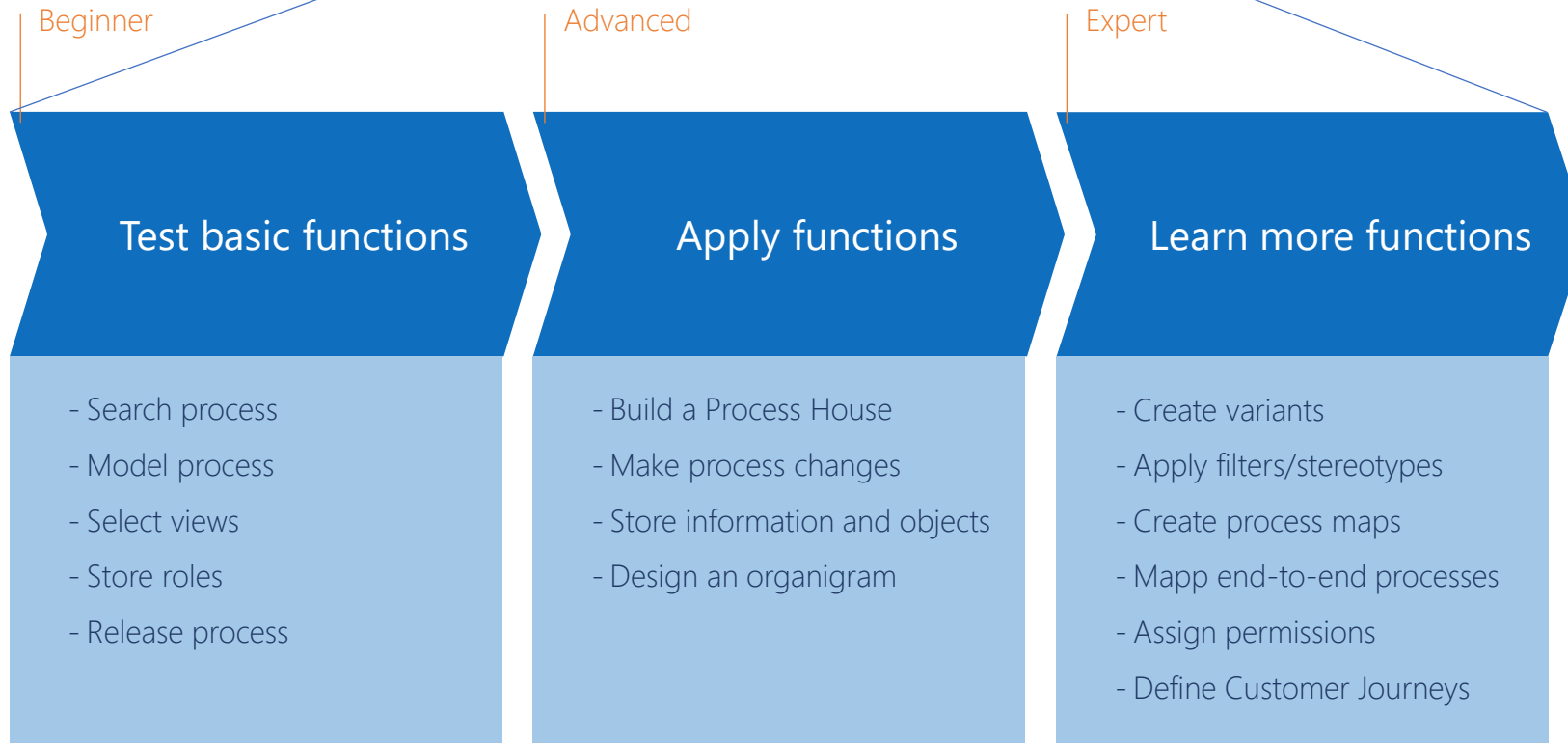
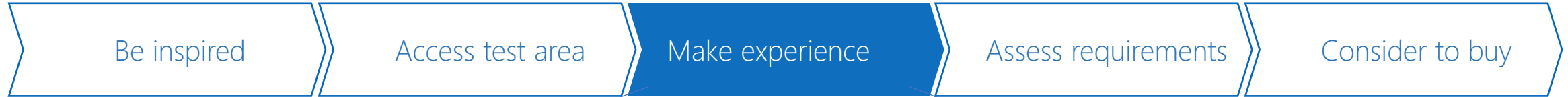
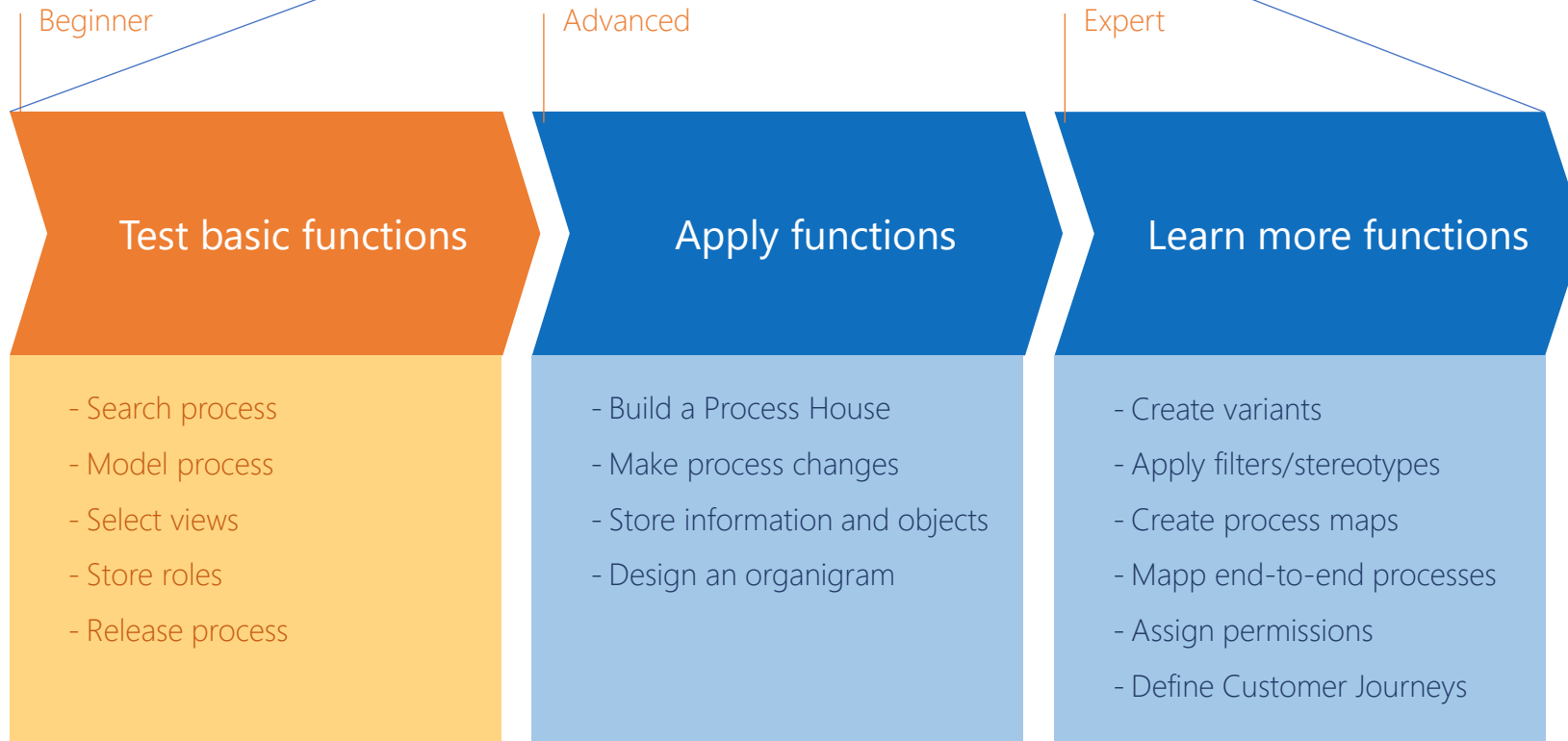


