

Symbio User Manual

Release 4.3





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List of abbreviations

Abbreviation	Meaning	Description
BPM	Business Process Management	
BPMN	Business Process Model and Notation	Methodology for the graphical representation of a process flow at the detailed level
EPC	Event-driven process chain	Methodology for the graphical representation of a process flow at the detailed level
eEPC	Extended event-driven process chain	As above, but includes process details (such as organisational units, roles, inputs and outputs, systems, directives/guidelines, requirements, risks, indicators, etc.)
E2E	End-to-end views, end-to-end processes	Processes that start with the customer, cycle through (most of) the company, and eventually end up back with the customer
GUID	Global Unique Identifier	A globally unique identification number with a key length of 128 bits
ISO	International Organisation for Standardization	Responsible for ISO 9000, ISO 14000 and other certifications
USP	Unique Selling Point/ Unique Selling Proposition	Factor that differentiates a product from its competitors
VCD	Value chain diagram	Graphical representation of the main and sub processes at higher levels
SAP WPB	SAP Workforce Performance Builder	SAP authoring tool for creating user assistance through recording (screen) transactions for training or educational purposes ("screen movies")



1 Working with Symbio

The ability to record business processes simply, quickly, cost-efficiently and with little expenditure on training is vital for companies and organisations. Symbio meets all these criteria and is a complete system for managing business models and processes. Symbio supports the acquisition, structuring, maintenance, compression and provision of many types of information in the business model.

Its functions can be summarized as follows: databases, process houses, organisational charts and glossary data are created in Architect. Process flow processes are modelled via MS Excel in the Modeling Client, which in turn can be imported into Architect together with the recorded process flows. Publications are created using Architect, and after the processes have been verified, the entire process can start again with modelling, if required.

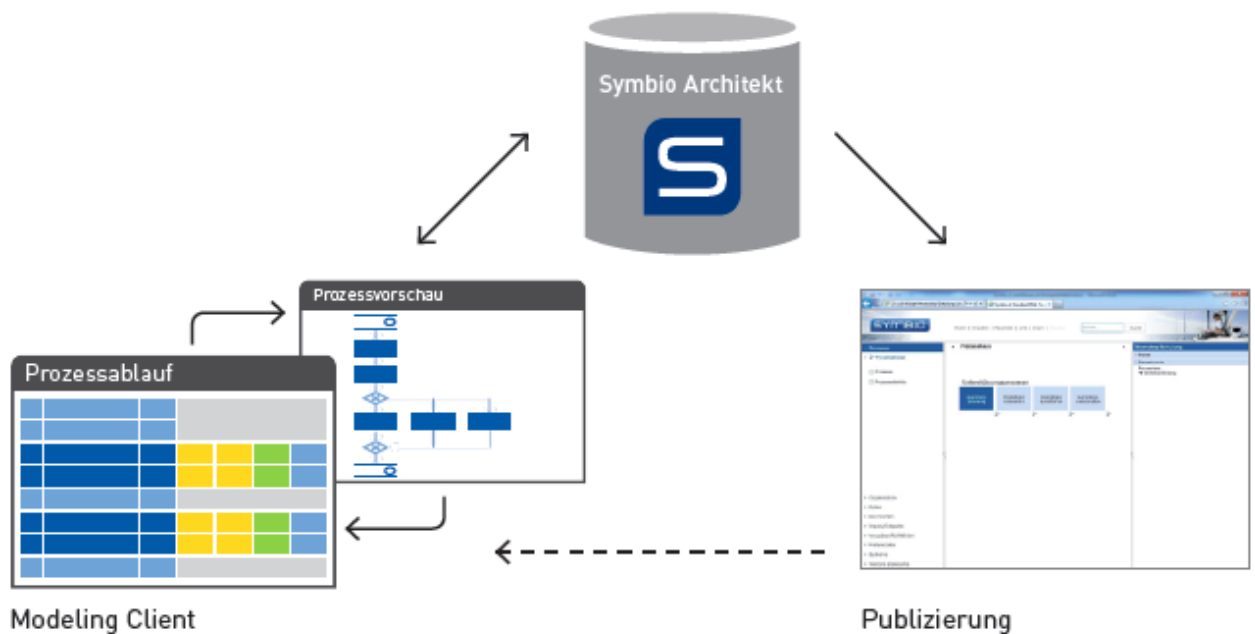


Figure 01 – The Symbio process cycle



1.1 The Symbio philosophy

1.1.1 Simplicity

To meet this claim, Symbio always provides its users with an interface optimized for their own particular application.

- The administrators of the business model manage the collected information by establishing and maintaining structures and checking compliance with these structures. They use Symbio Architect.
- The creators of the business model record, maintain, and compress information. They use the Symbio Modeling Client.
- The information users of the business model require targeted access to the information. They work with Symbio Publishing or Symbio Document.

1.1.2 Integration

Symbio is a complete system for managing business models. It supports the acquisition, structuring, maintenance, compression and provision of many types of information in the business model.

Symbio's strengths become particularly apparent once Symbio is integrated into existing systems rather than run as a stand-alone system.

- The filing of Symbio Modeling Clients in a document management system not only allows the use of the built-in version management and workflow automation features, it also integrates the recording, maintenance and compression of information in software that is already being used. As a result, the business model automatically becomes an integral part of every day's activities.
- Embedding Symbio Publishing and Symbio Document in the intranet not only makes the business model available to every employee, it also allows to share and link with information and tools already available on the intranet, including role descriptions, checklists, manuals and instructions.

1.1.3 Involvement

The acceptance of a business model depends on many factors. Without doubt, topicality is of one of the most important. Through its ease of use and its ability to be integrated into existing systems, Symbio specifically promotes the involvement of the greatest possible number of employees in the company. Because the **Symbio Modeling Client** gives every user the chance to record, maintain and compress information themselves, staff become actively involved in the business model.



1.1.4 The Ploetz + Zeller BPM approach

At Ploetz + Zeller GmbH, the focus is on a comprehensive BPM approach. Every employee needs to be integrated into the business process management lifecycle. The managers and individuals at various levels need to believe in the usefulness of the tool in order to ensure a successful BPM strategy. As a result, employees feel involved and motivated to participate. BPM should be aimed at both the strategic and the operative levels.

1.1.5 Symbio USPs

- **Can be used without delay:** Symbio is easy to integrate in a company and can be used immediately for internal and external projects.
- **Low licensing and operating costs:** Symbio is offered with departmental, divisional and corporate licenses.
- **Simple database management:** Databases can be created and managed easily in Architect.
- **Extremely low training costs:** Only two hours of training are required to learn the functionality.
- **User-friendly:** Modelling is based on MS Excel.
- **High level of acceptance:** Because the system is easy to use, staff acceptance is very high.
- **Visual evaluations:** Processes can be evaluated in professional graphics.
- **Embedded process web:** The process web can be easily integrated into the existing IT environment.

1.2 The benefits of Symbio

Processes are defined within the team and by each individual employee.

This helps to identify **areas for improvement** and initiate first changes in people's minds.

- **Transparency** is obtained by linking data in the process. (Who does what in the company? Which system supports which process?) Existing data can be easily networked with Symbio.
- Symbio makes **organisational changes** in the company clearly visible by linking process and organisational architectures. It quickly becomes apparent which tasks are fulfilled by which organisation and whether tasks are assigned clear responsibilities (roles).
- **ISO certifications** may be obtained and compliance conformity can be ensured within a very short time frame.



- Using **standard software**: Symbio is deployed as a ready-made product and has a clearly defined scope to ensure low licensing and training costs. Employees know immediately how the software works, and they can deliver results quickly. This increases employee motivation.
- **Rapid deployment** is guaranteed in the most diverse internal or external projects (regardless of the industrial sector involved), and projects can start immediately with Symbio. This creates flexibility and acceptance in any company and prevents unnecessary investments.
- **Rapid and easy entry of data in Excel** and direct data analysis on the web or in Office documents quickly provides transparency regarding business processes, current figures and potential areas for improvement.
- **Wasted expenditure** becomes apparent and unnecessary work steps can be eliminated, creating sustainable and ecological working methods.
- **The process portal provides an overview and transparency for all employees** and it creates new perspectives and views on the company, helping organisations to increase employee satisfaction.
- **Different application scenarios** and the easy-to-use software interface allow for continuous and thus sustainable business processes optimization.



2 Manage the business model

Basic activities of business process management, such as database management, compiling process maps, creating glossaries and generating publications, are handled in **Architect**. First and foremost, **Architect** serves as an exchange and processing platform for process data.

The following are useful Architect keyboard shortcuts:

Shortcut	Description
DELETE	Deletes the selected item
CTRL + Cursor Up	Moves the selected item up
CTRL + Cursor Down	Moves the selected item down
CTRL + Cursor Left	Moves the selected item out
CTRL + Cursor Right	Moves the selected item in
CTRL + D	Changes the data language
CTRL + W	Closes the current database
CTRL + Enter	Adds a new item under the selected item. Uses the same element type and same indentation.

Table 1 – Architect shortcuts



2.1 Getting started with Symbio

2.1.1 Homepage

When Symbio Architect is launched, the following user interface appears (see Figure 2). **Recent databases** on the left-hand side lists recently used databases. Double-click a database to open it. **Help & Support** on the right-hand side provides links to view user guides or contact information for Ploetz + Zeller GmbH.

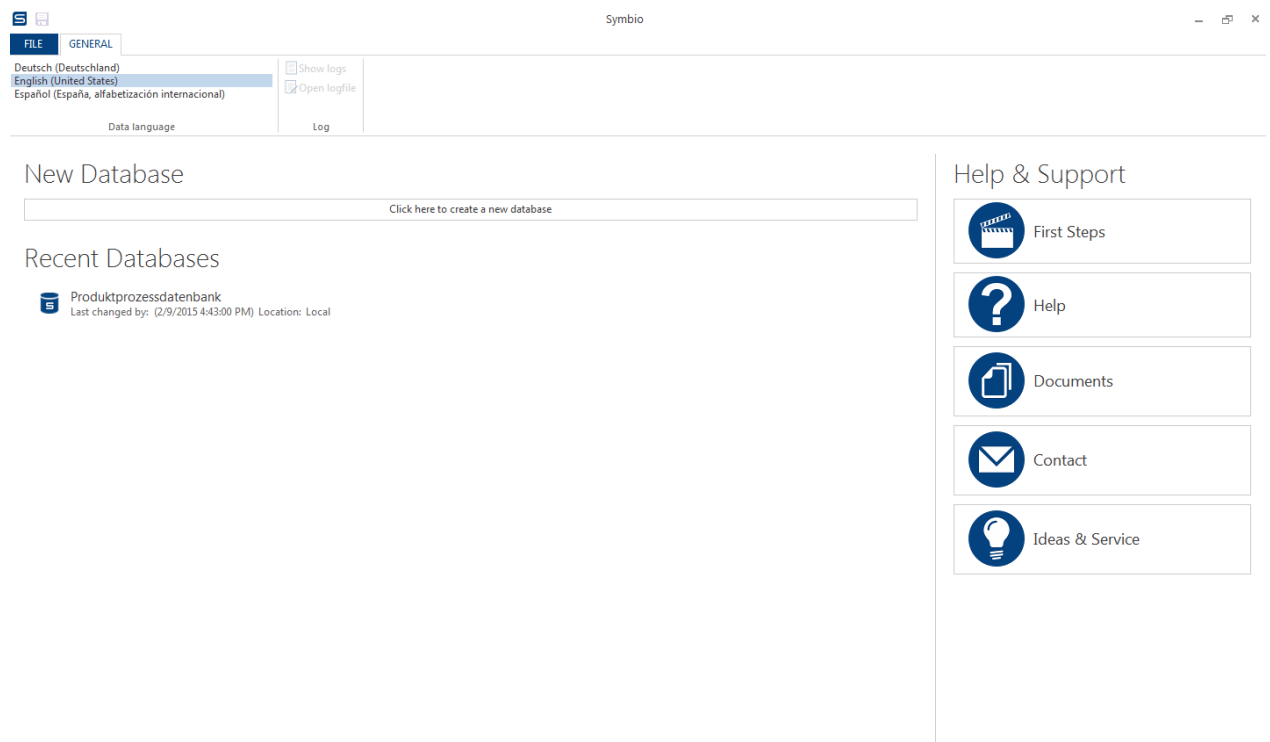


Figure 02 – Symbio homepage



2.1.2 Create a new database

Click **File** in the menu bar to

- display all available databases
- create a new database
- import an existing database.

