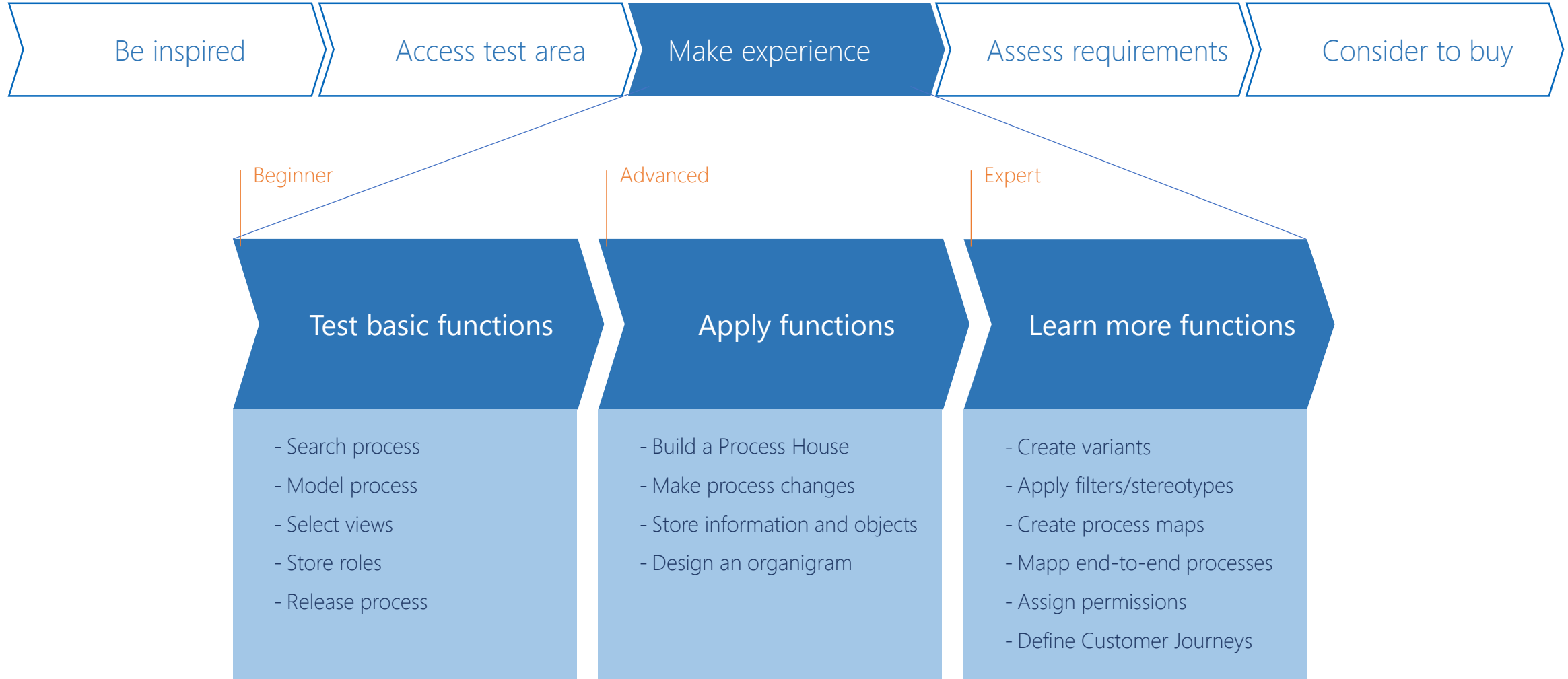


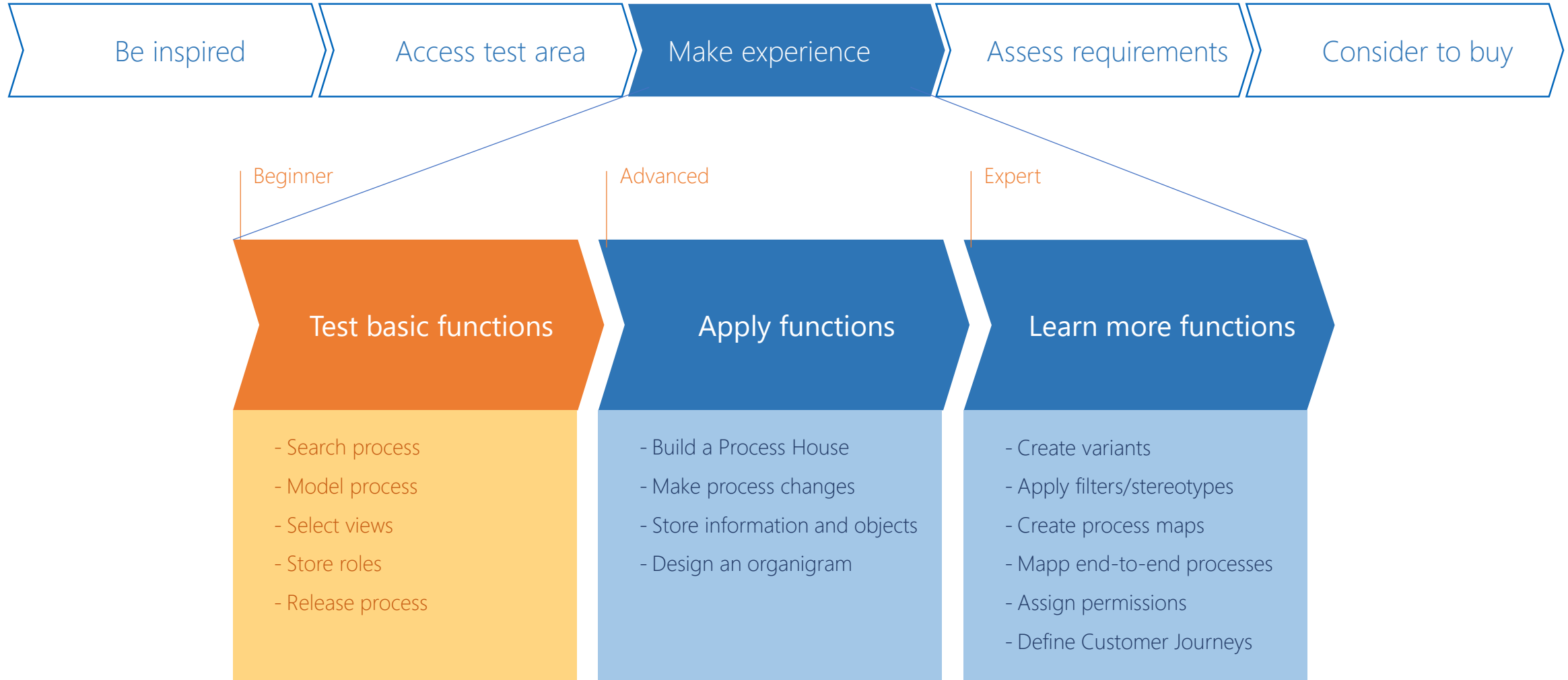
The SYMBIO logo is displayed in white, uppercase letters within a blue rectangular box with rounded corners. The background of the entire slide is a photograph of a bright blue sky filled with large, white, fluffy clouds.

SYMBIO®

Symbio Quick Guide

Wednesday, November 20, 2019







1. Log in

- Log in with access data received by mail
- Get familiar with Symbio work area
- Navigate to one of the following search functions

2. Enter search terms

Option 1

- Go to Header
- Enter term (use AND/OR)
- Filter by field (option)
- Select searched term in list
- Open link in Detail Content