Symbio Quick Guide



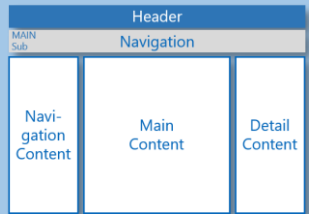




Search process

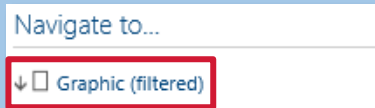
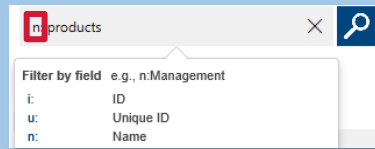
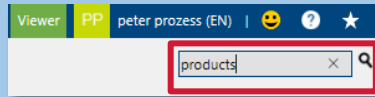


1. Log in



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

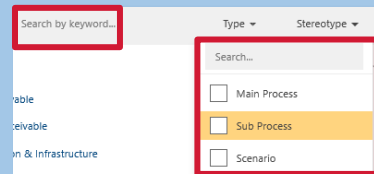
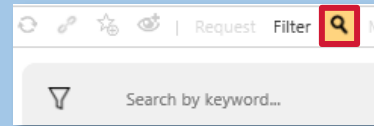
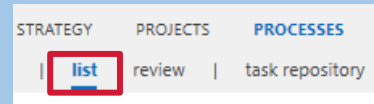
Option 1 2. Enter search terms



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

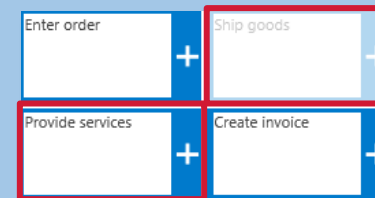
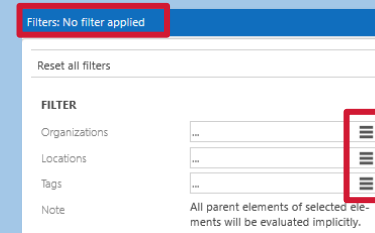
Option 2 3. Search list content

» Feature only available after activation



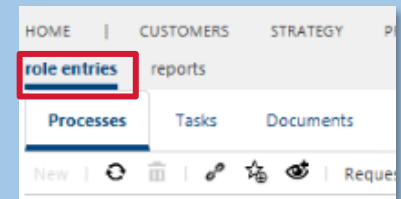
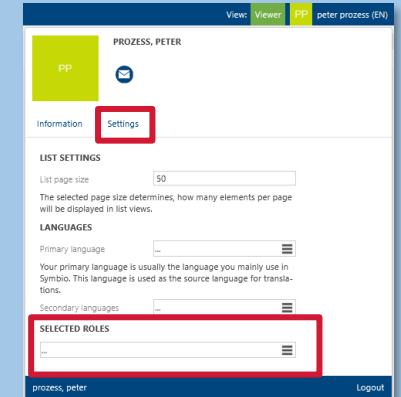
- Navigate to PROCESSES in list view
- Click on magnifier icon
- Search by content

Option 3 4. Select Scope filter



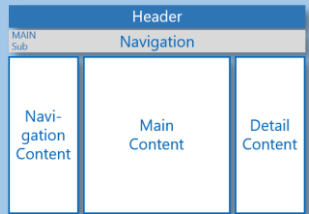
- Set Scope filter(s) in Header
- See appropriate processes
- Non-applicable processes are greyed out

Option 4 5. Enter by role



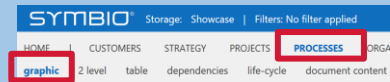
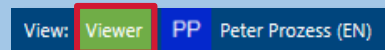


1. Log in



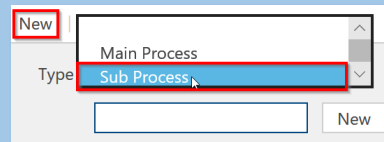
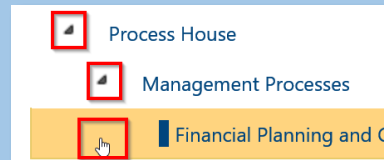
- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing



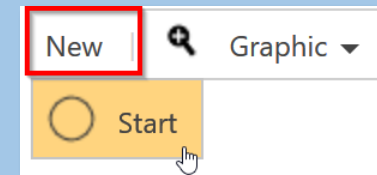
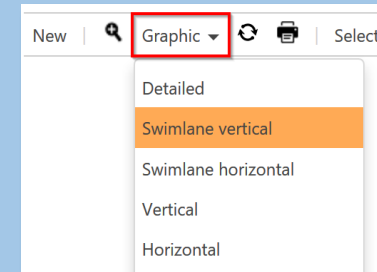
- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to PROCESSES to create a new process

