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**Hint:** Read only the content relevant for you.

Relevant for the following user roles:
- Administrator
- Editor
- Author
- Reviewer
- Reader
Agenda

Introduction and overview BPM

• BIC Cloud
• Awards
• Central steps of BPM
• Business Process Management (BPMN and EPC)

• Getting started
• Modeling
• How to use the catalog
• Publication
• Supporting Features
• Administration
• Portal view
• Useful hints
• Released & to be released
BIC Cloud – SIMPLE. SMART. CLOUD.

The BIC Cloud provides all information about processes and documents quickly and clearly.

- no installation
- no hardware
- available immediately
- access from anywhere in the world
- also offline 100% range of functions
- unlimited modeling on the web without loss of comfort
- high functionality


At the moment, BIC Cloud is optimized and released for Google Chrome 🌐 and Microsoft Edge 🌐. Soon you will be able to execute BIC Cloud in its entirety via additional browsers (e.g. Internet Explorer 11).
Awards

In 2015 the recognized analyst house BARC (Business Application Research Center) awarded BIC Design with the golden seal. In the analysis of different process modeling tools BIC has finished as the overall test winner.

GBTEC is listed in Gartner's "Market Guide for Enterprise Business Process Analysis" in April 2016 and is one of the few companies that are incorporated immediately after the collaboration with Gartner.
The central steps towards digital business processes

- BPM strategy
- Technical process modeling
- IT-process modeling
- Process implementation
- Digital process execution

- Monitoring, optimization and advancement
- Adoption of digital processes
- Design and implementation of digital technologies
- Technical conception of new digital offers
- Draft of prospective digital orientation of the organisation (IT neutral)
Technical and IT-based BPM

**Technical BPM**
Technical BPM deals with the economic arrangement of business processes.

**IT-based BPM**
IT-based BPM examines various forms of IT-support for technical processes (e.g. automatization).

**Digital BPM**
Digital BPM comprises the interactions between individuals, resources, information, and other services within an organisation or between organisations.

In digital BPM, processes are continuously oriented on changes so that activities can be easily adjusted. This leads to maximum flexibility.

There is a close connection between technical processes and related information technology.
Topics in the field of our products

• Strategic and operative process management
• Enterprise Architecture Management
• Integrated management systems
• Quality-, compliance- and risk-management
• IT-requirements management and blueprinting
• Process monitoring
• Process automation
What are processes?– Introduction (Basic BPMN)

A process is a **sequence of activities** within an organisation that render the organisational performance.

**Generally involved in a process:**
- various **roles**,  
- under usage of various **information**  
- and/ or **systems**,  
- under the influence of **requirements**  
- and/ or **risks**  
- and/ or **controls**.
# BPMN – Leading process notation in process management

Business Process Model and Notation (BPMN) has been established as the leading standard in the field of process modeling. It specifies symbols used for the modeling of business processes.

## Overview of the most important symbols

<table>
<thead>
<tr>
<th>Events</th>
<th>Gateways</th>
<th>Standard artifacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events are economically relevant conditions that occurred.</td>
<td>Gateways describe decision points (division) or points at which different control flows converge (merge).</td>
<td><strong>Data</strong> represent utilized or created documents. <strong>Annotations</strong> are text fields for additional comments.</td>
</tr>
<tr>
<td>Events that initiate a process.</td>
<td><strong>Parallel</strong> All outgoing process paths must be followed; all incoming process paths must be met.</td>
<td>Extented artifacts</td>
</tr>
<tr>
<td>Events that occur or are caused during a process.</td>
<td><strong>Inclusive Or</strong> At least one outgoing process path must be followed; at least one incoming process path must be met.</td>
<td>A <strong>Role</strong> is an abstraction of organizational positions.</td>
</tr>
<tr>
<td>Events that close a process.</td>
<td><strong>Exclusive Or</strong> Exactly one outgoing process path must be followed; exactly one incoming process path must be met.</td>
<td><strong>Applications</strong> are IT-systems that support the process execution.</td>
</tr>
</tbody>
</table>

## Activities

An activity constitutes an individual production step. Subprocesses are used for detailed descriptions of a complex activity.

## Link types

- **Sequence flows** link events, activities and gateways and therefore stress the chronological sequence of processes.
- **Message flows** symbolize the exchange of information with external process participants.

## Pools and Lanes

- A Pool can symbolize a role or an application system and is superior to Lanes.
- A Lane represents a pool of subordinate roles/application systems and is responsible for the execution of activities.

## Standard artifacts

- **Data** represent utilized or created documents.
- **Annotations** are text fields for additional comments.

## Extented artifacts

- A **Role** is an abstraction of organizational positions.
- **Applications** are IT-systems that support the process execution.
- **Risks** are dangers for processes.
- **Controls** are regulatory guidelines to minimize risks.
- **Norms** are requirements for the process execution.

**Note:** Roles, applications, risks, controls and norms are not Part of standard BPMN modeling. They are an Expansion by GBTEC AG to simplify the modeling process as well as to present additional content.
What are processes? – Introduction (Basic EPC)

A process is a sequence of activities within an organisation that render the organisational performance.

Generally involved in a process:
- various roles,
- under usage of various information
- and/or systems,
- under the influence of requirements
- and/or risks
- and/or controls.
EPC – Event-driven process chain (wide spread in DACH region)

Event-driven Process Chains (EPCs) are often used for more detailed process sequences.