3. Search list content

Option 2

» Feature only available after activation

- Navigate to PROCESSES in list view
- Click on magnifier icon
- Search by content

4. Select Scope filter

Option 3

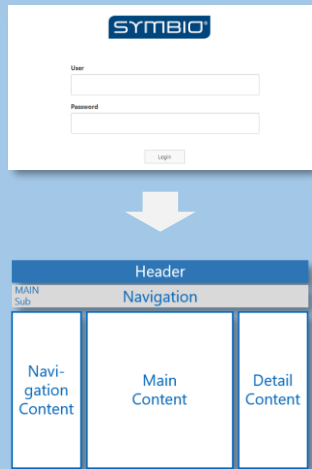
- Set Scope filter(s) in Header
- See appropriate processes
- Non-applicable processes are greyed out

5. Enter by role

Option 4

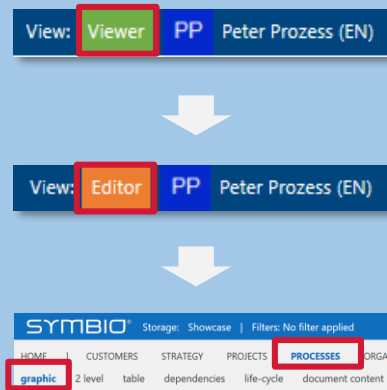


1. Log in



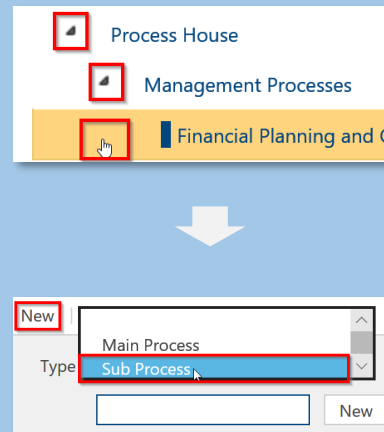
- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing



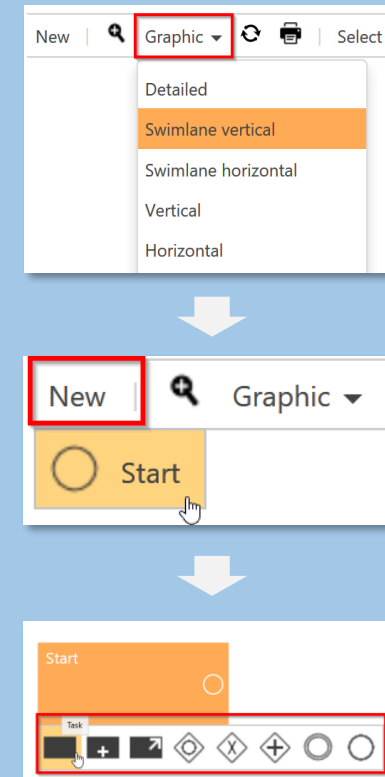
- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to PROCESSES to create a new process