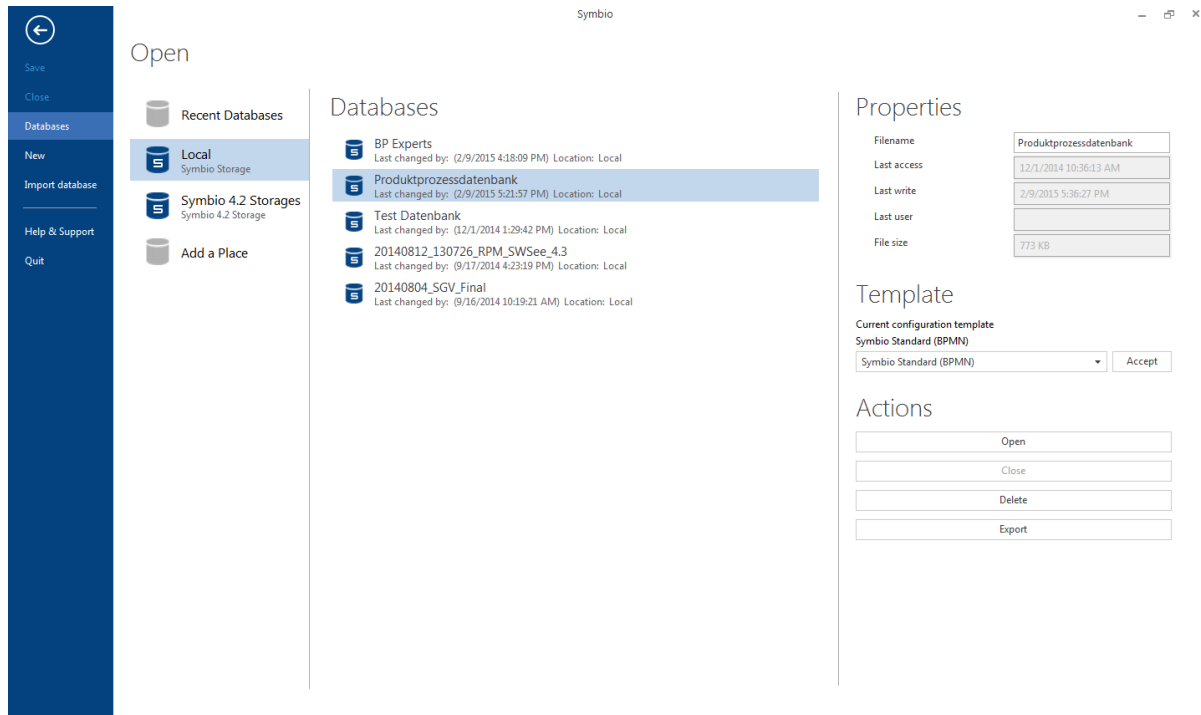


Figure 03 – Manage databases

Clicking **New** in the left pane enables the user to enter a new database name. Click **Create** to create a new database.

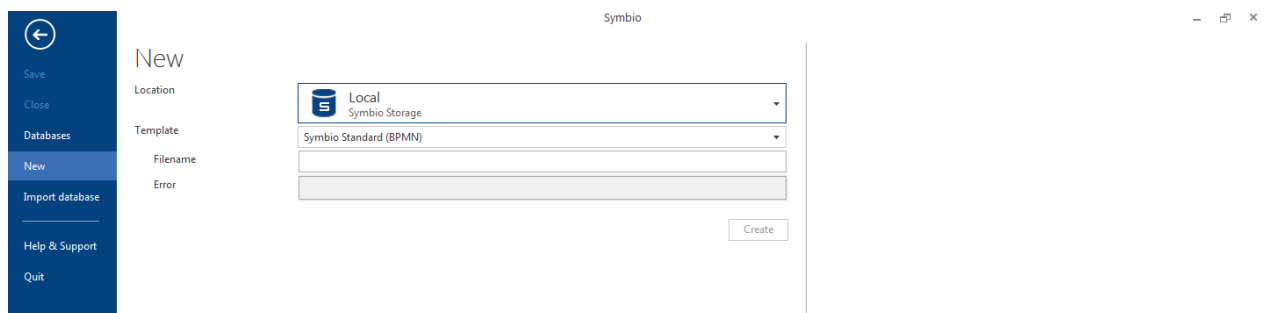


Figure 04 – Create a new database

Location is initially set to **Local**, but you can also define other storage locations (see 2.1.3).

By default, **Method** is set to **Symbio Standard (BPMN)**. You can also select **Symbio Standard (EPC)** for modelling with event-driven process chains. In addition, you can use **Symbio for ARIS** to create a database whose contents may be synchronized directly with ARIS®.



2.1.3 Create a storage location

Select **Add a Place** in the **Database** menu to define storage repositories (so-called *storages*). To do this, you need to specify the path to the location in **Properties** and add a name for the storage repository.

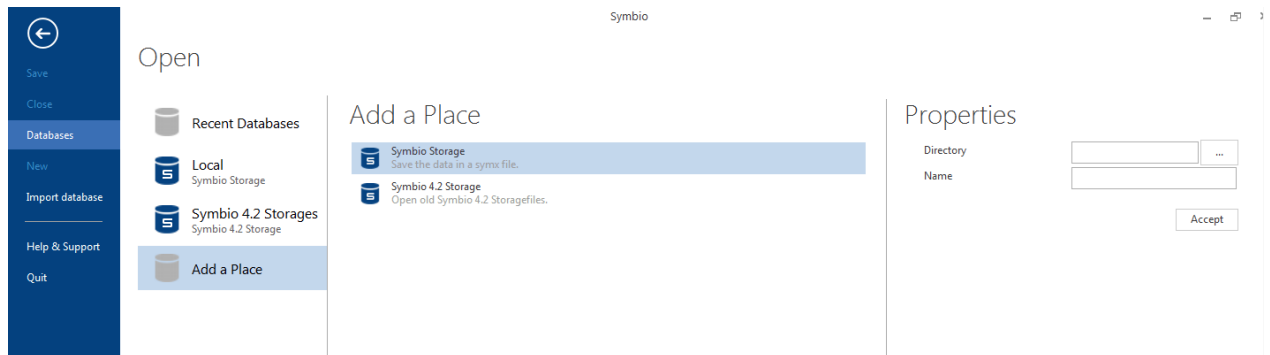


Figure 05 – Create a storage location

New storage repositories are listed under **Open**. Click the x next to an existing repository to delete it.

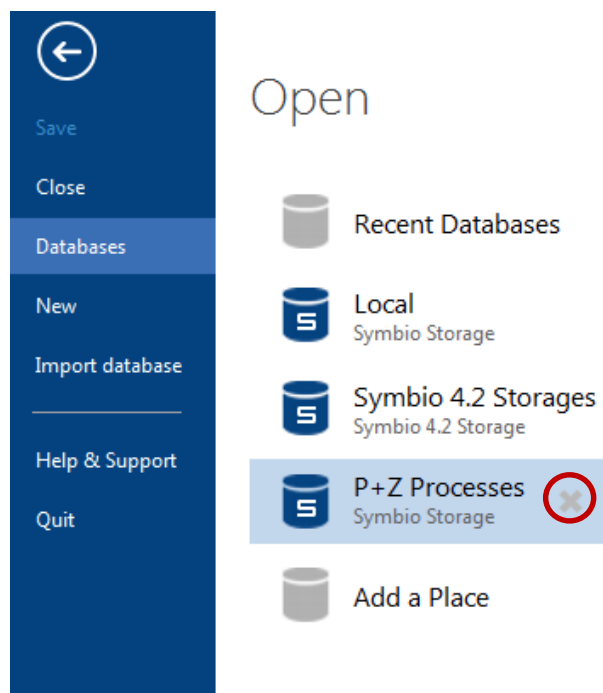


Figure 06 – Delete a storage location

When you create a new database (see 2.1.2), you can assign a pre-defined storage location to this database. This enables users to access, for example, a central database stored on a network drive from different work stations. A database can only be opened and modified by one user at a time. Access is blocked for all other users during this time.



2.2 Build and manage the process architecture

After creating a new database, you can build a process house via the **Processes** tab.

Produktprozessdatenbank - Symbio

Name	Type	Layer	Owner	Manager	Process State
Process House	Process House	0			
Management Processes	Category	0			
Establish process architecture	Main Process	1	Oliver Zeller	Rainer Debusmann	In process
Develop/adjust organizational architecture	Main Process	1	Oliver Zeller	Rainer Debusmann	In process
Core Processes	Category	0			
Establish business process management	Main Process	1	Oliver Zeller	Carina Supplith	In process
Manage organizational architecture	Main Process	1	Oliver Zeller		In process
Request adjustment of organizational architecture	Main Process	2			In process
Maintain existing organizational architecture	Main Process	2			In process
Communicate new organizational architecture	Main Process	2			In process
Manage business processes	Main Process	1	Oliver Zeller	Ioana Sturm	In process
Implement and operate process oriented IT implementation projects	Main Process	1	Oliver Zeller	Michael Hettich	In process
Define scope of project	Main Process	2	Oliver Zeller	Michael Hettich	In process
Establish project	Main Process	2	Oliver Zeller	Michael Hettich	In process
Define and release processes and requirements	Main Process	2	Oliver Zeller	Michael Hettich	In process
Define and release solutions	Main Process	2	Oliver Zeller	Michael Hettich	In process
Adjust software and programm extensions	Main Process	2	Oliver Zeller	Michael Hettich	In process
Test software functionally	Main Process	2	Oliver Zeller	Michael Hettich	In process
Close a project	Main Process	2	Oliver Zeller	Michael Hettich	In process
Implement and operate Symbio for SharePoint	Main Process	1	Steffen Ploetz	Steffen Ploetz	In process
Support Processes	Category	0			
Views	Views	0			
Unassigned Processes					
Tailoring of BPM processes	View	1	Steffen Ploetz		In process
Certification based on international norms	View	1	Oliver Zeller		In process

Figure 07 – Create and manage a process house

Symbio supports the following process types:

(See [3. Defining and maintaining processes](#) for more information about these elements.)

Element	Description	Example
Main process	→ Element for structuring the processes → May contain main processes or sub processes	
Sub process	→ Element for structuring the processes → May contain tasks	
Task	→ Individual activity within a temporal-logical sequence → May be linked to a variety of different master data	

Table 2 – Process types in Architect



Process types can be created in different **categories**, such as management, core or support processes. You can also define a custom category by selecting the name of a process house and clicking **Add** to add a category.

Produktprozessdatenbank - Symbio

FILE GENERAL ARCHITECT

Add Remove Convert Outdent Indent Move up Move down Import processes Export processes Import Workshop Photo Export process documents Web Publishing Reduce Expand Preview Evaluation Import trainings E-Learning

Diagrams & Objects Structure Modelling Reporting View

Processes Organization Glossary

Name	Type
Process House	Process House
Management Processes	
Establish process architecture	Main Process
Deflect strategies/market requirements and define core processes	Sub Process
Define and release goals/KPIs	Sub Process
Implement process architecture	Sub Process
Define process responsibilities	Sub Process
Implement organizational architecture	Sub Process
Develop/adjust organizational architecture	Main Process
Core Processes	
Establish business process management	Main Process
Manage organizational architecture	Main Process
Manage business processes	Main Process
Implement and operate process oriented IT implementation projects	Main Process
Implement and operate Symbio for SharePoint	Main Process
Support Processes	
Views	Views
Unassigned Processes	
Certification based on international norms	View
Tailoring of BPM processes	View

Figure 08 – Add a category

The process architecture should be designed as a hierarchical structure of processes, containing the elements **Main process**, **Sub process** and **Task**.

These elements can form a hierarchical structure with 2 or 3 (or more) levels and may be hierarchized to any depth.

→ **Main process 1 (3 levels)**

○ **Main process 1.1**

- Sub process 1.1.1
 - Task 1.1.1.1
 - Task 1.1.1.2
 - Task 1.1.1.n
- Sub process 1.1.2
 - ...

- Sub process 1.1.n
 - ...
- **Main process 1.2**
 - ...
- **Main process 1.n**
 - ...

2.2.1 Symbio Architect features

New processes may be created at any time in one of the content categories of management processes, core processes or support processes. If the content-based classification of new processes is not (yet) known, processes can also be created as **Unassigned processes**. You may also create views in the process architecture. Views may contain links to other processes and child views. This allows different views of the process architecture to be created (for example, end-to-end views).

The three tabs **Processes**, **Organisation**, and **Glossary** enable the user to **Filter/Group** data. The **Filter/Group** feature is available for every column. Below you can see that the column type in the process architecture is selected and you can, for example, select and display all sub processes.

