



Symbio feature overview



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1. Introduction

This document is an overview of all functions and related services in Symbio.

Some functions represent an additional service with investment expenditure and are marked accordingly. Customer-specific adjustments are not included.

The underlying Symbio user role concept is hierarchically structured, i.e. the higher role level contains all functions of the role below as well as additional functions.

Symbio is offered as a rental license model (SaaS). Depending on the type of SaaS, different functions are available. The corresponding investments are listed in the separate offer.

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2. Symbio function list

2.1 Customer Journey

Manage Customer Experience

Define customer experience management models	Customer Experience Management is a marketing instrument that describes the cycles of a customer journey (from awareness of a product/service to purchase and long-term customer loyalty). In Symbio, the process world can be combined with a customer trip in a uniform management system.
Modeling Customer Journey Maps	The Customer Journey Map is built up by individual Customer Journey Steps and depicts the chronological sequence of steps as a customer/person moves step by step to their destination. The goals can be different and can be changed by strategic touch points or further information.
Generate Customer Journey Map	An aggregated graphical representation of all customer journey steps with additional information, such as linked processes, in the form of a configurable "profile" (matrix) is possible.
Define customer touch points	The customers' touch points with the company are defined. They form the interface between customer, brand, brand, the internal company process, and the persona (the potential customer).
Define Stakeholders	The list of all stakeholders who have direct or indirect contact with customers illustrates the complexity of service provision and helps to identify potential for improvement.
Determine and define personas	Personas reflect certain groups of persons/target groups with their respective typical characteristics. These include characteristic features such as purchasing behavior, interests, age, etc.
Survey and define voice of customer	The collection of customer requirements (voice of customer) is also important for the creation of a comprehensive customer journey map. Here the expectations, likes and dislikes of the customer are described.
Define distribution channels	All distribution channels are listed. They are closely related to the Touch Points.



2.2 Process Modeling

BPMN 2.0 Process Modeling

Modeling processes according to the modeling standard BPMN 2.0	Symbio supports the BPMN 2.0 modeling standard, enabling all business processes to be modeled, defined, and optimized transparently and in a uniform language.
Extend processes with data objects and attributes (eBPMN 2.0 extension)	With the eBPMN 2.0 extension, further objects/object connections as well as standard attributes can be displayed. This offers the user different possibilities for process detailing, publishing, and evaluation.
Semantically guided modeling	The user is guided through the modeling process according to the BPMN 2.0 semantics. Only standard-compliant predecessor and successor objects are displayed for selection. The initial training effort is therefore to be classified as low.
Modeling process interfaces	A process interface refers to a predecessor or successor process. They are usually used to connect processes at the same level.
Modeling standardized process steps (Best Practice Tasks)	Repetitive, standardized process steps can be managed centrally in the repository and used in processes as often as required.
Initially record processes in tabular form (automatic generation of graphics)	Processes are recorded quickly and clearly in the table view and can be checked immediately in the graphical view.
Maintain and detail processes in tables (automatic graphics generation)	Processes are efficiently revised in the table view or further details are added.
Connect more objects with tasks (eBPMN)	Advanced BPMN 2.0 modeling, which includes the following objects: - Requirements- Standards- Standards- Risks- Controls- etc.
Maintain additional attributes	Further standard attributes can be maintained. See Standardized Meta-Model.
Differentiate roles according to the duty to cooperate (RASCI)	Roles are categorized in terms of their responsibilities according to the RASCI method. Alternatively, the RACI method (without "S") can be selected (optional).
Differentiate groups according to the duty to cooperate (RASCI)	Groups are categorized according to their responsibilities using the RASCI method. Alternatively, the RACI method (without "S") can be selected (optional).
Connect process interfaces in the start and end event	At the beginning and at the end of a process flow, reference can be made to predecessor or successor processes (usually at the same level).
Link predecessor and successor processes	Processes can be assigned to predecessor and successor processes to clarify their position in the overall process landscape.
Show BPMN Icons on process flow objects	Symbol icons of the BPMN 2.0 modeling standard are additionally displayed graphically on the process flow objects (optional).



Advanced Process Modeling

Model and orchestrate end-to-end processes (E2E) and business transactions (scenarios)	End-to-end processes and comprehensive business transactions can be represented by logically sequential processes that are necessary to fulfill a specific customer need.
Automatically update process layout during process modeling (Auto-Layout function)	The Auto-Layout function automatically updates the individual process flow objects and arranges them accordingly.
Generate different process layouts automatically	<p>Possible process layouts are:</p> <ul style="list-style-type: none"> - horizontal and vertical swimlane- horizontal and vertical lean process graphics (Lean) - detailed process representation (eBPMN) with all object connections- horizontal and vertical swimlanes for IT systems (Application Swimlane) - compressed process representation with all objects in matrix form (Process Matrix) - individually configurable profiles
Free graphical design of processes and process maps (HTML editor)	Symbols, text fields, shapes, or process flow objects can be modeled graphically free and linked to the process house. It is also possible to add images.
Upload and graphically visualize process workshop images	Process workshop images (movmint symbol slides) can be uploaded, edited, and saved as graphics.
Locking and unlocking process processing	Exclusive editing of processes prevents simultaneous editing by several people and thus avoids possible data inconsistencies (optional).

Language Management

Translate diagram and object details	A dialog window allows easy and fast text input of process and object details in different languages.
Automated translation of diagram and object details (Online Translation Service)	The translation of process and object details at the push of a button is possible with the help of an integrated translation service.
Automatic translation function with DeepL or Microsoft Translator	Automatic translation is guaranteed by the integration of DeepL or Microsoft Translator. Further translation services can be connected.