3. Create process

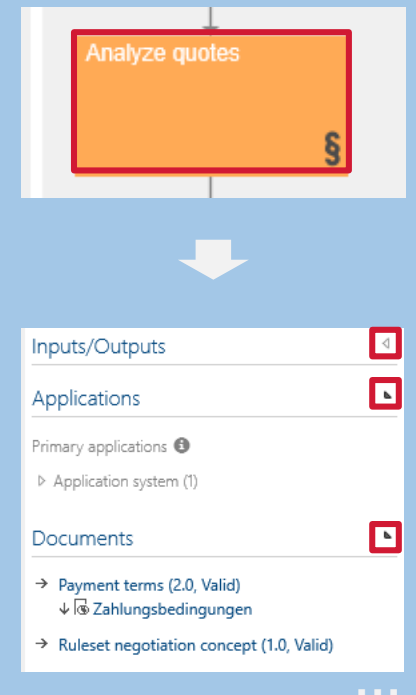


- Select Main Process in Navigation Tree
- Create Sub Process (BPMN2.0-Diagram)
- Start modelling in Main Content

4. Model process



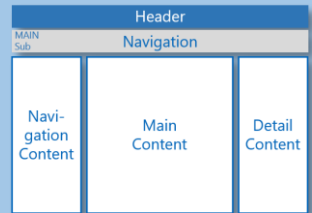
5. Store information



- Add further information in Detail Content
- Update by refresh button

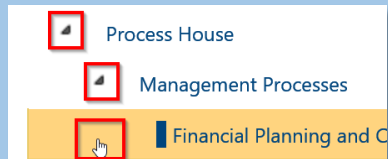
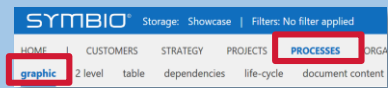


1. Log in

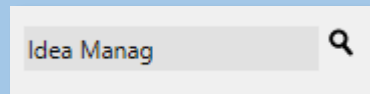


- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

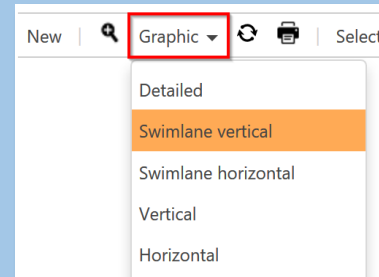
2. Navigate to process



OR

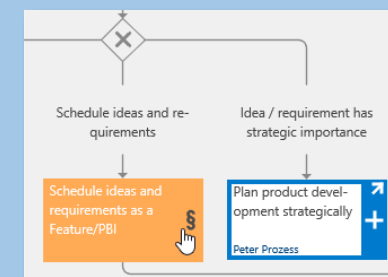


3. Select view



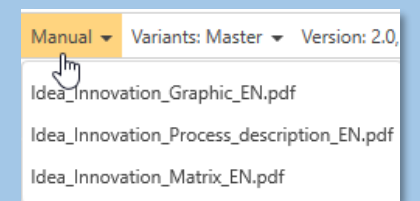
- Automated views can be selected
- Different views show the process on a various perspective

4. Get information

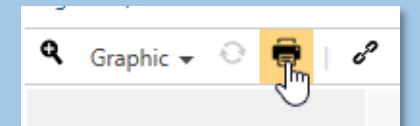


Name	
Schedule ideas and requirements as a Feature/PBI	
Type	Task
Key Performance Indicators	
→ Velocity (2.0)	
Roles	
Applications	

5. Work with the view



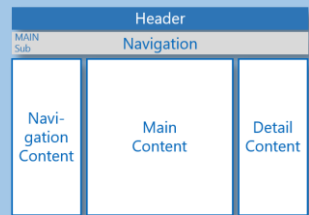
OR



- Select to get the process view as pdf
- Select to get the process manual
- Print out the selected view



1. Log in



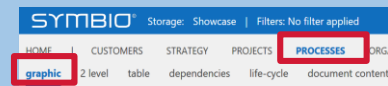
- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing

View: **Viewer** PP Peter Prozess (EN)



View: **Editor** PP Peter Prozess (EN)



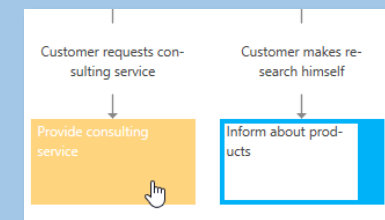
- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to PROCESSES to create a new process

3. Create roles



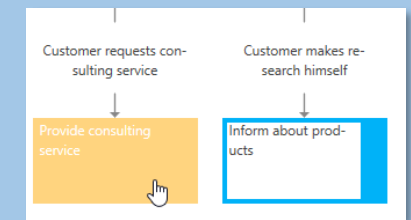
- Detailing Roles is done in the Detail Content

4. Apply known roles



- A swimlane is automatically generated for each Responsible (R) role

5. Apply unknown roles






1. Log in

Model
process

Store roles

2. Apply participants

- By including a Quality Manager, the process will be first released by him
- Responsible is always the last one releasing the process