**Overview of the most important symbols**

<table>
<thead>
<tr>
<th>Process</th>
<th>Organization</th>
<th>Further</th>
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</thead>
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<td><strong>Events</strong> are economically relevant conditions that occurred.</td>
<td>A <strong>Role</strong> is an abstraction of organizational positions.</td>
<td><strong>Norms</strong> are given guide lines or laws.</td>
</tr>
<tr>
<td><strong>Activity</strong> constitutes an individual Production step.</td>
<td><strong>Accountable</strong></td>
<td><strong>Applications</strong> are IT-systems that support the process execution.</td>
</tr>
<tr>
<td><strong>Process Interfaces</strong> refer to further processes.</td>
<td><strong>Responsible</strong></td>
<td><strong>Risks</strong> are dangers for processes.</td>
</tr>
</tbody>
</table>

**Gateways**

Gateways describe decision points (division) or points at which different control flows converge (merge).

- **Parallel** All outgoing process paths must be followed; all incoming process paths must be met.
- **Inclusive Or** At least one outgoing process path must be followed; at least one incoming process path must be met.
- **Exclusive Or** Exactly one outgoing process path must be followed; exactly one incoming process path must be met.

**Link Types**

Each Role connected to an activity has an specified responsibility.

- **Accountable**
- **Responsible**
- **Consulted**
- **Informed**

**Data**

**Business Objects** are "information" that are passed on during the process.

**Documents** represent utilized or created documents.

**Norms** are given guide lines or laws.

**Applications** are IT-systems that support the process execution.

**Risks** are dangers for processes.

**Controls** are regulatory guidelines to minimize risks.

**Requirements** are demanded prerequisites.

**Annotations** are text fields for additional comments.

**KPIs** are important indicators.
Multi level concept – Illustrating the organisational context

The process landscape should be organized in **several levels** that are structured **more detailed** with each level. Based on the process landscape that includes every process, the navigation should be executed graphically across several levels into the detailed processes.

Within the framework of **Business process management** the process landscape is structured across **several levels**. From level 1 to n the process areas are refined with **value chain diagrams** or **BPMN process diagrams**. The amount of levels may vary depending on the department and the size of the company.
Multi level concept – Illustrating the organisational context

The process landscape should be organized in several levels that are structured more detailed with each level. Based on the process landscape that includes every process, the navigation should be executed graphically across several levels into the detailed processes.

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Multi level concept – Illustrating the organisational context

The process landscape should be organized in several levels that are structured more detailed with each level. Based on the process landscape that includes every process, the navigation should be executed graphically across several levels into the detailed processes.

Within the framework of Business process management the process landscape is structured across several levels. The timely logical processes [BPMN collaboration diagram or Process (EPC)] form the last level.
Principle of database – Dealing with catalog items

In process modeling one item (role, IT-system etc.) has one catalog entry. To ensure this principle, always use the same object type and the same name for one element.
Agenda

• Introduction and overview BPM

Getting Started

• Login BIC Cloud
• Start screen
• Screen: overview and adjustment
• Language settings
• Generating folders/categories
• Creating diagrams
• Modeling
• How to use the catalog
• Publication
• Supporting Features
• Administration
• Portal view
• Useful hints
• Released & to be released
Getting Started – Login BIC Cloud

Open the BIC Cloud front page in your standard browser and login with your email and the password that has been sent to you.

To change your password, please click on the figure in the right corner next to your username. Possibilities to “Logout“ (red power-button) and “Change Password“ (key) appear. Click on the key-symbol and a pop-up window comes up, in which you have to enter your current password (twice) and your new password. Confirm your entry with “Change Password“.
Getting Started – Start screen

On the start screen you can see your last-edited, local diagrams and you have the option to create new diagrams.

With a single click on one of these choices you either open an already checked-out diagram (i.e. for offline modeling available) or you create a new diagram.
Getting Started – Overview of the screen

The screen of BIC Cloud stores different **functionalities** and **views**.

On the left side you can see the Explorer, in which your repository and the created diagrams as well as the Catalog are displayed.

The upper area displays further functionalities, which will be explained on the following slides.

Lastly, the screen contains your working area, in which you can model and edit your processes, as well as the necessary symbol palette.
Getting Started – Adjusting the screen

The screen can be adjusted and thereby tailored to your individual tasks or working style. For this purpose, toolbars can be easily unfolded and folded.

The following possibilities are at your disposal

Click on the **three lines** in the left corner next to the BIC Cloud logo in order to hide the explorer and extend your working area.

On the right-hand side of the bar you have the options to unfold and fold the toolbars “Documents”, “Attributes”, “Comments” and “Versions”.

![BIC Cloud logo with three lines icon and Hide sidebar button](image-url1)

![Toolbars options](image-url2)
Getting Started – Adjusting the screen

The screen can be adjusted and thereby tailored to your individual tasks or working style. You have the possibility to view processes in **different display formats**.

*In the checked-in mode you have the following possibilities*

### Profile

To view the **process description, roles, IT systems, documents, requirements and risks**, as well as the **people responsible** for the selected diagram, click on the “Profile”-symbol in the upper right corner of your bar.

### Diagram

Click on the “**Diagram**”-symbol on the right-hand side of the upper bar in order to view the diagram in **graphical form**.