3. Create process

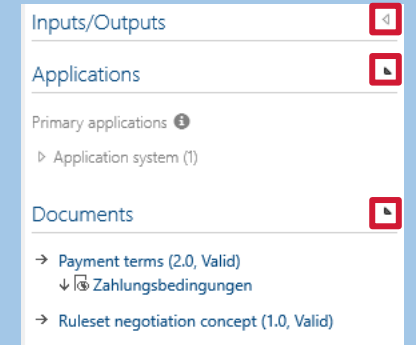
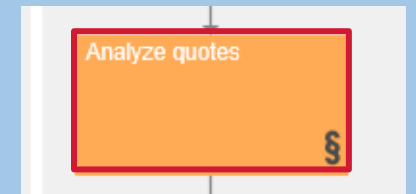


- Select Main Process in Navigation Tree
- Create Sub Process (BPMN2.0-Diagram)
- Start modelling in Main Content

4. Model process



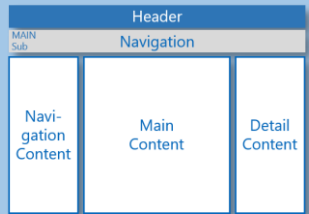
5. Store information



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

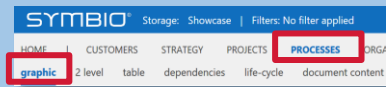


1. Log in

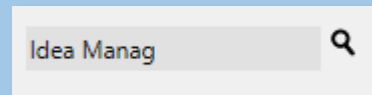


- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

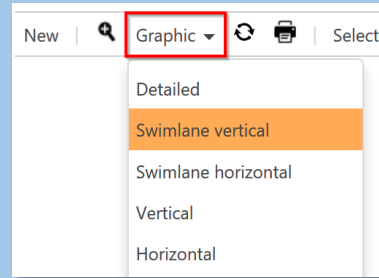
2. Navigate to process



OR

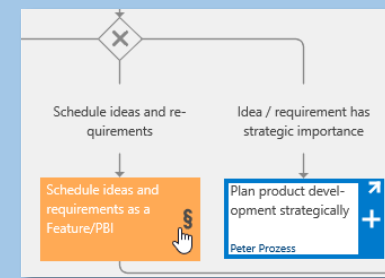


3. Select view



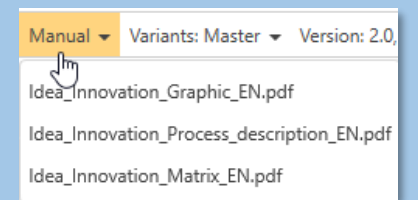
- Automated views can be selected
- Different views show the process on a various perspective

4. Get information

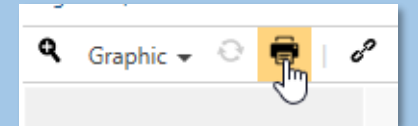


Name	
Schedule ideas and requirements as a Feature/PBI	
Type	Task
Key Performance Indicators	
→ Velocity(2.0)	
Roles	<
Applications	<

5. Work with the view



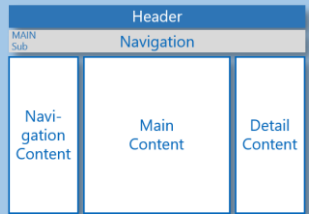
OR



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

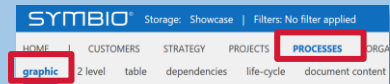
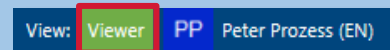


1. Log in



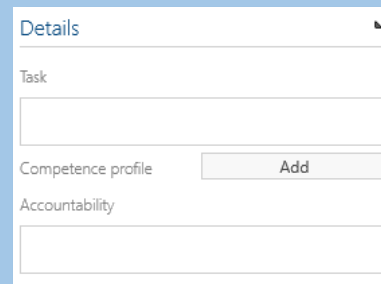
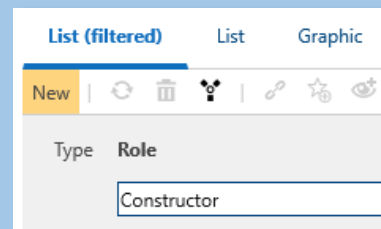
- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing



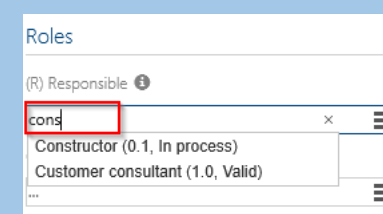
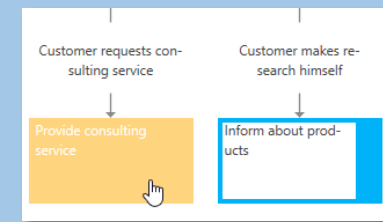
- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to PROCESSES to create a new process

3. Create roles



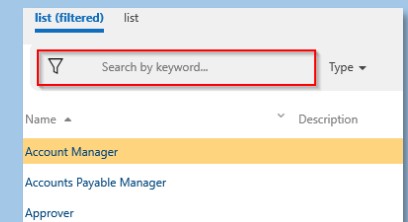
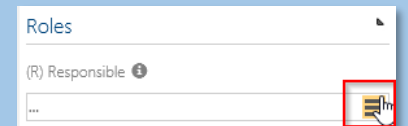
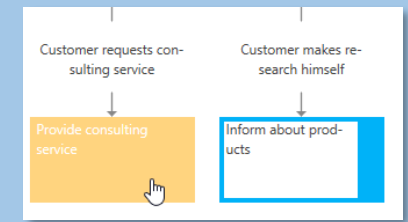
- Detailing Roles is done in the Detail Content

4. Apply known roles



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

5. Apply unknown roles





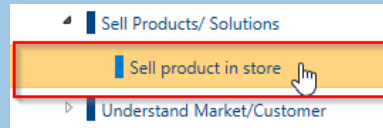
1. Log in



Model process

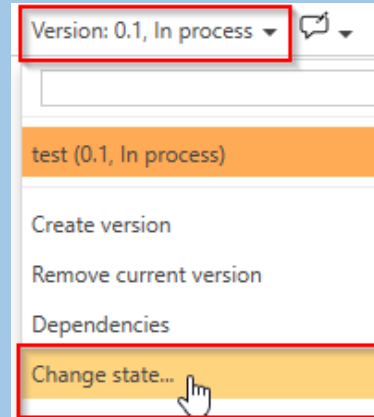
Store roles

2. Apply participants



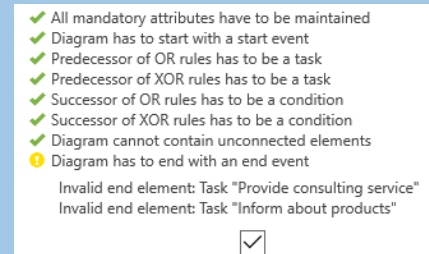
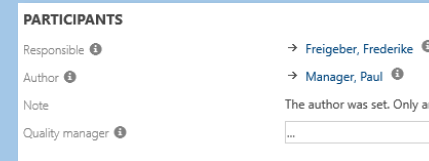
- By including a Quality Manager, the process will be first released by him
- Responsible is always the last one releasing the process

