Symbio – User manual

Release 4.1

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Content

List of figures

List of tables

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 organizations if they want to remain competitive. Symbio meets all these criteria. It 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.

To sum up, its functions can be described as follows: Databases, process houses, organizational charts and glossary data are created in Architect. The modelling of process flow processes takes place via MS Excel in the Modelling Client, which in turn can be imported into Architect with the recorded process flows. Publications can be created with Architect and, after reviewing the processes, modelling can be restarted if necessary.

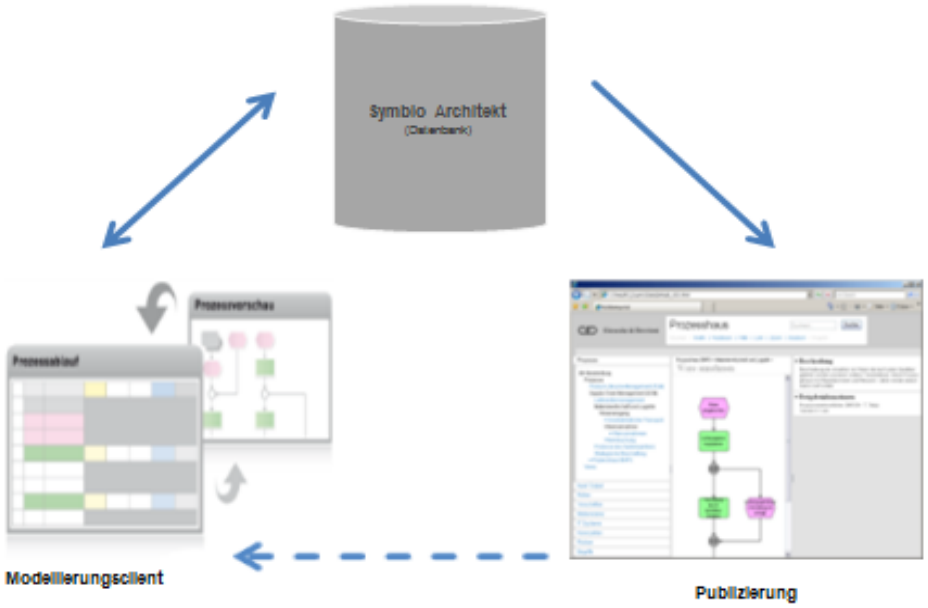


Figure 1 – The Symbio working circuit

1.1. The Symbio philosophy

1.1.1. Simplicity

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

- Administrators of the business model manage the information collected by establishing and maintaining structures, and monitoring compliance with these structures. They work with Symbio Architect.
- Modellers of the business model record, maintain, and compress information. They work with Symbio Modelling Client.
- And the information users of the business model want to access the information provided in a targeted way. They work with Symbio Web or with Symbio Documents.

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.

However, the special strength of Symbio only comes into play when Symbio is integrated into existing systems rather than run as a stand-alone system.

- The filing of Symbio Modelling Clients in a document management system not only allows the use of the built-in version management and workflow automation features, but 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 the workspace used every day.
- Embedding Symbio Web and Symbio Documents in the intranet not only makes the business model available to every employee, it also allows the shared linkage with information already available on the intranet and with tools such as role descriptions, checklists, manuals or 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 **Symbio Modelling Clients** give every employee the chance to record, maintain and compress information themselves, staff become actively involved in the business model. In addition, **Symbio Web**'s feedback function makes it possible to contribute comments and suggestions for improvement.

1.1.4. The Ploetz + Zeller BPM approach

At Ploetz + Zeller GmbH, the focus is on a comprehensive approach to BPM. Every employee needs to be involved in BPM. Management and the individual levels have to be convinced of the usefulness of the tool in order to guarantee successful BPM. 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. USP Symbio

- **Can be used *ad hoc*:** Symbio is easy to integrate in a company and can thus be used immediately for internal and external projects
- **Low licensing and operating costs:** Symbio is offered in the forms of departmental, divisional and corporate licenses
- **Simple database management:** New databases can easily be set up and managed in Architect
- **Extremely low training costs:** The functions are taught in just two hours of training
- **User-friendly:** Modelling is based on MS Excel
- **High level of acceptance:** Thanks to the ease of use, acceptance by employees is very high
- **Graphical evaluations:** Processes can be evaluated in professional graphics
- **Embedding the process web:** The process Web can be easily embedded into the existing IT environment

1.2. The benefits of Symbio

- By defining the process within the team (see "Developing the process in the workshop") as well as for every individual employee (see "Detailing processes") **areas for improvement are** detected and the first changes are already taking place in people's heads.
- **Transparency** is obtained by linking the 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 organizational changes** in the company clearly visible by coupling the process and organizational architecture. It quickly becomes apparent which tasks will be fulfilled by which organization and whether some tasks have no clear responsibilities (roles).
- An **ISO certification** can be obtained in a very short time, and compliance conformity ensured.
- Use of **standard software**: Symbio is used as a ready-made product and has a clearly defined scope. This guarantees low licensing and training costs. The employees know how the software works straightaway, and they can deliver results quickly. This increases employee motivation.
- **Rapid deployment** is assured in the most diverse internal or external projects (regardless of the industrial sector involved). Consequently, projects can be begun *ad hoc* with Symbio. This creates flexibility - and acceptance - in any company and prevents unnecessary investment.
- **Rapid and easy entry of data** into Excel and direct data analysis in Excel or subsequent visualization in key figures on the Web or in documents provides a transparency that makes the potential of the on-going business processes visible.

- **Wasted expenditure becomes apparent** and unnecessary work steps can be eliminated. This makes sustainable and ecological work possible
- The **process portal creates an overview and transparency for all employees** and creates new perspectives and views on the company. This way, every company can increase employee satisfaction too.
- **Different application scenarios** and the software's ease of use enables a continuous and thus sustainable optimization of the business processes.

2. Managing the business model

Basic activities of business process management, such as database management, the compilation of process maps, the creation of glossaries and generation of publications are handled in **Architect**. First of all, **Architect** serves as an exchange and processing platform for process data.

The following are useful Architect keyboard shortcuts:

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.

2.1. Start page

When Architect is launched, the following user interface appears (see Figure 2). The databases already created are listed on the left-hand side, under “available databases” and they can be opened with a double-click.
A user manual, the system requirements and the contact information of Ploetz + Zeller GmbH can be called up at “Help & Support” on the right-hand side.

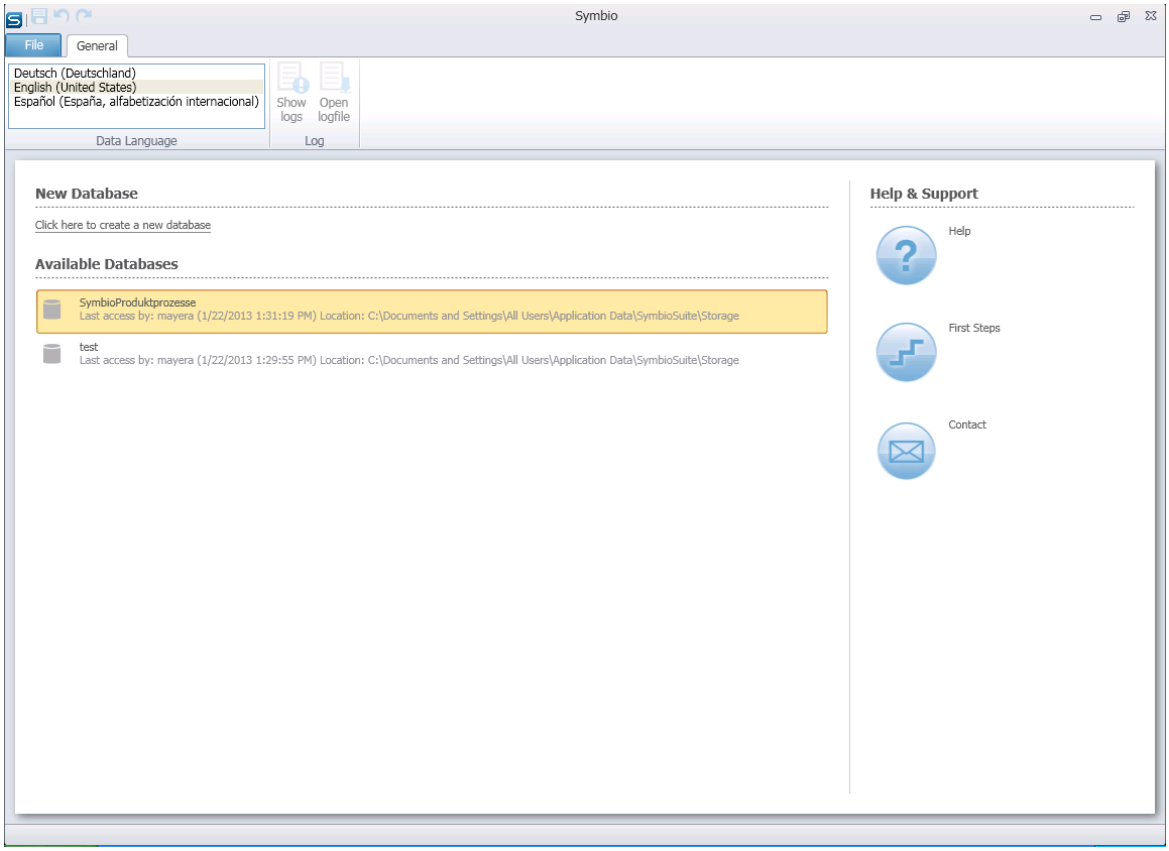


Figure 2 – The Symbio start page

2.2. Creating a new database

A new database name may be entered under the **file** Ribbon, and the database is finally created by clicking the **Create** button.
The initial setting in the **set of rules** is “StandardRuleSet”. Depending on the license key, a different set of rules can be taken over (for example, Database Explorer).
The **method** is pre-set at “StandardMethod”. Additional settings can be selected, depending on the configuration of a database containing specific requirements and rules.

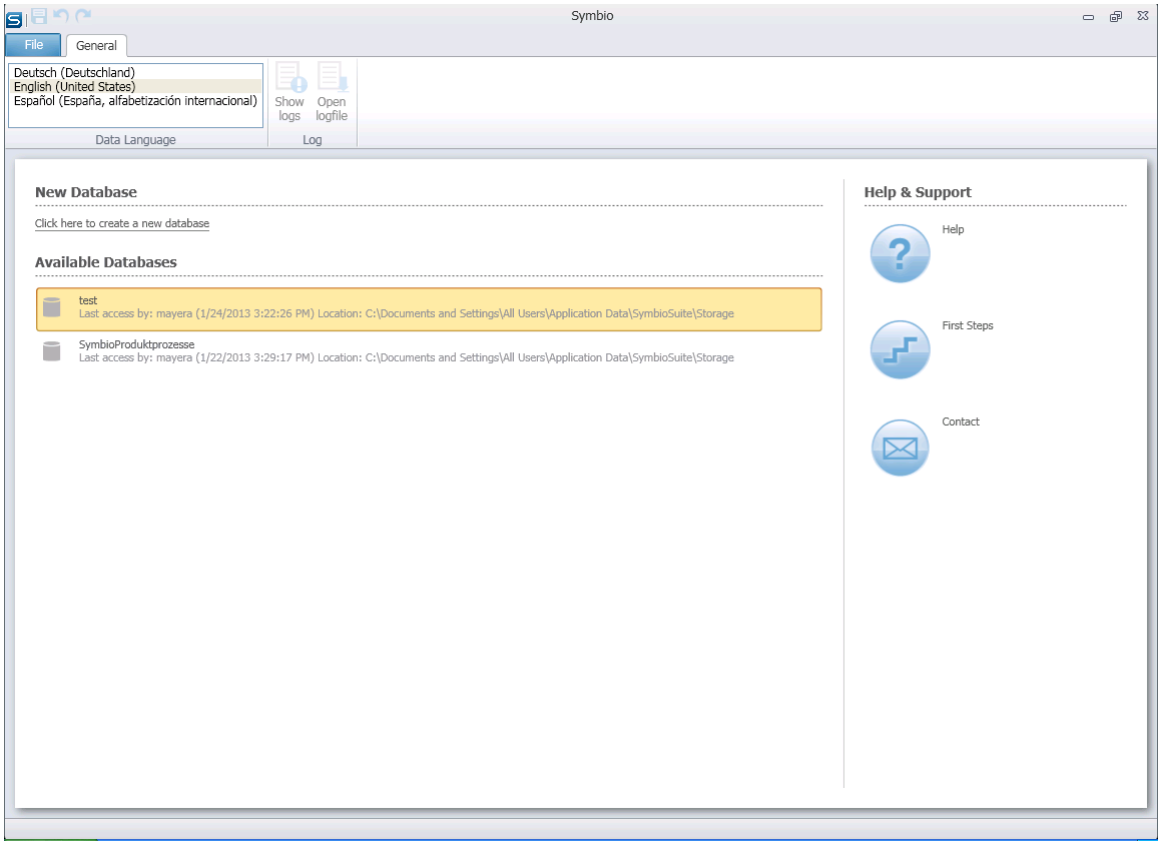


Figure 3 – Database creation

2.3. Building and managing the process architecture

After creating a new database, a process house is built up using the **Architect** ribbon, via the **Process architecture** tab page. Note that the view is minimized when a ribbon tab is clicked on. Though the buttons do appear if you click on the Ribbon, they are hidden as soon as you click outside the ribbon. If you double-click once more, the normal view will be displayed again.