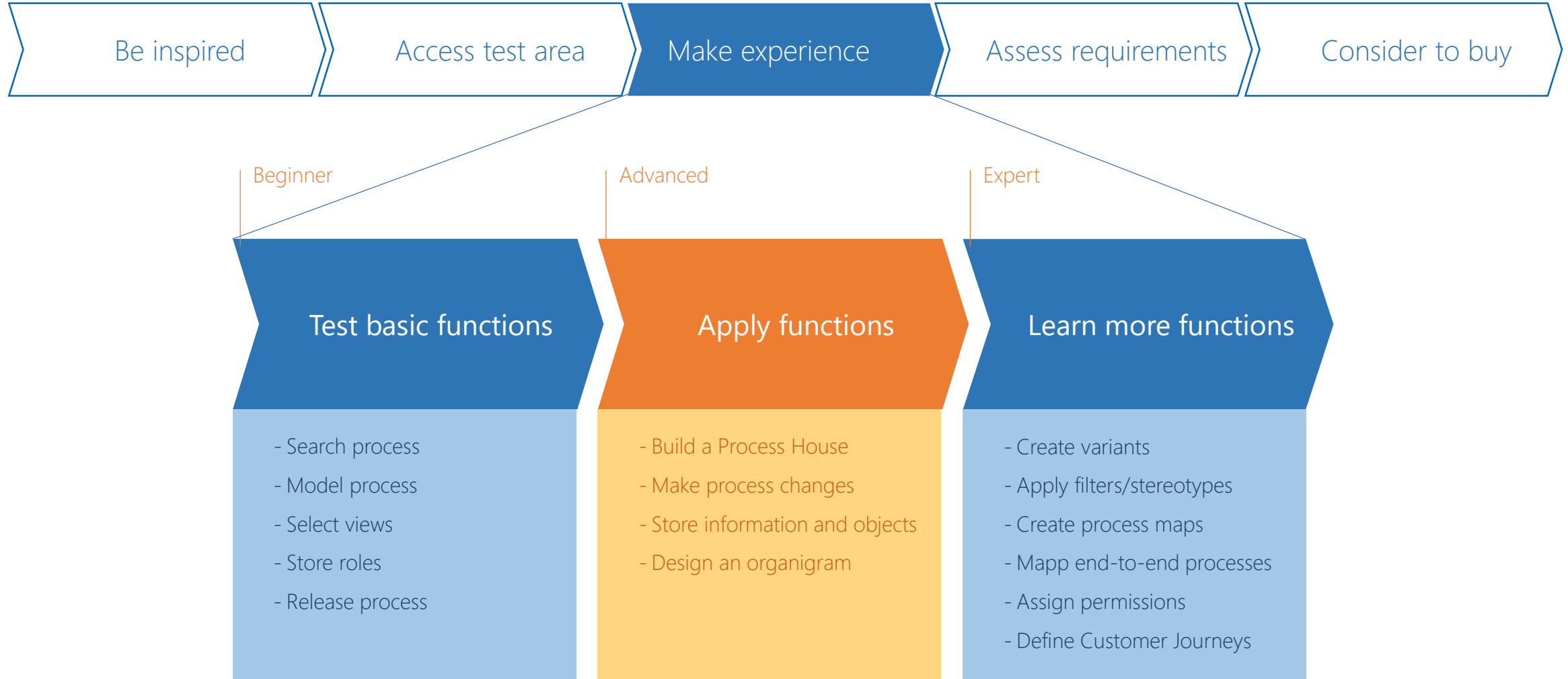
3. Initiate release cycle

- Go to Version dropdown in Toolbar of Main Content
- Select 'Change state'

4. Check mandatory fields

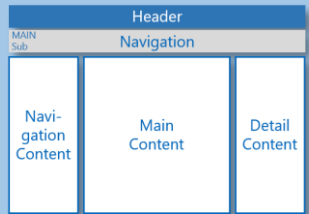
5. Send process to release

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





1. Log in

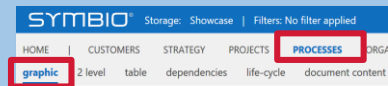


- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing

View: **Viewer** PP Peter Prozess (EN)

View: **Editor** PP Peter Prozess (EN)



- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to PROCESSES to create a new process

3. Create first levels

Process House

Process House
Management Processes

4. Store information

5. Release Process House

Release process

Step 3-5



Option

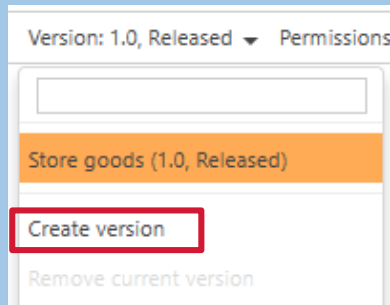
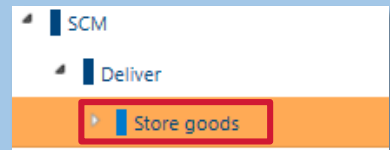
1. Log in



Model process

Store roles

2. Create new version



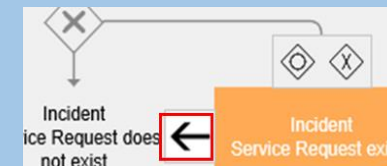
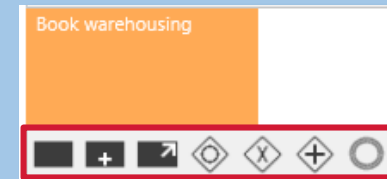
Version: 1.1, In process

3. Select multiple objects



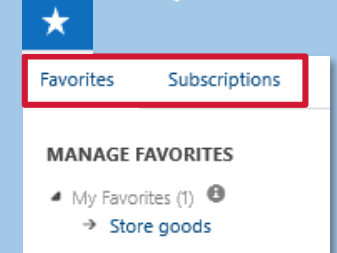
- Highlight process flow objects that should be modified