3. Initiate release cycle

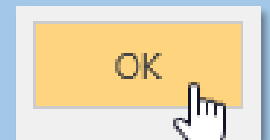
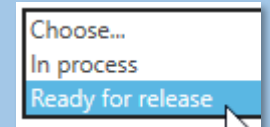


- Go to Version dropdown in Toolbar of Main Content
- Select 'Change state'

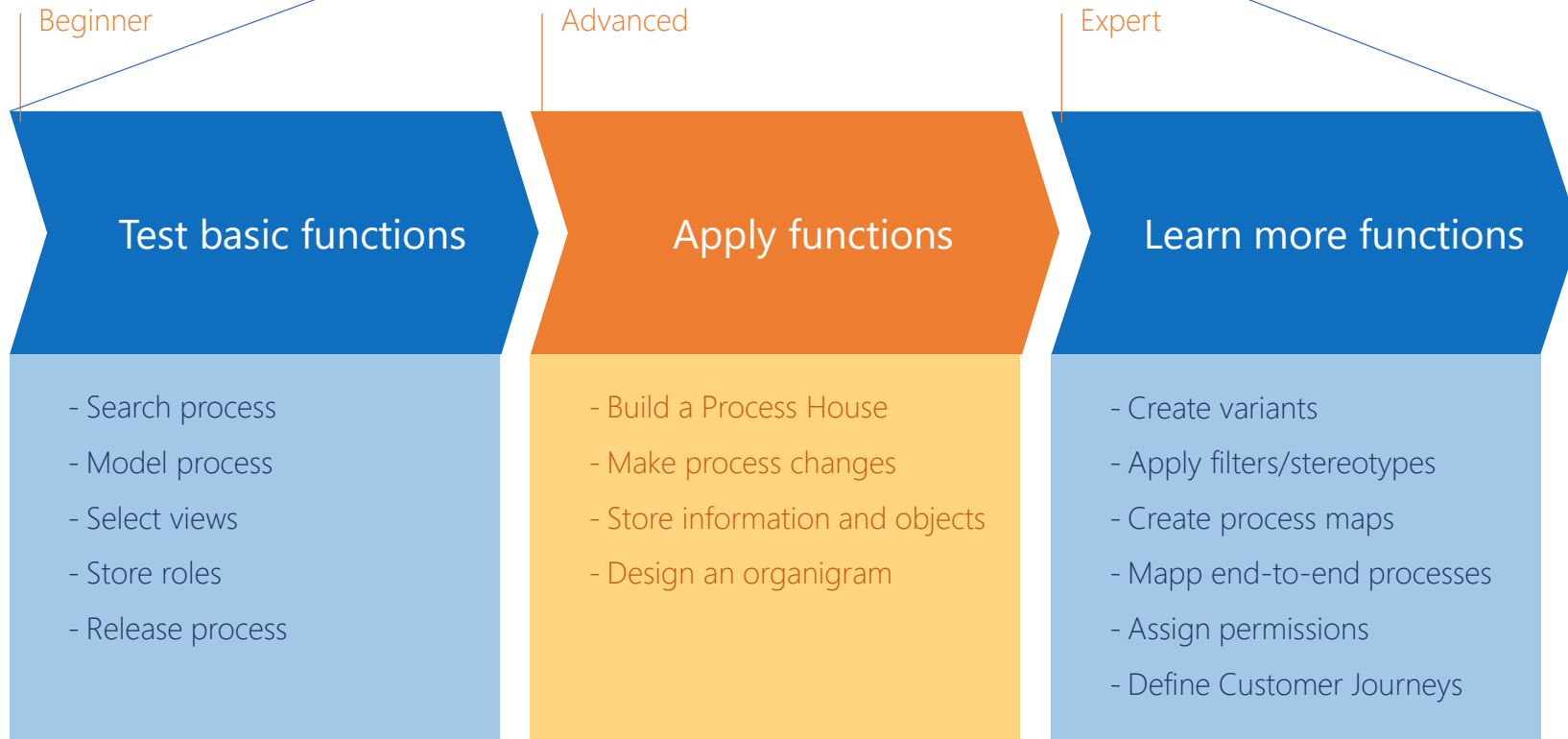
4. Check mandatory fields



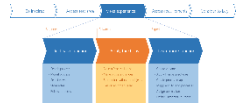
5. Send process to release



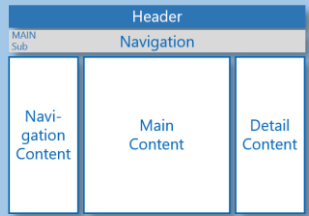
- In case a Quality Manager is set, the state first changes into "Ready for QA"



Build a Process House



1. Log in

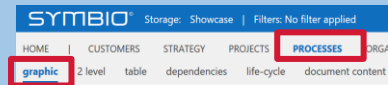


- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing

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

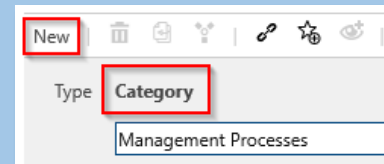
View: **Editor** PP Peter Prozes (EN)



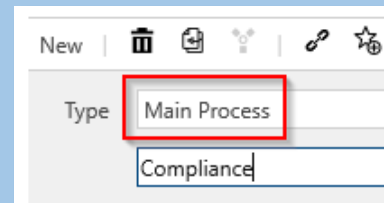
- In 'Viewer' mode, only released processes are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to PROCESSES to create a new process

3. Create first levels

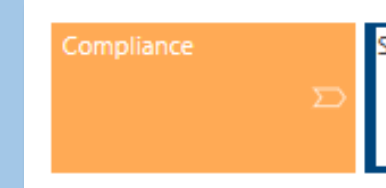
Process House



Process House
Management Processes



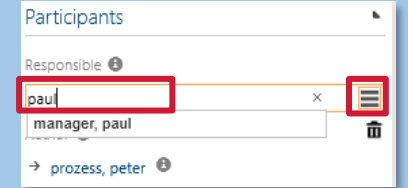
4. Store information



- Predecessor/successor process
- Accountable Organization
- Products
- Inputs/Outputs