### RACI-Matrix

If you only want to display the **type of participation of a role or an IT system** at the respective process step, click on the “**Matrix**”-symbol in the upper right corner of your bar. This type of representation is only available for EPK and BPMN diagrams.
Getting Started – Language settings

The language settings can be opened via the context menu (three dots) besides your repository. The language should be chosen before modeling.

The **content language** determines the language, in which attributes (e.g. diagram & object names) are displayed and maintained.

The **alternative language** will be displayed when entries are not maintained in the content language. The abbreviation in parentheses (here German) shows the maintained language of the object/diagram. Editing does not lead to changes of the alternative language. This mode is used for translations and multilingualism.
Getting Started – Generating folders/categories

Folders/categories serve as a **structuring device** for cohesive elements. Categories can be created within a repository or within other categories.

1. Click on the **context menu** (three dots) beside your repository and choose “**New Category**“.

2. A window pops up, in which you can enter the name of the new category. Confirm your entry by clicking “**Save**“.

3. The new category will be stored in your folder structure.
Getting Started – Creating diagrams

You have **two different options** to create diagrams. Note that the selection of a diagram type influences what kind of objects are available for modeling.

Option 1

Click on the **context menu** next to the folder/category in which you want to create a new diagram and choose “**New Diagram**”. All available diagram types will be displayed for your selection.

As a final step, a window in which you can **name** your diagram will pop up.
Getting Started – Creating diagrams

You have **two different options** to create diagrams. Note that the selection of a diagram type influences what kind of objects are available for modeling.

**Option 2**

Click on the category in which you want to create a new diagram. **All types of diagrams** will now be displayed in the working area of your screen. When you remain your mouse on a diagram, an introduction **modeling video** will be played. To create a new diagram, just click on a diagram type. A window in which you can **name** your diagram will pop up.
Agenda

- Introduction and overview BPM
- Getting Started

Modeling

- Place objects, mini symbole palett
- Align, connect and edit objects
- Create lanes
- Add/ remove free space and zoom
- Maintain attributes
- Cross-model copying
- Edit. Save. Check-in

- How to use the catalog
- Publication
- Supporting Features
- Administration
- Portal view
- Useful hints
- Released & to be released
Modeling – Place objects

Your newly created diagram automatically opens up (it is checked-out) and you can start to place objects using the symbol palett in your editor.

Choose a symbol from the symbol palett and drag it in your editor using the **Drag and Drop** function. You may repeat that step as often as you like and with every available symbol.

Select a symbol from the symbol palett and click on it once. You are able to place your chosen symbol within your editor per clicking one more time. You are now using the **stamp mode** (visible through grey highlighting of the chosen symbol) in which you can place as many objects of one type as you like. To end this mode, push the Esc-key.
Modeling – Mini symbol palett

The mini symbol palett displays all potential symbols for further modeling at your chosen object. This function simplifies and accelerates the modeling process.

1. **Click** on an object and choose the next object from the mini symbol palett.

2. Drag the chosen object with **pressed mouse button** into the editor and place it as you like.

3. Now, you only have to **name** the object. The system automatically creates the connection.
Modeling – Align objects

You have the option to use a support function to align objects.

To select multiple elements at once, you can either mark a whole area with pressed mouse button or you can select objects individually using shift and a mouse click. Furthermore, you have the following two options to adjust objects.

Choose “Align” in your context menu and choose one option (e.g. “Center vertically”). The elements are aligned with one another according to the selected entry.

Additionally, you have the option to align objects manually using the red alignment lines.
Modeling – Connect objects

To illustrate the process sequence, objects get linked with connectors. There are three different options to connect objects.

A connections symbol pops up when you click on an object. Click on that symbol and keep the mouse button pressed to link two objects.

Click on “Connection mode” in the context menu. A red dot appears when you hold your mouse over the object. You are now able to link the objects with pressed mouse button.

A red dot also appears when you hold your mouse over an object and wait for a few seconds. You are now able to link the objects with pressed mouse button.

**Hint:** Existing connections to a symbol can not be redirected to another symbol. Simply create a new connection to do so.
Modeling – Connect objects

To illustrate the process sequence, objects get linked with connectors. There are two possibilities of where to attach the connectors which have different impacts when you are shifting those objects.

If you link objects using the **outer port**, the connector will stay fixed at that side of the object even when you shift it.

If you link objects using the **centerport**, the connector will move when you shift the object.
Modeling – Edit objects

You can easily edit and label objects. Additionally, text fields can be moved and positioned.

Select an object by clicking on it. The text field opens up when you double-click on the object or press F2. If the entry gets too long, the return occurs automatically.

Please note: To be able to edit the text of certain types of objects (e.g. role), you have to click on the label instead of the symbol itself.

You can easily move a text field using your mouse. Additional returns can be generated by reducing the size of a text field.

Soon there will be an option to display additional model and object attributes within the editor.
Modeling – Create lanes

Lanes are generated by editing pools within the editor. Lanes are not part of the symbol palett to make sure that they are not modeled without a corresponding pool. This would be prohibited according to BPMN.

Four symbols pop up on the right-hand side of the object when you click on a pool within the editor. Choose the two horizontal lines to generate two lanes within the chosen pool.
You can add new lanes by clicking on the arrows at the right side of the pool.
Modeling – Add/ remove free space

There are further helpful features like adding and removing free space. The insertion and removal of free spaces can be achieved by two ways.