Process maturity level

Determine degree of process maturity	Process maturity can develop in different stages (percentage from 'defined' to 'continuously optimized'). Thus, the maturity level of a process organization can be determined. This value is displayed both as an attribute and as a graphical dashboard.
Aggregate process maturity level	The stored process maturity levels are aggregated and displayed on the upper level (structural process level).

Process Validation

Validate process semantics (check modeling errors)	Before release, the application of BPMN 2.0 semantics is checked and modeling errors are pointed out. If essential information is missing, the release workflow cannot be started. Warnings can be ignored.
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Evaluation of object links

Display connected objects in the process in a table	All objects connected to a process ('dependencies') are clearly displayed in a table. From this view, connected objects can be edited efficiently and quickly, they can also be sent directly to the release.
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Audit Trail

Display life cycle diagrams (audit trail) of all process versions	An audit trail is used for quality assurance and shows the entire history of status changes of processes. This is presented in an audit-compliant manner as a life cycle diagram.
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Versioning

Change attributes in released processes or objects	Certain attributes can be changed in released processes (only possible for selected user roles)
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Variant Management

Create possible variants in the administration area	The administrator specifies possible available variants, e.g. for countries, product groups or similar. (variant portfolio).
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Create variants	The editor selects a new variant from the variant portfolio. The original process becomes the master.
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Modeling variant processes	After the variant is selected from the variant portfolio, the specific process flow of the variant is modeled.
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Complete localization of variant processes	A variant process is completely localized (is a standalone variant independent of the master)
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Localize individual process flow objects of a variant process	Individual process flow objects can be localized, i.e. individual steps are variant-specific.
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Completely de-localize variant processes	The localization of variant processes is resolved.
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De-localize individual process flow objects of a variant process	The localization of individual process flow objects is resolved.
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Update variant processes	When the master process is changed, the non-localized (not changed) process flow objects are automatically updated by the master process.
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2.3 Publication

Graphical process version comparison

Compare released and edited process versions (Process Comparison Editor)	Process versions are displayed side by side and changes (deleted, added, modified) are graphically highlighted.
Attribute comparison	Attribute changes are displayed in a dialog. Both the old and the new value of a changed attribute is displayed.

Configurable home pages

Show individual entry pages (home pages)	Clearly arranged entry pages facilitate quick navigation to specific processes or objects. The content can vary depending on the user role (e.g. viewer editor).
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Configurable profiles

Display profiles for all diagram and object contents	The profile shows aggregated information about processes or objects and can be selected as a graphical view. Prerequisite is the previous configuration by the administrator.
Generate various graphical diagram representations	Different process layouts (such as Swimlane horizontal/vertical, detailed and Application Swimlane) can be selected and displayed by dropdown.

Organize process architecture

Display hierarchies in a navigation tree	Hierarchically arranged processes or objects are displayed as a navigation tree through which you can navigate.
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Graphic visualization

Display several process levels in one surface side by side (2-levels)	The 2-level view is particularly suitable for processes containing sub-processes, in order to display process and sub-process side by side in a clear and concise manner.
Process maps, graphical visualization	Process maps for overview and direct navigation to the respective areas can be graphically modeled.

browser print

Print diagrams directly via browser print	The quick print function allows process graphics to be printed out quickly, except for profiles.
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Personal setting

Make personal user settings: Languages	The primary and secondary languages can be selected individually, e.g. English as primary language and the respective national language as secondary language.
Make personal user settings: List sizes	The columns of the list view can be customized.
Make personal user settings: Selected role	Processes or objects can be displayed categorized according to their assigned roles. Every Symbio user can set this individually.



2.4 Organization Modeling

Organization Management

Define organizational models/diagrams	Organization charts are modeled hierarchically.
Automatically generate organizational models/charts graphically	Organization charts are automatically displayed as graphics.
Add and define positions in the organization model	Positions can be defined and detailed within the organization.
Detail organizations with attributes and related objects	Organizations are further specified by additional linked information.
Define groups with positions and further details	Groups (e.g. committees) and their AKVs can be created and assigned to corresponding organizations or positions.

Location Management

Define and detail locations (locations)	Company locations can be created and linked to processes or organizations. They are also used as filter criteria (Scope Filter).
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Skill Management

Define skills centrally	Required skills can be defined and detailed. This is relevant for the exact specification of positions or roles.
Maintain existing user skills	Defined skills can be assigned to roles and clustered by work experience (newcomer to master).
Maintain required skills in the position	Defined skills can be assigned to positions and clustered by work experience (newcomer to master). Job descriptions can be derived from this.

2.5 Modeling

Central property management

Reuse objects (roles, organizational units ...)	Objects stored in the repository are managed centrally and can be linked to processes or organizations as often as required.
Create suggestion list when entering glossary names (Auto-Complete function)	Available objects are quickly found by entering the first 2-3 letters and can be selected from a list.
Search for objects in lists and architectures via a dialog	Objects can be searched for keywords. The result list can be further filtered by specific fields or criteria.



Upload and link attachments

Add attachments as link	Attachments to further process information can be stored in the form of internal links (e.g. to documents on SharePoint) or external links (e.g. to websites).
Upload attachments (documents)	Attachments (further process information, such as documents) can be uploaded to Symbio.
Upload images and visualize them directly	Images can be uploaded in various formats (jpeg, png etc.) and displayed directly.
Intelligent linking of plants directly with connected systems (additional services)	Plants and connected systems can be linked (additional services).

