ Ⅲ Ⅲ Ⅲ Ⅲ Ⅱ H1 H2 % Ⅲ		20
REFERENCE ELEMENT	2		
Notice	Associates the request to the cur-		
La Carta de	vently idected element, if possible.		
		ОК	Cancel

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.

Task comment	<u> </u>
Title	Feedback zu Review
Description	
Feedback	
State	<b>`</b>
State	Assigned to responsible person
Created on 🔒	12/17/2021 12:10:59 PM
History	
• 12/17/2021 12:1	1:13 PM Assigned to
<ul> <li>12/17/2021 12:1</li> </ul>	on 1:12 PM Created
lafo.	
close the request with a author.	n answer or forward it to the
Involved	
Created by 📵	
💄 Viewer, Christine 🍕	
Assigned to 🚯	
🌢 Manager, Paul 🚯	
Responsible 📵	
🌢 Prozess, Peter 🤀	
Linked Element	
Test (Master, 2.0)	

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).

ATA		
eated by 🚯	👗 Boss, Sandro 🔞	
reated on 🚯	8/19/2022 3:26:43 AM	
ate 🚯	New	
isigned to	🎍 Boss, Sandro 🚯	
otice	If no 'Assigned to' is defined, the requests will be assigned to the default first level support.	
r information		
<u>_</u>	A Process, Peter 💿	
pe 👽	Question	
gency 👽	High	
QUEST		
te 🔁	Graphic Design	
tle 🗊 escription 🚯	Graphic Design B / U 4 語 語 理 理 H1 H2 9 网	
te 🖲 escription 🤁	Graphic Design B I U I III III IIII IIII IIIIIIIIIIIII	:
le 🜒	Graphic Design B I U I III IIIIIIIIIIIIIIIIIIIIIIIIIII	
te 🕤	Graphic Design B I 业 种語 臣 理 理 H1 H2 多 画 Which Graphic has to be applied for the corresponding process?	:
ie 🖲 scription 🖲	Graphic Design B I U 争 語 臣 酉 酉 H1 H2 多 画 Which Graphic has to be applied for the corresponding process?	:
le 🖲 scription	Graphic Design B I U I III III IIII IIII IIIIIIIIIIIII	:
le 🖲 scription	Graphic Design B I 业 争 語 臣 理 理 H1 H2 多 画 Which Graphic has to be applied for the corresponding process?	
le	Graphic Design B I U I III III IIII IIII IIIIIIIIIIIII	:
ie 🖲 scription 3	Graphic Design B I 业 争 田 田 理 田 H H2 多 画 Which Graphic has to be applied for the corresponding process?	
te	Graphic Design B I 业 争 田 田 理 田 H H2 多 画 Which Graphic has to be applied for the corresponding process?	:
e	Graphic Design B I U 中田 田 酉 酉 H1 H2 多 画 Which Graphic has to be applied for the corresponding process?	ОК Саг

### 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.



### 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.

Request	Manual 👻	Version: 2.0, Valid 👻	Comparison
			Real and the second



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

Store goods Process House > Core Processes > SCM > Deliver	
<b>Q</b>   2.0, Expired + 3.0, Valid	
Start	Start
Mark released mate- rial by stock cate- gory	Count provided ma- terial before storing
Check quality	×

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.

ersion	Released by	Released on	Reason for Re	evision	
1.0	Prozess, Peter (Peter Prozess)	12/1/2015 6:39:48 PM	Initial erstellt.		
2.0	Exozess, Peter (Peter Exozess)	10/11/2017 10:47:31 AM	Done		
		Table: Chang	e history		
State	•		2		
State <sup>/ersion</sup>	State	Start of Validity		End of Validity	
State /ersion 2.0	State Released	Start of Validity 12/1/2015 6:39:48 PM		End of Validity 3/31/2016 12:00:00 AM	
State Version 2.0	State Released	Start of Validity 12/1/2015 6:39:48 PM Table: Relea	se state	End of Validity 3/31/2016 12:00:00 AM	

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		<ul> <li>Customer (R)</li> </ul>	Customer ideas	<ul> <li>Customer ideas</li> </ul>	N/A
4	Pick up internal ideas and requirements		P+Z Team (R)	<ul> <li>Customer ideas</li> </ul>	N/A	N/A
7	Capture ideas and requirements		P+Z Team (R)	<ul> <li>Idea management</li> <li>Idea/requirement</li> </ul>	<ul> <li>Idea management</li> <li>Idea/requirement</li> </ul>	N/A
8	Restructure and qualify ideas and requirements		<ul> <li>Head of Sales (A)</li> <li>Product Owner (R)</li> <li>Scrum Master (C)</li> </ul>	<ul> <li>Symbio Presentation product description</li> </ul>	Idea/requirement	N/A
11	Schedule ideas and requirements as a Feature/PBI		<ul> <li>Product Owner (R)</li> <li>Scrum Master (I)</li> <li>Scrum Team (I)</li> </ul>	N/A	N/A	<ul> <li>Create PBI</li> </ul>
12	Estimate costs for the feature/PBI		<ul> <li>Developer (C)</li> <li>Head of Sales (I)</li> <li>Product Owner (A)</li> <li>Scrum Master (R)</li> </ul>	Idea/requirement	<ul> <li>Idea/requirement</li> </ul>	<ul> <li>Create PBI</li> </ul>
18	Plan and priorize PBIs		<ul> <li>Head of Sales (C)</li> <li>Product Owner (A)</li> <li>Scrum Master (R)</li> <li>Scrum Team (I)</li> </ul>	<ul> <li>Idea/requirement</li> <li>Project planning</li> </ul>	<ul> <li>Idea/requirement</li> <li>Project planning</li> </ul>	N/A
19	Confirm implementation of the PBI		<ul> <li>Head of Sales (I)</li> <li>Product Owner (C)</li> <li>Scrum Master (A)</li> <li>Scrum Team (R)</li> </ul>	<ul> <li>Idea/requirement</li> <li>Product Backlog Item (PBI)</li> <li>Release planning</li> </ul>	<ul> <li>Product Backlog Item (PBI)</li> </ul>	<ul> <li>Create PBI</li> </ul>
25	Move PBI into the next sprint		<ul> <li>Product Owner (I)</li> <li>Scrum Master (A)</li> <li>Scrum Team (R)</li> </ul>	<ul> <li>Product Backlog Item (PBI)</li> </ul>	<ul> <li>Product Backlog Item (PBI)</li> </ul>	N/A

Figure 51 – Task Details

3.3	3.3 RACI matrix															
		Ro	les (	oblig	atio	n to (	coop	erat	e)							
		L	ε	Sales	aster	Janve	eam	J.								
		stome	z Tea	ad of ;	M mu	duct (	1 mn	velope								
No.	Task in Sub Process	Cus	đ	Hei	Scr	Pro	Scr	Dev								
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	С	R										
11	Schedule ideas and requirements as a Feature/PBI				Т	R	Т									
12	Estimate costs for the feature/PBI			Т	R	A		с								
18	Plan and priorize PBIs			с	R	Α	I									
19	Confirm implementation of the PBI			Т	A	С	R									
25	Move PBI into the next sprint				A	Т	R									
*	= Global task	R	= Resp	onsibl	e, Ral	t = Res	IDODS-	alterna	ative, A	A = Acc	ountat	ole, C	= Cons	ulted,	= Info	med
	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.

Head of Disposition		
New   🛅 💱   🖉 🏂 😻   Requ	est Manual ▼ Import ▼ Export ▼   Version: 1.0, Rel	eased 🗸 🛛 🎝 🗸
Type Role	Generate Role handbook_EN	lew
Name 🔺	Description	✓ Role type
Scrum Master		Role
Head of Disposition	Responsible for the quantitative classific	ation of contracts wi Role

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.

Copy permanent link	(
You can copy the permanent link into the clipboard and use it in a new be open it.	rowser window to
ink independent of version	
https://pz.symbioweb.com/Test/Test-JD/go/pam6mvwqhbrnbe	be 🗹 Copied
https://pz.symbioweb.com/Test/Test-JD/go/pam6mvwqhbrnbe	be 🗸 Copied
https://pz.symbioweb.com/Test/Test-JD/go/pam6mvwqhbrnbe Link to version (the link will be created upon clicking on Copy)	be Copied
https://pz.symbioweb.com/Test/Test-JD/go/pam6mvwqhbrnbe Link to version (the link will be created upon clicking on Copy) Link to selection (in version)	be Copied Copy

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.