**Option 1**
Select the “Add / remove free spaces” function in the menu bar.

**Option 2**
A right-click in the modeling area opens a window. Select the “Add / remove free spaces” function.

Free spaces can be inserted or removed horizontally as well as vertically. Green arrows indicate that free spaces are added; red arrows that free spaces are removed.
Modeling – Zoom

In BIC Cloud you can enlarge the tool bars as well as the editor. Press the STRG key and use the scroll wheel of your mouse to zoom in or out.

Click into the editor to extend this area.

Click on one of the tool bars to extend this part of the screen.
Modeling – Maintain attributes

Further information about diagrams or objects can be provided within “Attributes”. The attribute-bar can be easily expanded and closed.

**Model attributes**

Click on the diagram displayed in your explorer or in the editor and choose “Attributes” to expand model attributes.

**Object attributes**

Click on an object and “Attributes” to expand further information about that particular object.
Modeling – Most important model attributes

Maintain the following model attributes to generate a sound process documentation.

- **Name**: Name of the process
- **Description**: Information that refers to the whole diagram
- **Governance attributes**: Maintain Author, Examiner and Responsible to use the multistate publication workflow. These persons have to be added to the catalog beforehand. How to add entries to the catalog will be explained later on.
  - **Autor**: Creator of diagram/model
  - **Examiner** (optional): Examines if model is correct
  - **Responsible**: Person who decides on publication of diagram
Modeling – Further model attributes

The following model attributes are also available in the standard version of BIC Cloud. Model and object attributes can be customized.

- **Identifier**: Specification of a unique, digital identifier to label your diagrams.
- **Keywords**: Entry of keywords for the respective diagram, which are taken into account in the search.
- **State**: Specification of the status of the diagram.
- **Release**: Specification of the version number according to conventions.
- **Scope**: Maintenance of organizational units, which are informed by e-mail when the corresponding diagram is published or depublished.
- **Restricted access**: Maintenance of organizational units that receive access to the corresponding diagram. Users who do not belong to the maintained organizational units cannot view the diagram.

**Hint**: To ensure that the employees of an organizational unit receive the relevant information, they must first be added as users and assigned to the appropriate user group. The organizational unit must then be connected with the associated user group. The creation of users and user groups, as well as the matching of organizational units and user groups is explained in more detail on the slides 64 to 66.
Modeling – Most important object attributes

Maintain the following object attributes to generate a sound process documentation.

- **Name**: Name of object
- **Description**: Further information about that particular object
- **Attachment (URL)**: You have the option to attach URL’s (Hint: You have to press the “Return” key to confirm the URL).
- **Decomposition**: You have the option to hyperlink another diagram. This feature enables you to navigate through the process map. How to generate a decomposition is explained on the following slide.
Modeling – Generate decompositions

Generate decompositions to structure processes over different levels and navigate through them.

1. Decompositions can be generated within the attributes of an object (here activity). Expand the attributes of the activity and click on “Decomposition”.

2. Start typing in the name of the diagram which you would like to hyperlink and choose the diagram using the propositions. The decomposition is now saved and made visible through the hierarchy-symbol underneath the object. A double click on the object now navigates you to the hyperlinked diagram.

Hint: If you want to generate more than one decomposition, use the attribute "Variants".
Modeling – Cross-model copying

With the aid of the cross-model copying, content of a diagram can be copied into a new diagram. This allows the creation of so-called variant copies.

1. **Select** all objects with [Ctrl]+[A] or by placing a marking frame around the objects while holding down the left mouse button, and **copy** them with [Ctrl]+[C].

2. Create a diagram of the **same diagram type** and paste the copied content into the new diagram by [Ctrl] + [V].

**Hint**: When using cross-model copying, resources (such as roles, IT systems, documents, risks and controls) are reused ("occurrence copy"). This means, that a change of the catalog entry by the administrator or editor changes all graphic illustrations of the object / catalog entry. However, elements of the process flow (such as events, activities and operators) are newly created ("definition copy"), so that a change does not influence further objects.
Edit. Save. Check-in

You can edit and save diagrams not only online but also when working offline. After editing the diagram it gets saved locally in the cache of your browser. When you want to provide the diagram for other users who are working online, you have to check it in.

Click on a diagram that you want to edit. You can now see the "Editing-button" in the upper right-hand corner of the editor. Click on this button to check-out the diagram and to be able to edit it offline. It is now locked for further editing by other users.

There is a "Save-button" in the upper right corner of your editor. Click this button to save your changes.

When you saved your diagram but did not check it in yet, there is a "Check-in-button" in the upper right corner of your editor. Click this button to check-in the diagram and unlock it for further online editing.
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- Modeling

How to use the catalog
- General remarks
- Add persons
- Maintaining catalog entries

- Publication
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How to use the catalog

The catalog contains all **object types** (artifacts) that are embedded in your diagrams and can be reused, like roles, IT-systems and documents. It furthermore provides the option to **manage** object types used in different diagrams **centrally**. **Modifications** of these object types can be controlled centrally as well.

The catalog is located on the left-hand side in your explorer. Using the arrow to the right of the catalog, you have the option to **expand the catalog** and display all available object types.

In the center of the screen **all catalog entries** as well as the **attributes** of the selected catalog entry are displayed.
How to use the catalog

In the toolbar of the catalog, you have the option to **search**, **filter** and **create new catalog entries** as well as to generate an **Excel export** or **reorganize the catalog**.