HTML text fields

Formatting descriptions with HTML editor	In the description text field, format adjustments (e.g. font size, upload of images) can be made with the HTML editor.
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Global filtering

Define scope (scope filter) via organization, locations, and tags	With the Scope filter, processes and objects can be filtered according to their respective scope. Relevant here are organizations, locations, and freely definable tags. For efficient use of the scope filter, the filter criteria must be maintained throughout.
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Automatic saving

Save intermediate states of the modeling automatically (Auto-Save)	The current modeling status is automatically saved at regular intervals to avoid data loss and possible duplication of work.
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Copy and move content

Copy process flow objects within a diagram	One or more process flow objects are marked and copied within the diagram.
Copy process flow objects to another diagram	One or more process flow objects are marked and copied to another diagram.
Cut out process flow objects within a diagram (drag and drop)	One or more process flow objects are marked and moved within the diagram.
Cut process flow objects into another diagram (drag and drop)	One or more process flow objects are selected and moved to another diagram.



2.6 Authorizations

Authorization Management

Authorize editing of diagrams and objects by multiple authors	Multiple authors can be defined for processes and objects. If no author is defined, any Symbio user (provided he or she is basically authorized) can edit a process or an object.
Define authorization levels	The characteristics of all possible authorization levels are stored by the administrator.
Assign permissions to individual users or user groups	To authorize content editing for specific authors only, the authorization levels can be assigned to specific users or user groups.
Set permissions on diagrams or objects	Each process or object can be assigned appropriate authorization levels and specific users/user groups (optional)
Assign permissions for facets	Authorizations can also be assigned for complete facets (navigation areas, e.g. "risks").
Assign authorizations for architectures	It is possible to customize rights to build architectures . For example, an author can be authorized to create structural processes (which by default only the architect does).

2.7 Evaluations

Evaluation of object links

List connected diagrams and objects in an evaluation group as links	An aggregated representation of all linked processes and/or objects in the form of a configurable "profile" is possible. These can be called up directly via link.
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Audit Trail

Display version history of all versions of diagrams and objects	An audit trail is used for quality assurance and presents the entire history of version changes of processes in an audit-compliant manner.
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Generate printable manuals

Generate standard manuals as Word files	Standardized manuals can be generated automatically or manually as Word files.
Generate process graphics as Word file	The quick print function allows process graphics to be printed out quickly as a Word file.
Generate individual customer evaluations as Word files	Evaluations are individually configured and output as Word files.
Open generated PDF manuals	Manuals in PDF format are available and can be opened.
Automatically generate PDF manuals upon approval	Manuals in PDF format are automatically generated upon approval.



Personal settings

Role entry for all employees with connected home page	Roles can be selected individually, through which you can enter the process world.
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2.8 Architecture

Organize process architecture

Structure process models hierarchically	Process models (consisting of structure-giving processes and process flows) can be built up hierarchically in the form of a navigation tree. The process depth is freely selectable.
Move process models	Processes can be moved within their hierarchical structure. Subordinate elements are moved as well.
Generate graphical navigation structure automatically	The navigation tree is also displayed graphically as a "block layout", which can also be used to navigate to the levels below.
Sort processes in the architecture with sort number	The sequence of processes within their hierarchical structure can be sorted individually. By default, the processes are sorted alphabetically.

Versioning

Delete not released diagrams	Processes or objects that are in progress can be deleted.
Sort processes in the architecture with sort number	The sequence of processes within their hierarchical structure can be sorted individually. By default, the processes are sorted alphabetically.

Consolidation of objects and diagrams

Consolidate diagrams and objects	Redundant processes or objects can be consolidated. For this purpose, a master process/object is selected and the element to be consolidated is assigned. Only processes or objects that are not released can be consolidated
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2.9 Interfaces

Import and export process models

Export BPMN 2.0 diagram	Exports of processes or objects in BPMN format are possible and can be transferred to other systems.
Import BPMN 2.0 diagram	Imports of processes or objects in BPMN format from other systems are possible.
Export Symbio Diagram	Exports of processes or objects in Symbio data format are possible to transfer content from one database to another.
Import Symbio Diagram	Imports of processes or objects in Symbio data format are possible to transfer content from one database to another.



Import and export process models

Import XML	Import of processes or objects in XML format from other systems is possible.
Import ARIS	Processes and objects can be converted from ARIS to Symbio. The exact mapping must be specified individually in advance (additional service).

Import Word documents

Import Word document (prerequisite: configured import template)	Imports of processes or objects in Word format are possible. An import template must be configured for exact mapping (additional service).
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Visio Importer

Import Visio data	Processes and objects can be converted from Visio to Symbio. The exact mapping must be specified individually in advance (additional service).
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Mass data processing

Export Excel mass data processing (translation)	Exports for efficient translation of mass data in Excel format are possible (additional service).
Import Excel mass data processing (translation)	Imports for efficient translation of mass data in Excel format are possible (additional service).
Import Excel mass data processing (translation)	

Architecture Excel Importer

Import and update organizational hierarchy.	Initial organization import of provided third-party system data, such as SAP HCM. Additionally, a continuous update of the organization data is possible. The use of the importers requires individual service to enable the correct import as well as the correct update (additional service).
Import and update IT architecture	Initial import of the IT architecture from provided third system data. Additionally, a continuous update of the IT data is possible. The use of the importers requires individual service to enable the correct import as well as the correct update (additional service).
Import and update risk and control architecture	Initial import of the risk and control architecture from provided third-party system data. In addition, a continuous update of the risks and controls is possible. The use of the importers requires individual service to enable the correct import and update (additional service).
Requirements can be imported and updated	Initial import of requests from provided third system data. Additionally, a continuous update of the requirements is possible. The use of the importers requires individual service to enable the correct import and update (additional service).