25.05.2021 Main process	Produce steel beams	Lorem ipsum dolor sit amet, consetetur
		sadipscing elitr, sed diam nonumy
25.05.2021 Risk	Prod system not reachable	Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tLorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod
Ready for release		
25.05.2021 Sub process	Cast steel	Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod
		sadipscing elitr, sed diam nonumy eirmod
25.05.2021 Control	Inspect buildings regularly	sadipscing elitr, sed diam nonumy eirmod Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod

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.

Favorites	
Type to filter the list	T
Main Prozess 2	1
Sub Prozess 1	Copy Move
La Many processes	Delete Move down

#### 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)

FavoriteServiceSyr	nbio	~	
ManyFavorites	51		
My favorite documents	1	:	
My favorite processes	1	:	
QM audit relevance	7	:	Edit
			Delete
			Share



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.

Share with users	
Search user	
	Cancel Done

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.



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.

	Favorites     Subscriptions       MANAGE FAVORITES       Image: Second S	
Group1		
New 🛛 🗖		< 🔍 Graphic 🗸 😳 👼   🕮 🖄 🖉 🗸 🖼 🗸   Permissions 🗸
Type Favorite group	New	Accounting Leadership
Name	Count of favorites	
Group1	2	
Group2	0	

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.

Management relevance		
New   💼	🔍 Graphic 🗸 😌 🖶	Edit 💼 🖄 🗸 🖼 🗸 🕻
Type Favorite group	Compliance	Strategy
Name 🛛 Y Count of favori 🚍		
Audit relevance 2		
Management rel 2		

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.



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.

HOME	CUSTOMERS	STRATEGY	PROJECTS	PROCESSES	ORGANIZATIO	N PRODUCTS	SYSTEMS DOCUMEN	ITS
architectu	re graphic	list docum	ent content	editor   o	orphaned rev	iew		
Guidelir Documents	nes							
New	t 🛛 🏋 🛛	୶ นิ 🔮	Request F	ilter Manual	👻 Services 👻 🛛	Permissions 👻	\$-	
Туре	Category							
						New		
Nan	ne				Туре		Stereotype	
4 D	ocuments				Docu	ments		
×.	Guidelines				Categ	gory		
⊳	Instruction spe	c			Categ	gory		

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.

SYMBIO' Web /	Storage: ShowCase / \	/ariant: Master					Info (1)   CV Christine Viewer (EN)
HOME   PROCESSES	ORGANIZATION IT	DEMANDS/IDEAS GUIDELINES	S RISKS REPOSITORY	REQUESTS	TASKBOARD		Search
info							
Perform review of	Sub Process Versior	n 'Ideen/Innovationen'					
ၿိဳ 🛱 🚿 🛛 Reques	t Manual 🛩						Review task information
Туре	Action type	XAssociated element	Created by	Created on 💌	✓ Status	~ <b>≡</b>	Name
						$\sim$	Perform review of Sub Process Version 'Ideen/Innovationen'
Element in review			$\rightarrow$ Symbio Administrator	8/1/2017 2:52 PM	To Do		Status To Do

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.

SYMBIO' Web / Storage: ShowCase / Va	riant: Master	
HOME   <b>PROCESSES</b> ORGANIZATION IT I graphic table reports review	DEMANDS/IDEAS GUIDELINES	RISKS REPOSITORY   REQ
Idea/Innovation (Master)		
	<ul> <li>Graphic - Request M</li> </ul>	anual 👻
Idea/Innovation (Master) (1.1)	Customer	P+Z Team
	Start O	]
	Pick up on customer ideas and require- ments	Pick up internal ideas and require- ments



After a technical check, the Reviewer can report his comments and suggested changes back to the author or responsible person via the <u>Submit request (feedback)</u> 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.

SYMBIO							ОН
<ul> <li>A Home</li> <li>         ■: Training History     </li> </ul>	3.5.4 Manage sales ord Process World > Operational Core Processes	ers (4.0) > 3.0 Market and S	Interface of the second sec		✓ Confirm	≫ Next Training	🗞 Full element
RE Team Training Dashboard	Y Filter						
	🗅 Name	Info D	Description	Roles	Inputs / Outputs	Applications	
	Enter T-code VA01 in the command field to create the sales order	E	inter VA01 in Transaction Command Field for creating Sales Order	<ul> <li>Internal Sales Representative</li> </ul>		<ul> <li>SAP SD</li> </ul>	
	Enter order type OR for Standard order	S	Select the relevant Order type to proceed to the next step. The orc • Type A • Type B • Type C	Internal Sales Representative		<ul> <li>SAP SD</li> </ul>	
	Populate Sales Area	P	Populate Sales Area with your relevant Sales Organization, Distribu	<ul> <li>Internal Sales Representative</li> </ul>		<ul><li>SAP SD</li><li>SAP CRM</li></ul>	
	Enter order detail	I	t will open a new window. Enter the following details:	<ul> <li>Internal Sales Representative</li> </ul>		<ul> <li>SAP SD</li> </ul>	
		E	Enter Ship-To-Party, Purchase Order, and Date.				
		E	Inter the Required Delivery Date.				
		E	inter the item details.				
	Enter Req. delivery date			Internal Sales Representative		<ul> <li>SAP SD</li> </ul>	
«	Enter quotation number in			<ul> <li>Internal Sales Representative</li> </ul>		<ul> <li>SAP SD</li> </ul>	

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.

III SYMBIO							ОН
🕅 Home	Home						Oliver Harvard
≣ <sup>;</sup> Training History	Due Date ↑	Name	Stereotype	Info	Modified	State	oliver.harvard@symbioworld.com
RΞ Team Training Dashboard	ç₀ <u>9/15/2021</u>	9.2.1 Process customer credit (4.0) Process World > ··· > 9.2 Perform revenue accounting		٨	9/1/2021	To Do اد	Koles Tenants SALES ~ Locales EN ~ R_ Sign out

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.

::: <mark>SYMBIO</mark>						(			
යි Home	Training Histo	Training History							
■ Training History	$\Box$ Modified $\downarrow$	Name	Stereotype	Info	State	Responsible			
RE Team Training Dashboard	δα 9/1/2021	9.2.1 Process customer credit (5.0) Process World > ··· > 9.0 Manage Financial Resources > 9.2 Perform revenue accounting		A	<ul> <li>Completed</li> </ul>	Symbio Administrator			
	₿a 9/1/2021	9.2.1 Process customer credit (4.0) Process World > ···· > 9.0 Manage Financial Resources > 9.2 Perform revenue accounting			<ul> <li>Completed</li> </ul>	5A Symbio Administrator			
	₿a 9/1/2021	9.2.1 Process customer credit (3.0) Process World > · · · > 9.0 Manage Financial Resources > 9.2 Perform revenue accounting			<ul> <li>Completed</li> </ul>	5A Symbio Administrator			

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 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 2 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.

Proc	CESS ss Ho	s vendor invoice use > Support Processes > Financial Manag	igement > Accounts Payable							
>	New	🖸 🖸 Select 💼 🖌 🖓 🚿	Request Manual 🗸	Variants: Master 👻	Version: 2.1, In process	+ Change pe	ermissions		New   🍳 Graphic 🗸	
	Ţ	rpe Successor Task Sub Process			Neg				Accounts Payable Manager	Buyer direct goods
		Or Na Either-or	~ <sub>T</sub>	'ype ~	(R) Responsible	~	(R) Responsible (alternative)	(A) accountable 🔳	Invoice received	
		Event End New	s	itart	Accounts Payable	Manager (2.0, \			Enter invoice	
		Enter Start	T	ask	Accounts Payable	Manager (2.0, \				
		Check invoice	Т	ask	Accounts Payable	Manager (2.0, \				
	~	Send invoice to department	т	ask	Accounts Payable	Manager (2.0, \		→ Buyer direct goo	Check invoice	
	٠		т	ask	Accounts Payable	Manager (2.0, \				
		Release invoice	Т	ask	Buyer direct goods	; (1.0, Valid)	→ Accounts Payable Manager (2.0, Valid)			
		Return invoice to Accounts Payable	т	ask	Buyer direct goods	; (1.0, Valid)			Send invoice to de- partment	
		Allocate and enter invoice	т	ask	Accounts Payable	Manager (2.0, \				
		Create payment proposal	т	ask	Accounts Payable	Manager (2.0, \		→ Head of Accoun Valid)	-	
		Send out payment proposal	т	ask	Accounts Payable	Manager (2.0, \				
		Vendor invoice is payed	E	vent	Accounts Payable	Manager (2.0, \				+
		File invoice	т	ask	Accounts Payable	Manager (2.0, \				Release invoice
		End	E	ind	Accounts Payable	Manager (2.0, \				

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 **D** 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 selecte this moved to the left (vertical) or up (horizontal).