**Search**
Browse catalog entries for a search term

**Filter**
Filter catalog entries by object type

**New catalog item**
Creation of a new catalog entry

**Export to Excel**
Automatic creation of an Excel table with a listing of all catalog entries

**Hint**: With “%” you can extend your search to show all results that include the entered term.

**Only show suggested items**
Show only catalog entries that have not been accepted yet

**Attention**: Filings in the model attributes are not yet considered when reorganizing, which means that you should control the object type “person” manually, since persons do not have to be modeled in the diagram, but can be stored in the governance attributes of the model.

**Reorganize**
If the filter is active, you can reorganize the selected object types. That means, that catalog entries which are not used in diagrams are deleted.
How to use the catalog – Add persons

Before you are able to fill out “Author”, “Examiner” and “Responsible” in the attributes of a diagram, you have to add the responsible persons to the catalog. Afterwards, they can be allocated to the desired diagram. Only Administrators and Editors have the right to add persons to the catalog.

1. Click on Catalog, which is located in the explorer. You are now able to see all catalog entries of your repository.

2. Click on “New Catalog Entry”. A window pops up in which you can name and choose the type of your entry. Please create a “Person” for “Author”, “Examiner” and “Responsible”.

![Catalog example image](image-url)
How to use the catalog – Add persons

Before you are able to fill out “Author”, “Examiner” and “Responsible” in the attributes of a diagram, you have to add the responsible persons to the catalog. Afterwards, they can be allocated to the desired diagram. Only Administrators and Editors are allowed to add persons to the catalog.

Select the designated person and click on the “i”-symbol to open the attributes. You have the option to provide a description and phone number as well as an email. Latter is necessary for the publication workflow. Click “Save”.

Go back to the process and fill in the attributes using the proposition list.
How to use the catalog – Maintaining catalog entries

In order to manage catalog items individually, you have the option to accept, reject and replace catalog entries, to edit them, to view their occurrences or to delete them.

All new entries are initialized as proposals and therefore are presented in red. When these are accepted, their color changes to black. The Proposed as well as the accepted entries appear in the proposal list while modeling objects.

Select the "Reject" button to delete the entry from the catalog which means that it no longer appears in the suggestion list for other modelers. Note that only the catalog entry is deleted; the corresponding graphic illustrations in the diagrams remain.
How to use the catalog – Maintaining catalog entries

In order to manage catalog items individually, you have the option to accept, reject and replace catalog entries, to edit them, to view their occurrences or to delete them.

When you click on the ”Show occurrences”-button, you can see a list with occurrences for the chosen catalog entry. For occurrences with connections to other objects the connected symbol’s name and the diagram’s name are shown.

For objects without connections to other symbols only the diagram’s name, in which the object appears, is shown.

A single click leads you to the corresponding diagram, where your chosen symbol is used.
How to use the catalog – Maintaining catalog entries

In order to manage catalog items individually, you have the option to accept, reject and replace catalog entries, to edit them, to view their occurrences or to delete them.

- **Edit**
  - Edit the attributes as you wish and push the save button.
  - Now opening a diagram that includes the catalog’s object, you can see that the object’s features in the public working area are updated just as you changed them.

- **More options**
  - Choose “more options“ to delete the catalog-entry. For entries that are not in use, deletion can be done without resulting side-effects. For catalog-entries that are in use, another catalog-entry needs to be chosen first to replace the wished entry (consolidation).

**Please note:** Changes of names or translations of existing objects in the catalog need to be changed in „attributes“, because otherwise definition copies will be created.
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Publication
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Publication

BIC Cloud has an **integrated workflow-engine** which enables you to release diagrams and documents easily.

1. At first, maintain the **relevant model attributes** for the release and publication. If the examiner is maintained as well, there will be an additional publication step.

2. Diagrams which shall be released, have to be **checked in**. If this is not the case, the system will remind you to do so. The publication is initiated via the context menu. In order to publish the diagram, please name the **reason** for publication.

3. The examiner/responsible person will be informed via email and can now execute the final publication. In case of a rejection, a comment has to be submitted and the author will be informed.
Depublication

If you want to remove already published diagrams from the publication, you can use the “Depublish” function. The integrated workflow engine ensures a multi-level check.

1. Open the diagram you want to remove from the publication and click on the “Versions”-button in the menu bar. Choose the paper basket to the right of “Publication” in order to depublish the selected diagram.

2. Specify a reason for the depublication and confirm the process by clicking the "Depublish"-button.

The responsible person receives a notification in the system as well as by e-mail and can arrange the final depublication.
Archive

When publishing a diagram, BIC Cloud creates a **copy of the previously published diagram version** and saves it in the **archive**. This allows you to access previous versions of a diagram, thus avoiding possible data loss.

1. Select a diagram and click on the "**Versions**"-button in the menu bar. To get to the archive you have to select the "**Former published versions**"-button.

2. In the archive, all published versions of the diagram are displayed in chronological order and available for download.
Agenda

• Introduction and overview BPM
• Getting started
• Modeling
• How to use the catalog
• Publication

Supporting Features

• Changing the workspace
• Changing the active role
• Document view
• Search
• Print, manuals and output

• Administration
• Portal view
• Useful hints
• Released & to be released
Changing the workspace

Users can **change their workspace** in order to see which graphs are available in the respective versions. This allows you to switch the entire repository, for example as a modeler, to “publication” in order to check what has already been published.

Open the **context menu of your repository** and go to the menu item „Change stage“. Select the desired workspace.