Type	Layer	Owner	Manager	Process State
(Blanks)				
Process (Non blanks)				
Category	Main Process			
Category	Process House			
Main Process	Category	Oliver Zeller	Carina Supplith	In process
Main Process	View	Oliver Zeller		In process
Main Process	Views	Oliver Zeller	Ioana Sturm	In process
Main Process		Oliver Zeller	Michael Hettich	In process
Main Process	1	Steffen Ploetz	Steffen Ploetz	In process

Figure 09 – Filter/Group

Produktprozessdatenbank - Symbio

FILE GENERAL ARCHITECT

Add Remove Convert Outdent Indent Move up Move down Import processes Export processes Import Workshop Photo Export process documents Web Publishing Expand Preview Evaluation Import trainings E-Learning

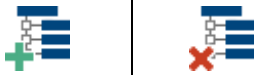
Diagrams & Objects Structure Modelling Reporting View

Processes Organization Glossary

Name	Type	Layer	Owner	Manager	Process State
Process House	Process House	0			
Management Processes	Category	0			
Establish process architecture	Main Process	1	Oliver Zeller	Rainer Debusmann	In process
Develop/adjust organizational architecture	Main Process	1	Oliver Zeller	Rainer Debusmann	In process
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Manage organizational architecture	Main Process	1	Oliver Zeller		In process
Request adjustment of organizational architecture	Main Process	2			In process
Maintain existing organizational architecture	Main Process	2			In process
Communicate new organizational architecture	Main Process	2			In process
Manage business processes	Main Process	1	Oliver Zeller	Ioana Sturm	In process
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Define scope of project	Main Process	2	Oliver Zeller	Michael Hettich	In process
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Adjust software and programm extensions	Main Process	2	Oliver Zeller	Michael Hettich	In process
Test software functionally	Main Process	2	Oliver Zeller	Michael Hettich	In process
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Support Processes	Category	0			
Views	Views	0			
Unassigned Processes	View	1	Steffen Ploetz		In process
Tailoring of BPM processes	View	1	Oliver Zeller		In process
Certification based on international norms					

Figure 10 – Unassigned processes



		Add/Remove Main processes, sub processes, process flows and process steps can be added or removed. In order to generate a process type on the core process level, the core process cell must be highlighted. You must select a process type to delete it. Master data objects can also be added by double-clicking the "..." input line.
		Convert Click this button to convert the selected process type to another type.
		Indent/Outdent Moves a process from a higher/lower level to a lower/higher level. Its type is converted automatically.
		Move up/down The Move up and Move down buttons move processes up or down within the table structure. You can also drag & drop processes: Click the area to the left of the process that you want to move. Hold the left mouse button down and drag the process to the desired location to the process, under which you want to drop the moved process. Please note that all the subordinate processes (child elements) will also be moved.
 Import processes		Import processes Once processes have been recorded, defined or optimized in the Modeling Client they can be imported back into Architect by clicking the Import processes button. They are then displayed in the updated process architecture, provided the processes have previously been exported from Architect. If newly created processes are imported into the Modeling Client, they appear under Non-allocated processes. The glossary is also updated when you import a Modeling Client.
 Export processes		Export processes Processes are modelled in the Symbio Modeling Client, not in Architect. Select the desired process in the process architecture and click the Export processes button to export the process to the Modeling Client. The Modeling Client can be stored in any location.



 Export process documents	Export documents documents A process manual for each individual process can be generated from within Symbio Architect. Select the process, and click the Export documents button to generate the required manual.
 Web Publishing	Web publishing With Symbio you can easily publish processes, organisations and related data records on the Web in HTML format. Web publishing is performed in Architect. The entire process and organisational architecture as well as the glossary can be published on the Web using the Web publishing feature. You can select the storage locations and languages.
	 Reduce/Expand: Use to reduce (hide) or expand (display) all the child processes of a process. All management, core and support processes as well as the entire process house can be collapsed or expanded by selecting the corresponding line and clicking the Reduce or Expand buttons.
	Details You can create attributes for selected objects, and selected attributes can be modified directly in the table.
	Preview Select created objects to visualize them. Click the button again to show the preview again.
	Evaluation You can display additional element information, for example the charts in which the element occurs or other elements to which it is linked.
	Consolidation During consolidation, two or more highlighted objects are merged into one object. This function is especially useful for consolidating objects in the glossary. After you click the button, you can select the name of the new consolidated object in a dialog box.
	 Deconsolidation/reconsolidation Once new objects have been imported (see "Export/Import data"), consolidated objects can be deconsolidated or reconsolidated. Relevant objects are displayed in red.



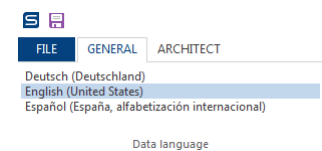
	Data language The data language can be changed to German or Spanish via the General menu option. Note that only the language of the data changes and not the language of the user interface, which is determined by your operating system.
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Table 3 – Buttons in Symbio Architect

2.2.2 Export processes from the database

Process flows are modelled on the basis of MS Excel in the Modeling Client and **not in Architect**. Select the desired **process flow** in the process architecture and click the **Export processes** button to export the process flow to the Modeling Client. The Modeling Client can be stored in any location.

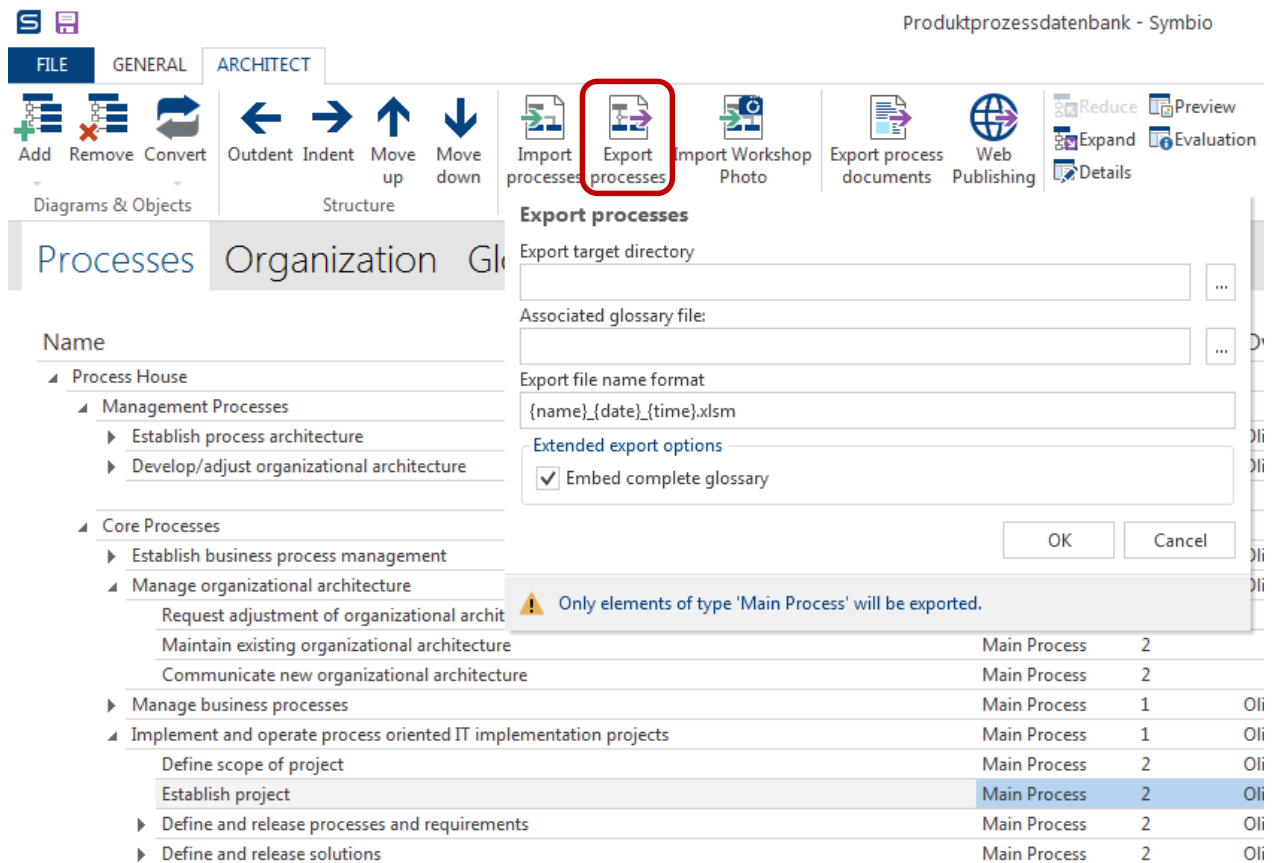


Figure 11 – Export process flows

2.2.3 Import processes into the database

Once processes have been recorded, defined or optimized in the Modeling Client they can be imported back into Architect by clicking the **Import processes** button. They are then displayed in the updated process architecture. Processes created using the Modeling Client (such as generated variants) are displayed under **Unassigned processes**. The glossary is also updated when you import a Modeling Client. It makes sense to consolidate similar objects after import (see "Symbio Architect features").

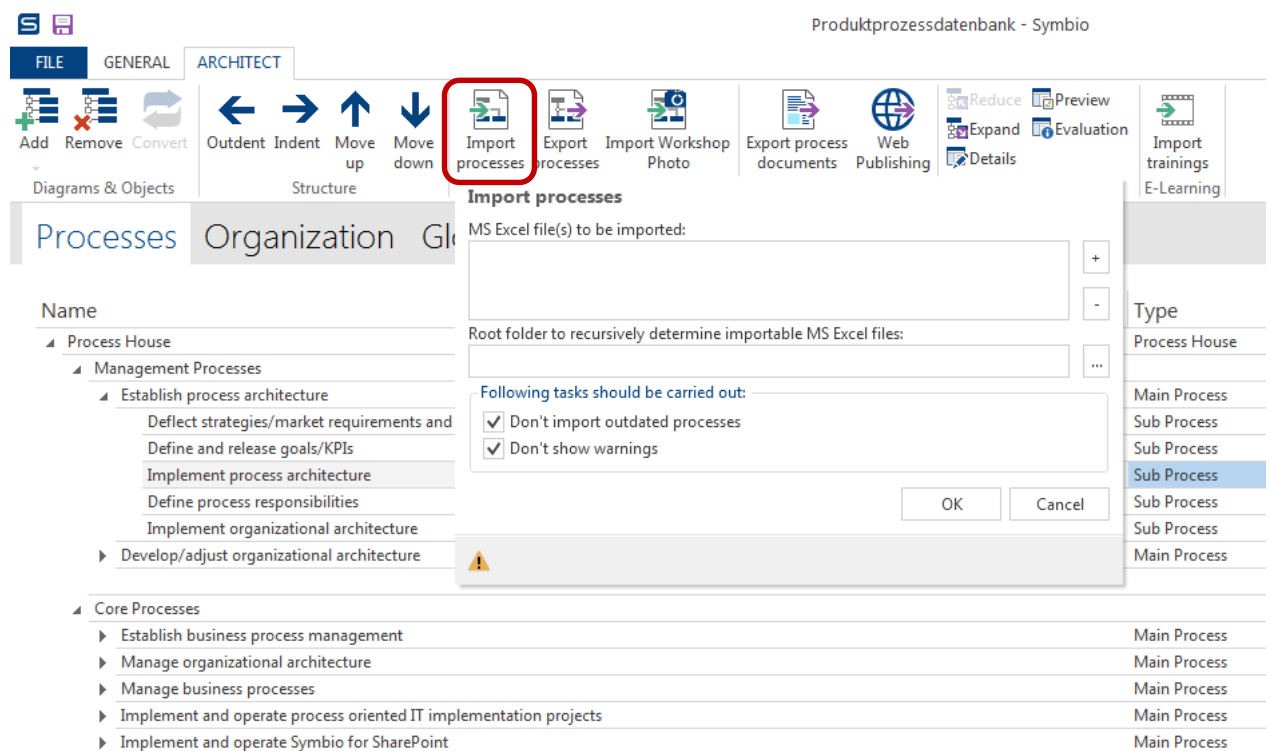


Figure 12 – Import a Modeling Client



2.3 Build and manage the organisational architecture

You can build and maintain organisations on the **Organisation** tab (see "Symbio Architect features").

The organisational unit and position are available to define the type of organisation.

Produktprozessdatenbank_1 - Symbio

FILE GENERAL ARCHITECT

Add Remove Convert Outdent Indent Move up Move down Export organization documents Reporting Expand Preview Evaluation Consolidate Deconsolidate Reconsolidate Consolidation

Diagrams & Objects Structure View Consolidation

Processes Organization Glossary

Name	Type	Layer	Type of Organizational Unit	Visualized Hierarchy Levels	Employee's Name	Hierarchical Re
Organization	Organizational Unit	0		2		
Customer Ltd.	Organizational Unit	1		2		
Corporate Management	Organizational Unit	2		2		
PLM	Organizational Unit	3		2		
Consulting	Organizational Unit	3		2		
Customer specific development	Organizational Unit	3		2		
Logistics	Organizational Unit	3		2		
Purchasing	Organizational Unit	3		2		
Service	Organizational Unit	3		2		
IT service	Organizational Unit	3		2		
HR	Organizational Unit	3		2		
Finance	Organizational Unit	3		2		
Controlling	Organizational Unit	3		2		
QM and BPM management	Organizational Unit	2		2		
Ploetz + Zeller GmbH	Organizational Unit	1	Company	2		
Standard development	Organizational Unit	2		2		
IT project team	Organizational Unit	2		2		
P+Z consultant	Position	3		0		
P+Z senior consultant	Position	3		0		
P+Z management consultant	Position	3		0		
P+Z project manager	Position	3		0		
P+Z customer service	Organizational Unit	2		2		
P+Z service manager	Position	3		0		
P+Z service employee	Position	3		0		
P+Z customer management	Organizational Unit	2		2		

Figure 13 – Build an organisational architecture

2.3.1 Define and maintain organisational units

When defining and maintaining organisational units, you can create organisational units from scratch or rename an existing organisational unit with the help of the **Name** and **Type** columns. Likewise, organisational units can be moved as desired using the **Move up/down** buttons.

Additional information can be entered in various columns. Note that the visualization levels in the **Visualized hierarchy levels** column can be adjusted up or down as required.