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).

Name	•
Interface	
Туре	Interface
Process reference	Create

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.

To copy process flow objects: Select the required objects. Then select the Copy icon in Colbar 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 objects. Again, click the predecessor object. The selected objects are moved to the specified place.

		COPY TO					×
		copy to					
		Name	Туре	Version	State	Maturity Responsible	Auti
		<ul> <li>Process House</li> </ul>	Process House		Show	Peter Prozess	
	a a datat	Management Processes	Category		Show		
	ଅ - ୯ ୳ ♥	Core Processes	Category		Show		
		Support Processes	Category		Show		
	Move in current process	<ul> <li>Symbio Introduction</li> </ul>	Category		Show		
n	move in current process	Use Cases	Main Process		Show	Peter Prozess	Pete
	Move to	<ul> <li>Submit feedback</li> </ul>	Sub Process				
	move to	<ul> <li>Submit feedback (Master)</li> </ul>	Sub Process Variant				
		Submit feedback	Sub Process Version	0.1	In process	Symbio Administrator	Sym
		N AND N A REAL PROPERTY.					

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.





• 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 t \_\_\_\_\_ par and finally select the object that is the desired starting point.





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.

Participants	•
Responsible 🛈	亩
<ul> <li>→ Qualität, Michael (Michael Qualität)</li> <li>Author </li> <li>→ Prozess. Peter (Peter Prozess)</li> </ul>	Ō
Additional authors (1)	
Quality manager 🚯	
 Reviewer 🚯	
	≣

Figure 85 – Define additional authors

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

	Name	
Start O	CRM	
Acceptiesd	Description	•
÷		
Determine require- ments	Process Information	4
	Responsibilities	•
Ť I	Responsible 🚯	
Lead incomplete Lead complete	→ Peter Prozess (Prozess, Peter)	
Task Task	Author 🕄	
	→ Peter Prozess (Prozess, Peter)	
ad	Quality manager 🚯	
0	→ Michael Qualität (Qualität, Michael)	
	Status	٩
	Organizations	٩
	Inputs/Outputs	⊲

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

Public

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  $appe \mathbf{\hat{m}}$  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.

	Name		•				
Determine require-	Name 📵	Name 🖲					
	Determine requirem	Determine requirements					
	Reference 🚯	Create					
	Task type 🔘	Choose	~				
	Task marker 🗿	Choose	~				
	Description		•				
	Task Repository		٩				
	Performance		٩				
	Roles						
	(R) responsible 🔕						
			≡				
	(R) responsible (altern	ative) 🚯					
			≡				
	(A) accountable						

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.



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.

Occurs in
Main processes
→ CRM (Master, 1.0, Valid)
Scenarios
<ul> <li>Order to pay (Master, 0.1, In process)</li> </ul>

Figure 90 – Changed evaluation groups for processes

#### Use BPMN2.0 and ArchiMate 3.0 nomenclature 5.1.6

>>>> 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

ightarrow 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.



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.

HOME	CUSTOMERS STRATEGY	PROJECTS	DD	OCESSES OF	CANUZATION	BRODUCTS	CVCTEME	DOCUMEN		REQUIREMENT			STANDARDS	-
HOME	CUSTOMERS STRATEGY	PROJECTS	PK	OCESSES OR	BANIZATION	PRODUCTS	STSTEMS	DOCUMEN	IS RISKS	REQUIREMENT	5 LEARINING		STANDARDS	,
graphic 2 le	evel table dependencies	life-cycle	2	document conter	nt editor	reports	architecture	list re	view orphane	d expired (	(architecture)	1	ask reposito	ary
Process ve Process House	ndor invoice > Support Processes > Financial I	Management	> Ac	counts Payable										
New		<		Select 🔟	Request Fi	iter Manual		Master 👻	Version 👻 Chan	ge permission	s			
<ul> <li>Process</li> </ul>	ss House	^		Name 👻	Туре 🗸	Stereotype	~	Version '	✓ State	Ň	Responsible ~	Aut	nor ~	Ade
⊳ Ma	anagement Processes						$\sim$			$\sim$				
▷ Co	ore Processes			Accounts Pay	Role			2.0	Valid		→ Administrato	→	Administrate	x
🖌 Su	pport Processes										Symolo		symolo	
⊳	Administration and Infrastruct	ure		SAP (1.0, Rel	IT System			1.0	Released		→ Freigeber, Frederike	⇒	Prozess, Peter	
⊳	Communication			Vendor invoi	Input/Output			2.0	Valid		→ Manager,	→	Prozess,	
⊳	Environment, Health and Safe	ty									Paul		Peter	
4	Financial Management			Payment tran	Input/Output			2.0	Valid		→ Manager, Paul	÷	Prozess, Peter	
	Accounts Payable	- 11		Buyer direct	Role			1.0	Valid		→ Freigeber,	→	Prozess,	
	Process vendor invoice			-							Frederike		Peter	
	Accounts Receivable		~	Supplier (1.0,	Role			1.0	Valid		→ Freigeber, Frederike	>	Prozess, Peter	



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.





#### 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.

		Info My tas	iks   View:	Editor PP	Peter Prozess (EN)
PP	Dr.	ROZESS			
Information	o Organizat	ions Loca	tions 1	ags Langi	Jages
LANGUAG Primary lan Secondary	i <b>ES</b> guage languages	ess 88		=	Legent
2	Figure Translate	97 — S	elect	langua	ges
Na	ame				4
De	escription				•
в	I 🗉 🍫		н 🗉 н1	H2 % 🌆	8
	During a goo the system p quantity of a amount can delivered dif compared w result, an un detected.	ods receip proposes ti ni item for be change ffers. The q ith the op der or ove	t for a pu he outsta the goo ed, if the juantity o en order r deliver	rrchase ord inding orde ds receipt. quantity lelivered is quantity. A y can be	er, er This s a

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.

ÜBERSETZEN übersetzen					
English (United States)	中文(中国)		Deutsch (Deutschla	nd)	
ACTIONS	ACTIONS		AKTIONEN		
Translate empty fields	Transla	te empty fields	Leero	e Felder übersetzen	
NAME	NAME		NAME		
idea/innovation	進んは新		ideen/innovationen		
DESCRIPTION	DESCRIPTION		BESCHREIBUNG		
B I 业 中 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田	※         B I U ● 田 戸 垣 田            est              回新市道家之間分売部務             ・             記録意見、総             ・             記録意見、総             ・             記録意見、総             ・             記録意見、総             ・             記書部後の対象目和示             ・             記書の指令             がお当時の             ・             読み等止 表示部計划中的            90	12 % 国 24 主要的「品的运作者」 更加定期後是否做合的课述 转移要求	B     I     I     Image: B     Ima		
PROCESS INFORMATION	PROCESS INFORMATION		PROZESSINFORMATION	EN	
Purpose  Qualification of received i requirements. The term qualification of received i lis the process of obtaining (qualifications, to perform tack or requirement can s the review of those ability the skills unificient to spe- ment the requirements in use is content of the so- validation.	deas and alification s a specific s is called outcould practical alled Scope ©	養空的法律利果未払貨幣。與假臣等 是使肥皂菜 (伊和)的注葉 (我们一項) 用作业于场景学家。同样 14 医感觉 刀的軍事案们为发程。可能 14 医感觉 34 使用 需要求引为发程。可能 14 医犯罪使使 用素求引为发程。可能 14 医20 million 加速的作等。	Zweck 0	Qualifizierung eingeganganer ideen und Anterdorungen. Unter dem Begriff Qualificationung versteht nam den Vorganig zur Erlangung von Pähigkeiten (Qualifikazionen), um eine bestrimmte Aufgabe oder bestroßerte Geberpoling dieser Fähigkeiten wird als Qualificierung bestrohent. Die Desprüfung dass die Fähigkeiten ausreichen, um im praktischen Instart reproduzierbar	
Scope  Complete company				die gestellten Anforderungen zu erfüllen, ist Inhalt der so genannten	

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 predefined 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."

Scope filters	•
Organizations 🟮	亩
	≡
→ Logistics (1.0, Valid)	
Locations 🚯	亩
→ Munich (1.0, Valid)	
Tags 🚯	

Figure 100 – Set Scope filter criteria

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.