Accountable Organization
Accountable Organization (Global)
HR

5. Release Process House



Release process

Step 3-5

Make process changes



Option

1. Log in

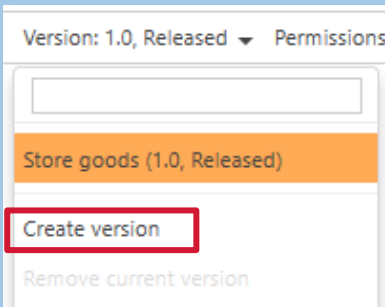
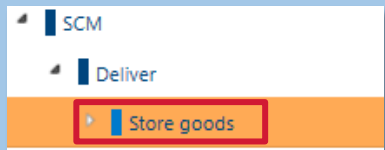


Model process



Store roles

2. Create new version



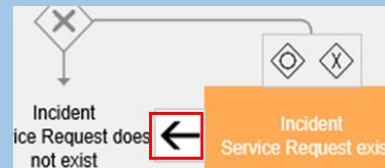
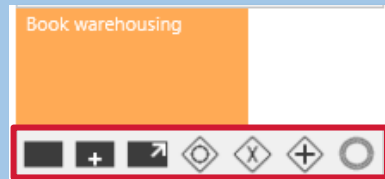
Version: 1.1, In process

3. Select multiple objects



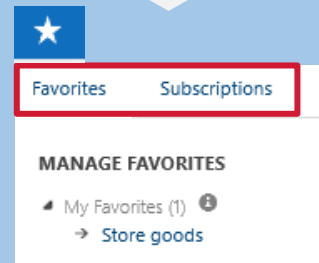
- Highlight process flow objects that should be modified

4. Modify process flow



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

5. Create favorite/link

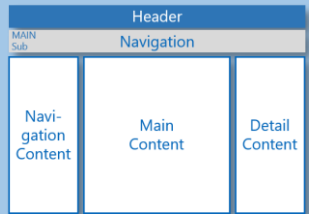


- Define a favorite or subscribe to process to be informed by mail in case of changes
- Create a link to share process with other users

Store information and objects

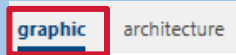
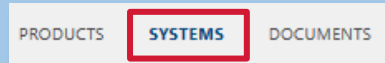
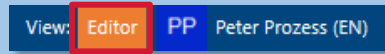


1. Log in



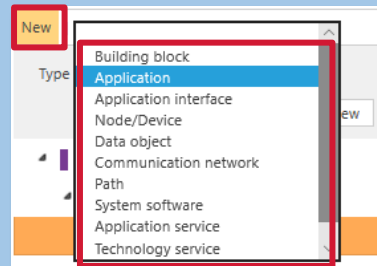
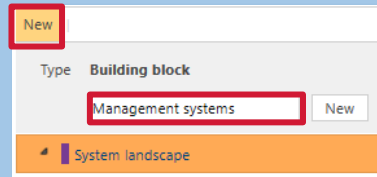
- Log in with access data received by mail
- Get familiar with Symbio work area
- See user information in Header

2. Start editing



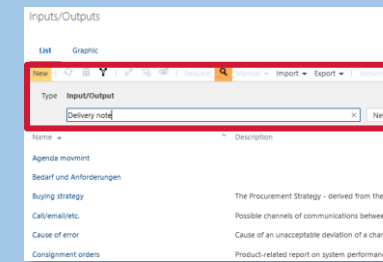
- In 'Viewer' mode, only released objects are shown
- Click on 'Viewer' to change to 'Editor' mode
- Navigate to SYSTEMS

3. Set up object architecture



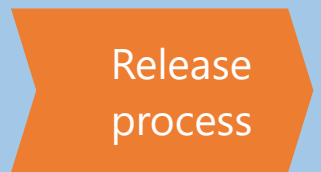
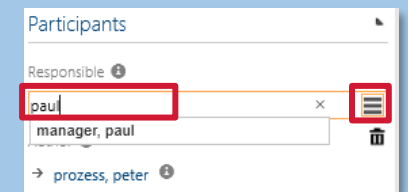
- Define further object architectures for DOCUMENTS, RISKS, REQUIREMENTS etc.

4. Define listed objects



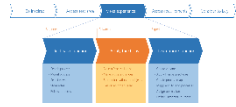
- Create further objects in a list like roles, locations etc.
- Consolidate objects if they are redundant

5. Release objects



Step 3-5

Design an organigram



1. Log in

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

2. Start editing

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

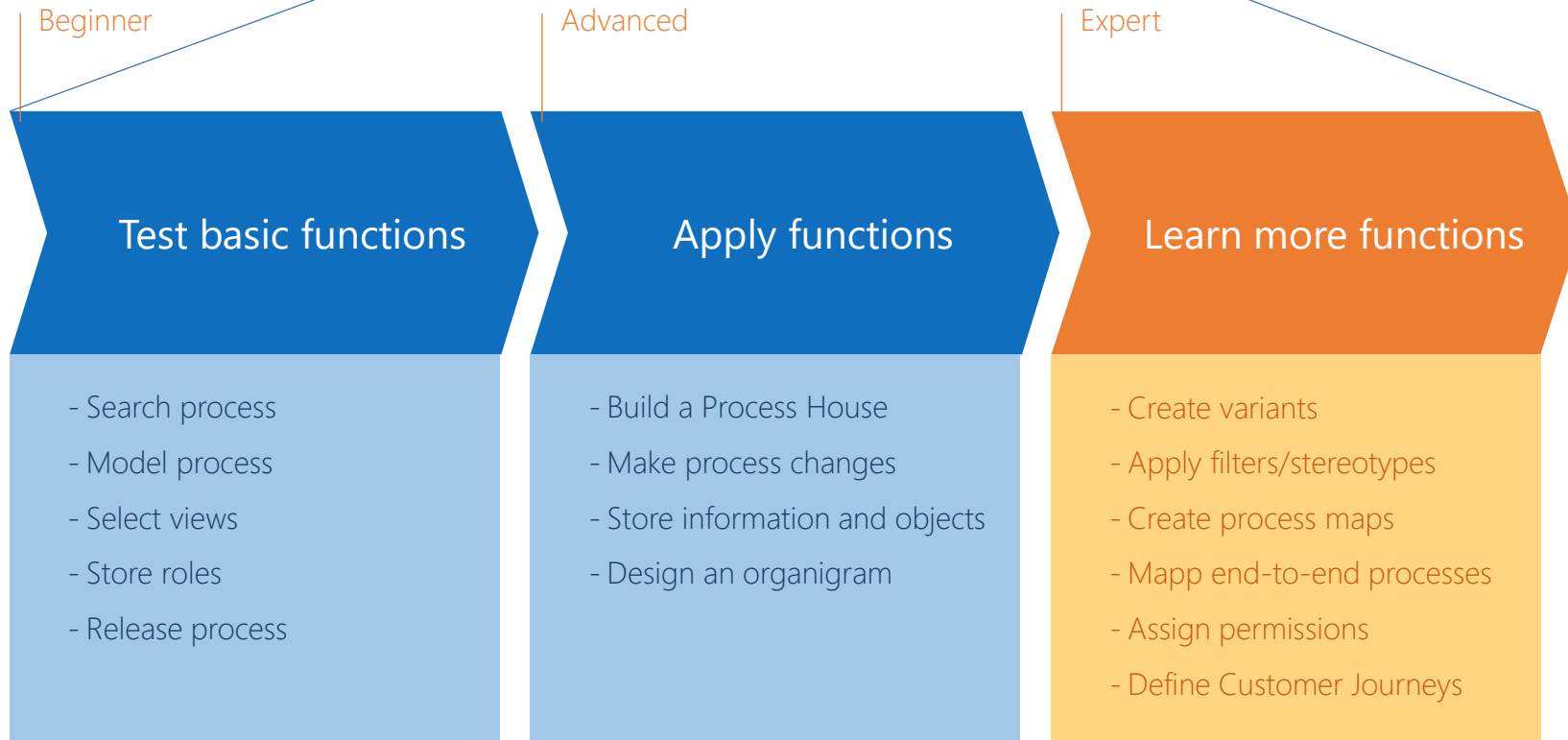
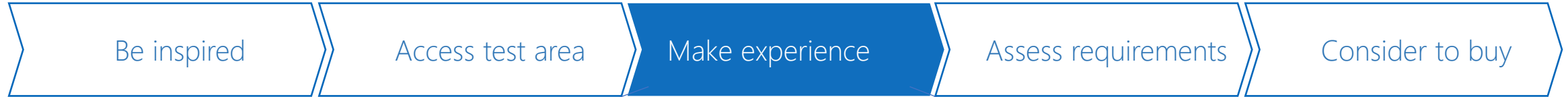
3. Set up org structure