- **Local Workspace**: In the local workspace, you will find all the edited, but not yet checked-in diagrams.
- **Public Workspace**: The public workspace contains all the check-in diagrams.
- **Preview**: The preview contains all the diagrams that are in the publication workflow.
- **Publication**: The publication contains all the diagrams that have already been published.
Changing the active role

Users who have more than “Reader” rights can switch their active role in the system. This makes it easier for you to put yourself into the role of other users and to view the system from the perspective of your employees.

To switch your active role, click on the figure next to your user name and select the "Change Role“-button. In the appearing window, you can pick the role of your choice from the drop-down list. The access rights for the respective roles are explained later.
Document view

The document view allows you to see at a glance which documents are present in the selected diagram.

Select a diagram and click the “Documents” button on the context menu. An additional bar opens containing the document view.

In the document view, you have the additional option of filtering for documents with attachments or changing the alphabetical sorting.
Search

You can use the search function to browse all diagrams and catalog entries of a selected repository for a search term. The intuitive search mask allows you to quickly and easily find the desired diagram or catalog entry.

Click the “Search”-button on the context menu. Enter your search term and confirm with Return. The search mask opens.

The search mask is composed of three areas. In the middle you see all results for your search term. Clicking on the name of a diagram will take you directly to the chosen diagram. On the left side you can filter the results according to author, diagram type, examiner and responsible person. The attributes of the first search result are displayed on the right.
Printing, manuals and output

BIC Cloud allows for easy **online printing**. Furthermore, **manuals** can be created and downloaded easily.

**Printing**

Click on the **printer-symbol** to print your diagrams. Printing options will open up in the explorer.

**Manuals**

There is also an option to generate and download **manuals** and reports from one or more diagrams.
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• Introduction and overview BPM
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• Supporting Features

Administration

• Add User and User groups
• User management and authorization
• Tasks list
• Customizing options

• Portal view
• Useful hints
• Released & to be released
Administration – Add User

Within the administration area, you have the possibility to add new users, search for users, edit and delete users. This area is only available if you have administration rights.

Click on the “Administration“-button on your main bar. Then click on “Add User“, to create a new user. A window with three mandatory fields (name, email and user role) pops up.

There are five different user roles you can choose from. They will be explained in further detail on the following slides. After filling out the mandatory fields, click the “Save“-button. The new user will now appear in the user administration.
Administration – Add User groups

In addition to individual users, you can also **create user groups** and **add users to them**. This facilitates a faster administration of system users.

1. Go to the **administration area** and select “user groups” in the Explorer. Click on the “Add group“-button to create a new user group.

2. In your workspace area, you can now **name and save** the group. When you click “Save”, the group appears in the user group list.

3. To add users to the created user group, click the "Details“-button. By clicking on the button "Add user to the group“, a list of all users appears and you have the possibility to select the appropriate users.
Administration – Connecting organizational units with user groups

The object type “organizational unit” can be connected with the associated user group. This ensures that the employees of an organizational unit receive the relevant information when the organizational unit is maintained in the model attributes “Restricted access” or “Scope”.

1. Go to the catalog and search for the desired organizational unit using the search function or the filter. Now click on the “Details”-button to display the attributes of the organizational unit. Type the name of the user group in the field “Identifier” and save your change. The organizational unit is now connected to the user group.

2. You can now open a chart of your choice and store the organizational unit in the model attributes “Restricted access” and “Scope”.

![Diagram showing the process of connecting an organizational unit to a user group]
Administration – User management and authorization

BIC Cloud has an easy and intuitive authorization management.

**Administrator**

Administrators have all rights, including the administration of user permission. They have access to all existing versions.

**Editor**

Editors have access to all existing versions and the right to model. Furthermore, they are allowed to create and maintain catalog-entries.

**Author**

Authors have access to all existing versions and have the right to create and change diagrams. They are not allowed to create or maintain catalog-entries.

**Reviewer**

Reviewer release diagrams and documents. They have the right to access Preview and Publication.

**Reader**

Reader are portal users and can only access published processes and documents within Publication. They are also allowed to comment on diagrams and documents (collaboration) as well as conduct analyses.
Administration – Tasks list

Users who are maintained as “Examiner” or “Responsible” in the governance attributes of a diagram must approve or reject a publication or depublication of the diagram. Via the tasks list users can directly view the outstanding and completed (de-)publication tasks.

1. Open the tasks list and click on “My Tasks”. A list of all outstanding and completed tasks appears on your screen. Select one of the outstanding tasks to go directly to the corresponding diagram.

2. The selected diagram is presented to you in a preview. You now have the option to approve or reject the publishing or depublishing by clicking on the corresponding icon and making a selection in the appearing window.
Administration – Customizing options

In the administration area you have the possibility to set your **company colors**, the **company logo** as well as a **company-wide start diagram**.

1. Go to the **administration area** via the main navigator and select “Configuration” in the Explorer.

2. An area is displayed in your workspace, allowing you to set your **company colors**, define a **company-wide start diagram**, and insert your **company logo**.
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Portal view

• Start screen
• Setting Favorites and a Start diagram
• Making comments

• Useful hints
• Released & to be released
Portal view – Start screen

The portal view contains all **published content** (diagrams, documents and IT systems) and can be viewed by users with “**Reader**”-rights. On the start screen the portal user can see his personal favorites.
Portal view – Setting Favorites and a Start diagram

Portal users can **customize their welcome screen** by setting favorites and that way quickly access the processes relevant to them. In addition, you have the option to select a diagram as your **personal start diagram** so that it is opened directly when logging in.