ORGANIZATIONS					
architecture list					
Name	Туре				
Organization	Organizational Unit				
Management board	Organizational Unit				
Central area	Organizational Unit				
<ul> <li>Logistics</li> </ul>	Organizational Unit				
Customs	Organizational Unit				
Disposition	Organizational Unit				
Goods Management	Organizational Unit				
Transportation management	Organizational Unit				
Marketing	Organizational Unit				
Organisation & Compliance	Organizational Unit				
Compliance	Organizational Unit				
Process management	Organizational Unit				
Quality management	Organizational Unit				

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.

LC lis	LOCATIONS						
	Search by keyword		Туре 🔻	Stereotype 👻			
п	Name 🔺 👋 Des	Stereotype	Yersion	✓ State			
	Alt Ötting	City	2.1	Expired			
~	Bejing		1.0	Valid			
$\mathbf{P}$	Boston		1.0	Valid			
~	Cape Town	City	3.0	Valid			
~	Dortmund	City	1.0	Valid			
$\mathbf{P}$	Erlangen	City	1.0	Valid			
4	Hamburg	City	1.0	Valid			
4	Milano		3.0	Valid			
~	Munich	City	4.0	Valid			
Z	Singapur		1.0	Valid			



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.

New   💼 🔂 🖋 🍫   R	equest Manual +   Permissions - 🍄 -	
Type <b>Tag</b>		
		New
Name	Туре	
Tag architecture	Tag arc	hitecture
<ul> <li>Service</li> </ul>	Tag	
Configuration	Tag	
Consulting	Tag	
Training	Tag	

#### 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

 $\rightarrow$  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.

Standards	4
Glossary	<b>•</b>
 → BPMN (Show) → RASCI (Hide)	≡
Attachments	<b>L</b>
Add	

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.

Status							•
Version	0.1						
State 🚯	In pro	cess					
Notice 🕄	Status changeable via version button in toolbar.						
Start of Validity 🕄							
End of Validity 🚯	12/31	/999	9				
Review date 🚯	1/10/	2022					]
Type of change 🚯	0		Janu	ary 2	022		0
Reason for Revision 🕄	Мо	Tu	We	Th	Fr	Sa	Su
D / Y A						1	2
$B I \cup ? := := :=$	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31						

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.

Technical IDs		•
Version dependent ID	7736f0bc-1155-4f91-8fb6- 86cc5d6b753c	
Version independent ID	452c69dd-4c7d-4907-a75c- 01aec6b29183	

Figure 107 – Technical IDs

#### 5.1.14 Synchronize trainings with SAP Enable Now®

>>>> To use this functionality, an interface to SAP Enable Now<sup>®</sup> 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.

workarea: P-und-Z				
Search	$\sim$	Project (PR_94465	5833AA55808B)	
Workarea				
> 💥 Resources		OVERVIEW	TASKS COURSE ASSETS	
My Unsorted Objects				
🗸 🔁 root group		Name	Simulation learning unit	
Trainings		Language	German (Germany)	$\checkmark$
✓ Simulation learning unit			German (Germany)	
Quiz learning unit		library Autostart		e 🖬
Context Help learning unit		Short Description		<u>^</u>
Guided Tour learning unit				Ý
Context Help Web learning unit				
Guided Tour Web learning unit		Description	Updated	$\hat{}$
Book learning unit				
Book Page learning unit				
Text Unit learning unit				
Desktop Assistant learning unit				
🗧 PDF file				
> 🕰 Video file				
Audio file				
Image file				
Word document				
> 😂 Unsorted		Hide		
> 💼 Trash		Start Link	https://partners.con.consulting.ou?.conable.now.c	loud cop/wa/20201107_puz
			https://partners-sen-consulting-eus.enable-now.c	louu.sap/wa/20201107_puz
		lags		

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.

Learning units Graphic (filtered)	_							;		
ew   O 🛅 Y   🖉 🎭 🕸   Request	Manual + Services + SAP +	Version: 0.1, In process - Permissions - O	•						P Translate	
Search by keyword	Stereotype - Version - S	tate • Responsible • Author •	Scope	filter				×	Name	
			_						Simulation learning unit	
ime •	~ Type	✓ Stereotype	<ul><li>Version</li></ul>	State	<ul> <li>Responsible</li> </ul>	~ Auth	or	~ ≡	Type	Learning unit
udio file	Learning unit	SAP Enable Now: Audio	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		Stereotype 0	SAP Enable Now: Simulatio
lok learning unit	Learning unit	SAP Enable Now: Book	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		ID.	
ook Page learning unit	Learning unit	SAP Enable Now: Bookpage	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys			
intext Help learning unit	Learning unit	SAP Enable Now: Context Help	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		PR_94465833AA558088	
intext Help Web learning unit	Learning unit	SAP Enable Now: Context Help Web	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		Participants	
esktop Assistant learning unit	Learning unit	SAP Enable Now: Desktop Assistant	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		Lather O	
uided Tour learning unit	Learning unit	SAP Enable Now: Guided Tour	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		EnbleNovExternalS	ystemToken-ENLocalExtSys
uided Tour Web learning unit	Learning unit	SAP Enable Now: Guided Tour Web	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		Note 0	The author was set. Only
age file	Learning unit	SAP Enable Now: Image	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys			authors are allowed to edit
0F file	Learning unit	SAP Enable Now: Pdf	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys			the current element.
uiz learning unit	Learning unit	SAP Enable Now: Quiz	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		Attachments	-
nulation learning unit	Learning unit	SAP Enable Now: Simulation	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		Callebrary Telebra	
xt Unit learning unit	Learning unit	SAP Enable Now: Cdoc	0.1	In process		Enbl	eNowExternalSystemToken-ENLocalExtSys		<ul> <li>Unk zum Training</li> </ul>	_



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 <u>website</u> or on the <u>Atlassian</u> <u>Marketplace</u>.

## 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.

Participants	•
Responsible 🚯	亩
→ Prozess, Peter (Peter Prozess)	
Author 🚯	亩
→ Manager, Paul (Paul Manager) 🟮	
Quality manager 🚯	亩
	≡
→ Qualität, Michael (Michael Qualität) <sup>1</sup>	
Reviewer 🕄	ā
	≡
→ Viewer, Christine (Christine Viewer) <sup>1</sup>	

Figure 111 – Select Reviewer

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

CHANGE STATE change state	
RESPONSIBILITIES	
Responsible 🕄	→ Prozess, Peter (Peter Prozess)
Author 🕄	→ Manager, Paul (Paul Manager)
SETTINGS	
Version	Choose In process
State 🕄	In review
Notice	▲ <sup>vog</sup> The state can not be changed. The



The same validation rules apply as in the <u>release cycle</u>. 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 <sup>[2]</sup> <u>Approver</u>

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.

	Version 👻			
	Create version			
	Change state			
	Connected Items			
CHANGE STATE_		-		
change state				
RESPONSIBILITIES				
Responsible 0	<ul> <li>Prozess, Peter (Peter Prozess)</li> </ul>			
Author O	<ul> <li>Manager, Paul (Paul Manager)</li> </ul>			
SETTINGS				
Version State <b>O</b>	Choose In process Ready for QA			
VALIDITY				
Start of Validity 🟮				
End of Validity 🛈	12/31/9999			
REASON FOR REVISION				
ithere have been changes.				
Notice: If the status cannot be changed, please also chec	t the application roles of the responsibilities.		ОК	Cancel

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.

Responsibilities	•		
Responsible 📵			
→ Peter Prozess (Proz	tess, Peter)		
Author			
→ Peter Prozess (Proz	tess, Peter)		
Quality manager 📵			
→ Michael Qualität (Qualität, Michael)			
→ Michael Qualität (C	Qualitat, Michael)		
→ Michael Qualität (C Status	zualitat, Michael)		
Michael Qualität (C Status Version	Jualitat, Michael)		
Michael Qualität (C     Status     Version     State	1.1		
Michael Qualität (C     Status     Version     State      Start of Validity	1.1 In process Ready for release Released		
Michael Qualität (C     Status     Version     State      Start of Validity     End of Validity	1.1 In process Ready for release Released Expired		

Figure 115 – Simplified release

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

Responsibilities	•
Responsible 🚯	Ō
→ Manager, Paul (Paul Manager) 6	
Author 🖲	亩
→ Prozess, Peter (Peter Prozess)	
Quality manager 🕄	亩
	≡
Qualität, Michael (Michael Qualität)	

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.