4. Modify process flow



- Copy/move selected objects
» Feature only available after activation
- Delete selected objects
- Add further objects
- Swap paths for better layout

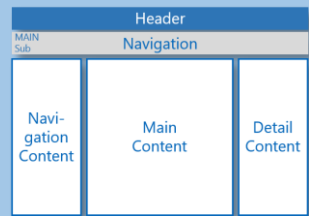
5. Create favorite/link



- Define a favorite or subscribe to process to be informed by mail in case of changes
- Create a link to share process with other users

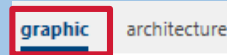
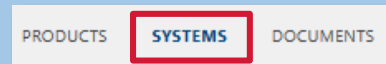
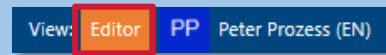


1. Log in



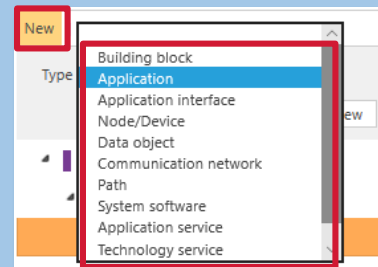
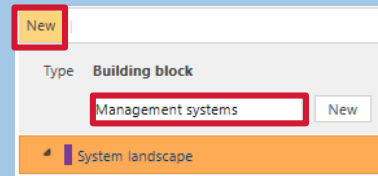
- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing



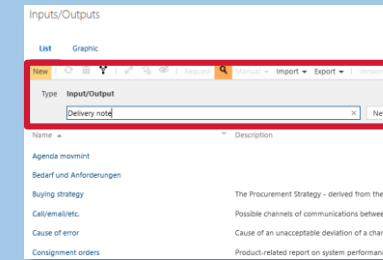
- In 'Viewer' mode, only released objects are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to SYSTEMS

3. Set up object architecture



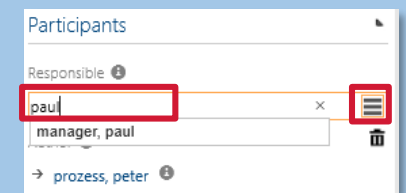
- Define further object architectures for DOCUMENTS, RISKS, REQUIREMENTS etc.

4. Define listed objects



- Create further objects in a list like roles, locations etc.
- Consolidate objects if they are redundant

5. Release objects

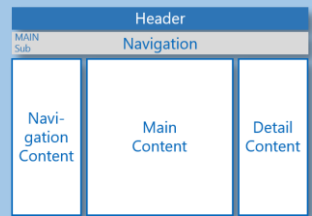


Release process

Step 3-5



1. Log in

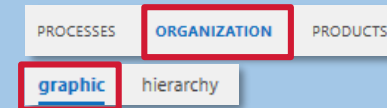


- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing

View: **Viewer** PP Peter Prozess (EN)

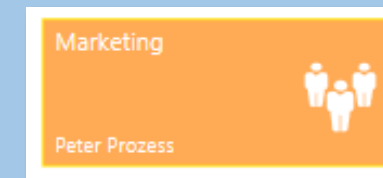
View: **Editor** PP Peter Prozess (EN)



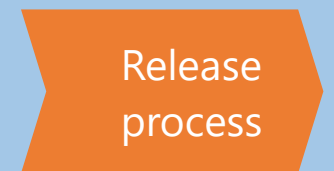
- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to ORGANIZATION