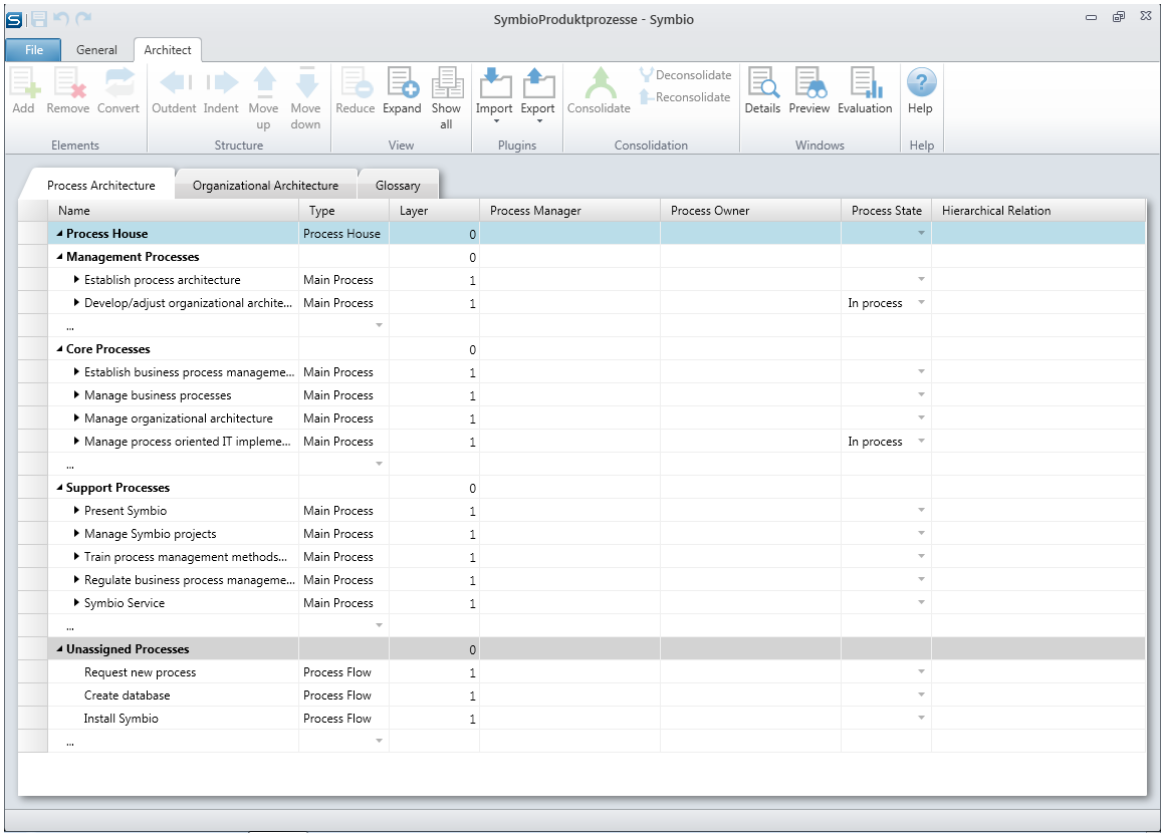


Figure 4 – Creating a process house

Symbio supports the following process types:

Element	Description	Example
Main process	• Element for structuring the processes • May contain sub-processes or process flows	Establish process architecture
Sub-process	• Element for structuring the processes • May contain process flows	Implement process architecture
Process flow	• Element for structuring the processes • May contain process steps	Maintain process architecture

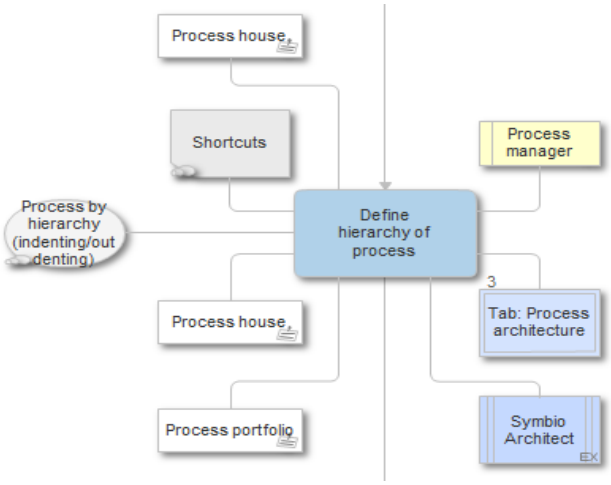
Process step	• Individual activity within a temporal-logical sequence • May be linked to many different types of master data	

Table 1 – Process types in Architect

The process architecture should be planned as a hierarchical structure of processes formed from the **main process, sub-process, process flow** and **process step** elements.

These elements may form a hierarchical structure with two, three or four levels.

- Main process 1 (4 levels)
  - Sub-process 1.1
    - Process flow 1.1.1
      - Process step 1.1.1.1
      - Process step 1.1.1.2
      - Process step 1.1.1.n
    - Process flow 1.1.2
      - ...
    - Process flow 1.1.n
      - ...
  - Sub-process 1.2
    - ..
  - Sub-process 1.n
    - ...

2.3.1. Functions in Architect

New processes can 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 the new process is (still) not clear, it can also be created at **non-allocated processes**.

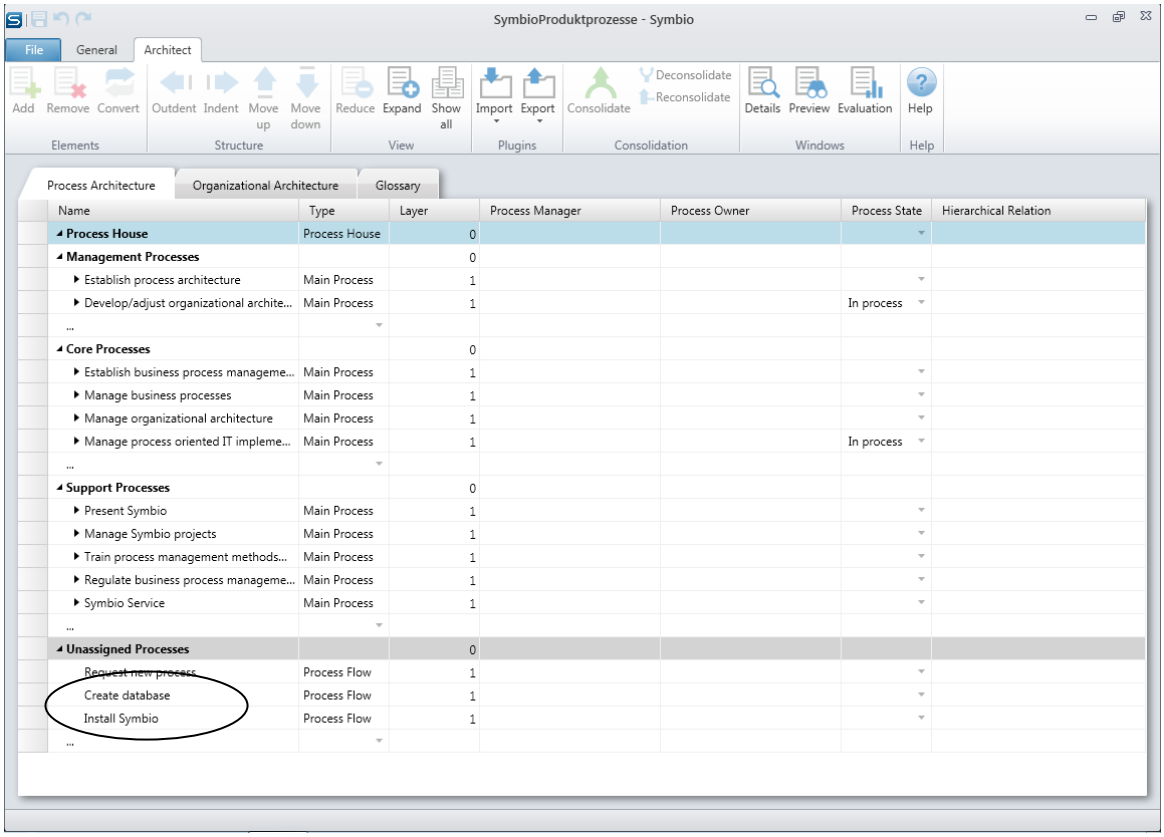


Figure 5 – Non-allocated processes

Add/delete:

Main processes, sub-processes, process flows and process steps can be added and deleted. If a process type is to be generated under the core process level, the core process cell must be highlighted. On deletion, the respective process type is highlighted.

Move in/out:

Moves a process from a higher/lower level to a lower/higher level. The type is automatically converted.

Convert:

By clicking this button, a highlighted process type will be converted to another type.

Consolidate:

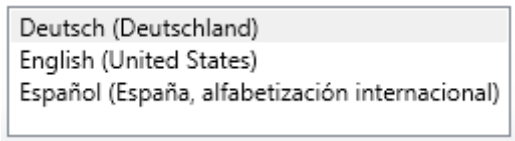
During consolidation, two or more highlighted objects are merged into one object. This function is especially useful for consolidating objects in the glossary. After pressing the button, the name of the new consolidated object can be selected in a dialog box.

De-consolidate / re-consolidate:
Consolidated objects can be de-consolidated and re-consolidated after new items have been added by importing (see “Exporting/importing data”). Relevant objects are shown here in red.

Preview:
Objects created can be depicted graphically by highlighting them.
The preview can be re-played by clicking the button again.

Evaluation:
Additional information on how an element can be displayed, for example the diagrams in which the element occurs or other elements to which it is linked.

Detail maintenance:
Attributes of the selected objects can be defined. The changes in details must be separately stored or discarded using the buttons. Selected attributes can also be edited directly in the table.



Data language:
The language of the data can be changed to German or Spanish on the **General** ribbon. Note that only the language of the data is changed - not the language of the user interface.

2.3.2. Exporting processes from the database

Process sequences are modelled in the Modelling Client, based on MS Excel, and **not in Architect**. For this purpose, the process flow to be modelled is highlighted in the process architecture and exported to the Modelling Client with the **Export** button (export Modelling Client). The Modelling Client can be stored on any desired storage space.