REST API interface

Open REST API interface to Symbio See docs.symbioworld.com

2.10 Method Standard

Meta-Model (Company Map)

Use BPMN 2.0 standard	Process modelling is carried out according to the BPMN 2.0 modelling standard about the process flow and the available symbols.
Extended BPMN 2.0 standard modeling standard	Centrally managed objects (such as risks, standards, etc.) can be added to the processes.
ArchiMate 3.0 Standard	The ArchiMate 3.0 standard is an open and independent modeling language for enterprise architectures. Symbio offers the possibility to model IT architectures in this standard and thus makes a decisive contribution to the implementation of Enterprise Architecture Management (EAM)
Build IT landscape	The IT landscape can be depicted in the uniformly designed hierarchical Symbio structure.
Map and manage organizational structure including positions	The organizational structure can be mapped and edited in the uniformly designed hierarchical structure.
Implement Customer Experience Management (CEM)	For practical implementation of the CEM, Symbio offers the option of defining a customer journey: all points of contact between a customer and the company are graphically displayed with the aim of optimizing interactions and achieving long-term customer loyalty.
Customer Journey Mapping	The customer journey is displayed in the form of a customer journey map. The mapping method required for this is mapped in Symbio.
Create strategy and target diagrams (target trees, measures including status etc.)	Strategic strategy and target diagrams can be displayed hierarchically and linked to measures and (optionally) their status.
Define key figure trees and reports with report chapters	<p>With Symbio key figure system an even better control of the company becomes possible. The KPI system offers the possibility of mapping KPIs in driver trees (KPI architecture). With the combination of the strategy view and the KPI system, customers can establish a balance score card in Symbio and then communicate this continuously throughout the organization. By continuously measuring the key performance indicators, the achievement of objectives is checked, and the company can then react to changes at an early stage. Furthermore, the key figures can then be linked to processes, IT application systems and other views in Symbio. The connection between the goals (the strategy) because key performance indicators and the processes ensures the fastest possible implementation in the organization and for each employee.</p> <p>In addition to the key figure driver tree, reports with report chapters can be displayed. This enables companies to map the annual report chapter structure, for example, and link the necessary key figures in the various report chapters. This will enable companies to generate company reports from Symbio in the future as well. Symbio is thus increasingly digitizing corporate management.</p>



Meta-Model (Company Map)

Set up product portfolio	A clear presentation of a product portfolio as well as the linking of relevant attributes with the process landscape is possible.
Manage Skills	The positions stored in the organizational structure can be further specified by skills. Thus, the organizational structure can be optimally linked with the skills required for the job.
Manage Learnings and Trainings	The trainings and learning units relevant for the implementation of BPMN can be mapped and connected to the relevant processes.
Present risk/control management	Risks and controls of a process can be depicted in a hierarchical structure and assigned to processes.
Manage requirements	Requirements and solutions are definable and can be linked to stored solutions.
Deposit standards and standard chapters	The standards required for the process flow (e.g. ISO) and corresponding chapters of standards can be defined.

2.11 Objects

Central property management

Model and define objects	Objects can be created in a hierarchy and/or list structure. Processes to which they are linked are clearly listed.
Detail objects with HTML editor attributes	Objects can be graphically designed and further detailed.
Detailing objects with attributes	You can add further attributes to objects.
Connecting objects with other objects	Dependencies of glossary elements can be represented by specific mutual linking possibilities.
Release Object Versions	Objects can be released analogous to processes. If the author and the person responsible are the same person, release by this one person is possible.
Create object new version	New versions of (released) objects can be created to revise them.
Consolidate objects	Redundant objects can be consolidated with others if they have not already been linked to processes.
Filter objects	In the list view, objects can be filtered by name, and you can also search by name.
Structure objects hierarchically	The majority of objects can be displayed in a hierarchical structure. This can be deactivated individually (e.g. for systems).



Disable architecture in system facet	The hierarchical structure/architecture can be deactivated for the SYSTEMS facet. This serves to optimize performance.
Store documents and link them to processes	Documents or other attachments can be added to the objects, which can then be assigned to processes.
Evaluation groups Display connections to other objects/diagrams	For each object you can see in which processes they are used. The objects are grouped for a clearer presentation.

2.12 Comprehensive Services

Subscriber Service

Subscribe to content (subscription service)	Processes or objects can be subscribed to. This allows the Symbio user to easily track the version history of selected content.
Info-Mail for release changes	The user is notified by e-mail when a new version is released (day/week/month).
Subscribe to content with multiple selection	The multiple selection allows you to select and subscribe to several contents at once.
Select subscriptions for categories	Multiple selection allows you to select and subscribe to several document categories at once.
Combine subscriptions and favorites (button with fly-out)	Subscriptions and favorites are summarized in an overview for quick access.
Show list of all changes in chronological order	Subscription changes are listed chronologically.

Favorites management

Define favorites	Contents can be defined as favorites and called up specifically
Favorite Service: Manage/Group Favorites	Defined favorites can be grouped and managed for individual person groups/functions.
Favorite Service: Share Favorites	Favorites can be shared with other employees.

Link Service

Create permanent links from versions	Links to specific process or object versions can be generated and inserted into emails or documents for further use.
Create permanent links from version independent versions	Links to specific process or objects can be generated and inserted into emails or documents for further use. The latest version is automatically displayed.



Create permanent links from selection (in versions)

Links to selected process flow objects can be generated and inserted into emails or documents for further use. The latest version is automatically displayed.