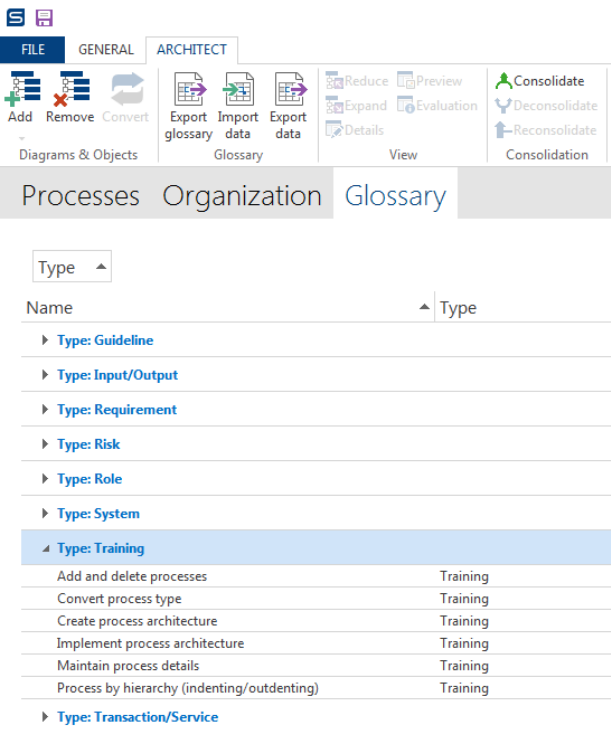
2.3.2 Define and maintain positions

When defining and maintaining positions, you can create a desired position from scratch or rename an existing position with the help of the **Name** and **Type** columns. Positions can also be moved as desired by using the **Move up/down** buttons.

Additional information can be entered in various columns. Note that the visualization levels in the **Visualized hierarchy levels** column can be adjusted up or down as required.

2.4 Create and manage the glossary

You create and manage glossary items in the **Glossary** tab.
(See “Symbio Architect features”.)



The following glossary items have been predefined:

- Roles
- Input/output
- Systems
- Directives/guidelines
- KPIs
- Milestones
- Locations
- Requirements
- Training
- Transactions/services
- Risks
- Events

Figure 14 – Create a glossary

Use the **Type** button to easily and efficiently select the required glossary items in the glossary and display them in a concise view.

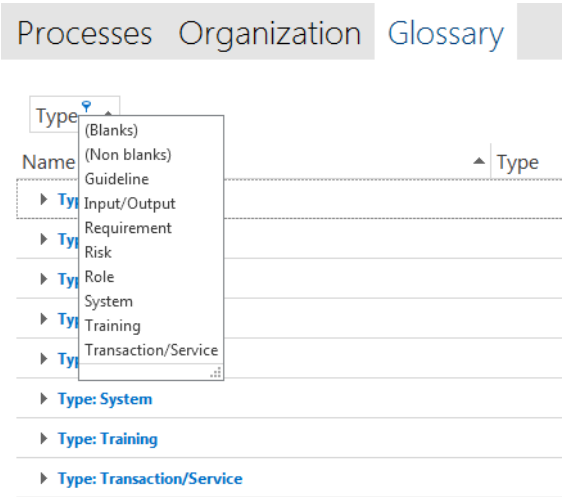


Figure 15 – Select glossary items by type



2.4.1 Export and deploy the glossary

The glossary can be exported to an Excel template and made available to all employees with the aid of the **Export glossary** button. In order to activate the export feature, you need to select a row of data content in the glossary.

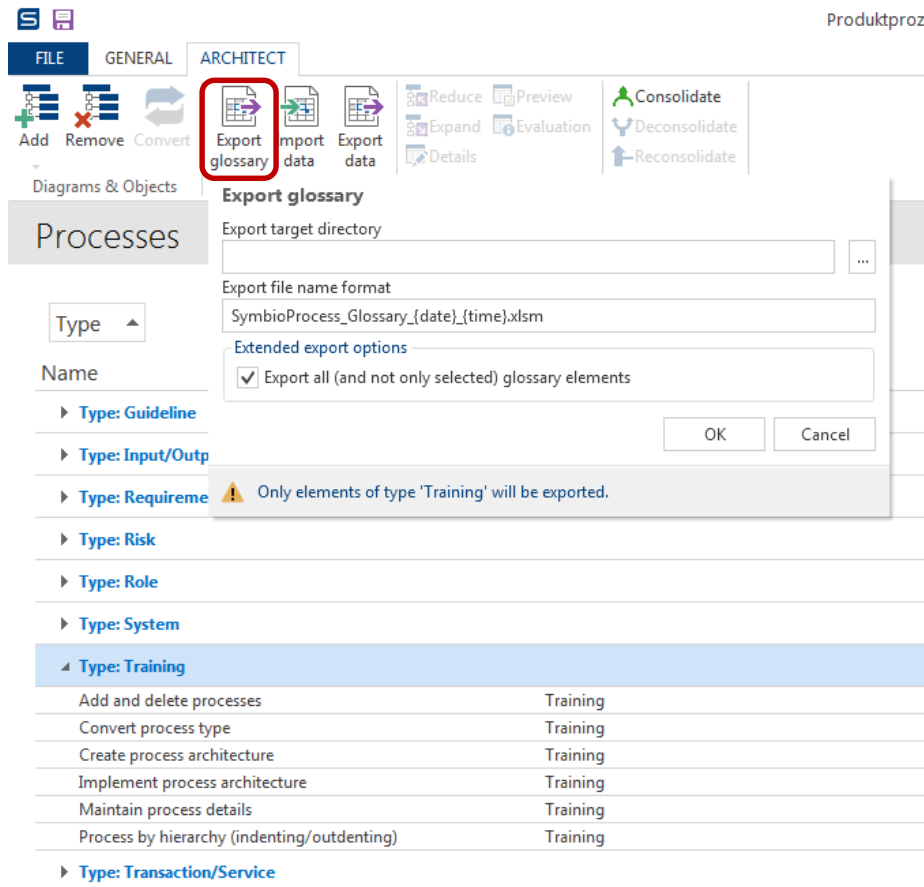


Figure 16 – Export the glossary

The Excel template for the glossary contains a separate worksheet for each glossary item.

2.4.2 Store the glossary in a central location for all Symbio Modeling Clients

It makes sense to access a centrally stored glossary file if a number of modellers are to create process flows with the same glossary. This ensures that data are created only once and are then available for all process flows. In an additional step, you can link a glossary with the Modeling Client when exporting the process flow into the Modeling Client.

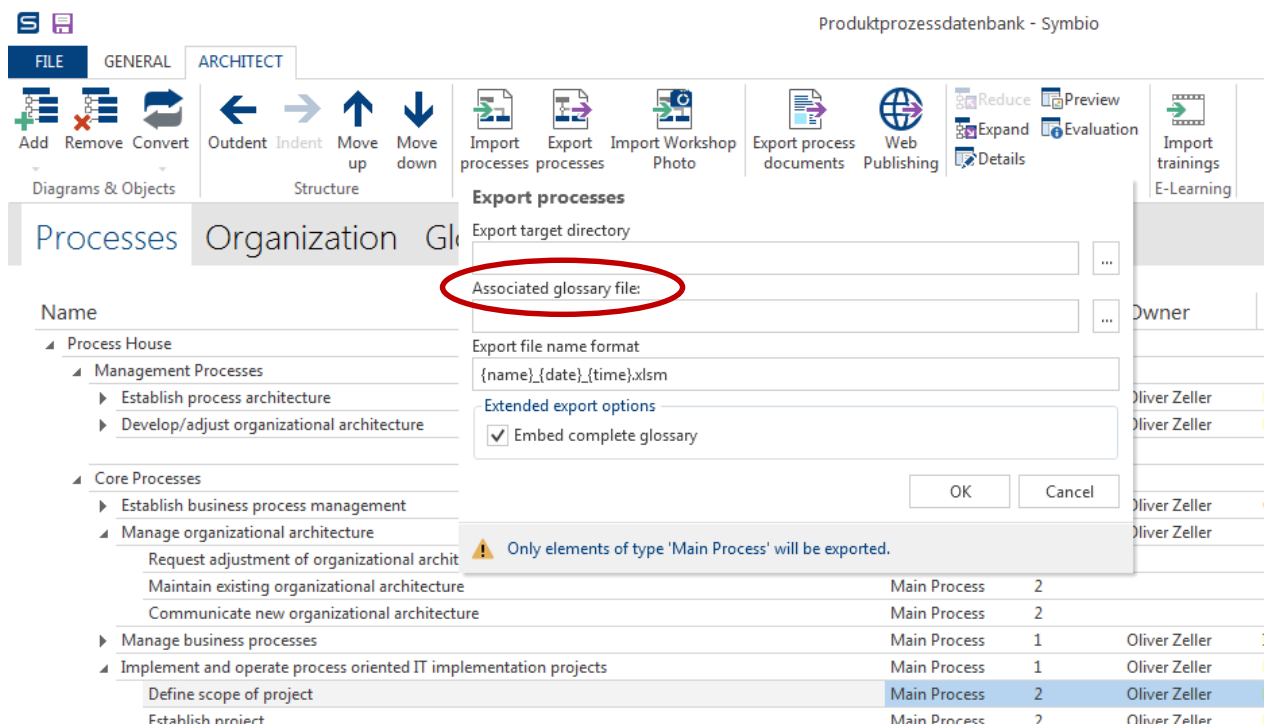


Figure 17 – Link the Modeling Client with a glossary

2.4.3 Export/Import data

Use the **Export data** button to export glossary items into an Excel data sheet for further editing. Use the **Import data** button to easily import glossary items that were updated in the Excel data sheet back into Architect. In order to enable the export/import feature, you need to select a line containing data in the glossary. After data have been imported, they are displayed in the updated glossary.