4. Store information

5. Release an organigram

Release process

Step 3-5



Create variants

Prerequisite: Variant options are available (created by Admin)



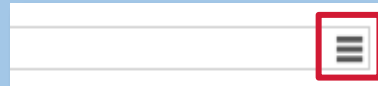
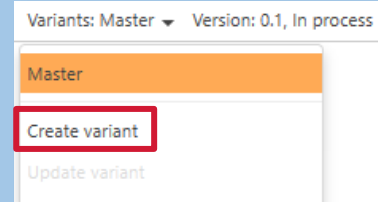
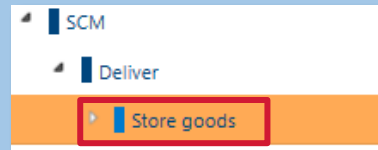
1. Log in



Model process

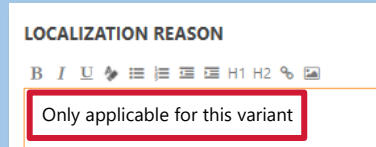
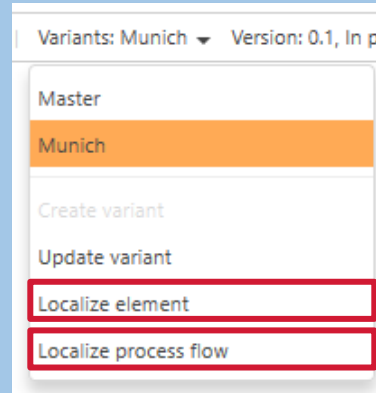
Store roles

2. Create variant



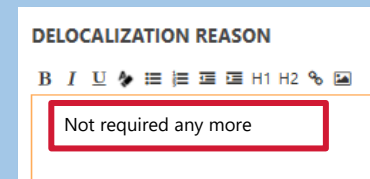
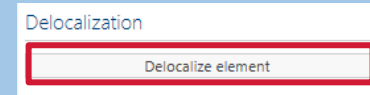
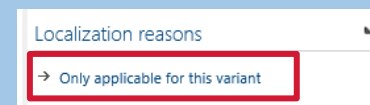
- Select variant via hamburger button
- Go back to Toolbar

3. Set up localizations



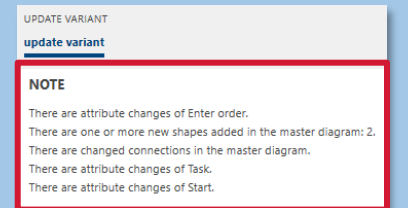
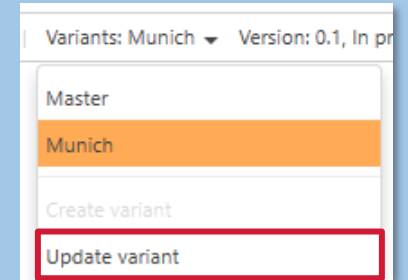
- Mark task to localize a single element OR
- Localize entire process flow