3. Set up org structure

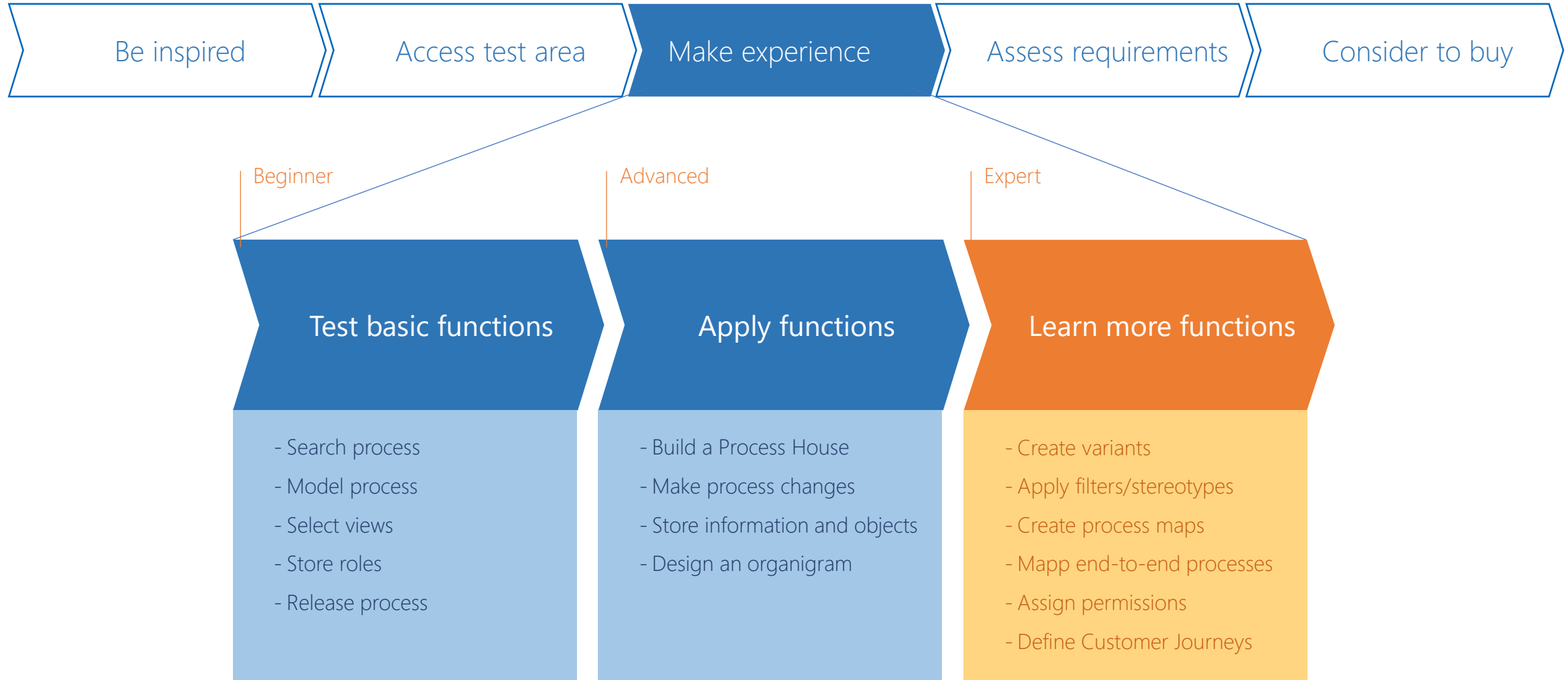
4. Store information



5. Release an organigram



Step 3-5





Prerequisite: Variant options are available (created by Admin)

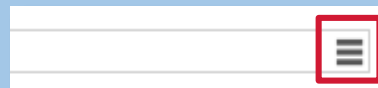
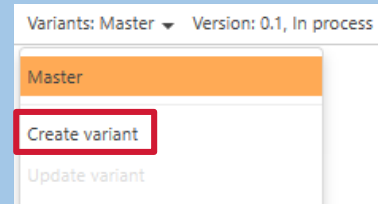
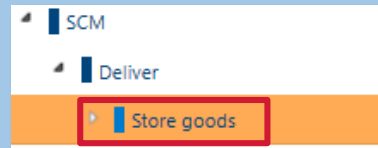
1. Log in



Model process

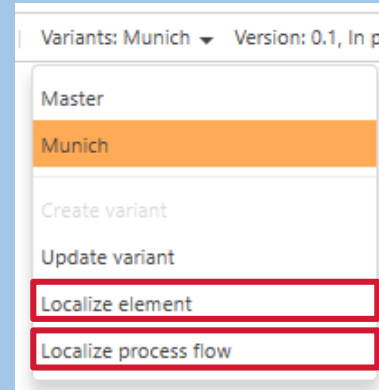
Store roles

2. Create variant



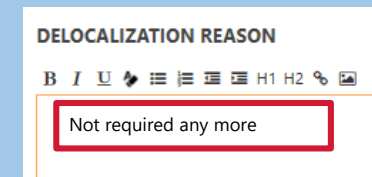
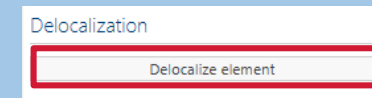
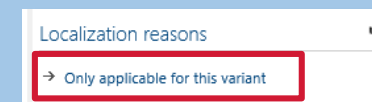
- Select variant via hamburger button
- Go back to Toolbar

3. Set up localizations



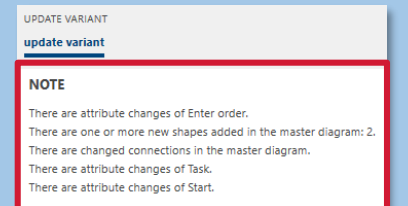
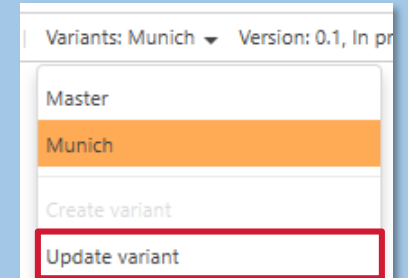
- Mark task to localize a single element OR
- Localize entire process flow