2.13 Search and find

Global Search

Standard search: Search diagrams, objects, and information globally	The standard search is used to search processes, objects, and content for the beginnings of words entered. If several search terms are entered, they are linked with "AND".
Expert search: Search/filter in specific attributes.	With the expert search you can filter by the field in which the search terms should occur (e.g. in the description text field).
Expert search: Search with operators	The expert search allows the use of operators "AND"/"OR" to combine or mutually exclude search terms.
Expert search: Search with asterisks and quotation marks	In the expert search, you can also search for a partial term (using asterisks) or a compound term (using quotation marks).
Direct access to the selected search result via link in the details area	The selected search result (process or object) can be called up directly via link.

List filtering

Filter search results in the list view	The list of search results can be filtered according to additional, predefined criteria, such as type, version, author, etc.
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Global filtering

Apply scope (scope filter) to search results (can be activated/deactivated)	The list of search results can be further narrowed down by restricting the search to the scope (Scope Filter).
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2.14 Filtering

Global filtering

Adjust navigation tree on the left and graphical display according to the set scope filter	Filtered out processes or objects are graphically grayed out and no longer displayed in the navigation tree.
Apply Scope filter to processes and objects in list view (can be activated/deactivated)	Processes or objects can be displayed in the list view The list of search results can be further narrowed down by restricting the search to the scope (Scope filter).
Enable filtering for manuals	The extension of the standard filtering also for manuals is possible.

2.15 Versioning

Versioning



Create new diagram or object versions	When new processes or objects are created, new versions are automatically created. Several versions can be created and edited in parallel for processes.
Delete diagrams and objects that are being edited	Processes or objects that are in progress can be deleted.
Create a new version of released processes and objects	To revise released processes or objects, new versions must be created each time.
Automatic versioning of processes and objects	The version numbers for processes and objects are assigned automatically (integer for 'Released/Valid' (e.g. 1.0), decimal for 'In progress' (e.g. 1.1)). A manual adjustment is not possible.

Release Workflow

Sharing: add more approver/approver groups (optional)	By default, the person responsible and, if applicable, the quality manager is stored as approvers. Additional approver/approver groups can also be configured (optional).
Release: Validate methodical rules in the process	Before release, the application of BPMN 2.0 semantics is checked and modeling errors are pointed out. If essential information is missing, the release workflow cannot be started.
Release: Send diagrams and objects to the release	After changing the status of a diagram or object the release workflow is started automatically. The default sequence is: Author - (QM) - Person responsible.
Release: Ignore validation rule warnings to start the release (enable/disable)	Before release, the application of BPMN 2.0 semantics is checked and modeling errors are pointed out. If these are "warnings", the release workflow can still be started.
Release: Define diagram and object validity start "Valid from"	The validity start for processes and objects can be freely defined. If no date is defined, the validity start is set to +14 days by default (configurable). There is no automatism when the validity end occurs.
Release: Enter reason for revision (must have attributes)	Before a process can be sent to the approval workflow, the reason for the revision must be entered in a text field. For objects, the input of the reason is optional.
Release: Automatically forward requests for release to approvers	After a status change, the diagram/object to be checked is forwarded to the first approving instance (e.g. quality manager). In case of approval, the request is forwarded to the second instance for release, in case of rejection the release workflow is interrupted. In all cases, the author is informed.
Approval: Inform approvers by e-mail about pending requests for approvals (optional)	It is also possible to automatically notify approvers by e-mail when a request for approval is submitted.
Sharing: Automatically create and view requests (tasks) for approvers	Once the approval workflow is started, a request to the approver is automatically generated and displayed in his workspace.
Release: Manage requests (tasks)	Outstanding or completed requests are displayed in an overview for further administration.
Release: Call process/object directly	The process or object to be released can be accessed directly from the request via a link.
Release: Approve or reject release of processes and objects	The release of processes or objects can be approved or rejected at the push of a button. In case of rejection, a reason must be entered in the text field.
Set processes and objects to 'Expired'	A process or object can receive an "expired" status. The procedure is similar to the release workflow. Expired processes or objects can be reactivated.



2.16 Collaboration

Review Workflow

Review: Define Reviewer	So-called "reviewers" can be stored to check the process before starting the release workflow. This can be any Symbio user.
Review: Automatically forward request to reviewer	After a status change, the process/object to be checked is automatically forwarded to the reviewer.
Review: Notify Reviewer	The reviewer receives a message in his workspace. A feedback to the author can be given via the request function.

Request Workflow

Request: Send request for processes or objects	Every Symbio user can submit a request, i.e. give feedback on a process or object.
Request: Automatically forward the request to the responsible person	The request for a process/object is automatically forwarded to the responsible person (or quality manager, if stored).
Request: Display/change the processing status of the request	The initial status can be changed by the responsible person in the corresponding request area.
Request: Call process/object directly	The process or object to be released can be accessed directly from the request via a link.
Request: Accept or reject request	The responsible person has the possibility to accept or reject the request.

2.17 Document Management

Digital documents

Create document templates for processes and documents	Individual document templates can be created for processes and documents.
Edit document templates for processes and documents	Content is extended as free text and formatted in the HTML editor.
Release document templates for processes and documents	Document templates for processes and documents must be approved.
Create document templates for remaining facets	For other facets (navigation areas, e.g. "risks") individual document templates can be created
Edit document templates for other facets	Content is extended as free text and formatted in the HTML editor.
Release document templates for other facets	Document templates for other facets (navigation areas, e.g. "Risks") must be released.