4. Delocalize



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

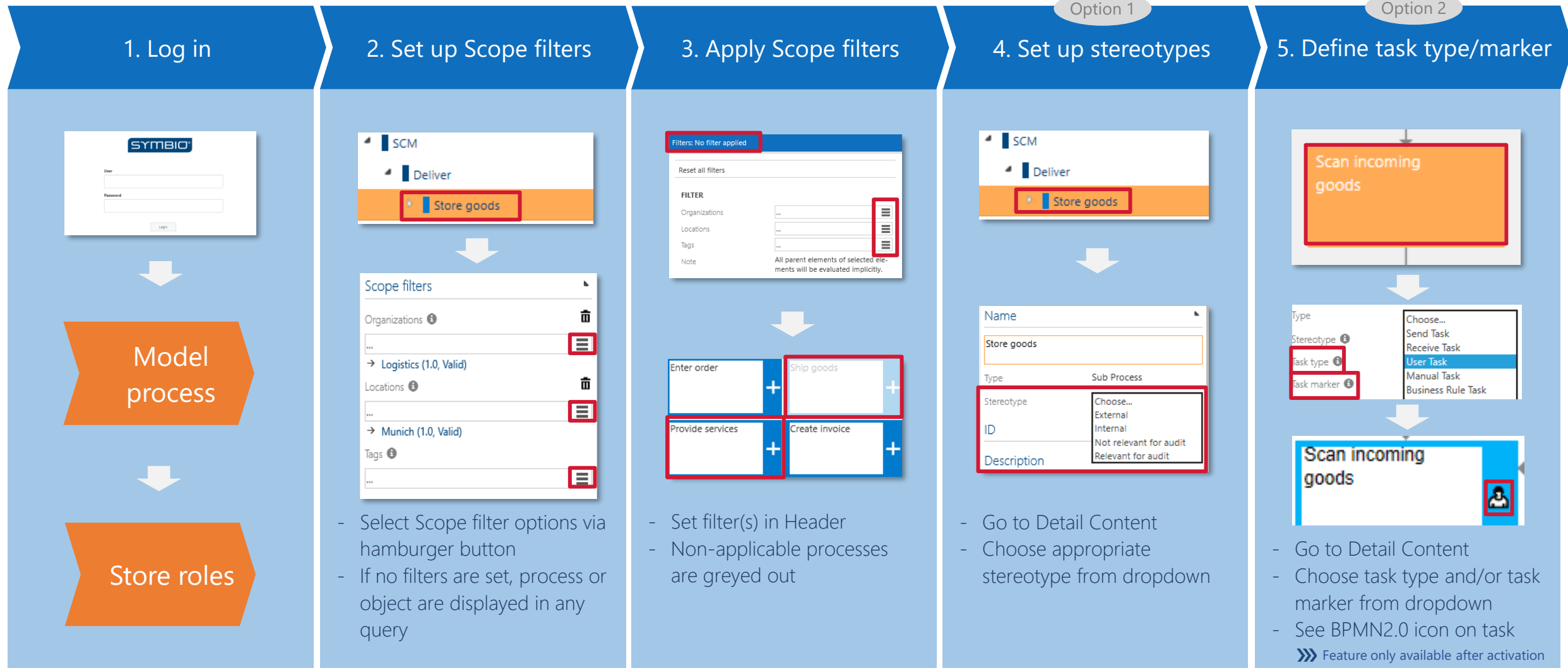
5. Update variant



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

Apply filters / stereotypes

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



Create process maps



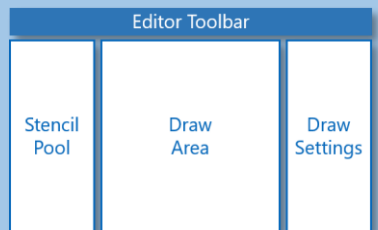
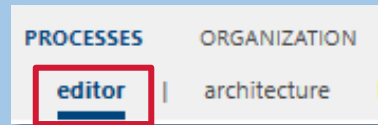
1. Log in



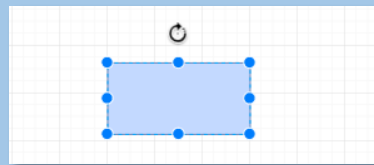
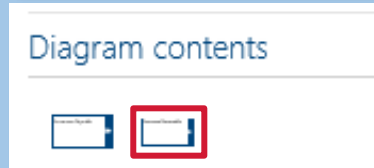
Build a
Process
House

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

2. Open editor

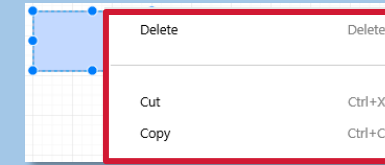
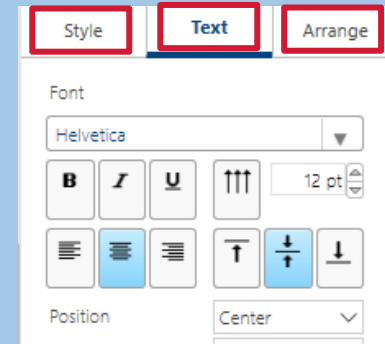


3. Select objects



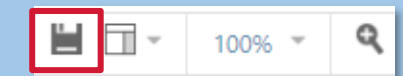
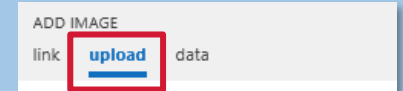
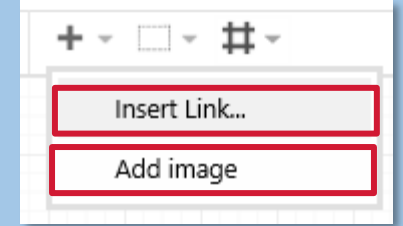
- Drag&drop from Stencil Pool to Draw Area

4. Edit objects



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

5. Insert link / add image

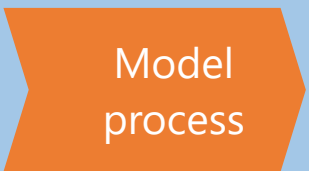


- Don't forget to save your changes!!!

Map end-to-end processes (scenarios)

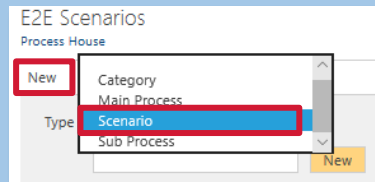
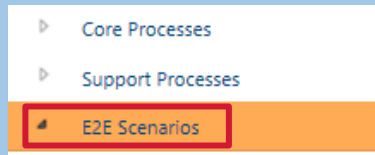
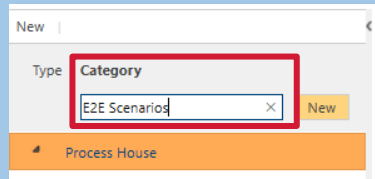


1. Log in

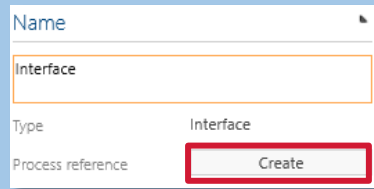
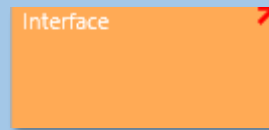
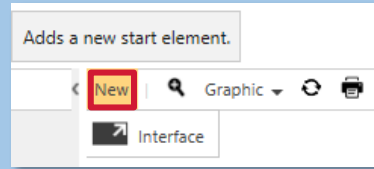


- Log in with access data received by mail
- Model Sub Processes
- Go to Navigation Content

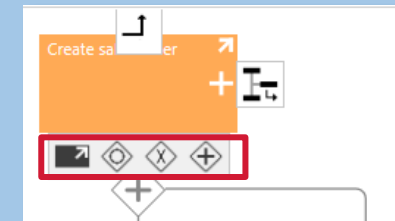
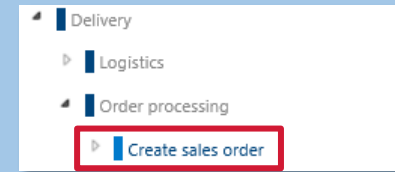
2. Create scenario