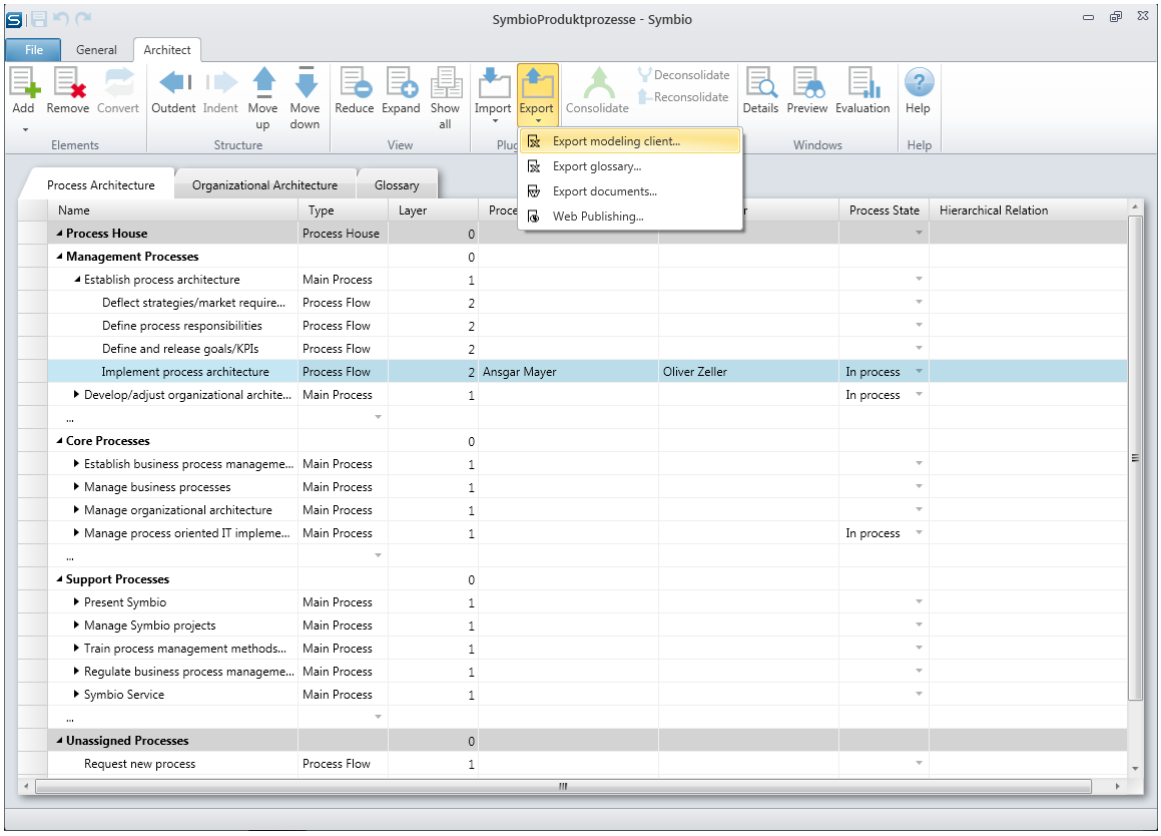


Figure 6 – Export process flow

2.3.3. Importing processes into the database

Once processes have been recorded, defined or optimized in Modelling Client, they can be reloaded into Architect via the **Import** button (import Modelling Client) and you can then see them in the updated process architecture and under non-allocated processes. The glossary will also be updated when you import a Modelling Client. After an import, it makes sense to consolidate similar objects.

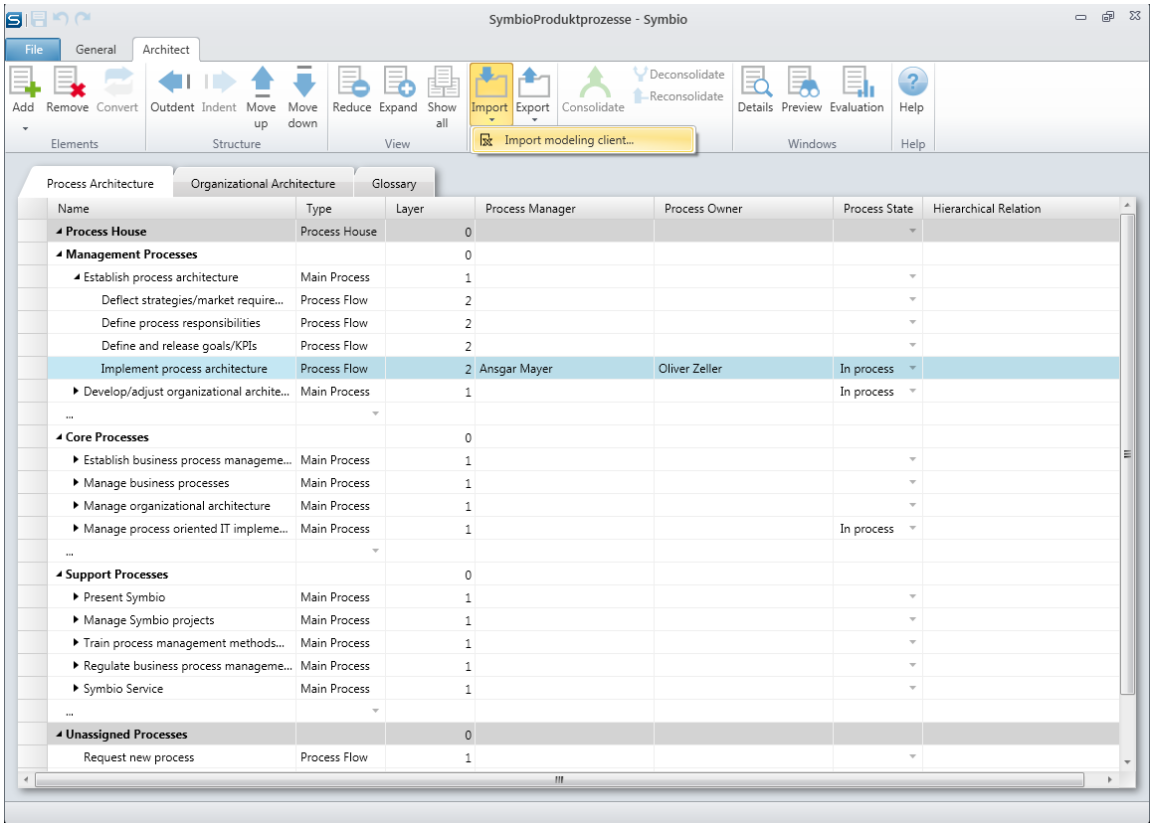


Figure 7 – Importing a Modelling Client

2.4. Building and managing the organizational architecture

An organization can to be designed and managed (see “Functions in Architect') using the **Organizational architecture** tab page.

The organizational unit and the position are available as organization types.

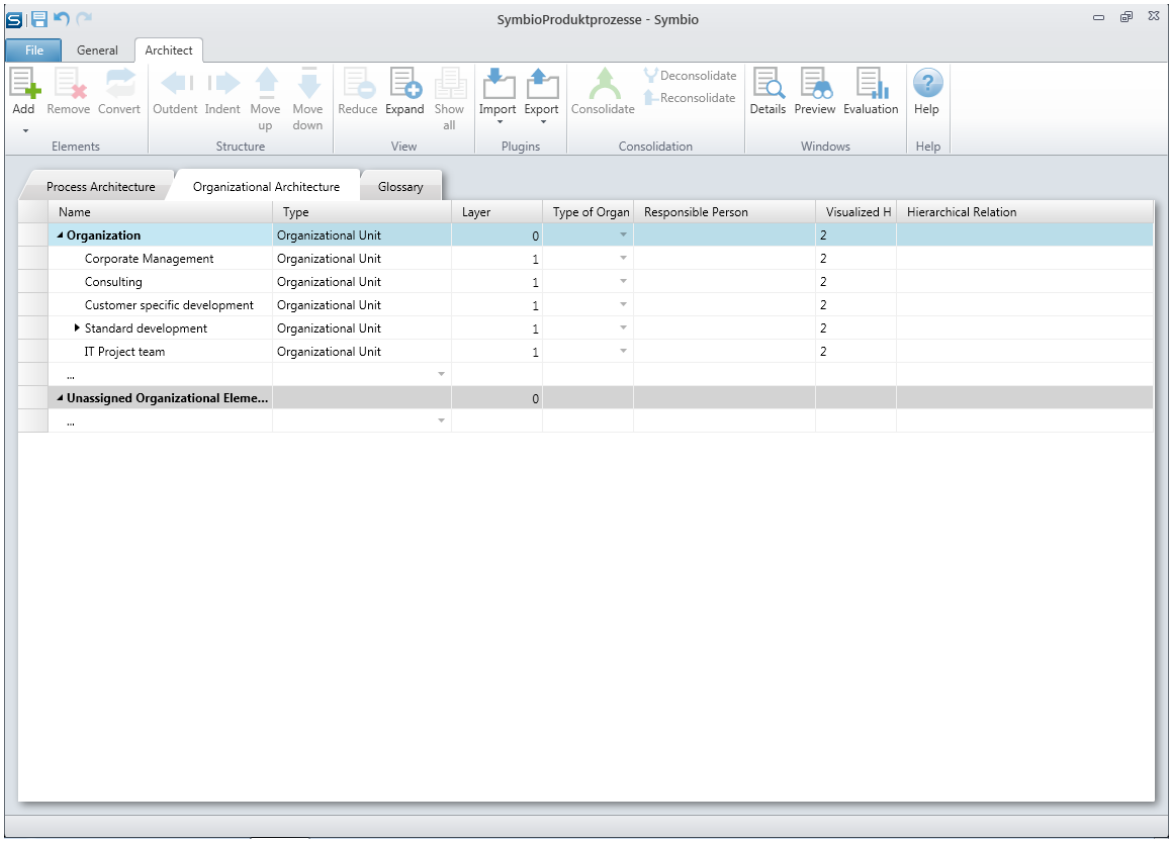


Figure 8 – Building the organizational architecture

2.4.1. Defining and maintaining organizational units

When defining and maintaining organizational units, the desired organizational unit can be newly set up or an existing organizational unit can be renamed in the **Name** column and in the **Type** column. Likewise, organizational units can be moved as desired by pressing the **Up/Down** buttons.

Additional information can be entered in various columns. In the **visualized hierarchy levels** column, do note that the steps to be visualized can be adjusted up or down as required.

2.4.2. Defining and maintaining positions

When defining and maintaining positions, the desired position can be newly set up or an existing position can be renamed in the **Name** column and in the **Type** column. Likewise, positions can be moved as desired by pressing the **Up/Down** buttons.

Additional information can be entered in a variety of columns. In the **visualized hierarchy** levels column, do note that the steps to be visualized can be adjusted up or down as required.

2.5. Creating and managing the glossary

Glossary items can be created and managed using the **Glossary** tab page.

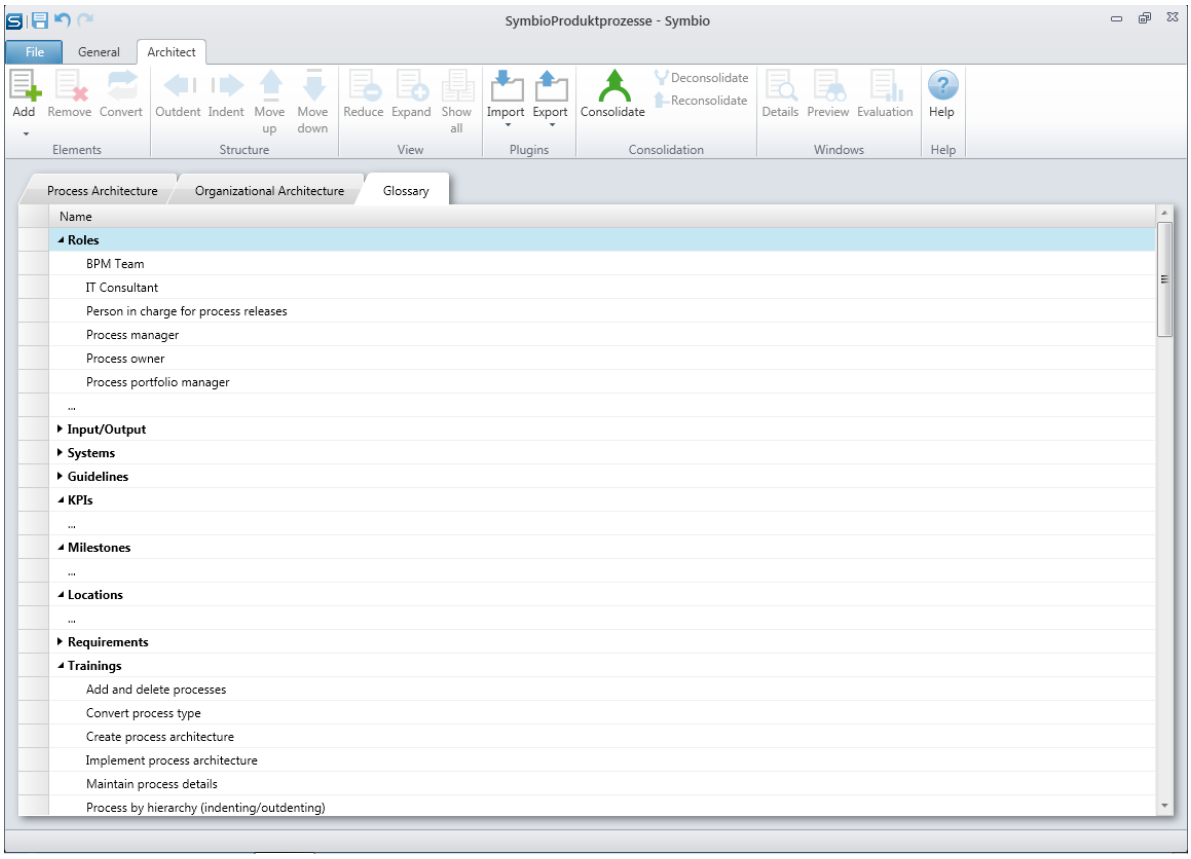


Figure 9 – Creating a glossary

The following glossary items are pre-set:

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

2.5.1. Exporting the glossary and making it available

The glossary can be exported to an Excel template and made available to all employees with the aid of the **Export** button (Export glossary). A line with data content must be marked in the glossary to enable the export feature.