Participants	APPROVER
Responsible 🚯	approver users approver user groups
Approver 🚯	Search by keyword
Quality manager 🚯	
🔳	Imagé User
Author 🕄 💼	SA Admin
→ Administrator, Symbio 🕚	

#### 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-usergroups-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.

Version	1.1
State 1	In process
Notice	▲ The state can not be changed. The following information is missing: Reason for Revision.
Non-released connected objects	<ul> <li>→ Customer can vote for the idea (0.1, In process)</li> <li>→ Manage Release Planning (0.1, In process)</li> </ul>
Notice	The connected objects listed are not visible to the viewer until they are released. The first five objects are displayed.
Obsolete connected objects	→ Website (1.0, Expired)
Notice	The connected objects listed are no longer valid, but are displayed to the viewer. The first five objects are dis- plaved.

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.

Version: 0.1, In process 👻 🔳
Provide Aftersales Service (0.1, In pr
Create version
Remove current version
Dependencies
Change state

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.

<mark>c has to be</mark> it leer shier bei Cre	EDIT MODAST DATA Control to 0 Control to 0 State 0 Anaports 0 To otherwater Ver 0 Description 0 Descriptions date 0	Imp Service       Stry(S22) Shink Ad      The     The		** *		
	Algues Tours of the Council of the C	B     I     U     Image: Bit is a set of the sequel of the first consequencing process?       B     I     U     Image: Bit is a set of the sequel of the first consequencing process?       B     I     U     Image: Bit is a set of the sequel of the first consequencing process?	Graph Design Cable Design Cable Design Cable Cab	EXT HOLEST Development due 0 REQUEST Time 0 Description 0	Concerned         21           Annotation         21           Diright Design         21           Diright Design         22           Mithin Graphic has to be applied for the corresponding process?         21	*
				Control change note	R J U D BIE BER IN 10 % 20 Additionally to chea andre will be the Process Equent.	



### 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 <u>Open a manual</u>.

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 rereleased
- 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.

Start of Validity 🚯							
nd of Validity 🖲	Q	1	Noven	nber	2018		0
	Мо	Tu	We	Th	Fr	Sa	Su
SON FOR REVISION				1	2	3	4
ns for Revision	5	6	7	8	9	10	11
ing Polyinian	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30		

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.

<u>Attention</u>: 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 <u>here</u> 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.

Variants: Munich 👻 V	ersion: 0.1, In process 👻
Master	
Munich	
Create variant	
Update variant	
Localize element	
Localize process flow	

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.

Navigation	•
Navigation 🚯	
Hint	Navigates to the diagrams of the underlying layer.

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.

New					
Type Sub Process New					
Process House					
Management Processes					
<ul> <li>Core Processes</li> </ul>					
CRM					
▷ PLM					
SCM					
4 Deliver					
Store goods (Master)					
Store goods (Germany)					
Store goods (Spain)					

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.

88

SYMBIO' Storage: ShowCase1812   Filters	No filter applied				
HOME   CUSTOMERS STRATEGY PROJECTS graphic 2 level table document content	5 <b>PROCESSES</b>	ORGANIZATION k repository	PRODUCTS	SYSTEMS	DOCUN
SCM Process House > Core Processes					
	Contraction Contraction	- Ə 🖶 I	8 G 🔮	Request Ma	anual 👻
Process House	Deliver		Store goods (Ger	many) (Sub Pi	rocess)
Management Processes		Ð	Store goods (Mas	ster) (Sub Pro	cess)
					_
▷ PLM					
A SCM					
Deliver					
Store goods (Germany)					
▷ Store goods (Master)					

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.

Variants: Munich 👻 Version	n: 0.1, In
Master	
Munich	
Create variant Update variant	
Localize element	
Localize process flow	
	_

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.

Localization reasons
Localization reasons
Localization reason
Created on (10/22/2021 12:47:13 PM
Created by 🕄
🛔 Administrator, Symbio 🚯
Changed on 🚯 10/22/2021 12:47:13 PM
Changed by 🚯
🛔 Administrator, Symbio 🚯
Delocalization
Delocalize object

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.

SYME	Storage: ShowCase   Filters: No filter applied						
HOME	CUSTOMERS PROCESSES ORGANIZATION SYSTEMS E DEMA	NDS/IDEAS	GUIDELINES	STANDARDS	RISKS REPO	SITORY   REQUE	STS TASKBOAR
graphic	architecture list editor   orphaned review   customer jou	urney steps	touch points	sales channels	stakeholders	customer journey	stages persona
Sell pro <sup>Customers</sup>	ducts						
New		< New	🔍 Graphic 🗸	Select 🔟	∅ . ⊎ .	P 76 🔮	Request Filter
Туре	Customer journey map	Aquiri ing ne	ng and loyalis- w customers	Promote custome ditional	e exiting ers with ad- purchases	Sell spare pa	rts
4 C	ustomers	_					
$\triangleright$	Force service						
	Involve customer						
	Promoting mobility						
4	Sell products						
	Aquiring and loyalising new customers						
	Promote exiting customers with additional purchases						
	Sell spare parts						

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).

IOME   CUSTOMERS PROCESSES ORGANIZATION IT DEMANDS/IDEAS GUIDELINES STANDARDOS RISKS REPOSITORY   REQUESTS TASKBOARD Inaphice Interfacture list editor   orphaned review   customerjourney steps touch points sales channels stakeholders customerjourney stages personas voice of customers							
Acquiring and loyalising new customers Customers > Sell products	ccquiring and loyalising new customers automers > 5e provids						
New	New   🔍 Graphic 🗸   Select 🛍 🖄 🗸 🗟 🗸   🖋 🌾 😻   Request 🖬 Manual 🗸   Version: 0.1, In process 🗸						
Type Customer journey map New	New elike discovered for the velocity of the v						
4 Customers	(consulting inter						
Force service							
Involve customer	Å.						
Promoting mobility	$\overset{\vee}{\oplus}$						
<ul> <li>Sell products</li> </ul>							
Acquiring and loyalising new customers							

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.).

Touch Points	•
<ul> <li>→ Greet customers in store (0.1, In process)</li> <li>→ Rental for product testing (0.1, In process)</li> </ul>	
Sales channels	•
	≡
→ Retail store (0.1, In process)	
Personas	•
→ Peter (0.1, In process)	

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.

Journey step details	L.
Feelings	
Reason feelings	
Thinking	
Customer engagement	High
Satisfaction index	Very positive
Customer engagement I	Purchase
Alternative steps	
Ideas to improve	•
ideas to improve	

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.

CHANGE STATE	
change state	
PARTICIPANTS	
Responsible	→ Freigeber, Frederike (Frederike Freigeber)
Author 🕄	→ Expert, Customer (Customer Expert)
Note	The author was set. Only the defined authors are allowed to edit the current element.
SETTINGS	
Version	Choose
State 🚯	In process
Non-released connected objects	Ready for 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)

Project process scope	

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)

Public

Analysis Results	
Processes	
Result 🕄 Choose	]
Opinion Statement Choose	
B I U 🍫 ≔ 📜 🔤 Effective	
Improvements	
Minor deviations	
Main deviations	
	1
Date 🚯	
Observations summary	
B I U 🍫 ≔ ≔ ≔ ⊟ H1 H2 % 🖾 🛛 🔀	

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.

B I U 🍫 ≔ ≔ ≔ ≔ H1 H2 % 🖼	23
Type in 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.

Name Sub Process	 ID Click to set value
Description <u>Click to set value</u>	 
Tags	
Add item	 

1		
× ×		

Figure 147 – Add properties to documents

Documents			
Document			
Document			

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

Mv	tacks	(1)
wy	usks	<b>U</b>

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

Task information	•
Name 🕄	
Approve release of Locati	on Version 'Aschheim'
Assigned to	
→ Freigeber, Frederike (F	Frederike Freigeber) 🕚
Assign to 🕄	
	≡
Reject	Reject
Accept	Accept
Status	To Do
Release information	
→ Aschheim (0.1, Ready	for release)
<ul> <li>→ Aschheim (0.1, Ready</li> </ul>	for release)

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.

99

# 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 subprocesses. 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 dropdown 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.





Click an existing process object and select the same level.

To set up a process on the level below: Click the  $\bot$  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.