3. Insert interfaces

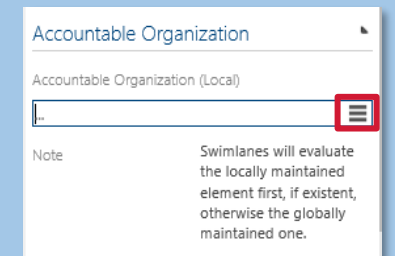
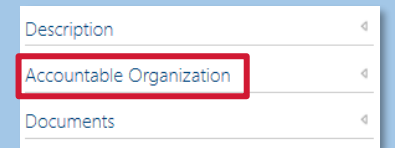
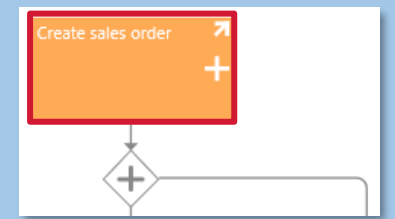


4. Develop E2E process



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

5. Apply roles



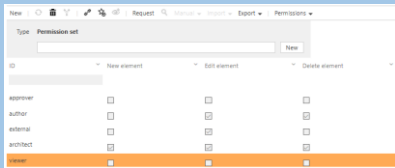
Assign permissions

Prerequisite: Permission sets are available (created by Admin)

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

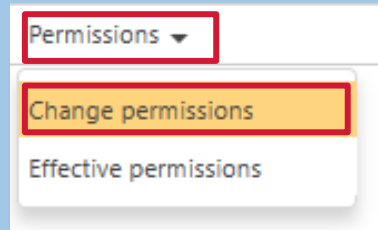
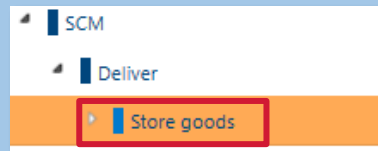


1. Log in



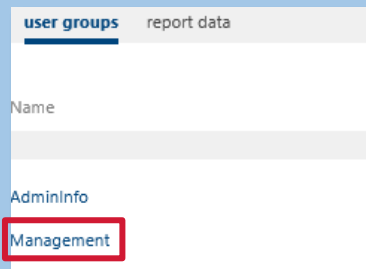
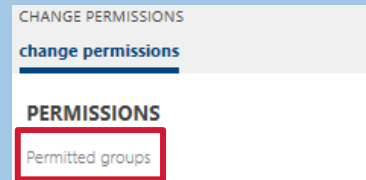
- Log in with access data received by mail
- Get familiar with existing permission sets
- Go to Navigation Content

2. Select process

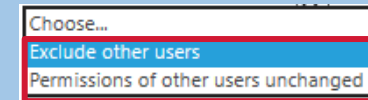


- Use 'Permissions' in Toolbar to assign a specific permission set to a selected process
- Also apply for categories or objects if required

3. Permit user groups

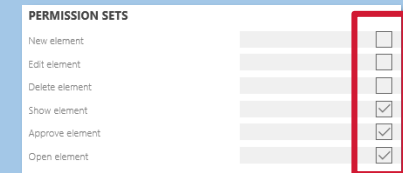
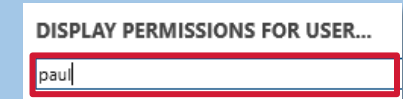
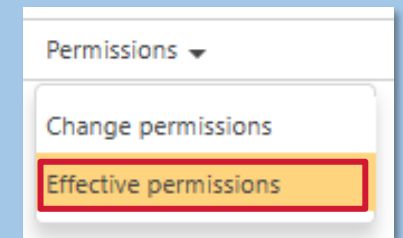


4. Select permission mode



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

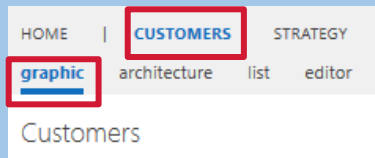
5. Verify permissions



- See existing permission rights for a specific user

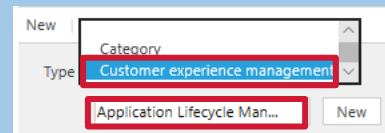
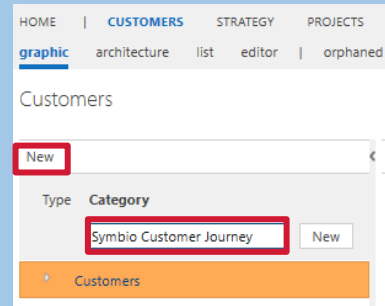


1. Log in



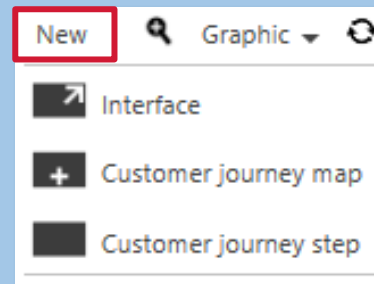
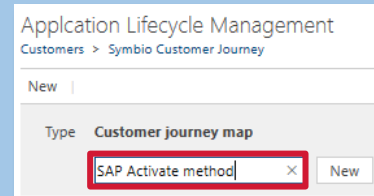
- Log in with access data received by mail
- Go to CUSTOMERS navigation

2. Set up CEM structure



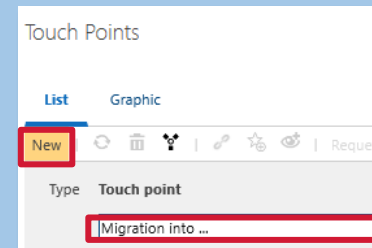
- Create a Customer experience management (CEM) consisting of Customer journey maps below

3. Work out CJM



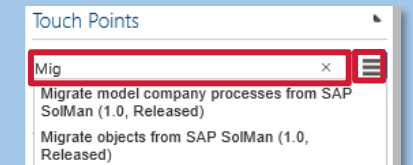
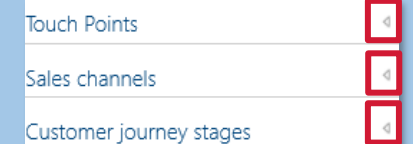
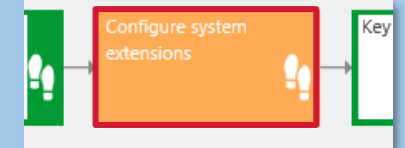
- Design a Customer journey map (CJM) with the help of dropdown objects

4. Add detailed information



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

5. Store information



Symbio Viewer

Login and Navigation

Different views

Search, Filter, Favorites

Feedback, Perma Link,
Global Filter and Manual



[click here to be linked to youtube.com](#)

Symbio Author

Create process

Define and detail process

Optimize process flow

Initiate release