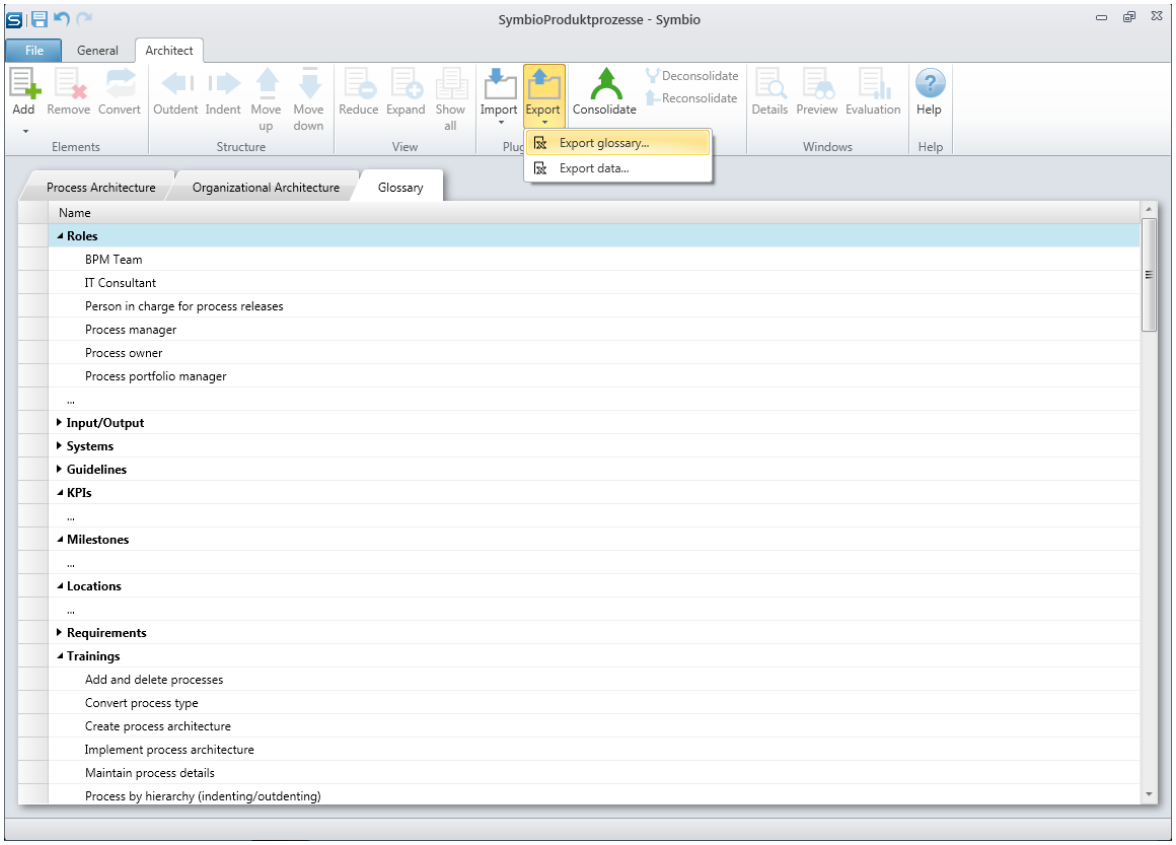


Figure 10 – Exporting a glossary

In the Excel glossary template, each of the data items used in the Glossary can be seen in an individual tab.

2.5.2. Central filing of the glossary for all Symbio Modelling 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 is because the data only has to be created once and can then be used for all process flows. When exporting the process flow into the client modelling, you can link a glossary to the Modelling Client in a separate step.

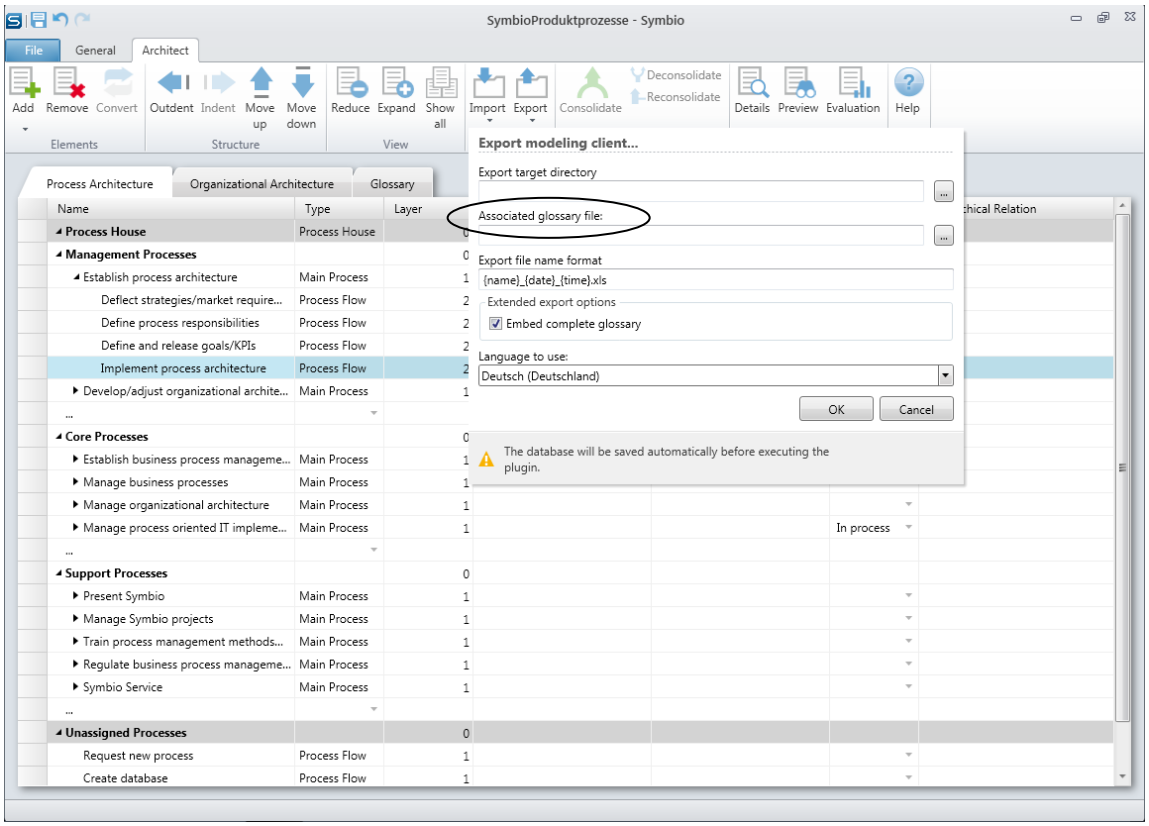


Figure 11 – Linking the Modelling Client to the glossary

2.5.3. Exporting/importing data

Glossary items can be exported and edited in an Excel data template with the aid of the **Export** button (data export). Using the **Import** button (data import), Glossary items that have been updated in the Excel data template can be easily imported back into Architect. A filled line must be marked in the glossary to enable the export/import feature. After importing, the data recorded can be seen in the updated glossary.