HOME   CUSTOMERS	STRATEGY PROJECTS	PROCESSES	ORGANIZATI	ON PRODUC	TS :
graphic 2 level table	dependencies life-o	ycle documer	nt content ed	litor   archi	tecture
Idea Management/ I Process House > Management	nnovation Processes				
New   💼 🔂 😭   .	တိ 🗘 🍼   Request	Manual 👻 Ser	vices 👻 SAP 👻	Enable editi	ng Var
Type Main process					
				N	lew
Name			Туре	2	
Process House			Proc	ess House	
<ul> <li>Management Pro</li> </ul>	ocesses		Cate	egory	
Financial Plan	nning and Controlling		Mai	n process	
🕴 📕 Idea Manage	ment/ Innovation		Mai	n process	

#### 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 2 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

 $\rightarrow$  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

 $\rightarrow$  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:

avel exp Move To							×
mt travel a Name	Type	Stereotype	Version	State	Maturity	Responsible	1
<ul> <li>Process House</li> </ul>	Process House			Show		Johnson, Emma	- 1
Management Processes	Category			Show			- 1
Core Processes	Category			Show			- 1
CRM	Main process	Structure Process	2.0	Released	40%	Process, Peter	- 1
PLM	Main process	Structure Process	1.1	In process	60%	Johnson, Emma	- 1
Product Portfolio Management	Main process	Structure Process	1.1	In process	80%	Johnson, Emma	- 1
Define Product	Main process	Structure Process	2.0	Released	B0%	Johnson, Emma	- 1
Realize Product	Main process	Structure Process	1.1	In process	80%	Johnson, Emma	- 1
Commercialize and Operate	Main process	Structure Process	1.0	Released	60%	Johnson, Emma	
Phase Out Product	Main process	Structure Process	1.1	In process	60%	Johnson, Emma	
P 🛛 🕫	Sub process		0.1	In process		Johnson, Emma	
P SCM	Main process	Structure Process	2.0	Released		Process, Peter	- 1
P Support Processes	Category			Show			- 1
B E2E Scenario	Category			Show			- 1
P OPEX	Category			Show			- 1
View	View			Show			17
4							
false a second descent and disk for a second to refer the descent	a alexistence allowed and					0× 0.00	4
Select a parent element and click UK to move the selected element to	o the parent element.					UK Lance	ы

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.

SYMBIO' Storage: ShowCase   Filters: No filter applied			
HOME   CUSTOMERS PROCESSES ORGANIZATION SYSTEMS E D	EMANDS/IDEAS GUIDELINES STAND		
graphic architecture list editor   orphaned review   custome	r journey steps touch points sales (		
Customers			
New   💼 🔄   🕫 🏂 🚿   Request Filter Sorting 🗸 Manual 🗸	Import 👻 Export 👻 📋		
Type Customer experience management			
Sell product	New		
Name	Туре		
Customers	Customer architecture		
Force service Customer experience management			
Involve customer Customer experience management			
Promoting mobility Customer experience management			

Figure 154 – Create Customer Journey Maps

Then a Customer Journey Map is created under the respective type.  $\square$  see chapter <u>5.8</u>.

# 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.

Change permissions	ertura list raview oronanezi avoirezi (ariniterture) i tav renogiony
PERMISSIONS	
Permitted groups	
Inherit permission from parent	
Permission mode	Exclude users from other user groups

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.

PERMISSIONS	Permitted groups		53 ×
Permitted groups	user groups report data		
Inherit permission from p	Name	➤ Description	~ =
Permission mode			- 1
	Viewers Requestinfo AdminInfo		



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	х	х		х		х
Edit element		х		х		х
Delete element			Х	х		х
Show element				х		
Approve element				х	Х	х
Open element				х	Х	

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.

Permissions 👻	EFFECTIVE PERMISSIONS		
Change permissions	effective permissions		
Effective permissions	NAME Store goods		
	DISPLAY PERMISSIONS FOR USER	→ manager, paul 🕚	
	PERMISSION SETS		
	New element		
	Edit element Delete element		
	Show element		
	Open element		$\checkmark$
	New architectural element		
	Edit architectural element		
	Delete architectural element		

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.

~	New architectural element	~	Edit architectural element	~	Delete architectural element	~
_						

#### 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.

CHANGE PERMISSIONS								30 ×
NAME Perform training								
PERMISSIONS Inheit permissions Permission of other users 0	inherit from parent Choose Wherit from parent							
New Edita 1	Starting from default Starting without any p	permissions permissions	New			Permissions Architect		•
Name	Permission sets	♥ Users		<ul> <li>Permitted groups</li> </ul>		Type Permission sets	Permission	
Permissions Author			_		_		OK	Cancel

Figure 160 – Permissions directly on process/object

Further information, especially for administrators, is available <u>here</u>.

### 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 <u>Author chapter</u>. 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.

Version	: 2.0, Rele	ased 🔻	Variants 🔻
ldea/In	novation (	1.0, Expir	ed)
Idea/In	novation (	2.0, Relea	ased)
Create	version		
Depend	dencies		
Change	e state		
Edit att	ributes		

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 <u>Author chapter</u>. 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.

Version: 1.0, Released 👻
Idea Management / Innovation (1.0, Released)
Create version
Dependencies
Change state
Edit attributes
Generating documents
Add symbols of child elements

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.

📙 🗍 - 🛛 100% - 🔍	ৎ 🗠 ා 💼 🚽 ≓∗ 🗆 + + · □ -  # - editor Toolbar	
1 <u></u>		n Diagram 🗙
General		Options
Text		🗹 Grid 10 pt 🖨
		Guides
		Page view
		Background
		Paper size
		A4 (210 mm x 297 mm)
		Portrait O Landscape
Stencil Pool	Draw Area	Draw Settings
Basic		
Arrows		
UML		
BPMN General		
Flowchart		
Clipart		Y

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 remodel 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).

Search	
Search ×	
Search	Start
Diagram contents	· · · · · · · · · · · · · · · · · · ·
	Accept lead
	Determine require- ments
Repository contents	
and a second sec	
Complete diagram	

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  $\bigcirc$  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.

#### Best practices / Usage

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

Add new process structures to the Link_	Optimize existing	Release	•	¢		
architecture	Delete	Delete <b>f</b> l	•	••••	Delete	Delete
Questions about the	Cut	Ctrl+X			Cut	Ctrl+)
	Сору	Ctrl+C			Сору	Ctrl+C
	Duplicate	Ctrl+D			Duplicate	Ctrl+D
	Set as Default Style	Ctrl+Shift+D			Set as Default Style	Ctrl+Shift+D
	To Front	Ctrl+Shift+F			To Front	Ctrl+Shift+F
	To Back	Ctrl+Shift+B			To Back	Ctrl+Shift+E
					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.

Version: 2.0, Released 👻
Plan product development strategically (1.0, Expired)
Plan product development strategically (2.0, Released)
Create version
Remove current version
Dependencies
Change state
Edit 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.

NAME		
Name (eesti (Eesti)) <b>0</b>		1 I
Name (English (United States)) 0	Goods receipt with yard management	
Name (Deutsch (Deutschland)) 0	Wareneingang mit Lagerplatzverwaltung	
TYPE		
Sterectype 0	Choose	1
PARTICIPANTS		
Responsible ()	🛔 Doe, Jane 🔞	
Quality manager	-	
Author 0	& Boss, Sandro 0	
Additional authors 🚯	-	
Note 🛈	The author was set. Only architects and the defined authors are a	llowed to edit the current elem
Reviewer 0	- =	
Process management positions 0		
VALIDITY		
Start of Validity 0	5/16/2022	
End of Validity 🔕	12/30/9999	
Note for validity 0	The date "5/16/2022" for "Start of Validity" is in the past.	
Review date 0	5/16/2023	
ATTACHMENTS		
Add		
SCOPE FILTERS		
Organizations 0	=	

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.

REASON FOR CHANGE		
Reason for change	В I U 🏕 🖽 🖽 🖽 н1 н2 % 📾	24
	Missing stereotype Add additional scope - organizations	
Attachments to the change 🜒	2 Confirmation	
	Add	

Figure 176 – Edit attributes - Reason for change

The changes made are documented in the life cycle.

	> 🔎 Translate
In process	Name Attributes changed
Ready for release	Changes Stereotype Test processes Note for validity (English) The date "10/10/2022" for "Start of Validity" is in the past.
peterprocess@symbio.cloud	Organizations Production Reason for change Missing stereotype
Released	Add additional scope - organization. Attachments to the cha (A Confirmation Status d
Attributes changed	

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.