2.18 Administration

Generate printable manuals

Manage manual templates centrally	Templates for creating manuals are centrally managed in the administration area.
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Meta-Model (Company Map)

Configure method	The method is configurable.
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Hide, rename, or add attributes/objects (Advanced Configuration)	In the administration area attributes/objects can be hidden, renamed, or added. Changeable attributes/objects are predefined.
---	---

User Management

Manage users and user groups	Users and user groups are created or deactivated in the administration area (deletion is not possible). They are also assigned user roles and permissions there.
-------------------------------------	--

Authentication

Authentication provider: Use OAuth	The authentication provider can be configured in the administration area.
---	---

Authorization Management

Define permissions for facets	It is possible to set permissions so that only certain user groups can add or edit a facet.
--------------------------------------	---

Variant Management

Define variant types	A variant portfolio (all possible variant types) is created in the administration area.
-----------------------------	---

Tag Management

Define Tags	Tags are grouping criteria that can be defined individually (e.g. product groups). They are also relevant as criteria for the scope filter.
--------------------	---

Language Management

Configure languages (default: DE/EN)	The languages German and English are available by default. Other European and Asian languages can be configured (optional).
---	---



Configure default or optional language	The default language setting (Default) and other optional languages can be configured.
---	--

Making languages available for reporting	Reports can be offered in different languages.
---	--

Create and upload new user interface language	It is possible to create and upload new (user interface) languages.
--	---

Workflows Configuration

Configure notifications by e-mail or tasks	Notifications via e-mail about pending requests (e.g. about a pending approval) are configurable. The areas of application for e-mail notifications are predefined.
---	--

Adjust release cycle	The approval workflow can be customized by integrating additional approver/authorizer groups or by changing the time span until the validity start.
-----------------------------	---

Feature Management

Enable and disable features	Certain functionalities/features can be activated or deactivated individually.
------------------------------------	--

CI Management

Customize CI	The workspace in Symbio can be adapted according to the customer-specific CI.
---------------------	---

Configurable profiles

Configure profiles	Profiles are individually configured by the administrator using widgets. They show aggregated information about processes or objects.
---------------------------	---

Create and customize stereotypes (subtypes) for diagrams/objects	Stereotypes (subtypes) can be created to further categorize processes or objects. They are available to the author during modeling.
---	---

Generate printable manuals

Configure Manuals	Manuals (process manuals, organization manual, professional and technical specifications, etc.) can be programmed in Word and static information such as headings, images, formatting, etc. can be customized using the normal Word application. Within Symbio the different manual templates can be uploaded and activated/deactivated in the administration area.
--------------------------	---



Process Validation

Define validation rules	Standard validation rules can be defined (within a given framework).
--------------------------------	--

Automation

Configure Service and Web Hooks	A Webhook enables an application to provide another application with real-time information, i. e. it receives the data immediately - in contrast to typical APIs where the data would have to be queried very often. This makes Webhooks much more efficient for both providers and consumers.
--	--

3. Symbio Add-Ons

The Symbio Add-Ons are optional functionalities which can be made available to the customer on demand. The Add-Ons require additional licensing.

3.1 business intelligence

reporting services

Evaluate Symbio data with Symbio standard reports	Various standard reports are available and can be operated within the reporting environment. The operation of the standard reports is covered by the rent.
Set up customer-specific reporting (optional)	Customer-specific reports can be ordered additionally (optional). These reports can then be added to the process landscape. The operation and further development is to be covered by a separate service budget from the customer.
Integration of the reports into the Symbio user interface	The reports are integrated into the Reports section in Symbio. Only the analyst can access here. This also ensures that only analysts can access them.

Reporting PowerBI (currently in development - expected to be available from 2021)

Evaluate Symbio data with Symbio standard reports	Various standard reports are available and can be operated within the reporting environment. The operation of the standard reports is covered by the rent.
Set up customer-specific reporting (optional)	Customer-specific reports can be ordered additionally (optional). These reports can then be added to the process landscape. The operation and further development are to be covered by a separate service budget from the customer.
Integration of the reports into the Symbio user interface	The reports are integrated into the Reports section in Symbio. Only the analyst can access here. This also ensures that only analysts can access them.



3.2 Interfaces

Interfaces to 3rd party tools

SAP Solution Manager Connector	The Symbio SAP Solution Manager interface offers SAP customers the possibility to synchronize their data with the BPM from SAP Solution Manager. The synchronization is usually done via the design branch. In Symbio the identical methods as in Solution Manager are used to ensure continuous synchronization with necessary SAP libraries (Process Step Library, Executable Library, etc.).
Process Mining Connector	The Symbio Process Mining Connector offers the possibility to automatically transfer the analyzed processes to the Symbio process map. Each analysis is then automatically linked to the defined actual/target process. Within the Process Mining Tool all connected sub-processes from Symbio are then displayed in order to carry out further analyses.
JIRA Connector	With the Symbio JIRA interface, requirements management in Symbio can be combined with task management in JIRA. The customer can initially define requirements in different views (processes, risks, etc.) and then synchronize them with JIRA. JIRA then controls the implementation of the different transferred user stories. The initially recorded user stories are transferred by JIRA and updated in Symbio.
DeepL Translation Service	The Professional DeepL Translation Service can be easily connected to Symbio. This means that all text in several languages is translated simultaneously. Due to the high translation quality, manual reworking in English, for example, is hardly necessary. The translations with the Professional DeepL Service are not stored and the data does not leave Germany. Alternatively, the Microsoft Translator can be used.