4. Delocalize



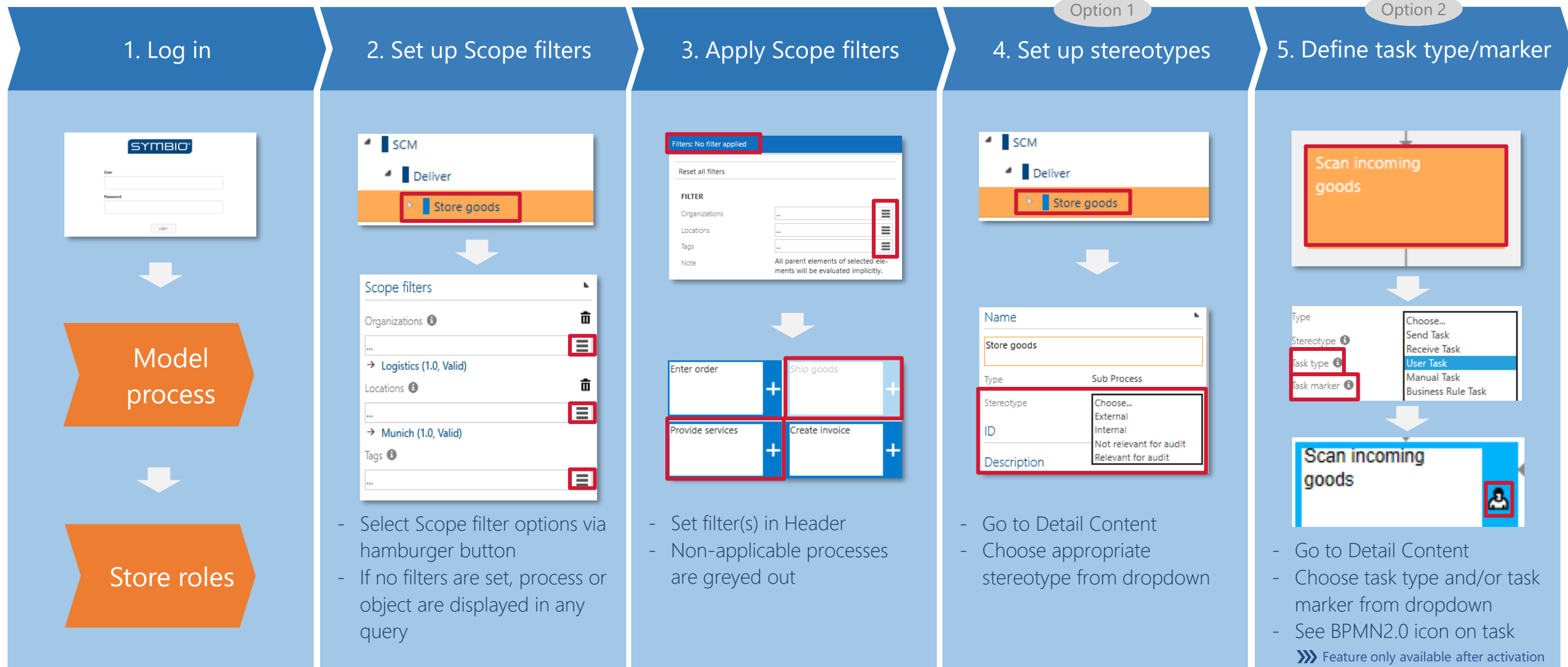
- Go to 'Localization reasons' in Detail Content
- Click button to delocalize task or process

5. Update variant



- Update only if Master has been changed
- Localized element or process flow remain unchanged

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





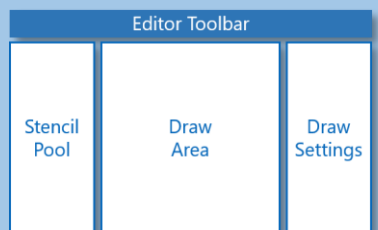
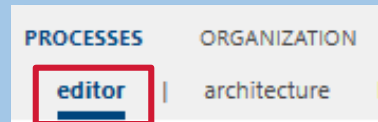
1. Log in



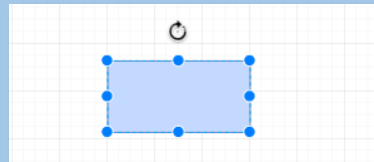
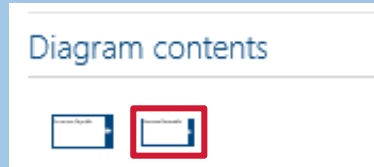
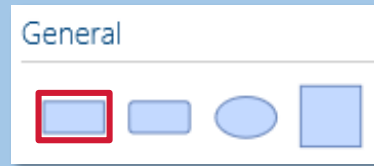
Build a
Process
House

- Log in with access data received by mail
- Model Process House
- Go to Navigation Content

2. Open editor

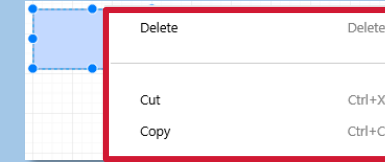
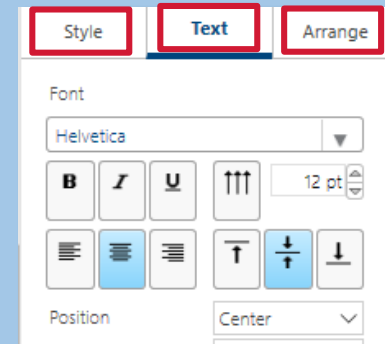


3. Select objects



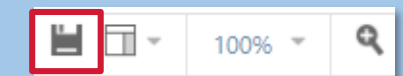
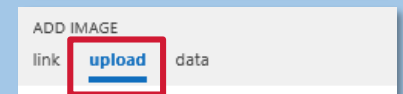
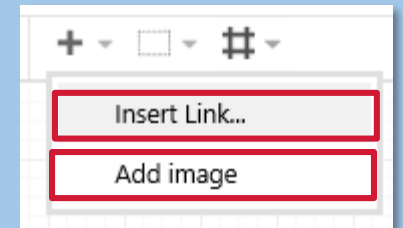
- Drag&drop from Stencil Pool to Draw Area

4. Edit objects



- Edit in Draw Settings area and in right mouse button menu

5. Insert link / add image



- Don't forget to save your changes!!!