Start of Validity	[							
ind of Validity 🚯	0		Ma	iy 202	22		0	
Review date 🚯	Мо	Tu	We	Th	Fr	Sa	Su	
							1	
SCOPE FILTERS	2	3	- 4	5	6	- 7	8	
	9	10	11	12	13	14	15	
Organizations 🚯	16	17	18	19	20	21	22	
ocations 🚯	23	24	25	26	27	28	29	
	30	31						
ags 🚯								

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 2 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.

HOME	PROCESSES ORGANIZA	TION IT DEMANDS/IDE	AS GUIDELINES RIS	SKS REPOSITORY	FEEDBACK	TASKBOARD
hierarchy	list graphic   orpha	ned				
Organi	zation					
New	🛅 🕘 Link 🏋   F	eedback Manual <del>-</del> Impo	rt 🕶 Export 🕶 🛛 Vers	ion: 1.0, Released 👻		
Type	Organizational Unit	~				
				New		
Na	me		Туре		Organization type	Employee's Name
- <b>-</b> C	rganization		Organizati	onal Unit	Company	
4	Management board		Organizati	onal Unit	Company	
	Central area		Organizati	onal Unit		



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 = 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.

Attachments	<b>L</b>
	Add
ATTACHMENTS <b>link</b> upload	
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.

1	2	Λ
+	2	4

Release history	•
→ Version: 1.0   Symbio / 5/24/2016 3:26:33 PM	Administrator   Released on: I
Organizations	•
	≡
Attachments	•
Attachments	Add
Generate PDF on release	
Symbio will try to generat attachements upon releas viewer will only see the ge Currently following file ty *.doc, *.rtf	te pdf documents of the se of the current element. The enerate pdf documents. pes are supported: *. <i>docx</i> ,

Figure 182 – Generate document as PDF

#### 7.9.3 Version organizational units

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

New   🛅 😫 Link 🍄   Feedback Manual 🗕 Import 🗸	Export 👻 📔 Version: 5.1, In process 👻
Name	Type ty
Organization	Orgal Finance (1.0, Expired)
Management board	Orgai Finance (2.0, Expired)
Central area	Orgai Finance (3.0, Expired)
Controlling	Orgai Finance (3.1, Expired)
<ul> <li>Finance</li> </ul>	Orgai
Accounts Payable Manager 2	Finance (5.0, Released)
Accounts Payable Manager 1	Finance (5.1, In process) Positi
Head of Accounts Payable	Positi Create version
Human Resources	Change state

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).

New	Ē	Link	••	Feedback	Import 👻	Export 👻	Version: 1.0, Released 👻		
Туре	Role								
								New	
_		_	_					] [ ]	4



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: <a href="https://docs.symbioworld.com/admin/administration/stereotypes/creating-stereotypes">https://docs.symbioworld.com/admin/administration/stereotypes/creating-stereotypes</a>.

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.





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.

orphaned	SYSTEMS	DOCUMENTS RISKS RE	QUIREMENTS LEARNING STAND	ARDS   REPORTS   REC	UUESTS TASK-BOARD	Search
-   Version: 0.1, in process + Permissions + 🖸 🗸					🕨 🏸 Translate	
					Name	
New					Contact data	
Type Stereotype	Version	State	Responsible	Author	Type	input/Output
Architecture		Show			Stereotype ()	Choose
Category		Show			D	d
Input/Output	0.1	In process	Freigeber, Frederice	Manager, Paul		
Category		Show			Description	
Input/Output	0.1	In process	Freigeber, Frederike	Manager, Paul	Details	4
Input/Output	0.1	In process	Freigeber, Frederike	Manager, Paul	Participants	4
					inputs/Outputs	
					Required Inputs/Outputs	
						=
					Risks	đ
	Version 5.1 is process - Permissions - Q -      Version 5.1 is process - Permissions - Q -      Version 5.1 is process -	- Western 3.1 in process - Permissions - Q - New Version - Versio	- Version 3.1 in process - Permissions - Q - Invertigination of the second sec	- Version 1.1 in process - Remissions - Q - Invertigination - Version	<ul> <li>Medica.3.1 in process ► Permissions ► Q ►</li> <li>Westor.3.1 in process ► Permissions ► Q ►</li> <li>Type Storeofigue Version State Responsible Author</li> <li>Showe</li>     &lt;</ul>	

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.

SYMBIO' Storage: ShowCase	Filters: No filter applied			
HOME   CUSTOMERS PROCESSES	ORGANIZATION SYSTEMS E DEMANDS/IDEAS	GUIDELINES STANDARDS	RISKS REPOSITORY   REQUESTS	TASKBOARD
graphic architecture list editor	orphaned review   customer journey steps	touch points sales channels	stakeholders customer journey stages	personas voice of customers

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.

Touch point-Details		
Emotion	Positive	
Importance	Choose	
Effort	High Medium	
	Neutral	
	Low	
	Very low	

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.

	•
Add	
	•
Add	
	Add

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.

Responsible	•
Responsible 📵	
	=
Author 💿	
Note	The author was not set. All
	users are allowed to edit the current element.

Figure 190 – Define responsible

The status change is then initiated in the toolbar.

HOME   CUSTOMERS PROCESSES ORGANIZATION	IT DEMANDS/IDEAS GUIDELINES STA	ANDARDS RISKS REPOSITORY
architecture list graphic   orphaned review		
Internal Audit Guidelines > Handbücher		
New   🛱 🔂 📽   🖋 🕸 🖉   Request Filter	Sorting - Manual - Import - Export -	Version: 0.1, In process 👻 🕴 🗸
Name	Туре	
4 Guidelines	Guideline	Internal Audit (0.1, In process)
Guidelines	Category	Create version
<ul> <li>Handbücher</li> </ul>	Category	Remove current version
Internal Audit	Guideline	Change state
Roboter manual 3.1	Guideline	Edit attributes

Figure 191 – Change object state

The status change triggers the release workflow.

CHANGE STATE	
change state	
PARTICIPANTS	
Responsible 🚯	→ Prozess, Peter (Peter Prozess)
Author 🕄	→ Qualität, Michael (Michael Qualität) ①
Note	The author was set. Only the defined authors are allowed to edit the current element.
SETTINGS	
Version	Choose
State 1	In process Ready for release

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.

Author			
New	Link 🕈   Feedback	Import 👻 Export 👻	Version: 1.0, Released 👻
Type Ro	le		
			Author (1.0, Released)
Name 🔺	~	Description	Create version
			Change state



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 to ar. 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.

	ONSOLIDATE							×
~	Name	Description	Version ~	State	Attachments ~	ID		~ ≡
~	Head of Disposition	Responsible for the quantitative classific	0.1	In process				
~	Head of PLM	Responsible for product lifecycle manag	0.1	In process				
Č.	Head of Store		0.1	In process				
Ŷ	IT Service Desk	Central point of contact for all service re	1.0	In process	doc			
~	Project Manager	Responsible for the operational plannin	1.0	In process	doc			
~	Quality Manager	To support responsible for the selection	1.1	In process				
~	Store Manager		0.1	In process				
	elect multiple elements and click OK to conse	olidate them with the master element.				OK	Cancel	

co	NSOLIDA	JE						
~	lmagě	User	~ Туре	× 1	Email		Last name	~
×	AA	Anton Analyst	User	ł	anton.a	Consolidate?		
× ×	PP	Peter Prozess	User	1	peter.pi	Target: Admin (Administrator, S	ymbio)	
	SD	Susan Developer	User		susan.d	Sources: Susan Developer (Deve	loper, Susan)	
	FF	Frederike Freigeber	User	f	frederik	External Auditor (Extern	eigeber, Frederike) al, Auditor)	
	AE	External Auditor	User		externa	OK	Abbrechen	
	JP	John F. Project	User	j	ohn.f.pr	oject@p-und-z.de	Project	
<b>V</b>	CV	Christine Viewer	User	c	christine	viewer@p-und-z.de	Viewer	
<b>V</b>	MQ	Michael Qualität	User		michael.	qualität@p-und-z.de	Qualität	
1	CE	Customer Expert	User	c	custome	r.expert@p-und-z.de	Expert	
~	HL	Hans Lieferant	User	1	hans.liefe	erant@p-und-z.de	Lieferant	
	PP	ProjectX1	User	ł	ProjectX	l@p-und-z.de	ProjectX1	

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.

Sorting 👻
Implicit
Explicit

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.

P	
Name	4
Description	4
Sorting	•
2	\$





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.