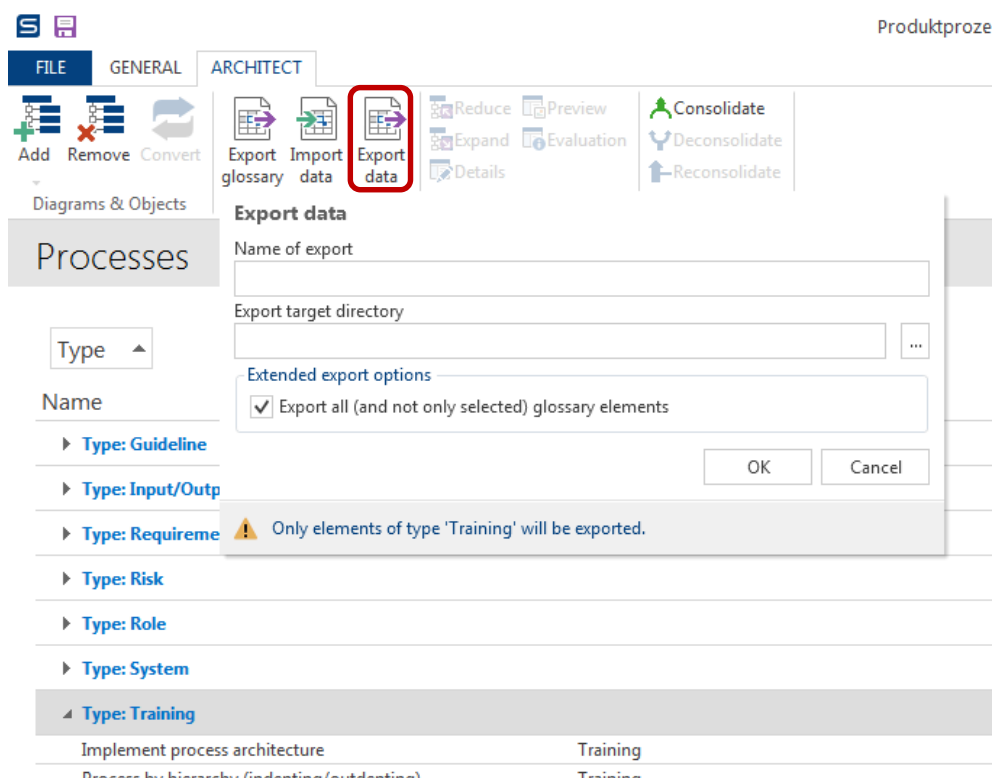


Figure 18 – Export data

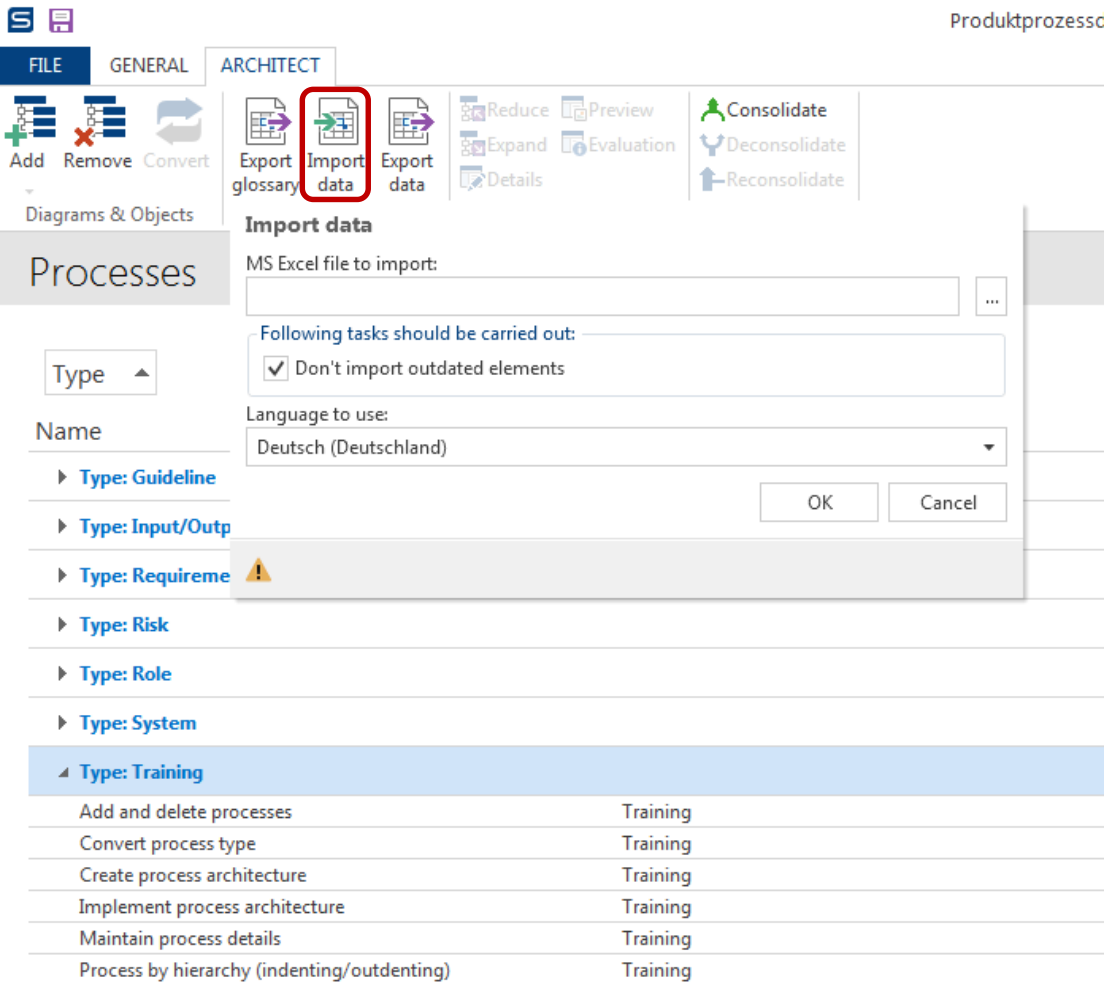


Figure 19 – Import data



3 Define and maintain processes

The following two modelling methods have been established for documenting business processes – **Event-driven Process Chains (EPC)** and **Business Process Model and Notation (BPMN)**. As described in 2.1.2, these two methods are available in Symbio.

Both methods distinguish between two types of models: **main processes** and **sub processes**. Main processes are suitable for modelling at low detail levels. Sub processes are designed to represent processes at the activity level.

Business processes are captured, defined and maintained with the help of the **Symbio Modeling Client**.

Different templates are used for the modelling of processes, depending on the model type. A Modeling Client for a main process contains only modelling elements which can be child elements to a main process.

Model type	Elements
Main process (BPMN)	▪ Main process ▪ Sub process
Main process (EPC)	▪ Main process ▪ Sub process

Table 4 – Elements in main processes

The Modeling Client for sub processes provides the following elements:

Model type	Elements
Sub process (BPMN)	▪ Task ▪ Sub process ▪ AND, OR, EITHER-OR connectors ▪ Start event ▪ End event ▪ Intermediate event ▪ Condition
Sub process (EPC)	▪ Process step ▪ Sub process ▪ Event ▪ AND, OR, EITHER-OR connectors ▪ Interface

Table 5 – Elements in sub processes

Main or sub processes are displayed in rows, and multiple relationships between processes (a process with multiple predecessors or successors) are represented by direct links.

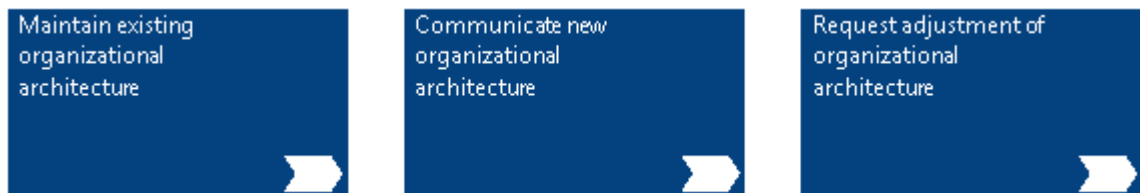


Figure 20 – Example of sub processes

Tasks or process steps, events, rules, etc. can be displayed line by line and drilled down. Multiple relationships between tasks or process steps (a task or process step with multiple predecessors or successors) are indirectly mapped by linking the relevant tasks/process steps via an intermediary rule.

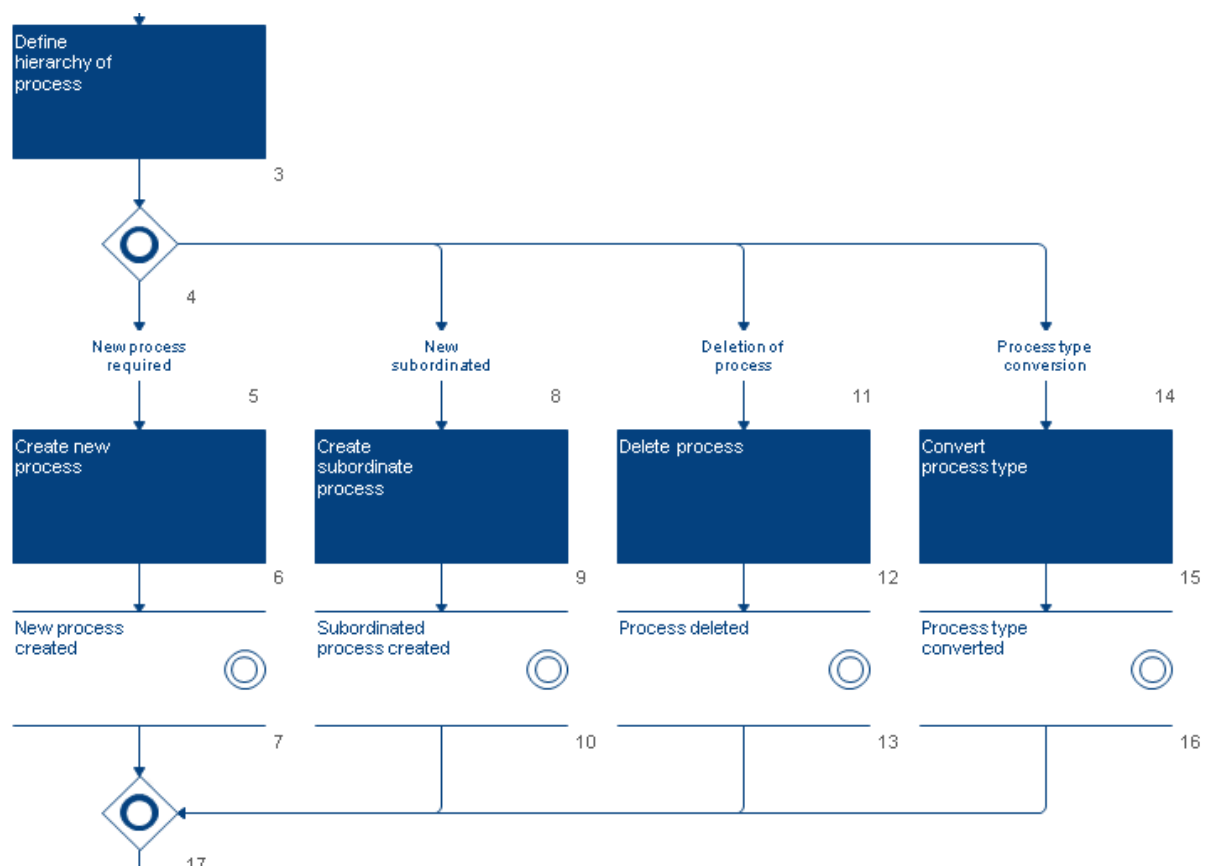


Figure 21 – Example of a sub process



3.1 Define and detail processes in the Modeling Client

After a process is exported into a Symbio Modeling Client using Symbio Architect (see "Export processes from the database"), it can be defined in more detail and drilled down in the Modeling Client, as described below for a sub process.

3.1.1 Record general process information

General information about the business process and the questionnaire can be recorded on the **1_process information** worksheet.

The worksheet is used:

- to specify the required meta data such as process name or process description
- for document and version management
- to maintain predefined model attributes, e.g. for quality assurance or for recording process times.

Name	
Name	Implement process architecture

Description	
Description	Process describes the build up and implementation of a process architecture in the Symbio architect

Process information	
Purpose	Illustrate management-, core and support processes of a company
Scope	All departments of a company

Status	
Version	0
Process state	In process
Reason for revision	
Start of validity	
End of validity	12/31/9999

Responsibilities	
Owner	Oliver Zeller
Owner (E-Mail)	oliver.zeller@p-und-z.de
Manager	Rainer Debusmann
Manager (E-Mail)	ansgar.mayer@p-und-z.de

Risk rating	
Risk-containing process	No
Risk level	High
Risk category	

History	
Created on	8/6/2012
Created by	mayera
Released on	
Released by	

Figure 22 – Record process information

The **1_process information** worksheet is divided into various subject areas, such as status, person responsible, or risk assessment.

Required fields are highlighted in yellow. When you save and close the Symbio Modeling Client with one or more required fields not filled in, a corresponding message displays. Optional fields may be completed, but are not mandatory. These fields are highlighted in white.



3.1.2 Create process variants

If you want to use an existing process model as the basis for a new process, for example because the new process is just a modified version of the existing model, you can **generate variants**.

A variant is a copy of a process model which you can modify and import into the Symbio Client or a Symbio database as a separate model in addition to the original process. This copy is given its own **GUID** (Global Unique Identifier), which is a unique identification number that is used to identify and distinguish the models and all the other elements in a Symbio database.

The **1_process information** worksheet contains a button for generating variants. Click on the button to open an input field in which to enter the name of the new process. Click **OK** to generate a new Modeling Client for this variant.

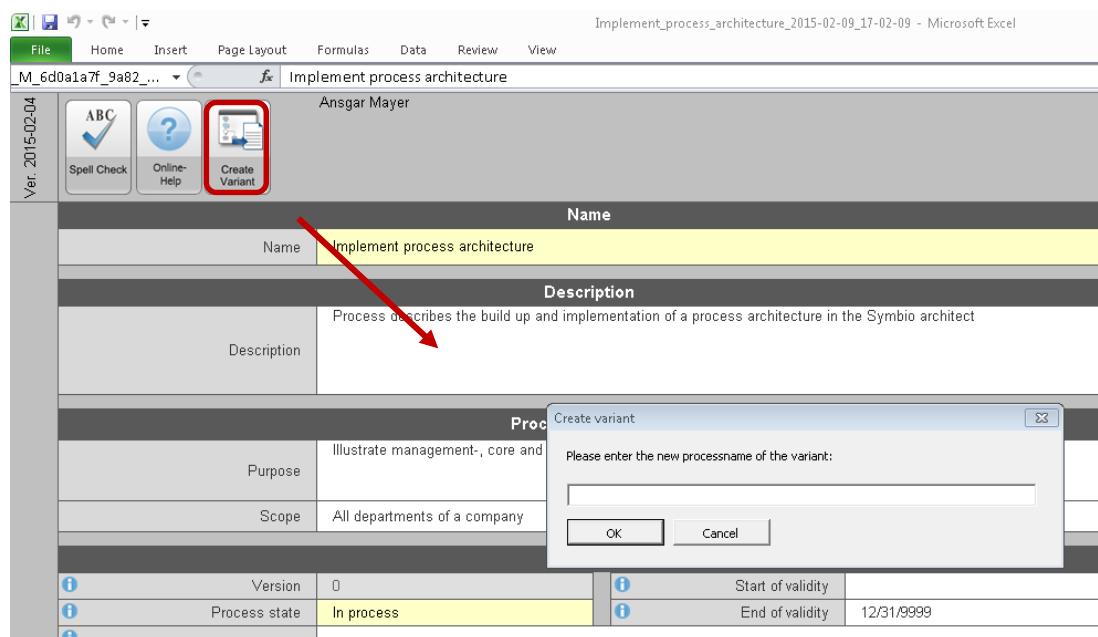


Figure 23 – Generate variants

Warning: Always use the **Generate variant** button to create a variant. If you simply copy a Modeling Client and/or rename it (by changing the file name or the process name on the **1_process information** worksheet), no new GUID is assigned. Importing a copy without a separate GUID into the Symbio Client will overwrite the original model.

3.1.3 Define processes

The second worksheet (**2_process flow**) forms the core of the Modeling Client. It is used to capture the processes, which may be recorded at any time and anywhere – online in the corporate network or intranet, on the Internet or in the cloud, as well as offline on a PC without a network connection.