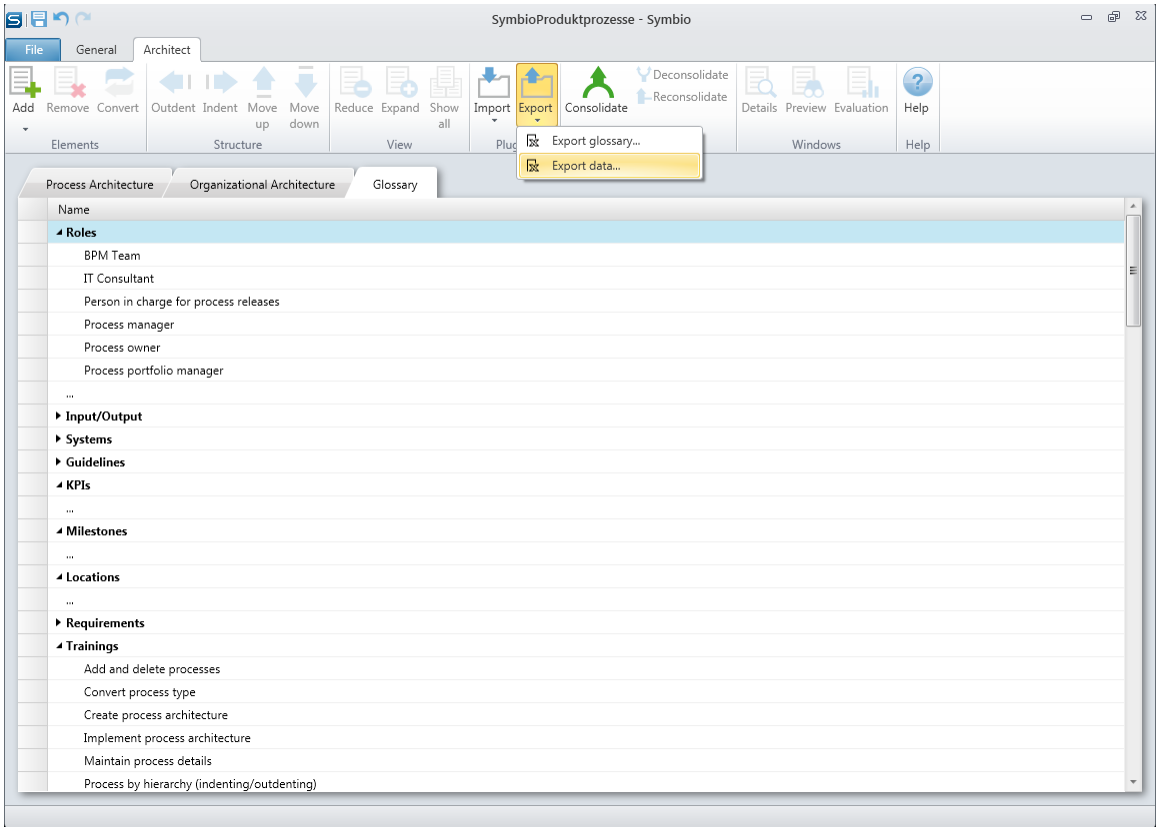


Figure 12 – Exporting data

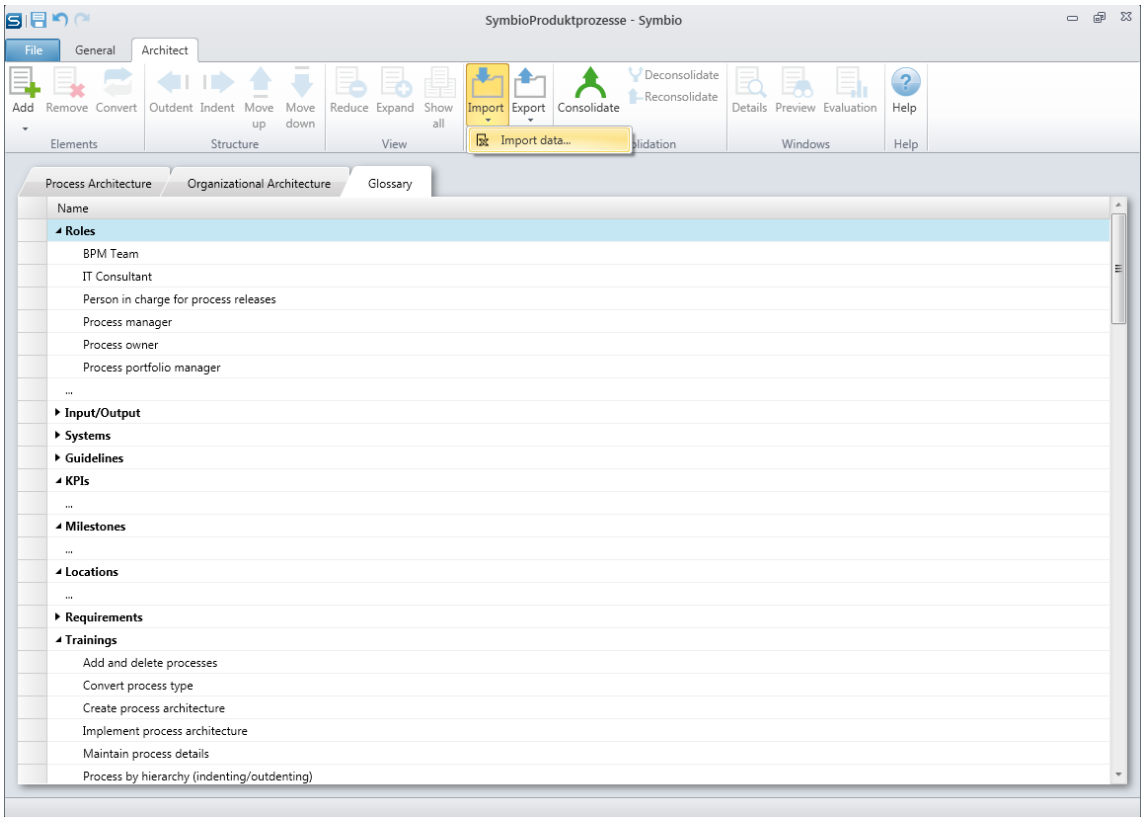


Figure 13 – Importing data

3. Defining and maintaining processes

Business processes are recorded, defined and maintained with the help of the Modelling Client. Modelling is based on the methods of event-controlled process chains (EPCs), value-creation chain diagrams (VCDs) or extended event-controlled process chains (EEPCs).

VCDs

Sub-processes are depicted in lines, and the multiple relationships between sub-processes (sub-process has multiple predecessors or successors) are directly depicted by linking the relevant sub-processes with each other.

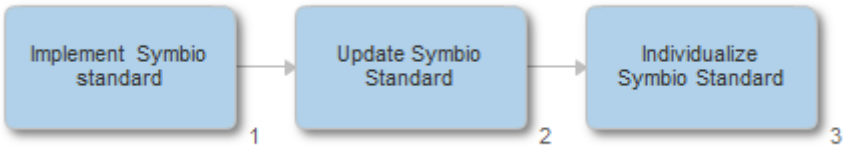


Figure 14 – Example of a value-creation chain diagram

EPCs/EEPCs

Process steps, events, rules and process interfaces can be represented line-by-line in the EPC and, if necessary, can be displayed in a more detailed way. Multiple relationships between process steps (process step has multiple predecessors or successors) are indirectly mapped by linking the relevant process steps via an intermediary rule.

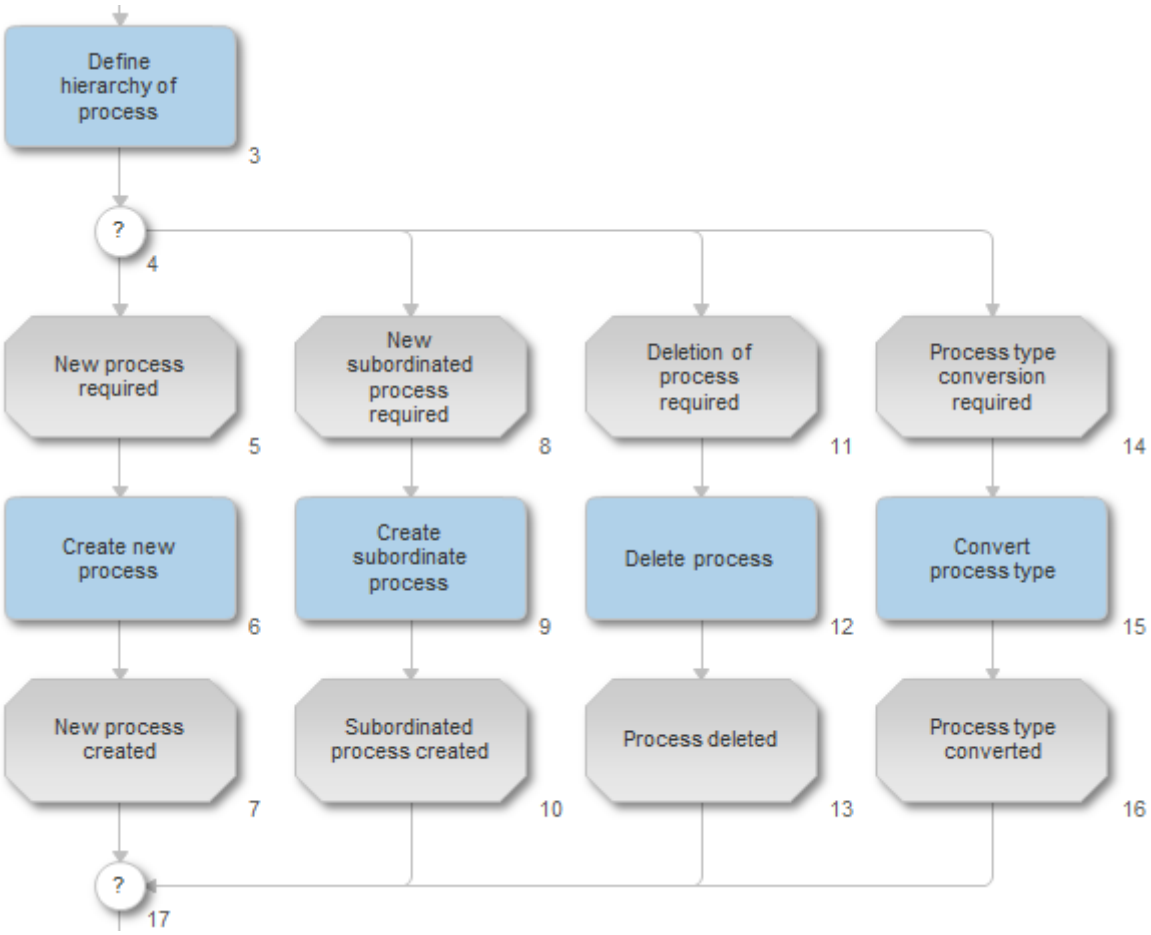


Figure 15 – Example of an event-driven process chain

3.1. Defining and detailing processes in the Modelling Client

Once a process has been exported with Architect into a Modelling Client (see "Exporting processes from the database") the process can be defined and described in detail in the Modelling Client.

3.1.1. Capturing general process information

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

The worksheet is used to:

- Determine the necessary meta-information such as process name or process description.
- Document and version management.
- Maintain pre-defined model attributes, such as quality assurance, or to record the process times.

The process information worksheet is divided into different subject areas such as status, person responsible, or risk assessment.

Mandatory fields are highlighted in yellow. When you save and close the Symbio Modelling Client, a message is displayed if a mandatory field has not been filled in. Optional fields may, but need not be, filled with values. They are highlighted in white.

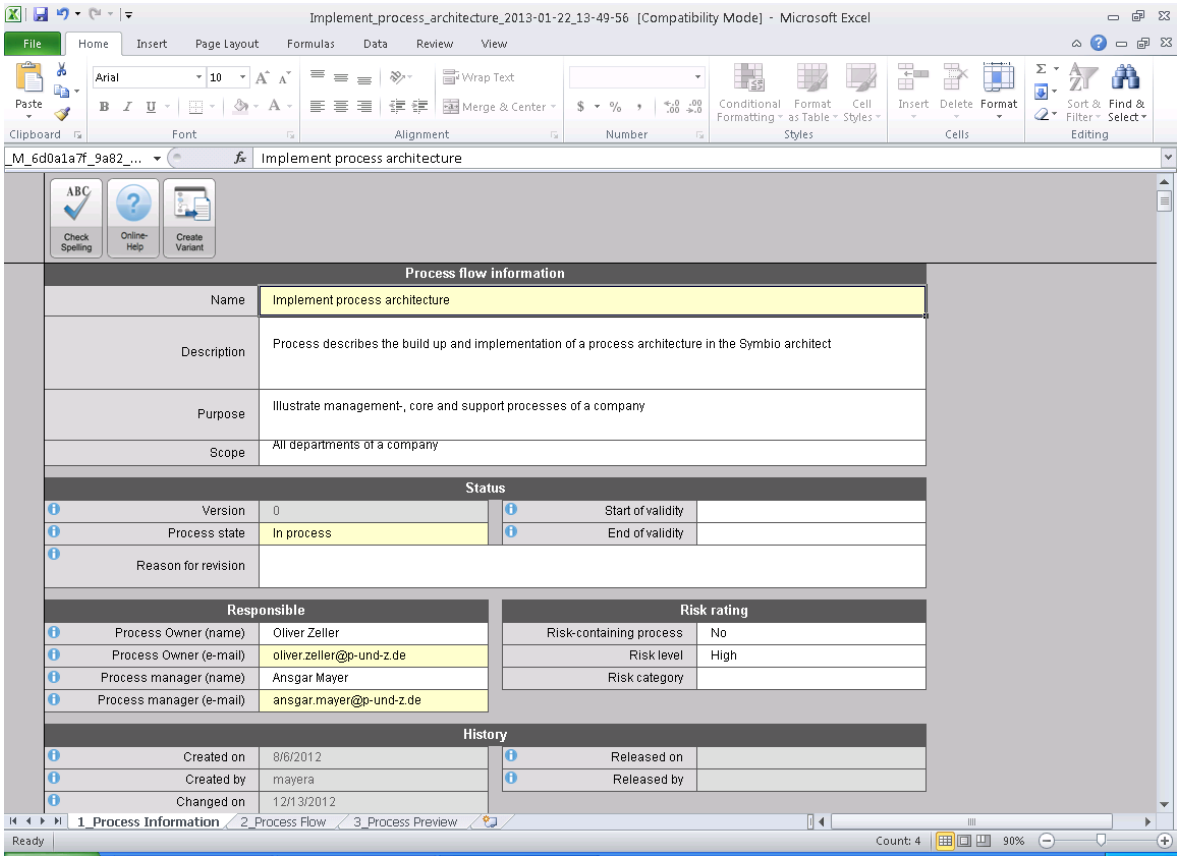


Figure 16 – Recording process information

3.1.2. Detailing processes

The second tab of **2_Process flow** forms the core of the Modelling Client. This tab is used to record the business processes. Process flows can be recorded online and in the corporate network or intranet, on the Internet or in the cloud, as well as offline on a PC without any network connection.