### Setting Favorites

To add a diagram to your favorites, open the appropriate diagram and click on the **star in the context menu**.

The diagram will appear under your favorites in the Explorer as well as on your welcome screen.

**Hint:** Users who have saved a diagram under their favorites are informed by e-mail when the diagram is published or depublished (removed from publication).

### Setting a Start diagram

Portal users can select a **diagram from their favorites** as their personal start diagram. To do so, open the Favorites list in the Explorer and go to the **three-point menu of the desired diagram**.

Here you have the possibility to set the diagram as your start diagram.
Portal view – Making comments

The portal view contains all published content (diagrams, documents and IT systems) and can be viewed by users with “Reader”-rights. Reader can also comment on diagrams and documents (collaboration) in order to make suggestions for improvement or to draw attention to errors.

To leave a comment, select the appropriate diagram and click the "Comments on"-button in the menu bar. The comment bar opens. Add a new comment by clicking on the green circle with the plus sign.

1

2

Enter your comment in the appearing comment box and click on "Send".

Comments can be edited or deleted via the three dots next to the comment.
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• User administration
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🔍 Useful hints
• Released & to be released
Useful hints

On the following slides, you find some concluding tips that facilitate the handling of BIC Cloud.

<table>
<thead>
<tr>
<th>Keystroke combination</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strg+C</td>
<td>Copy</td>
</tr>
<tr>
<td>Strg+V</td>
<td>Paste</td>
</tr>
<tr>
<td>Strg+X</td>
<td>Cut</td>
</tr>
<tr>
<td>Strg+Y</td>
<td>Restore</td>
</tr>
<tr>
<td>Strg+Z</td>
<td>Undo the last step</td>
</tr>
<tr>
<td>F2</td>
<td>Fast access on text field</td>
</tr>
</tbody>
</table>
Useful hints

On the following slides, you find some concluding tips that facilitate the handling of BIC Cloud.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0/0 Position</td>
<td>Model your diagrams at the 0/0 position to ensure that they will be displayed optimally in the editor after checking-out.</td>
</tr>
<tr>
<td>Move view area</td>
<td>You are able to move your view / work area as desired when holding the right mouse button pressed.</td>
</tr>
<tr>
<td>Extended search</td>
<td>With “%” you can extend your search to show results that include the entered term. Soon you can use “*” for this purpose.</td>
</tr>
<tr>
<td>Deposit websites in the attachments</td>
<td>After typing in the URL, confirm with the “Return”-key.</td>
</tr>
</tbody>
</table>
## Useful hints

On the following slides, you find some concluding tips that facilitate the handling of BIC Cloud.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoking decompositions</td>
<td>You have the possibility to invoke decompositions by double-klicking on the object. That way, the decomposition sign (hierarchy-symbol) can be hidden.</td>
</tr>
<tr>
<td>Shifting diagrams</td>
<td>Cut the desired diagram using the functionality “Cut” in order to shift it into another category. Soon, you will be able to shift entire categories as well.</td>
</tr>
<tr>
<td>Playground</td>
<td>In order to learn new methods and test modeling, please create a repository named “playground”. That way, you can prevent inconsistent catalog-entries in your productive repository.</td>
</tr>
</tbody>
</table>
Useful hints

On the following slides, you find some concluding tips that facilitate the handling of BIC Cloud.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>After checking-out, your diagrams will be saved locally in the cache of your browser. Therefore, you should always use the same browser.</td>
</tr>
<tr>
<td>Translation</td>
<td>Accepted catalog-entries cannot be changed by modelers and hence cannot be translated within the editor. Please go to the catalog and open the attributes to change the name of the object in your desired language.</td>
</tr>
<tr>
<td>Save and check-in at all times</td>
<td>Please, save your diagrams regularly and check them in to avoid data loss and to make them available for other users.</td>
</tr>
</tbody>
</table>
Agenda

- Introduction and overview BPM
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- Modeling
- How to use the catalog
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- Supporting Features
- Administration
- Portal view
- Useful hints

Released & to be released
New features since March 2017

- **Attribute-bar in the catalog**
  When opening the catalog, the attribute-bar appears automatically. That way, you can see the most important information at first sight.

- **Filtering settings**
  The filtering settings in the catalog are retained while navigating in the Cloud, so that they are still active when you return to the catalog. Additionally, the dialog for creating new catalog entries is presetted with the filtered type.

- **Group-based authorization management**
  Besides the role-based authorization management, there is also the possibility to assign authorizations based on groups. In order to do so, you simply have to match your users with the appropriate group. It facilitates the authorization of users. Note, that users can be assigned to more than one group.

- **Dynamic tooltip**
  Descriptions to objects are displayed in a dynamic tooltip as soon as you place your mouse over the highlighted information symbol ("i") in the diagram.

- **RACI-matrix-illustration**
  The RACI-matrix-illustration is an alternative view for EPC- and BPMN Collaboration Diagrams. It provides an easy to understand overview of the responsibilities in your process.