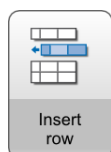
No.	Pre-decessor	Type	Name	Organizational unit	Role	RACI	Input	Supplier Process	Status	Output	Customer Process
1		Sub process link	Defect strategies/market requirements and define core processes		Process manager	R					
2	1	Task	Maintain process architecture		Process manager	R	Strategy paper			Process house	
3	2	Task	Define hierarchy of process		Process manager	R	Process house		created	Process portfolio	
4	3	OR			Process manager	R					
5	4	Condition	New process required		Process manager	R					
6	5	Task	Create new process		Process manager	R	Process profile		approved	New process	
7	6	Intermediate event	New process created		Process manager	R					
8	4	Condition	New subordinated process required		Process manager	R					
9	8	Task	Create subordinate process		Process manager	R	Process profile		approved	Subordinated process	
10	9	Intermediate event	Subordinated process created		Process manager	R					
11	4	Condition	Deletion of process required		Process manager	R					

Figure 24 – Define process flows

The standard configuration includes the following columns:

- **No.:** This column cannot be edited. The line numbers 1-250 are read-only and are used in the **Process preview** (where they appear with the individual process flow elements).
- **Predecessor:** Records the line number of the predecessor object. This information is mandatory to ensure that the automatic graphics generator “knows” in which order to arrange the process flow elements.
- **Type:** Use to select the structure-forming objects, such as tasks, connectors, conditions, etc.
- **Name:** Enter the name of the process flow element in this column.
- **Description:** Use the  button in the column header above the **Name** column to expand and collapse the **Description** column.

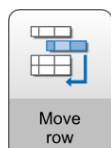
Functions of the Modeling Client (second tab)



Insert row

Insert row

You can insert a new row before the current row in the worksheet. Enter the number of new rows in this dialog box. You can add up to 10 rows at a time.



Move row

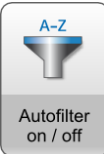
Move row

You can move a selected row to any other row. Enter the row above which you want to move the current row.



Remove row

The current row is deleted, as is the “old” number of the next object.



Autofilter on/off

The autofilter is applied only to the **Object type** column. It is useful when you want to display only certain types of objects, e.g. events. You cannot edit the table (delete or remove rows, etc.) while a filter is active.



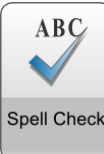
Adjust row height

You can change the row height by entering an appropriate value for the row height of the selected rows. If you specify 0, the row height is automatically adjusted to the contents of the selected cells.



Import glossary

You can import glossary items. Click this button to display a dialog box for selecting the desired glossary file.



Spell check

You can check at any time if the text you enter contains spelling mistakes. The Excel® spell checker is activated and, where necessary, a dialog box will appear indicating any errors and making suggestions for corrections.

Table 6 – Process flow buttons



Define the process flow

When you define a process flow, you always select the **process type** first by selecting a row in the **Type** column and choosing the relevant process type from the drop-down list. In EPCs, the following structure-forming object types are available: **process steps**, **events**, the **AND**, **OR** and **EITHER-OR** connectors, and **interfaces**. Enter the row number of the predecessor object into the **Predecessor** column.

No.	Pre-decessor	Type	Name	Organizational unit	Role 1	RACI	Input 1	Supplier Process	Status
1		Sub process link	Deflect strategies/market requirements and define core processes		Process manager	R			
2	1	Task	Maintain process architecture		Process manager	R	Strategy paper		F
3	2	Task	Define hierarchy of process		Process manager	R	Process house		created P
4	3	AND			Process manager	R			
5	4	Condition	New process required		Process manager	R			
6	5	Task	Create new process		Process manager	R	Process profile		approved
7	6	Intermediate event	New process created		Process manager	R			

Figure 25 – Select a process flow element

Record general process flow information

The **Name** column holds the name of the structure-forming object type (such as a “Maintain process architecture” task). Please note that the number of available characters for the name is limited to 81 characters. This helps to ensure that the text in the graphical representation does not protrude over the size of each shape.

The columns to the right of the **Name** column contain additional process details. We recommend, however, to **first model the entire process flow** with the help of the first 3 columns. Please add all relevant details after the process flow has been fully defined.

We recommend to start by adding a sufficiently detailed description of the individual tasks. To do this, click the button above the **Name** column. This opens the **Description** column. Use this cell to describe each task in more detail. Unlike the name field, there are no length restrictions for this field. Take advantage of this, and explain the tasks in such detail as is necessary to ensure that all potential recipients can understand what is happening within the individual process activities. The **OU** column contains the name of the organisational unit which is responsible for the task. Enter the role (person) that is responsible for carrying out the task into the **Role** column. To identify that a role (person) is responsible for completing a task, select “R” (responsible) in the next column.



If other roles are involved in a task (decision makers, consultants or persons to be informed), please click the **+** button in the top row of the **Role** column. Nine additional fields are available for entering different roles. You can define the type of involvement for each role with the aid of the **RACI** system (**R** = **R**esponsible), **A** = **A**ccountable, **C** = **C**onsulted, **I** = to be **I**nformed). Then click the **−** button to hide the additional **Role** columns.

Detail the process flow

The Modeling Client contains a number of additional columns for adding details to the process flow. The most important elements include:

- **Input:** Select the data or documents etc. which are a required input for a process step from the *Input* columns. Inputs can be selected as desired or chosen from the predefined selection list. Based on a SIPOC model (SIPOC = **S**upplier – **I**nterface – **P**rocess – **O**utput – **C**ustomer), you can record for each input that is associated with a sub process where this input is from (i.e. which predecessor process generated this input).
- **Output:** In the *Output* columns, you enter the data/documents etc. that are created or edited in the process step. Just as with the input, you can select the SIPOC information for a successor process (i.e. which successor process is the recipient (customer) of the generated output).

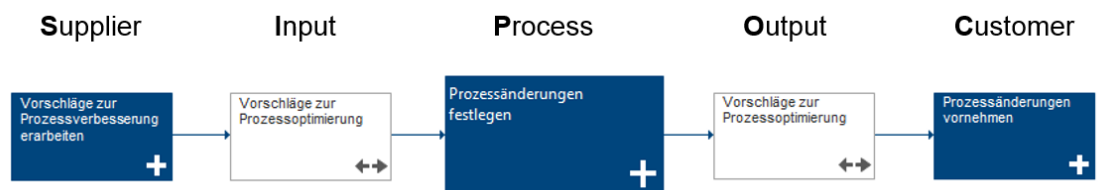


Figure 26 – SIPOC

- **System:** Enter application systems (e.g. SAP®, Oracle®, etc.) to support a process step.
- **KPIs:** Enter the key figures or measured values.
- **Directives/guidelines:** Add directives and guidelines to be followed.
- **Risk:** Enter potential risks (SOX and business risks).
- **Requirement:** Enter the specific requirements for a process step.
- **Transaction/service:** Create transactions or other services (e.g. SAP masks).
- **Training:** Enter courses or training details.
- **Milestone:** You can allocate a milestone to every event in the process flow. This column cannot be edited for any other object type in the process flow.

An input and selection dialog box with the following options is available for entering glossary items:



- Selecting existing objects from the **Objects found** list on the bottom left: After selecting an object, all the available attribute information for this object is displayed in the **Details** section of the dialog box.
- Finding existing objects: Enter the required term into the **Search text** field if you are searching for a known object. Underneath you can specify which attribute to search. By default, the object name is searched.

Input

New object

Name

Type
Technical term [default]

Add

Search

Search text

in attribute
Description

Found objects

- Converted process type
- CS documents (external document)
- Details
- D5 document (external documents)
- New process
- Plan process architecture
- Preview
- Process change request
- Process house
- Process portfolio
- Process profile
- Process types
- Request: new process
- Solution specification (FS)
- Solution table (Symbio)
- Strategy paper**

Details

Name* Strategy paper

Description Document where the strategy, goals and KPIs of a company are documented

Link title

Link

Start of validity 11/25/2012

End of validity 12/31/2013

Version 0

Mandatory attributes are marked with "*".

You can copy attribute values to the clipboard by marking the value and then pressing [strg]+[c].

OK Cancel

Figure 27 – Input/selection dialog box

- **Adding objects:**
The default template configuration lets you add objects at any time, with the exception of interfaces. Interfaces require that you first create the corresponding processes in Symbio Architect. Only processes that exist in Architect are displayed in the Modeling Client in the list of available interfaces.
If you want to define a new object, specify a relevant **Name**. This enables the **Add** button. Click this button to open a dialog box with all potential **attributes** that are available for this object.
- **Changing object attributes:**
You can maintain and change any attributes incl. the name before importing the Modeling Client into Architect. If an object was imported into Symbio Architect and then exported again, you can edit its name and any other attributes.

Input

New object

Name

Type

Technical term [default]

Add

Search

Search text

in attribute

Description

Found objects

- Checklist
- Choose ribbon architect
- Choose tab process architecture
- Converted process type
- CS documents (external document)
- Details
- DS document (external documents)
- New process
- Plan process architecture
- Preview
- Process change request
- Process house
- Process portfolio
- Process profile
- Process types
- Request: new process

Details

Name*

Checklist

Description

Link title

Link

Start of validity

End of validity

Version

Mandatory attributes are marked with "*".

You can copy attribute values to the clipboard by marking the value and then pressing [strg]+[c].

OK Cancel

Figure 28 – Link documents to objects

In order to link documents or files with an input, add them in the **Details** panel in the **Link** field.

You can automatically generate graphics for illustrating the process flow in the third tab (3_Preview) of the Modeling Client.

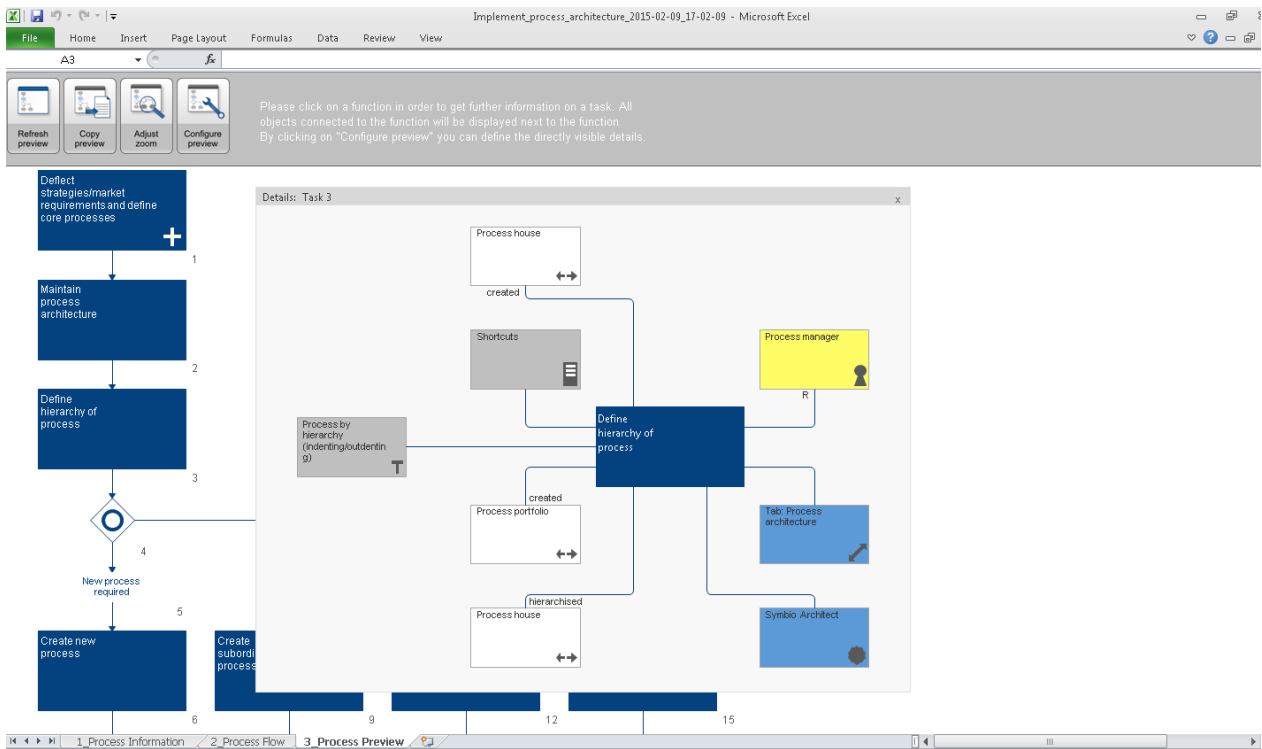
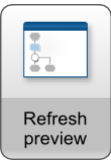
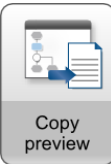


Figure 29 – Graphic representation of the process flow



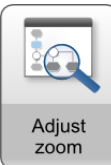
Refresh preview

We recommend to update the graphical representation of the process flow after you've modified the second worksheet, **2_process flow**.



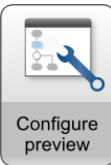
Copy preview

The preview can be copied and inserted into any file (e.g. Word document, PowerPoint presentation, Publisher document, etc.)



Adjust zoom

Use this dialog box to enter various zoom values.



Configure preview

Use this dialog box to customize the modelling method. You can change alignment, type, and process details (= glossary items or Corona objects). Corona objects can be completely/partially displayed or hidden, depending on your needs.