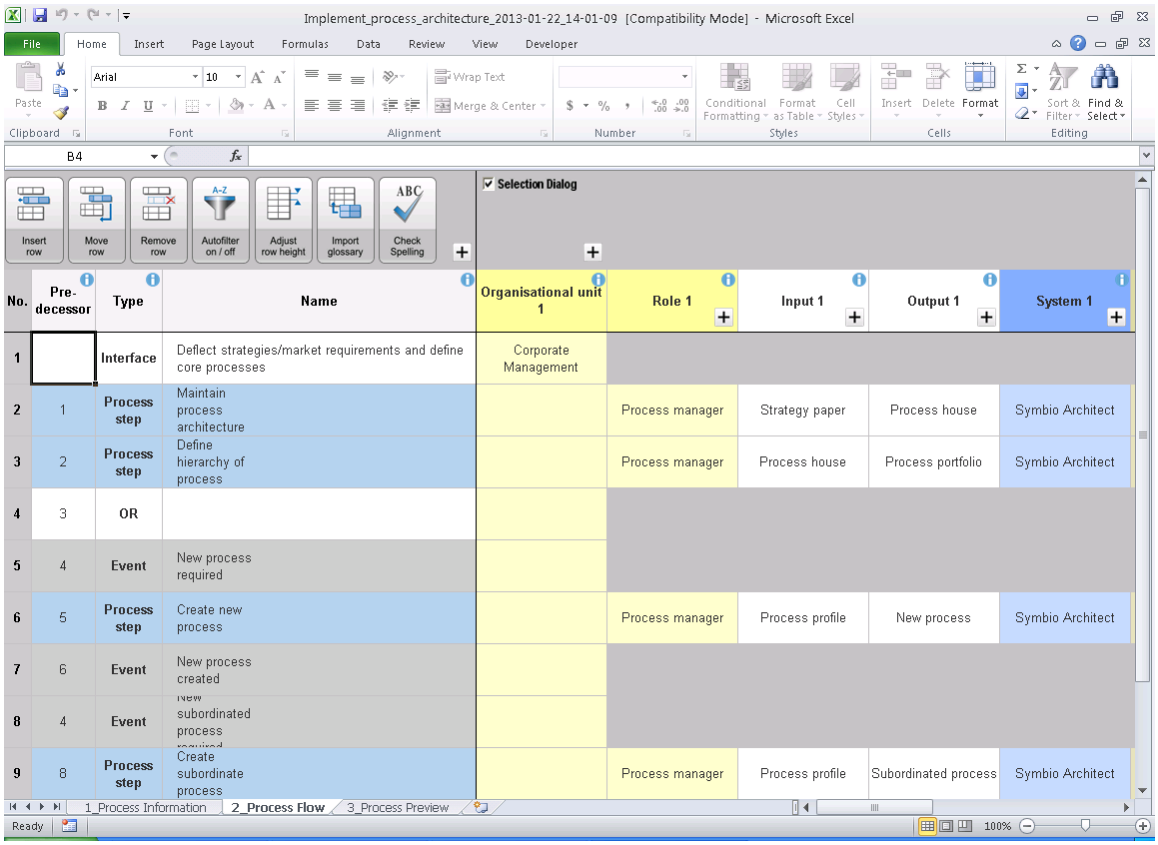


Figure 17 – Recording processes

The standard configuration consists of the following columns:

- **No.:** Line numbers 1-250 are read-only and serve for orientation in the process preview.
- **Predecessor:** The line number(s) of the previous object(s) is noted here.
- **Type:** The process flow objects can be selected here. A process step, an event, the connectors “AND” and “OR”, and a link are all available.
- **Name:** The name of the process flow object is entered in this column
- **Description:** You can expand and collapse the Description column with the + button in the column header above the Name column.

Functions of the Modelling Client (2nd tab)

Insert line:
A new line can be inserted before the current line in the worksheet. In this dialogue, you can enter the number of new lines.

Move line:
A selected line can be moved to any another chosen line. In this dialogue, enter the line into which the now current line is to be moved.

Delete line:
The current line is deleted, as is the previous number of the next object.

Autofilter on/off:
The Autofilter is only applied to the Object type column. Table editing actions (e.g. delete line, move line, etc.) can be performed as long as a filter is set.

Adjust line height:
The line height can be changed and the desired line height can be entered in the subsequent dialogue.

Import glossary:
Glossary items of the business process can be imported. The glossary file can be selected in a file selection dialogue. After importing a glossary, a dialogue may appear, informing of errors or warnings if the configurations of the two files do not match or if the specified file could not be read.

Spelling check:
You can check at any time to see whether any spelling errors have crept into the entries. The Excel® spelling checker will be activated and, where necessary, a dialogue will appear that indicates any errors and makes suggestions for improvement.

3.1.3. Defining the process flow

When defining the process flow, the relevant process type is created in the **Type** column on the "top-down" basis. Process steps, events, the "AND" or "OR" connectors, and links are available as process flow objects. The previous object is recorded in the **Predecessor** column.

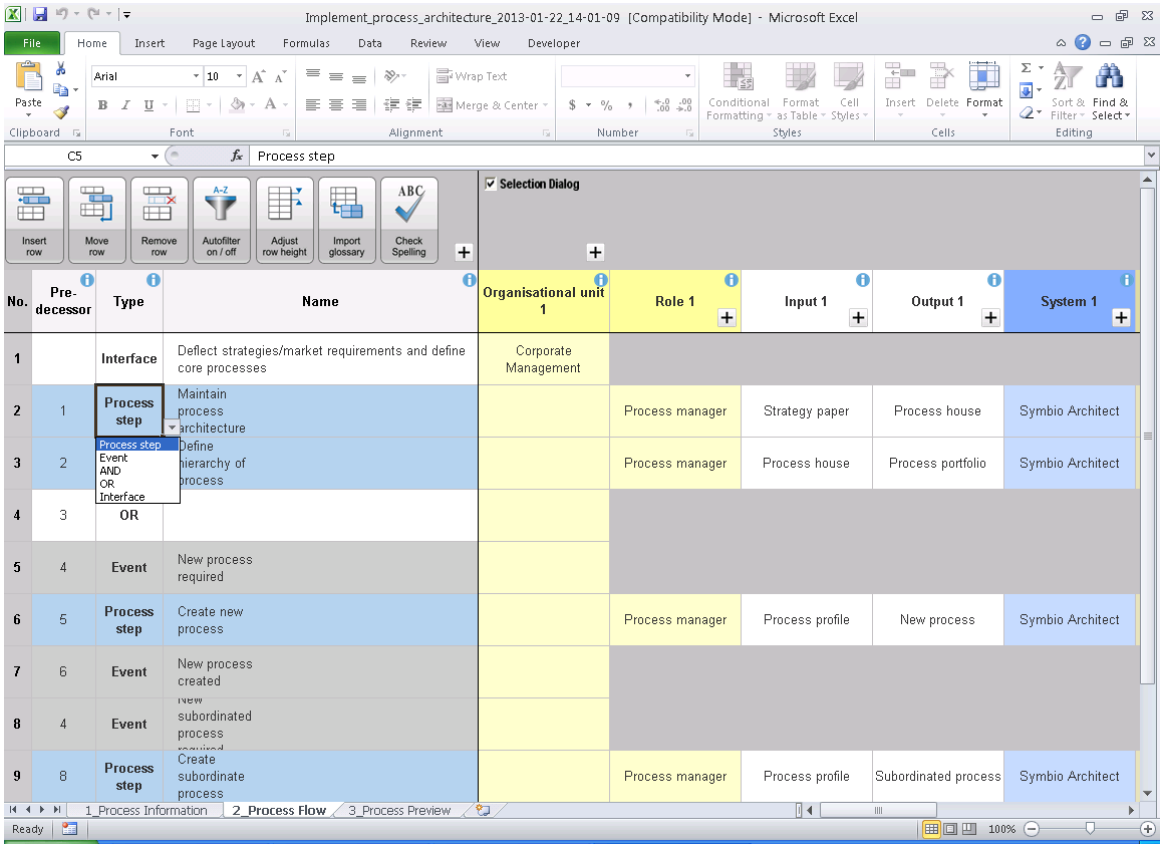


Figure 18 – Creating a process type

Recording general process flow information

The name of the process flow object types is entered in the **Name** column (e.g. an "Order triggered" event). Activating the + button above the **Name** column opens another column called **Description**. The process flow object type may be described in more detail in this cell. More columns, highlighted in blue and further to the right in the Modelling Client can be filled out if necessary.

The name of the organizational unit is entered in the **Organizational unit** column. Activating the + button over the **Organizational unit** column will open more columns into which the **roles** may be entered. RACI information (responsible, accountable, consult and inform) can be created in addition to the **roles**.

3.1.4. Detailing process flow

The Modelling Client contains a number of additional columns in which the process flow can be inserted in detail together with other elements. The most important elements include:

- **Input:** You can select the data/documents or similar that are needed as an input for a process step in the input columns. Inputs can be selected as desired or chosen from the predefined select list.
- **Output:** In the output columns, you can input the data/documents or similar that are created or edited in the process step
- **System:** Application systems (e.g. SAP®, Oracle®, etc.) with which a function is supported can be entered
- **Key figures:** The key figures or measured values to be used can be entered
- **Directives/guidelines:** The directives and guidelines to be followed can be added
- **Risk:** The risks to be noted (SOX and business risks) can be entered
- **Requirement:** The specific requirements for a process step can be entered
- **Transaction/service:** Transactions or other services can be created
- **Training:** Courses or training can be entered
- **Milestone:** Here you can allocate a milestone to each event in the process flow. This column must not be used by any of the other object types of the process flow.

In order to enter the glossary items, there is an input and selection dialogue with the following functions:

- Select existing objects from the list of **Objects found**, bottom left: After selecting an object, all the available attribute information about this object will appear in the details section of the dialogue.
- Search existing objects: The required term can be entered in the **Search text** box if a particular object is being searched for. Below this, you can specify which attribute should be searched in to find the entered term. By default, the search is always made in the object name.
- Depending on the template configuration used, you can add objects or also change existing ones:
    - Add object: After the name has been typed, the **Add** button will become active. Before pressing **Add**, the type should be reviewed. The content of

the selection list for Type can be configured individually (e.g. for roles, organizational units, groups, etc.). After adding the new object, the available object attributes can be entered as needed.

- The attribute input fields can be written in if existing objects can be modified.

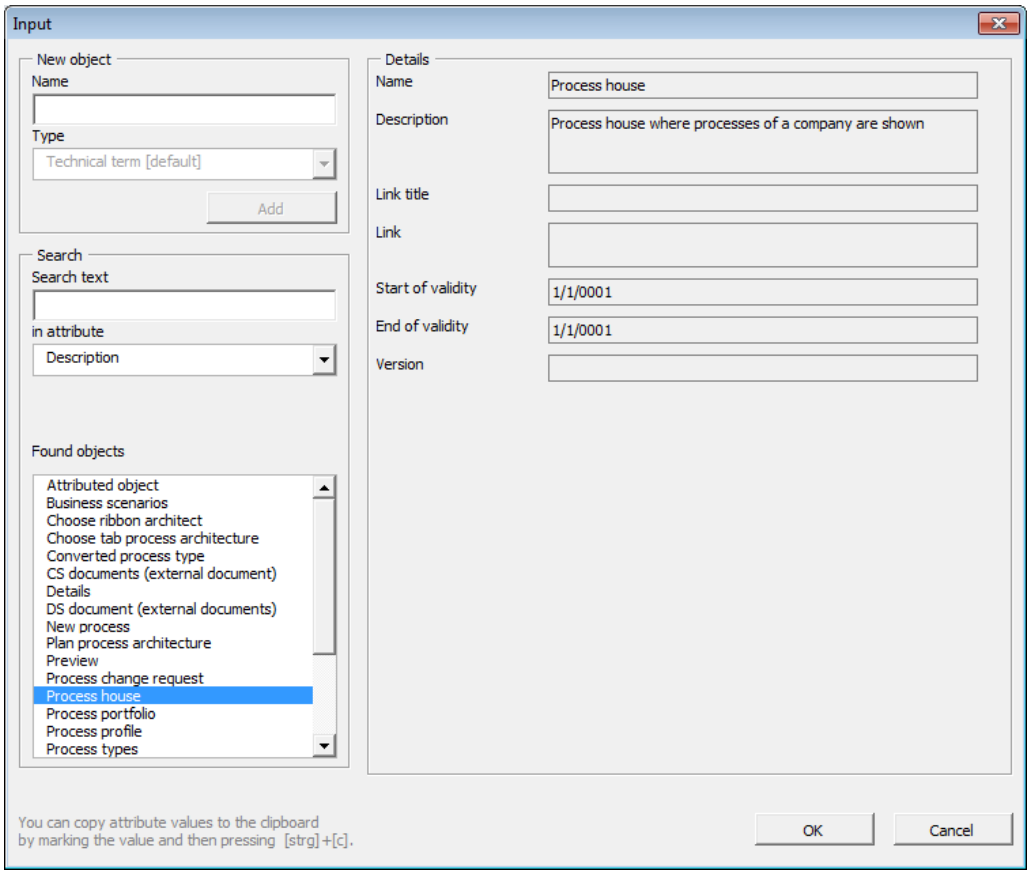


Figure 19 – Input/selection dialog

If documents or files are to be associated with an **Input**, these can be entered via a link at "details".