4. Function evaluations/matrices

4.1 User Roles Overview

Features	Viewer	Author	Architect	Approver	Analyst	Administrator
Define customer experience management models		X	X			X
Modeling Customer Journey Maps		X	X			X
Generate Customer Journey Map	X	X	X	X	X	X
Define customer touch points		X	X			X
Define Stakeholders		X	X			X
Determine and define personas		X	X			X
Survey and define voice of customer		X	X			X
Define distribution channels		X	X			X
Modeling processes according to the modeling standard BPMN 2.0		X	X			X
Extend processes with data objects and attributes (eBPMN 2.0 extension)		X	X			X
Semantically guided modeling		X	X			X
Modeling process interfaces		X	X			X
Modeling standardized process steps (Best Practice Tasks)		X	X			X
Model and orchestrate end-to-end processes (E2E) and business transactions (scenarios)		X	X			X
Automatically update process layout during process modeling (Auto-Layout function)	X	X	X	X	X	X
Generate different process layouts automatically	X	X	X	X	X	X
Free graphical design of processes and process maps (HTML editor)		X	X			X
Initially record processes in tabular form (automatic generation of graphics)		X	X			X
Maintain and detail processes in tables (automatic graphics generation)		X	X			X
Connect more objects with tasks (eBPMN)		X	X			X
Maintain additional attributes		X	X			X
Differentiate roles according to the duty to cooperate (RASCI)		X	X			X
Differentiate groups according to the duty to cooperate (RASCI)		X	X			X
Connect process interfaces in the start and end event		X	X			X
Link predecessor and successor processes		X	X			X
Upload and graphically visualize process workshop images		X	X			X
Determine degree of process maturity		X	X			X
Aggregate process maturity level		X	X			X
Validate process semantics (check modeling errors)		X	X			X
Show BPMN Icons on process flow objects						X
Locking and unlocking process processing		X	X			X
Display connected objects in the process in a table		X	X			X
Display life cycle diagrams (audit trail) of all process versions		X	X			X
Compare released and edited process versions (Process Comparison Editor)		X	X			X
Define organizational models/diagrams		X	X			X
Automatically generate organizational models/charts graphically		X	X			X
Add and define positions in the organization model		X	X			X
Detail organizations with attributes and related objects		X	X			X
Define groups with positions and further details		X	X			X
Define and detail locations (locations)		X	X			X
Define skills centrally		X	X			X



Features	Viewer	Author	Architect	Approver	Analyst	Administrator
Maintain existing user skills		X	X			X
Maintain required skills in the position		X	X			X
Reuse objects (roles, organizational units ...)		X	X			X
Create suggestion list when entering glossary names (Auto-Complete function)		X	X			X
Search for objects in lists and architectures via a dialog		X	X			X
Add attachments as link		X	X			X
Upload attachments (documents)		X	X			X
Upload images and visualize them directly		X	X			X
Intelligent linking of plants directly with connected systems (additional services)		X	X			X
Formatting descriptions with HTML editor		X	X			X
Define scope (scope filter) via organization, locations, and tags		X	X			X
Save intermediate states of the modeling automatically (Auto-Save)		X	X			X
Copy process flow objects within a diagram		X	X			X
Copy process flow objects to other diagrams		X	X			X
Cut out process flow objects within a diagram (Drag and Drop)		X	X			X
Cut process flow objects into another diagram (drag and drop)		X	X			X
Authorize editing of diagrams and objects by multiple authors			X			X
Translate diagram and object details		X	X			X
Automated translation of diagram and object details (Online Translation Service)		X	X			X
List connected diagrams and objects in an evaluation group as links		X				X
Display version history of all versions of diagrams and objects		X				X
Generate standard manuals as Word files		X				X
Generate process graphics as Word file		X				X
Generate individual customer evaluations as Word files		X				X
Structure process models hierarchically			X			X
Move process models			X			X
Create new versions for released diagrams			X			X
Consolidate diagrams			X			X
Delete not released diagrams			X			X
Generate graphical navigation structure automatically	X	X	X	X	X	X
Sort processes in the architecture with sort number			X			X
Export BPMN 2.0 diagram						X
Import BPMN 2.0 diagram						X
Export Symbio Diagram						X
Import Symbio Diagram						X
Import Word document (prerequisite: configured import template)						X
Import XML						X
Import ARIS						X
Import Visio data						X
Export Excel mass data processing (translation)						X
Import Excel mass data processing (translation)						X
Import and update organizational hierarchy.						X
Import and update IT architecture						X
Import and update risk and control architecture						X
Requirements can be imported and updated						X
Use BPMN 2.0 standard	X	X	X	X	X	X
Extended BPMN 2.0 standard modeling standard	X	X	X	X	X	X

Features	Viewer	Author	Architect	Approver	Analyst	Administrator
ArchiMate 3.0 Standard	X	X	X	X	X	X
Build IT landscape	X	X	X	X	X	X
Map and manage organizational structure including positions	X	X	X	X	X	X
Implement Customer Experience Management (CEM)	X	X	X	X	X	X
Customer Journey Mapping	X	X	X	X	X	X
Create strategy and target diagrams (target trees, measures including status etc.)	X	X	X	X	X	X
Define key figure trees and reports with report chapters	X	X	X	X	X	X
Create project portfolio	X	X	X	X	X	X
Manage Skills	X	X	X	X	X	X
Set up product portfolio	X	X	X	X	X	X
Manage Learnings and Trainings	X	X	X	X	X	X
Present risk/control management	X	X	X	X	X	X
Manage requirements	X	X	X	X	X	X
Deposit standards and standard chapters	X	X	X	X	X	X
Model and define objects		X	X			X
Detail objects with HTML editor attributes		X	X			X
Detailing objects with attributes		X	X			X
Connecting objects with other objects		X	X			X
Release Object Versions		X	X			X
Create object new version		X	X			X
Consolidate objects		X	X			X
Filter objects		X	X			X
Structure objects hierarchically		X	X			X
Disable architecture in system facet		X	X			X
Store documents and link them to processes		X	X			X
Evaluation groups Display connections to other objects/diagrams	X	X	X	X	X	X
Show individual entry pages (home pages)	X	X	X	X	X	X
Display profiles for all diagram and object contents	X	X	X	X	X	X
Generate various graphical diagram representations	X	X	X	X	X	X
Display hierarchies in a navigation tree	X	X	X	X	X	X
Display several process levels in one surface side by side (2-levels)	X	X	X	X	X	X
Process maps, graphical visualization	X	X	X	X	X	X
Print diagrams directly via browser print	X	X	X	X	X	X
Make personal user settings: Languages	X	X	X	X	X	X
Make personal user settings: List sizes	X	X	X	X	X	X
Make personal user settings: Selected roles	X	X	X	X	X	X
Automatic translation function with Deepl.com		X	X			X
Subscribe to content (subscription service)	X	X	X	X	X	X
Info-Mail for release changes	X	X	X	X	X	X
Subscribe to content with multiple selection	X	X	X	X	X	X
Select subscriptions for categories	X	X	X	X	X	X
Combine subscriptions and favorites (button with fly-out)	X	X	X	X	X	X
Show list of all changes in chronological order	X	X	X	X	X	X
Define favorites	X	X	X	X	X	X
Favorite Service: Manage/Group Favorites	X	X	X	X	X	X
Favorite Service: Share Favorites	X	X	X	X	X	X
Create permanent links from versions	X	X	X	X	X	X