Table 7 – Process view buttons



4 Publish the business model

The Symbio BPM tool lets you **publish all recorded** business data, including processes, organisations and related records, easily and efficiently as HTML-based process web pages. The process web can be displayed in all major browsers, which means it works with portable devices.

The described publication format creates a high degree of transparency. Every employee is able to gain a comprehensive insight into “unknown” processes, including detailed information (e.g. systems used in the different processes).

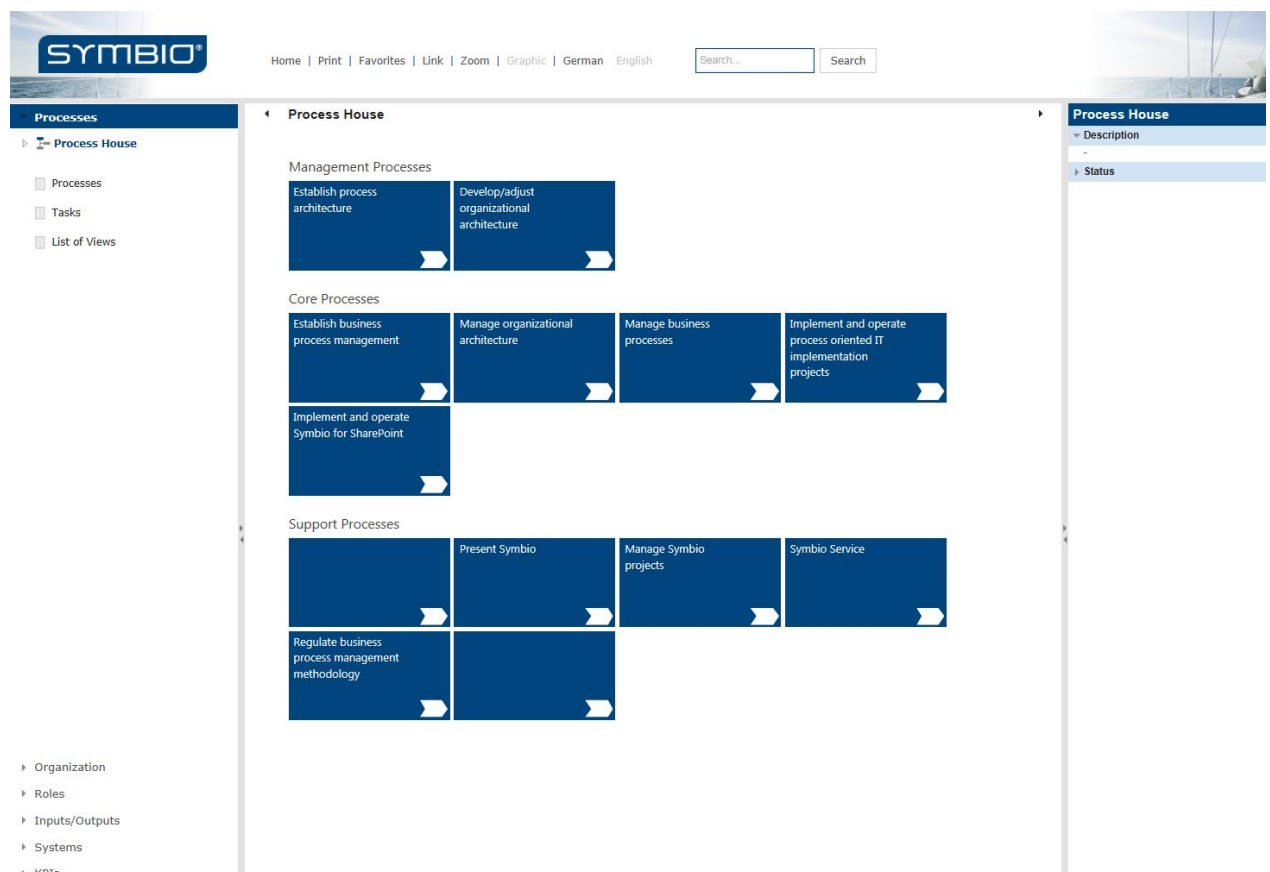


Figure 30 – Web publishing



4.1 Generate a (html) process web

The process web is published via Symbio Architect. The entire database is published as a process web by clicking **Web publishing**. You also get to select the storage location and the language, and you may choose to generate a web publication which contains only processes with the status **Shared**. To do this, enable the **Export only shared processes** checkbox.

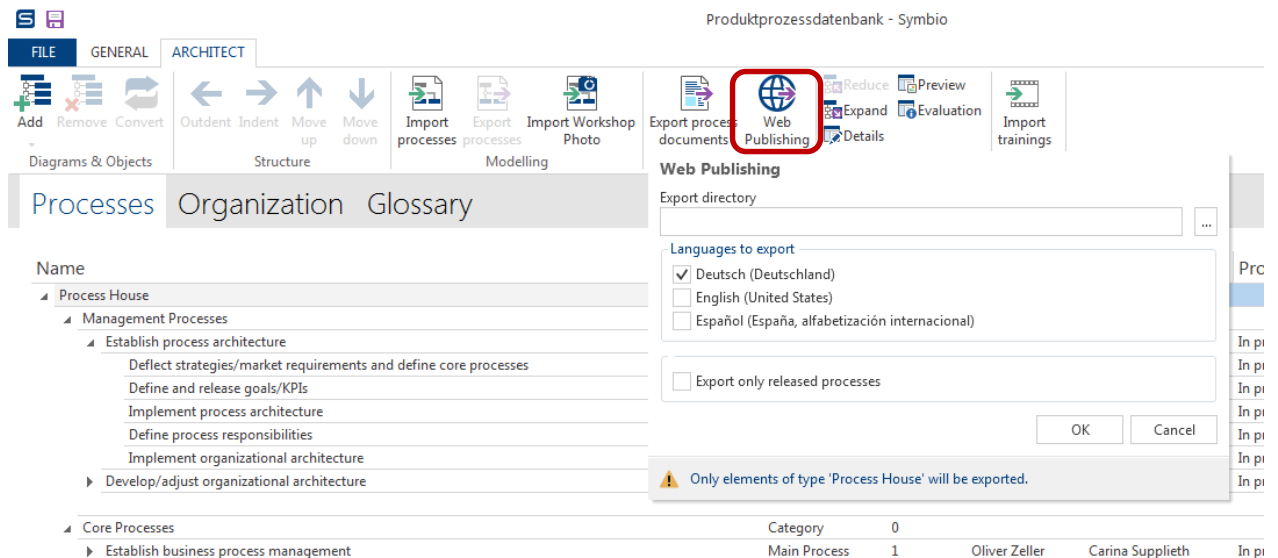


Figure 31 – Generate a process web

There are a number of different ways to start publishing to the web. Typically, you start from the process list or the process graphic. You can also use the search function to enter the web directly via a specific search term, such as a specific role, an organisational document or a SIPOC analysis.

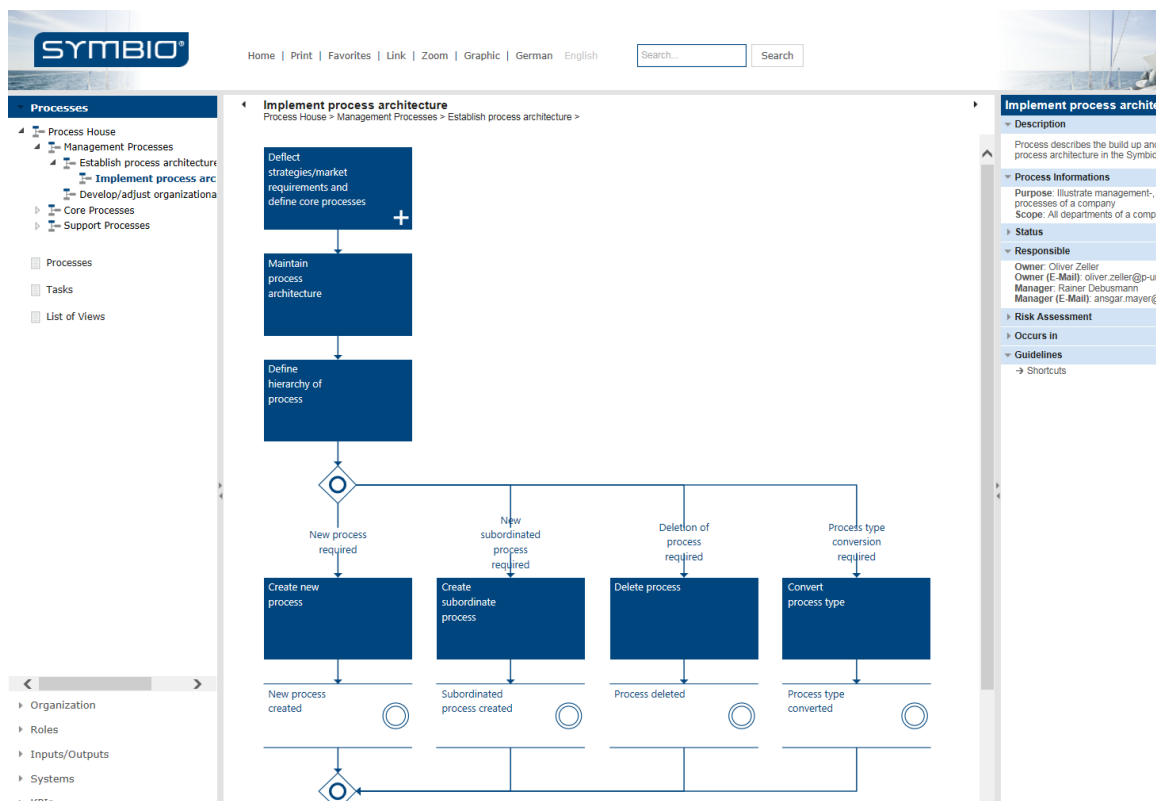


Figure 32 – Navigate through the process web



Navigating the process web is a highly **intuitive** experience: The left panel shows an overview of the various elements, the middle section displays the graphical representation, and to the right you find the relevant descriptions. Clicking any structure-forming object in the graphic will update the associated description on the right.

You can use the process web to display process graphics in **different views**. Select **graphic** on the user interface to open the required view, for example, a process flow or a swimlane.

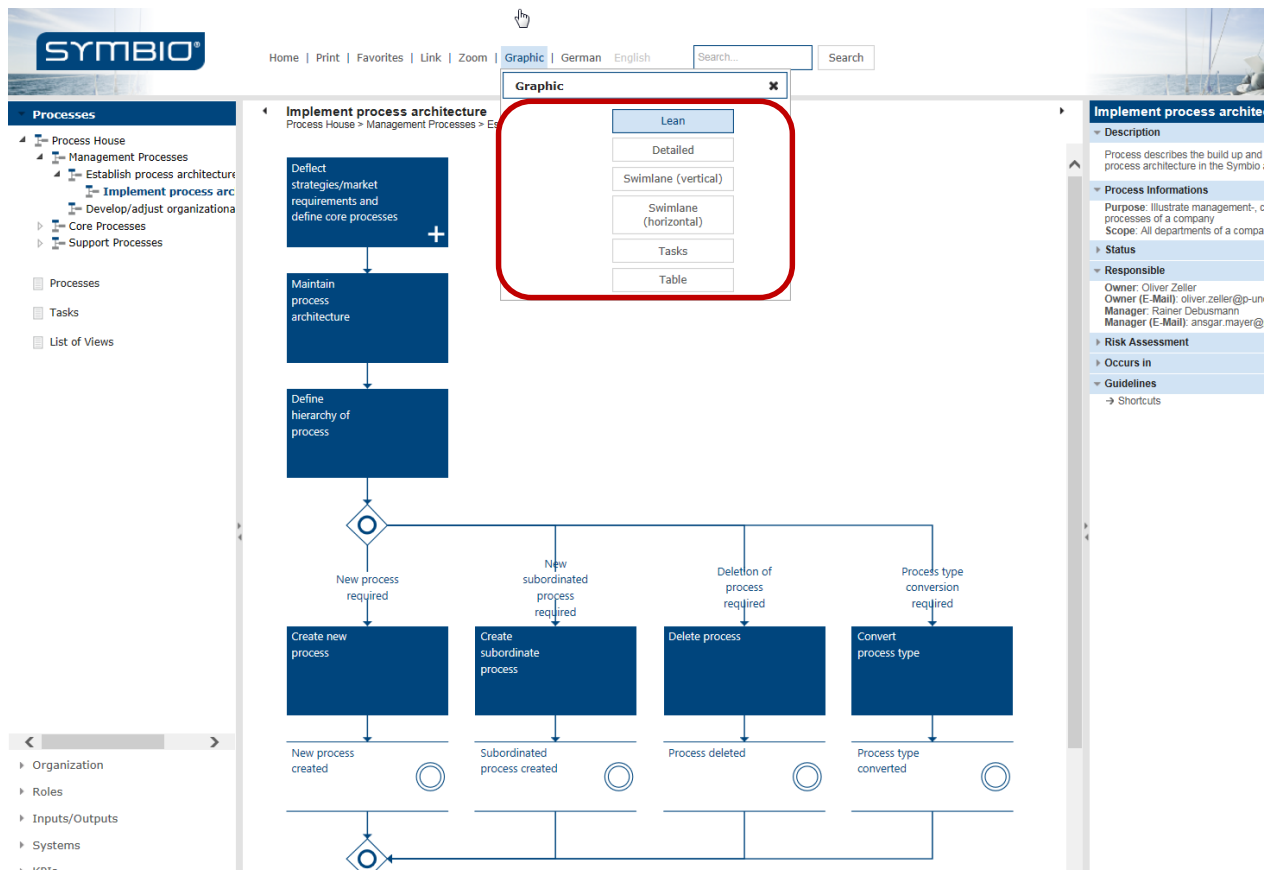


Figure 33 – Select different views

Click **Roles** at the bottom left in the navigation pane to display all roles in alphabetical order. Click a role in the list to view **role-based** graphic models. The graphic contains all process flows and process steps which involve the role. Click on a process step to display all associated data for the role.