Translate	ID Role_ID_4
Example-Role	Name
LJ	Example-Role

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:

Information	Settings		
LIST SETTING	is		
List page size (	0	200	
LANGUAGES		Choose	
Primary langua	ige 🚯	25	
Secondary lang	guages	50	
SELECTED RO	LES	100	
		150	
<ul> <li>Customer</li> <li>Dispatcher</li> </ul>	r (1.0, Release er (2.0, Valid)	<sup>d)</sup> 200	



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.

#### Public

HOME   CUSTOMERS STRATEGY	KPIS PROJECTS	PROCESSES	ORGANIZATION	PRODUCTS
graphic 2 level table dependencie	s life-cycle do	cument content	editor   arci	hitecture list
CHANGE (SAP Hana)				
New   😌 Edit 🛅 🚏   🖉 墑	😻   Request	7 Manual 👻 S	Services 👻   Variar	nts: Master 👻 Ver
$\nabla$ Search by keyword	Type 👻	Stereoty	pe 👻 Version	✓ State
🗹 Name 🔺		~ Туре	⊻ St	ereotype
<ul> <li>Business Excellence</li> </ul>		Main proc	ess	
CHANGE (SAP Hana)		Main proc	ess	
Check admissibility and customs benef	fits in requests to sup	pli Sub proce	SS	
Commercialize/ Operate		Main proc	ess	

Figure 200 – Selection to edit mass data

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

EDIT	
Stereotype	Choose
ID	
ID 🕄	
DETAILS	
Scope 🟮	Enter a <u>new scope here</u>
Purpose 🚯	Add a <u>purpose</u>
Employee's Name (Remove)	
Employee's Name (Add/Replace)	
PARTICIPANTS	
Process management positions 🟮	
Responsible (Remove)	
Responsible (Add/Replace)	➔ Prozess, Peter
Quality manager (Remove)	…
Do you really want to perform these attribute of	hanges?

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).

EDIT			
CHANGE NOTICE			
The following values of 1 elements will be changed irreversibly!			
Affected elements	▷ Sub process (1)		
Non changeable elements	▷ Main process (2)		
Scope	Enter a new scope here		
Purpose	Add a purpose		
Responsible	Prozess, Peter		
	-		

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

Participants	
Responsible 🚯	ሰ
Zeller, Oliver <sup>1</sup>	
Quality manager 🚯	
	Ξ
Author 🚯	<b>ā</b>
🛔 Zeller, Oliver 🚯	
Note	The author was set. Only architects and the defined authors are allowed to edit the current element.
Additional authors 🕄	
	Ξ
Leader 🚯	<b>a</b>
🛔 Lars, Jenny 🕄	

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.

Details		•			
Name Mitarbeiter 🚯					
Luftfrachtdisponent,	Martin 🚯				
Kostenstelle 🚯					
Erforderliche Fähigke	iten	٩			
Rollen		۱.			
		_			
<ul> <li>Luftfracht Disponent</li> </ul>	(1.0, Freigegeben)				
Details		•			
Name Mitarbeiter 🚯	Name Mitarbeiter 🕄				
🛔 Logistikleiter, Jennife	0				
Kostenstelle 🟮					
Erforderliche Fähigkeiten					
Rollen					
➔ Luftfracht Disponent	(1.0, Freigegeben)				

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).





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.



Leite	er 🖯	
4	Logistikleiter, Jennifer	0

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.

🗰 (сутаю)			
☆ Home	Team Training Dashboard		*
■ Training History	Name	To Do	In Progress
RE Team Training Dashboard	OH) Oliver Harvard	0	1



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.

	SYMBIO'				TH
ඛ	Home	Report			^
≣:	Training History	Status	Count	Overdue	
RE	Team Training Dashboard	∠ <sup>I</sup> To Do	4	4	
i.de	Report	🖉 In Progress	2	2	
₩	Training Maintenance	<ul> <li>Completed</li> </ul>	0	•	
		All	б	6	
_					

#### 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.

137

III <mark>бүтвю</mark>		•					
☆ Home	Training Maintenance						
≣ <sup>≠</sup> Training History	ning History						
RE Team Training Dashboard							
🖾 Report							
IT Training Maintenance	Name	User					
	<ul> <li>&amp; AAA (1.0) Process House &gt; Management Processes     </li> </ul>	UT User Two					
	AAA (2.0) Process House > Management Processes	User Two					

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.	<ul><li> Process hierarchy</li><li> With few details</li></ul>
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.	<ul> <li>Process hierarchy</li> <li>With many process attributes</li> <li>Linked objects</li> </ul>
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.	<ul><li>Object types</li><li>Object attributes</li></ul>
Object Analysis – Numbers and Occurences	Where-used list of the various objects and their connections in the company map	<ul><li>Object types</li><li>Evaluation of connected objects</li></ul>
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.	<ul> <li>All levels of the process house, risks, controls and assigned attributes</li> </ul>
Process Org Matrix	Evaluation of processes and the related organisational units. The aim is to review responsibilities in the organisation.	<ul> <li>Process house with all levels and assigned organisational units</li> </ul>
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 <u>here</u>.

### 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 <u>4.3.5</u>).

HOME role entrie Suppor Process Ho New												
Type P	Sub process New Noves No	Object Analysis Object Analysis - Number and Occurrences Process Model Structure Process Model Structure (extended) Process Org Matrix Process Role Matrix Risk Control Matrix Identity and cap failure	▷        ble       ble       vagement       ture IT	Process Hit In M	100%  S Name (default) Accounts Payable Accounts Receivable uman Capital Management tellectual Capital management Identify and capture IT failure	Description	(1033) managemen nt typically i	t and IT incident wolves the entire	Suchen   W Description (de IT incident mar management t	fault)	d IT incident res the entire	Resp Paul Paul Pete Pete Pete
	Environment, Health and Safety     Einancial Management     Human Capital Management     Intellectual Capital Management     If Management					organizatio response to incidents or preparatory As technica Incidents ar trouble tick monitoring responsible	nal and tech identified c faults in IT measures a l problems a e document ets. For the of the ticket	nical process of rr suspected security fields and this nd processes, such. ind weaknesses. ed by means of receipt and is a Service Desk is	organizational response to ide incidents or fau preparatory me As technical pr Incidents are d trouble tickets. monitoring of responsible.	and technical entified or sus ilts in IT fields asures and pro- oblems and w ocumented by For the receip he tickets a S	process of pected security and this rocesses, such. eaknesses. y means of ot and ervice Desk is	

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.

Idea Management/ Innovation Process House > Management Processes					
New	K Report 🗸 🕑 🖋 🏠 😻 🛛 Request				
Type Main process					
New	Object Analysis				
	Object Analysis - Number and Occurrences Process Model Structure				
Process House					
<ul> <li>Management Processes</li> </ul>	Process Model Structure (extended)				
Financial Planning and Controlling	Process Org Matrix				
Idea Management/ Innovation	Process Role Matrix				
Integrated Management System	Risk Control Matrix				
▶ Leadershin					

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.

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.

Idea Management/ Innovation Process House > Management Processes							
New		< Report 🗸 🖓 🕫 📽   Request Manual 🗸   Variants (2): Master 🗸 Version: 2.1, In process 🗸 Permissions 🗸   🌣 🗸					
Туре	Main process	Facet:	Bericht anzeigen				
	New	□ docContent ▲					
<ul> <li>Process House</li> </ul>		□ globaltasks					
<ul> <li>Management Processes</li> </ul>		✓ inputsoutputs					
	Financial Planning and Controlling	□ It					
	Idea Management/ Innovation	☑ kpi					
	Integrated Management System						
	Leadership						

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.

la ∨ 🗗		
Word		
Excel		
PowerPoint		
PDF		

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.

Symbio Standard Penorts in	Pd.,			
Business Navigator		Report Publica	ition in Bl, in Symbio	
(PowerBI Embedded in evaluati	on)	Distribution and publishing of	bution and publishing of specific Reports in with the utilized	
Use reports in Symbio productive environment				
alla dah 🐖				
•••••		and the second s		
			Ť	
No. of Contract of		RI Solutio		
hourly crud	Easily build reports based on		RL	
Symbio	predelined star schemes			
bio (REST API) Data Connect (SQL) Warehouse	BI Experts Design and develop individual Symbol	reports Analytic	i Cloud	
	based on flat ODS data model	Others		

Figure 215 – Data Warehouse enhancements

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

# 9 Admin

Please visit our Symbio Documentation Website on <u>https://docs.symbioworld.com/admin</u> 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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