Features	Viewer	Author	Architect	Approver	Analyst	Administrator
Create permanent links from version independent versions	X	X	X	X	X	X
Create permanent links from selection (in versions)	X	X	X	X	X	X
Change attributes in released processes or objects		X	X			X
Role entry for all employees with connected home page	X	X	X	X	X	X
Create possible variants in the administration area		X	X			X
Create variants		X	X			X
Modeling variant processes		X	X			X
Complete localization of variant processes		X	X			X
Localize individual process flow objects of a variant process		X	X			X
Completely de-localize variant processes		X	X			X
De-localize individual process flow objects of a variant process		X	X			X
Update variant processes						
Standard search: Search diagrams, objects, and information globally		X	X			X
Expert search: Search/filter in specific attributes.	X	X	X	X	X	X
Expert search: Search with operators	X	X	X	X	X	X
Expert search: Search with asterisks and quotation marks	X	X	X	X	X	X
Direct access to the selected search result via link in the details area	X	X	X	X	X	X
Filter search results in the list view	X	X	X	X	X	X
Apply scope (scope filter) to search results (can be activated/deactivated)	X	X	X	X	X	X
Adjust navigation tree on the left and graphical display according to the set scope filter	X	X	X	X	X	X
Apply Scope filter to processes and objects in list view (can be activated/deactivated)	X	X	X	X	X	X
Enable filtering for manuals	X	X	X	X	X	X
Create new diagram or object versions		X	X			X
Delete diagrams and objects that are being edited		X	X			X
Create a new version of released processes and objects		X	X			X
Automatic versioning of processes and objects		X	X			X
Sharing: add more approver/approver groups (optional)		X	X			X
Release: Validate methodical rules in the process		X	X			X
Release: Send diagrams and objects to the release		X	X			X
Release: Ignore validation rule warnings to start the release (enable/disable)		X	X	X		X
Release: Define diagram and object validity start "Valid from		X	X			X
Release: Enter reason for revision (must have attributes)		X	X			X
Release: Automatically forward requests for release to approvers		X	X	X		X
Approval: Inform approvers by e-mail about pending requests for approval (optional)		X	X	X		X
Sharing: Automatically create and view requests (tasks) for approvers		X	X	X		X
Release: Manage requests (tasks)		X	X	X		X
Release: Call process/object directly		X	X	X		X
Release: Approve or reject release of processes and objects		X	X	X		X
Set processes and objects to 'Expired		X	X	X		X
Review: Define Reviewer	X	X	X	X	X	X
Review: Automatically forward request to reviewer	X	X	X	X	X	X
Review: Notify Reviewer	X	X	X	X	X	X
Request: Send request for processes or objects	X	X	X	X	X	X
Request: Automatically forward the request to the responsible person	X	X	X	X	X	X
Request: Display/change the processing status of the request	X	X	X	X	X	X



Features	Viewer	Author	Architect	Approver	Analyst	Administrator
Request: Call process/object directly	X	X	X	X	X	X
Request: Accept or reject request	X	X	X	X	X	X
Define authorization levels			X			X
Assign permissions to individual users or user groups			X			X
Set permissions on diagrams or objects			X			X
Assign permissions for facets			X			X
Assign authorizations for architectures			X			X
Create document templates for processes and documents						X
Edit document templates for processes and documents						X
Release document templates for processes and documents						X
Create document templates for remaining facets						X
Edit document templates for other facets						X
Release document templates for other facets						X
Open generated PDF manuals	X	X	X	X	X	X
Automatically generate PDF manuals upon approval	X	X	X	X	X	X
Manage manual templates centrally						X
Use standard reporting					X	X
Set up customer-specific reporting (optional)					X	X
Configure method						X
Hide, rename or add attributes/objects (Advanced Configuration)						X
Manage users and user groups						X
Authentication provider: Use OAuth						X
Define permissions for facets						X
Define variant types						X
Define Tags						X
Configure languages (default: DE/EN)						X
Configure default or optional language						X
Making languages available for reporting						X
Create and upload new user interface language						X
Configure notifications by e-mail or tasks						X
Adjust release cycle						X
Enable and disable features						X
Customize CI						X
Configure profiles						X
Create and customize stereotypes (subtypes) for diagrams/objects						X
Configure Manuals						X
Define validation rules						X
Configure Service and Web Hooks						X
Open REST API interface to Symbio						X



Symbioworld GmbH
Einsteinring 41-43
85609 Aschheim

phone: +49 89 890635 – 0
e-mail: info@symbioworld.com

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