1. Log in



Model
process

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

2. Create scenario



3. Insert interfaces



4. Develop E2E process



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

5. Apply roles



Assign permissions

Prerequisite: Permission sets are available (created by Admin)

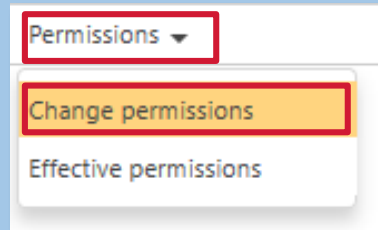
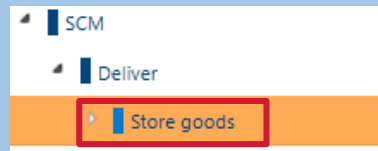
Please note that further Permissions features are available (refer to: <https://docs.symbioworld.com/admin>)



1. Log in

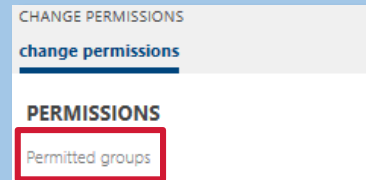
- Log in with access data received by mail
- Get familiar with existing permission sets
- Go to Navigation Content

2. Select process



- Use 'Permissions' in Toolbar to assign a specific permission set to a selected process
- Also apply for categories or objects if required

3. Permit user groups



user groups	report data
Name	
AdminInfo	
Management	

4. Select permission mode

Inherit permissions

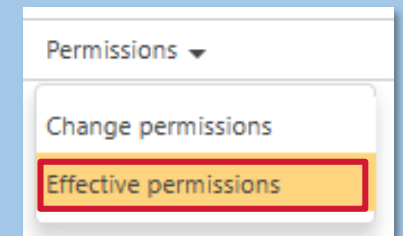


Permission mode

Choose...
Exclude other users
Permissions of other users unchanged

- Choose option whether permissions may be inherited from parent process (or not)
- Decide whether permission is exclusive or whether standard set remains unchanged

5. Verify permissions



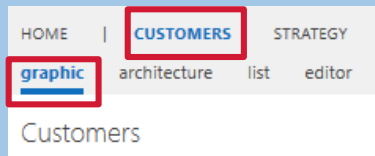
DISPLAY PERMISSIONS FOR USER...
paul

PERMISSION SETS	
New element	<input type="checkbox"/>
Edit element	<input type="checkbox"/>
Delete element	<input type="checkbox"/>
Show element	<input checked="" type="checkbox"/>
Approve element	<input checked="" type="checkbox"/>
Open element	<input checked="" type="checkbox"/>

- See existing permission rights for a specific user

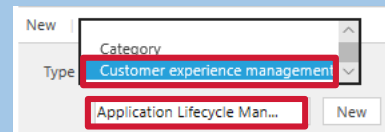
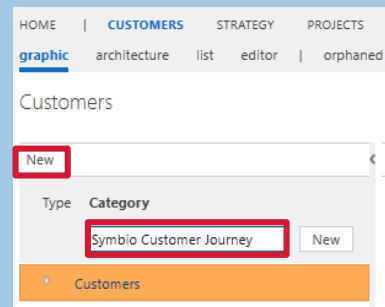


1. Log in



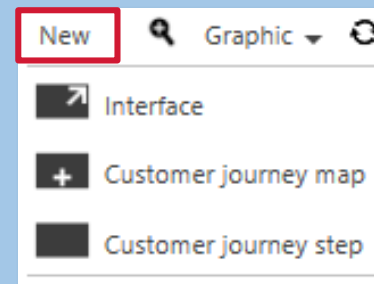
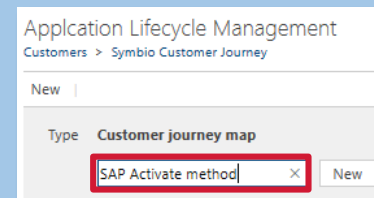
- Log in with access data received by mail
- Go to CUSTOMERS navigation

2. Set up CEM structure



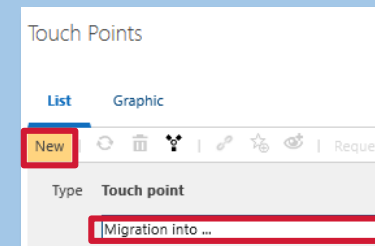
- Create a Customer experience management (CEM) consisting of Customer journey maps below

3. Work out CJM



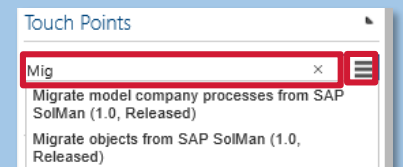
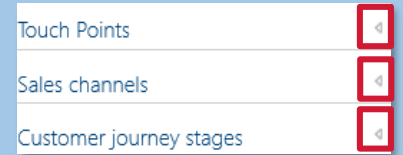
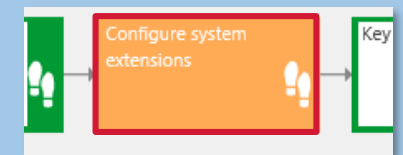
- Design a Customer journey map (CJM) with the help of dropdown objects

4. Add detailed information



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

5. Store information



Symbio Viewer

Login and Navigation

Different views

Search, Filter, Favorites

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Symbio Author

Create process

Define and detail process

Optimize process flow

Initiate release

Thanks