- **Check-in reminder**
  In case you didn’t check in an edited diagram, you will receive a reminder to do so when leaving the site (Internet Explorer) or when logging out (Internet Explorer and Chrome), in order to unlock the diagram for other users.
New features since April 2017

• **Watermarks**
  Watermarks are available in several languages and display the name of the respective object in the selected language. These are always activated in the background of pools and lanes initially. You can also edit the watermarks in the formatting palette. If you rename the watermark itself in the formatting palette, it will no longer automatically display the name of the object.

• **Diagram display in a new tab**
  You can open a chart in a new browser tab. To do this, you must click the "Open in a new window" option in the 3-point menu of your diagram.

• **Change workspace**
  Users can change their workspace - this is done either centrally from your active repository in the 3-point menu, or on the diagram by changing the versions. That way for example a modeler can view the entire repository in the publication version, in order to see what has already been released.

• **Cross-model copying**
  The copying of diagram content can now be done across diagrams of the same type. Note that resources (such as roles, applications, risks and controls) are reused and process flow elements (such as events, activities and operators) are newly created. As a result, connections from and/or to new elements must be recreated.

• **Search**
  You can search for attributes of your diagrams. The search results page shows intelligent filtering possibilities, attributes as well as descriptions and offers the possibility to directly move to the diagram profile. The latter can be found in the lower right corner of the page.
New features since April 2017

• **Notifications when generating a report**
  During the generation of a report, the system displays a progress indicator. If you close this indicator, you will receive another message after completion, which will allow you to download the report.

• **New loading indicator**
  If you open large diagrams, you will see a loading indicator for the duration up to the display of the diagram. This indicator has been updated and the design has been optimized.

• **Archiving diagrams**
  When you publish your diagrams, PDF archive entries are created from these diagrams. The archive entries are created in the same languages in which content is maintained in your diagram.
New features since June 2017

• **Performance IE11**
  Various performance enhancements within the Internet Explorer 11 browser.

• **Comments on process steps**
  The comment function is available not only on diagrams, but also on diagram content. Thus, the content in diagrams can be discussed more specifically.

• **Dynamic diagram comparison**
  The diagram comparison shows you your changes live and highlights them also by selection in the diagram. You can e.g. compare your local work stand with the published stand, or even two archived versions of the same diagram.

• **Multi-faceted search function**
  The search shows your results depending on the search filters ("facets") set. The search filters work additively - the more you activate in different categories, the less results you have left.
New features since September 2017

• **Performance improvement**
  Performance improvement when opening diagrams.

• **Improved comment display**
  Comments to objects are no longer displayed as a speech bubble at the respective object, but clearly visible in the center of the screen.

• **Start diagram**
  A user can set a diagram from his favorites as his personal start diagram so that it is opened directly at login.

• **Advanced search results**
  In addition to diagrams the search now also finds objects and provides the option of navigation via the occurrences of the objects.

• **Enriched Matrix**
  The alternative representation “Matrix” now also contains IT systems as executing actors for BPMN and EPK diagrams.
New features since September 2017

- **Display of the local workspace**
  The “Show only local diagrams” function can now be found under “Change area”. This further enhances the clarity of the system, especially for modelers. The function is now called “Local Workspace”.

- **Change the authorization role**
  The active role in the system can be switched if you have more rights than only “Reader”. This makes it easier for you to get into the role of other users and to view the system from the perspective of your employees.

- **Discard changes**
  Modelers can discard local changes via the context menu of the checked-in diagram.

- **Searching in the catalog**
  The search in the catalog shows the active search term permanently. This gives you a better overview of the displayed content of your catalog and you have the possibility to further restrict it.

- **Verbesserte Katalog-Anzeige**
  The catalog can be unfolded and then displays all available object types as a filtering option.

- **Copy of formatting**
  The copying of a specific format is available to modelers as a functionality in the menu bar. This allows you to transfer formatting from one object to the next.

- **Reorganization of the catalog**
  If the filter is active, you can reorganize the selected object types. That means that the unused (not modeled in a diagram) catalog entries are deleted. Keep in mind that decompositions are not yet considered as used in a diagram - this means that you should control persons’ objects manually, since these are not necessarily shown in the diagram but could be deposited as a governance participant.

- **Editing diagrams**
  Authors can only edit diagrams when they are maintained as authors in the model attributes. If you check in a diagram where the author has not been specified, the system will notify you.
New features since September 2017

- **Reminder when attempting to publish a checked-out diagram**
  Checked-out diagrams cannot be published, so the system tells you to check them in.

- **Comment when rejecting a published diagram**
  In case of rejection of a published diagram, a comment has to be given. In addition, the initiator receives a rework task.

- **Task list for releases**
  A list of tasks for upcoming and completed workflows is available to governance participants.

- **Depublication**
  The depublication (removal of a diagram from the publication) is now available.

- **E-mail delivery when publishing and depublishing**
  Users who have saved a diagram as a favorite or have it within their scope will be informed by e-mail when the diagram is published or depublished.

- **Bilingual e-mail delivery**
  Depending on the setting in the user details, the e-mail is sent in German or English.

- **Adjustment of colors and logo**
  In the admin area, you can set the company colors and the company logo. These settings affect all users.
Planned features 2017

- BPMN Export / Import
- Extended reporting
- New object workflows for catalog entries
- Upload and view of documents
- Extension of authorization management
- Extension of portal
- Extension of administration
Planned features 2017

- Interactive display of processes – portal
- Interactive display of processes – mobile entry
- Governance workflow for documents
- Sharepoint Plug-In
- Methods editor
- Extended placement of attributes in editor
- Layout assistant
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