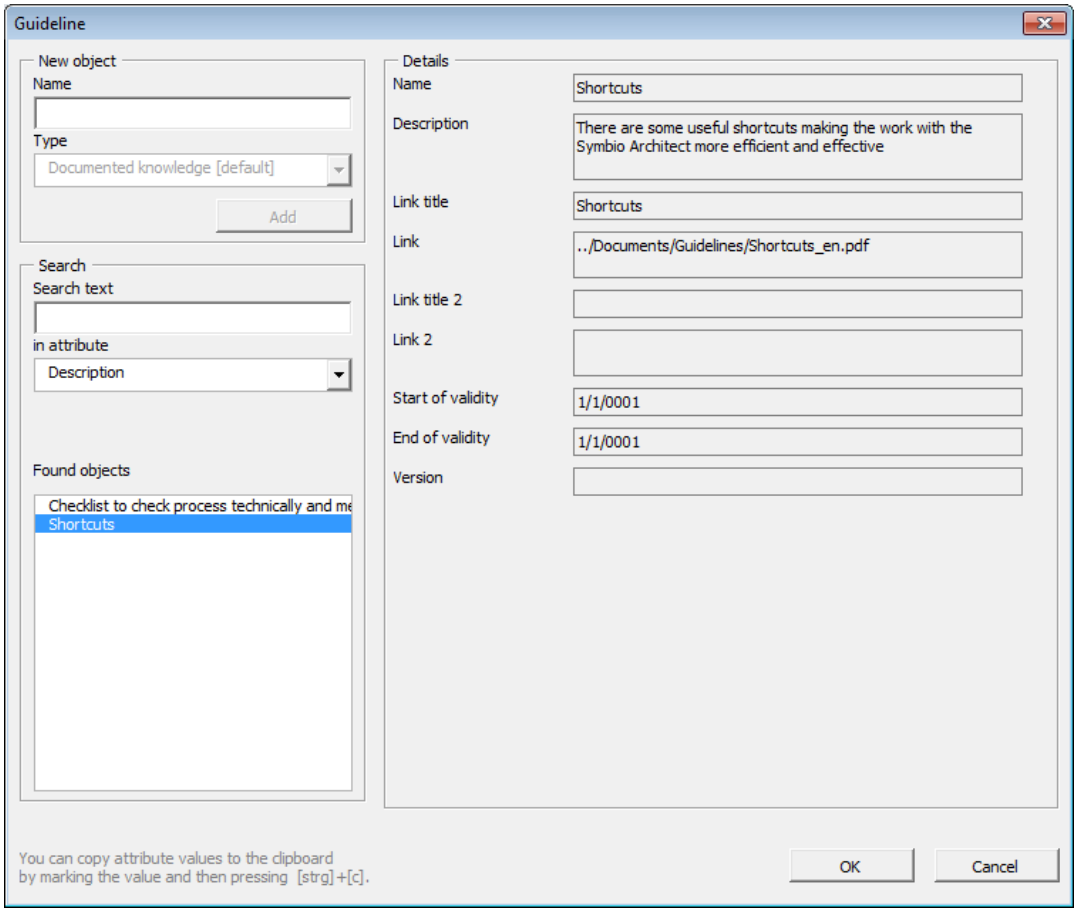


Figure 20 – Linking a document to an input

In the third tab, **3_Preview**, of the Modelling Client, graphics can be automatically created to depict the process flow.

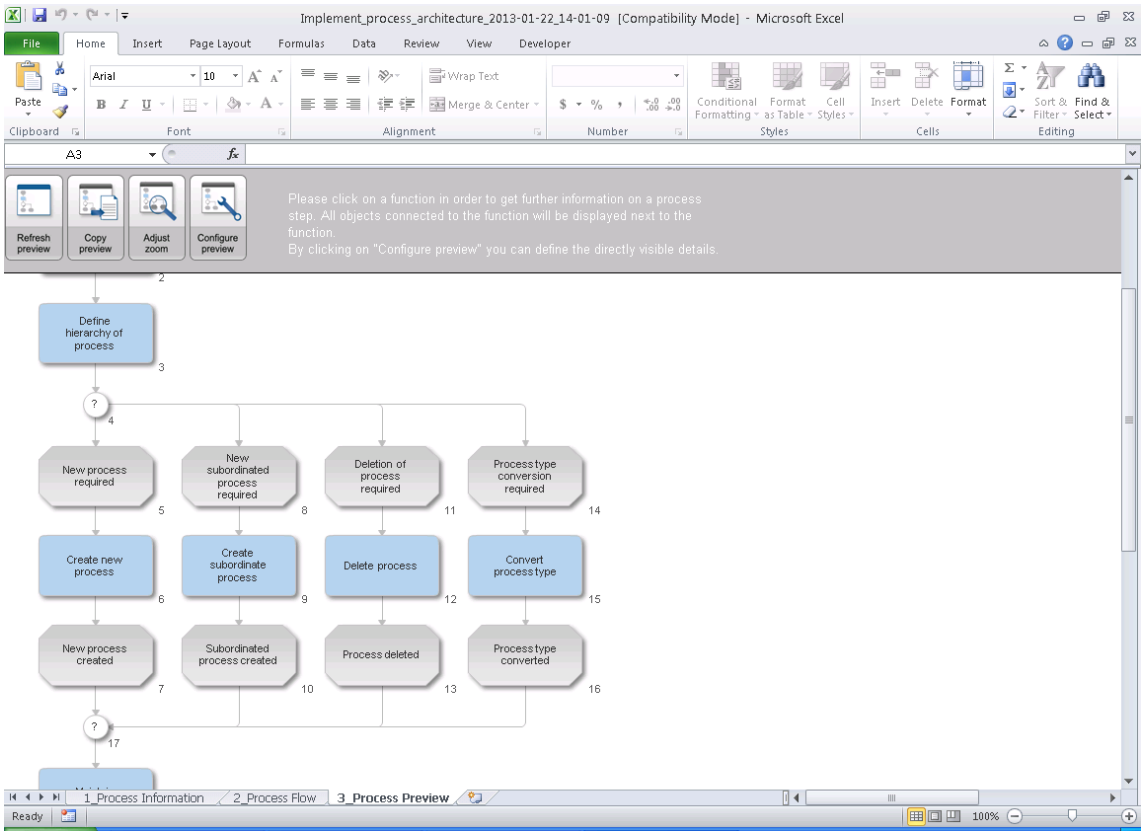
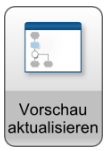
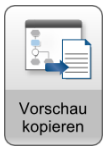


Figure 21 – Depicting the process flow graphically



Update preview:
The process can always be displayed after being updated again once changes have been made in the second **Process flow** tab.



Copy preview:
The preview can be copied and pasted, for example into a Word document.

Set zoom:
Different zoom values can be entered in this dialogue box.

Customize preview:

The modelling method can be adjusted in the dialogue box, where the alignment, the type, and the process details (Corona objects) can be changed. Corona objects can be completely or partially removed or added, depending on the depiction desired.

4. Publishing the business model

Processes, organizations and the related records can be published easily and ergonomically as HTML-based Web pages using the Symbio BPM Tool.

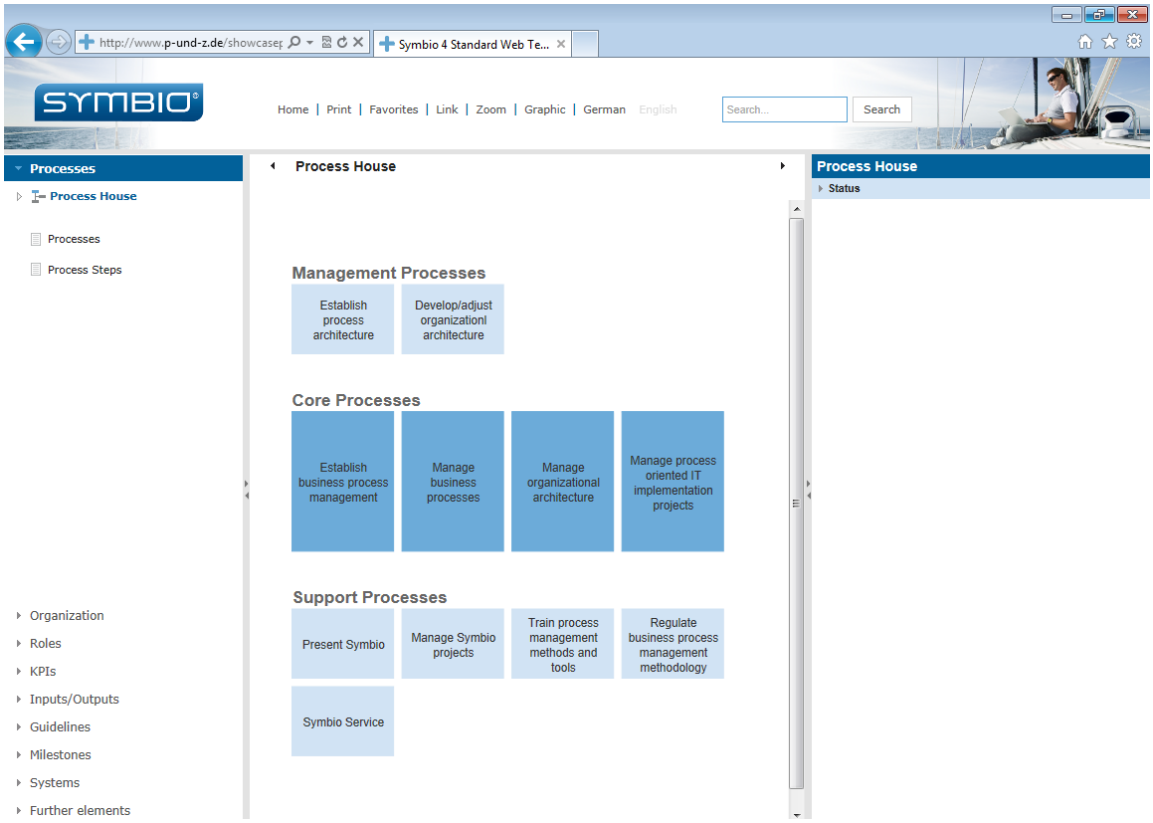


Figure 22 – Web publishing

The process landscape is entered via the interlinked documents, roles, IT applications, risks, key figures, etc. This simplifies access for every user. You can enter directly via the desired document, obtain all the details on it and the attached document, as well as on the business processes associated with the document.

The advantage of this transparency is obvious because everyone knows what everyone else is doing, what a particular process looks like, and which system belongs to which process, etc.

4.1. Publishing the process web

The publication of the web is carried out in Architect. The entire process and organizational architecture, as well as the glossary can be published as a Web using the **Export** function (Web publishing). The storage location and the language can also be chosen here.