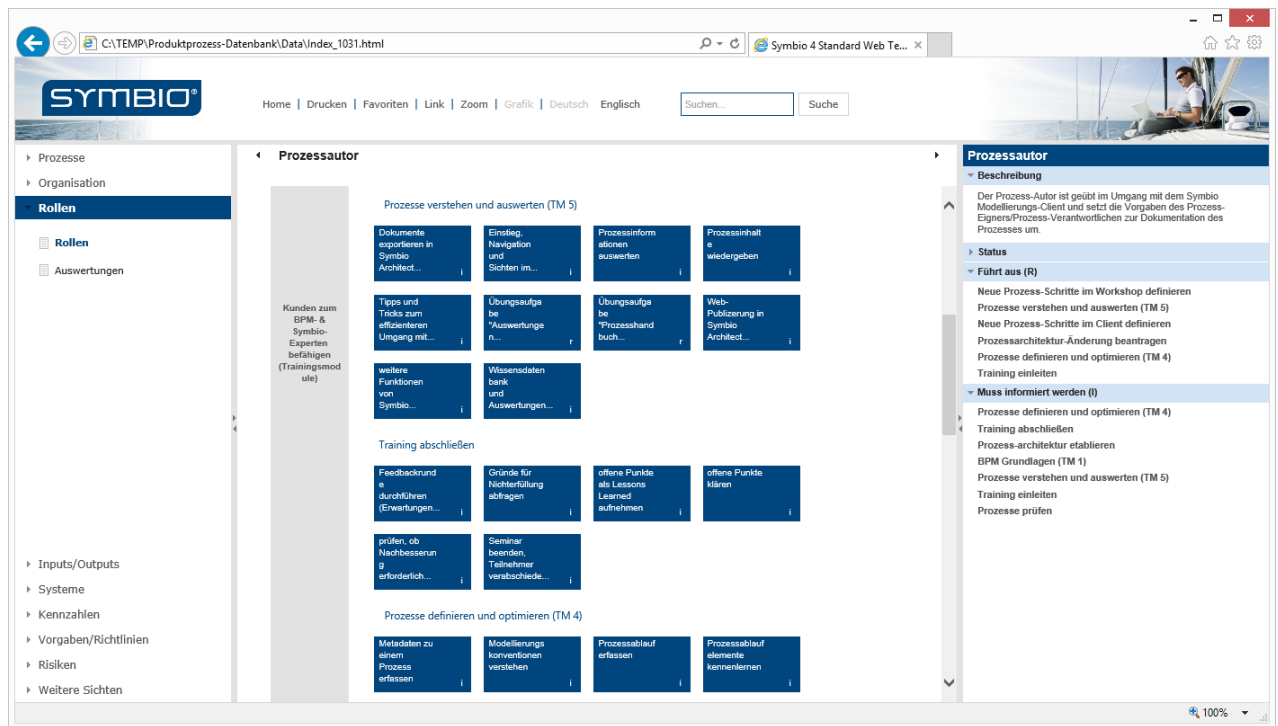


Figure 34 – A role-based model

Larger process graphics are cut off in the print preview and when printing in Internet Explorer, because they are displayed on one page. Internet Explorer is unable to distribute larger graphics over several pages. The only solution is to decrease the scale in the print preview of Internet Explorer and/or use page orientation.



4.2 Create documents

Use **Export process documents** in Architect to publish the entire process and organisational structure (including job descriptions) as a document.

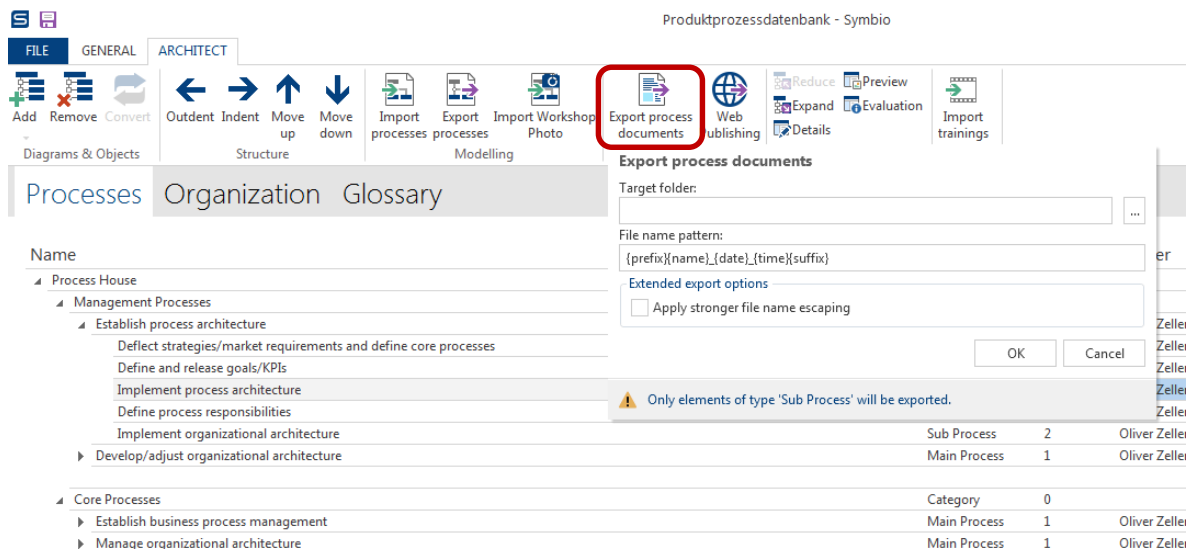


Figure 35 – Generate documents

4.2.1 Create process documents

You can create **individual** process documents for each process by selecting the process you wish to export and generating it as a document. The process document contains the process graphics, descriptions, tables, matrices and more.

To generate a **complete manual** with comprehensive process graphics, descriptions, tables, matrices, etc. select the name of the process house and click **Export process documents**.

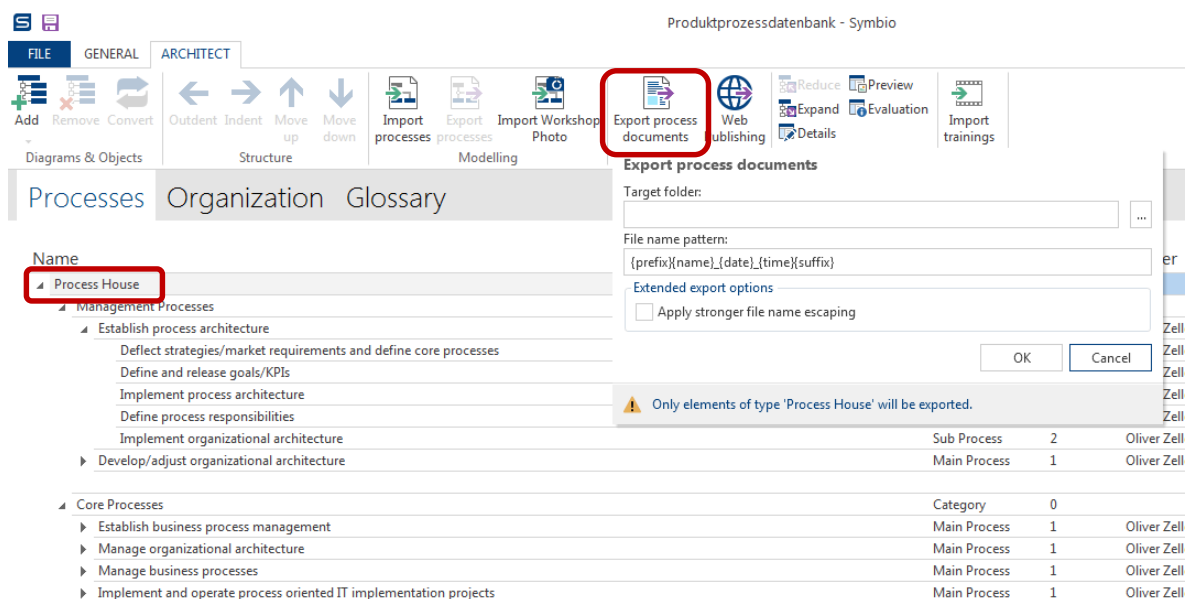


Figure 36 – Create complete/SIPOC manuals

A **SIPOC manual** is generated in addition to the complete manual which you can use to verify if the Supplier-Input-Process-Output-Customer view is complete.



4.2.2 Create organisational manuals

Apart from process manuals you may generate comprehensive manuals which describe the organisation and positions.

Click the position you wish to export in the organisation to generate a **job description**. The job description includes a description, assigned roles, and a training overview.

Produktprozessdatenbank_1 - Symbio

FILE GENERAL ARCHITECT

Add Remove Convert Outdent Indent Move up Move down Export organization documents Reduce Preview Expand Evaluation Consolidate Deconsolidate Reconsolidate Details

Diagrams & Objects Structure

Processes Organization Global

Name

- Organization
 - Customer Ltd.
 - Corporate Management
 - PLM
 - Consulting
 - Customer specific development
 - Logistics
 - Purchasing
 - Service
 - IT service
 - HR
 - Finance
 - Controlling
 - QM and BPM management
 - Ploetz + Zeller GmbH
 - Standard development
 - IT project team
 - P+Z consultant
 - P+Z senior consultant**
 - P+Z management consultant
 - P+Z project manager

	Organizational Unit	3	
	Organizational Unit	3	
	Organizational Unit	3	
	Organizational Unit	3	
	Organizational Unit	3	
	Organizational Unit	3	
	Organizational Unit	3	
	Organizational Unit	2	
	Organizational Unit	1	Company
	Organizational Unit	2	
	Organizational Unit	2	
	Position	3	
	Position	3	
	Position	3	
	Position	3	

Target folder: ...

File name pattern: {prefix}{name}_{date}_{time}{suffix}

Extended export options

☐ Apply stronger file name escaping

OK Cancel

Only elements of type 'Position' will be exported.

Figure 37 – Create job-specific manuals

The principle of creating a manual for an **organisational unit** is the same. First you select the OU for exporting, and then you click the **Export organisational documents** button. The manual includes overviews of the OU in table and graphical formats, an overview of all assigned positions and roles, and an overview of the training courses for each organisational unit.

An **organisational manual** is generated by selecting the name of the entire organisation. The organisational manual also contains an overview of all organisational units (in table and graphical formats), a comprehensive list of roles, all employees, a training overview and more.

Produktprozessdatenbank_1 - Symbio

FILE GENERAL ARCHITECT

Add Remove Convert Outdent Indent Move up Move down

Diagrams & Objects Structure

Export organization documents

Export organization documents

Target folder:

File name pattern: {prefix}{name}_{date}_{time}{suffix}

Extended export options

☐ Apply stronger file name escaping

OK Cancel

⚠ Only elements of type 'Organizational Unit' will be exported.

Processes Organization Global

Name

Organization

Customer Ltd.

Corporate Management

PLM

Consulting

Customer specific development

Logistics

Purchasing

Service

IT service

HR

Finance

Controlling

QM and BPM management

Process management

Ploetz + Zeller GmbH

Standard development

IT project team

P+Z consultant

P+Z senior consultant

Organizational Unit	3	
Organizational Unit	3	
Organizational Unit	3	
Organizational Unit	3	
Organizational Unit	3	
Organizational Unit	3	
Organizational Unit	3	
Organizational Unit	2	
Organizational Unit	3	
Organizational Unit	1	Company
Organizational Unit	2	
Organizational Unit	2	
Position	3	
Position	3	

Figure 38 – Create a complete manual



5 Release Notes Symbio 4.3

- [File storage format](#)
- [Process types and hierarchy of processes](#)

See **Building and managing the process architecture**.

- [Filtering process data](#)

See **Symbio Architect features**.

- [BPMN methodology](#)
- [Generating variants](#)
- [SIPOC modelling](#)
- [Grouping and sorting in the glossary](#)

See **Creating process documents** and **Creating organisational manuals**.

- [Process documents](#)



Publisher

Ploetz + Zeller GmbH
Einsteinring 41-43
85609 Munich, Germany
Phone: +49 89 890635 – 0
Fax: +49 89 890635 – 55
E-mail: info@p-und-z.de

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Symbio User Manual

Release 4.3

Contact: Ansgar Mayer

Phone: +49 89 890635-35



Ploetz + Zeller GmbH

Einsteinring 41-43

85609 Aschheim near Munich, Germany

Phone: +49 89 890635 – 0

Fax: +49 89 890635 – 55

E-mail: info@p-und-z.de

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