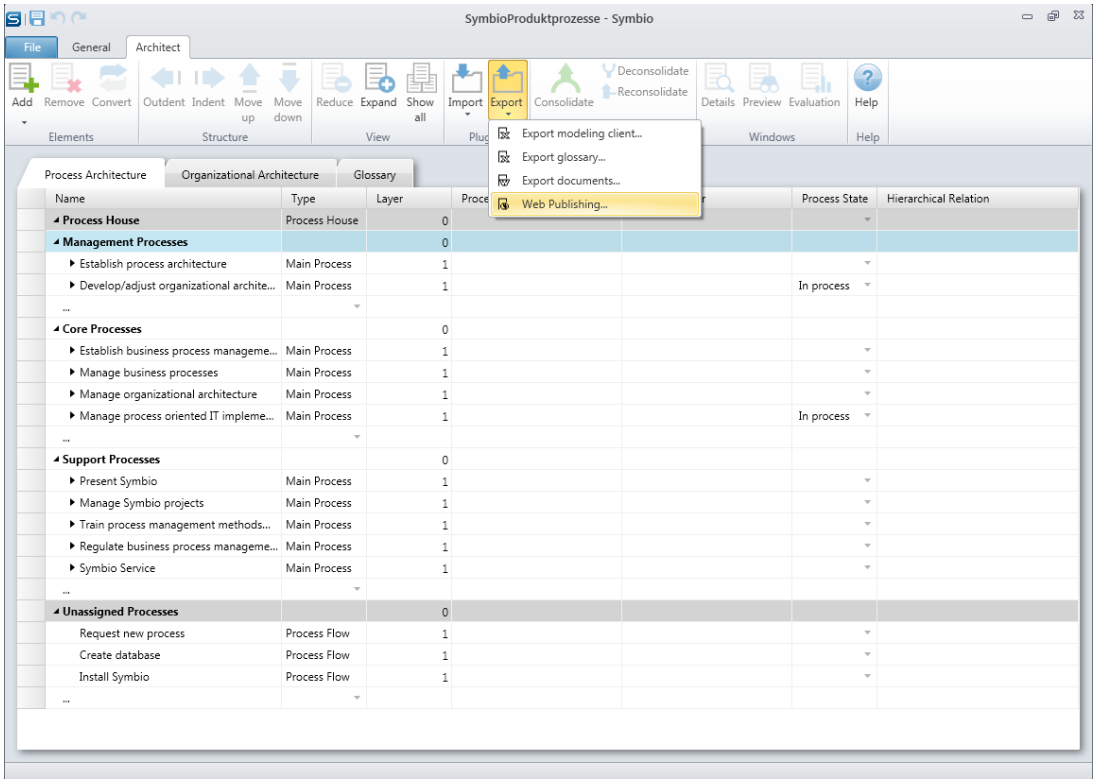


Figure 23 – Web generation

When opening the Web, you can enter via either the process graphics, the process list or the organization.

Navigation through the Web is very comprehensible, because there is an overview of the different elements on the left-hand side, and because the graphic is in the middle, while the descriptions can be seen on the right. When any process flow object in the graphic is clicked on, the associated description on the right will be updated.

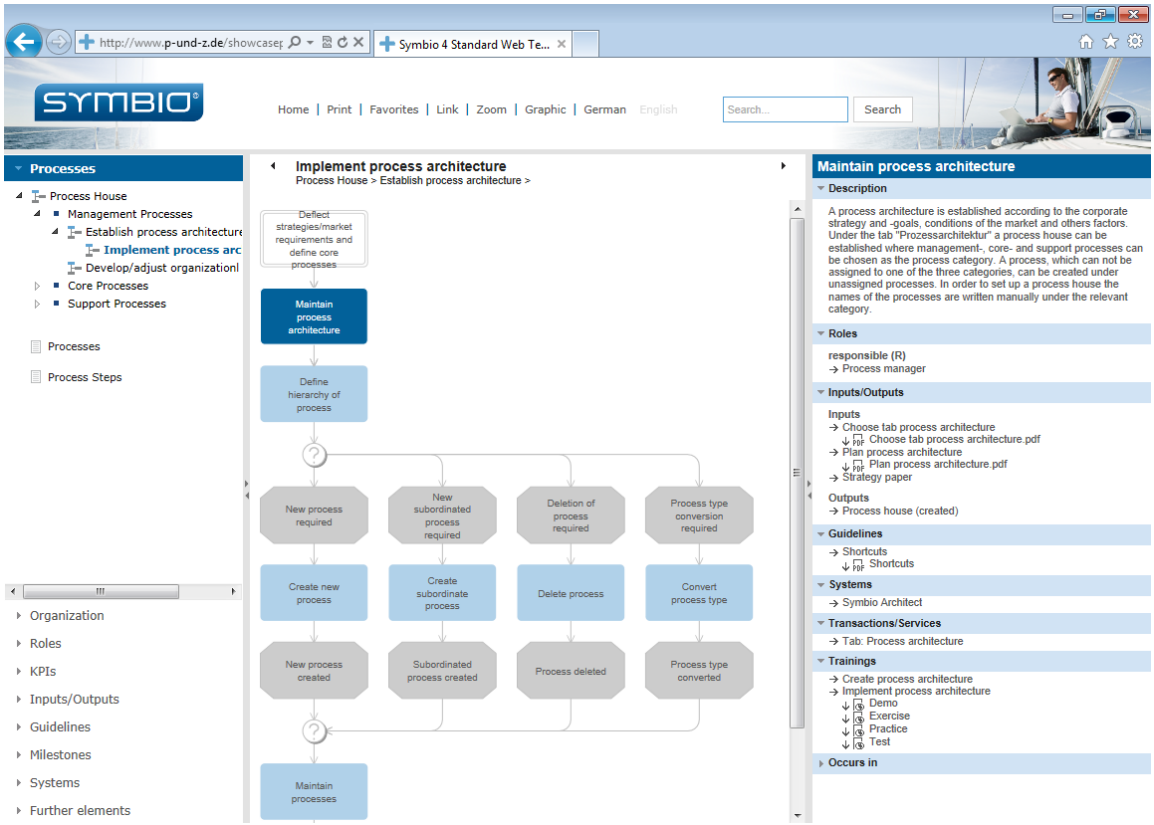


Figure 24 – Navigation through Web publishing

To print out information from the Web, the documents must first be created using the Export function in Architect. To do this, select all the processes in the "Process architecture" tab and then click on Export → Documents.

The following settings need to be adjusted in the dialogue:

Output folder: **[Web export directory]\Data\Print** (e.g. C:\Temp\Web1\Data\Print)

File name default: **P_{guid}_{lcid}.rtf**

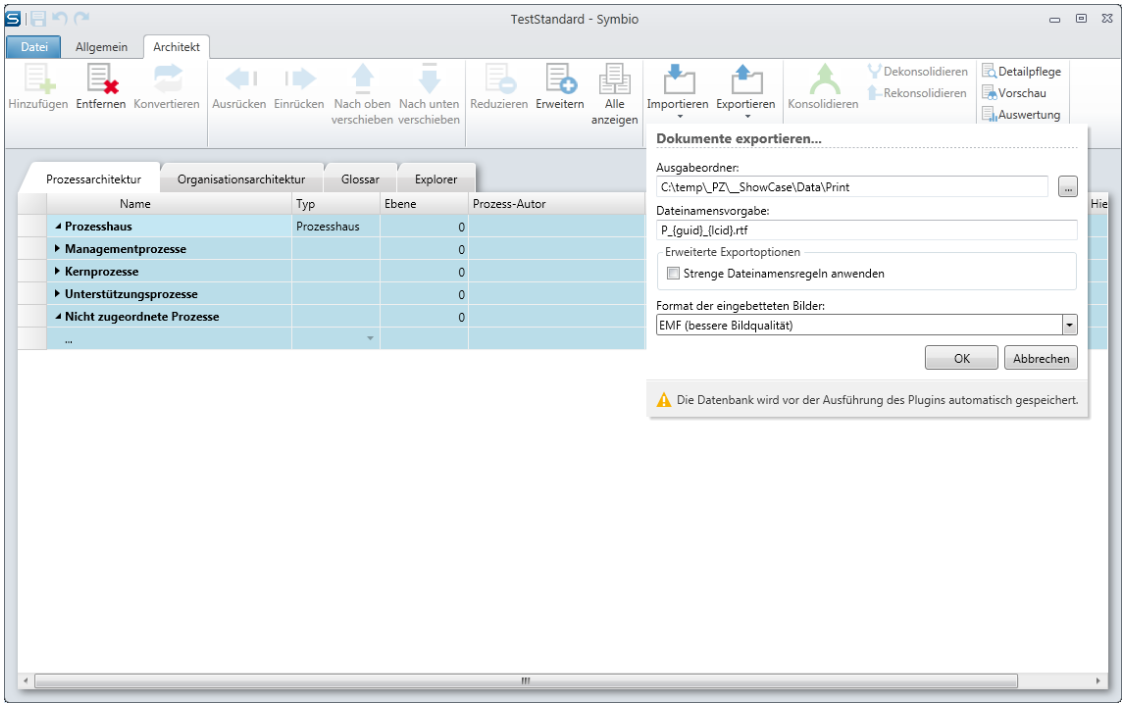


Figure 25 – Saving a document

4.2. Creating a document

The entire process and organizational architecture, as well as the glossary can be published as a document with the aid of the **Export** function (Export document). The storage location and the format can also be chosen.

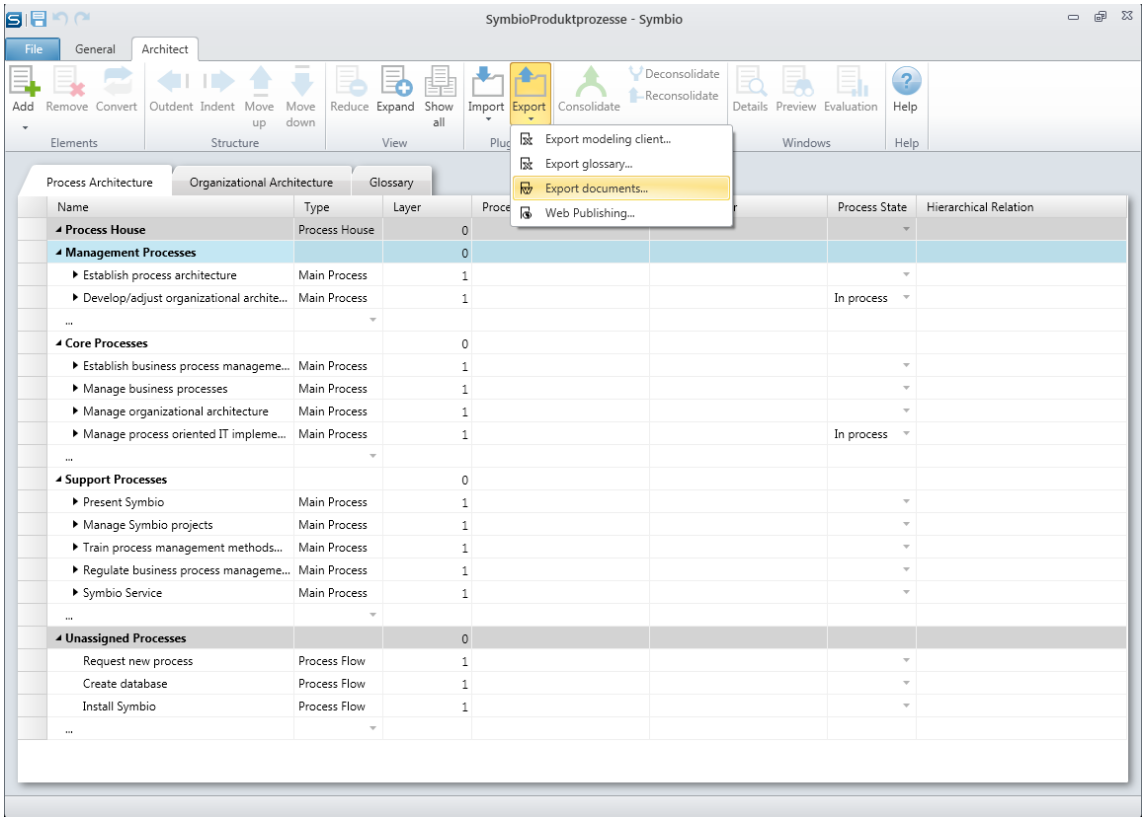


Figure 26 – Document generation

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LEGAL NOTICE

Symbio User manual

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