BIC Process Design

GBTEC Software AG

Sep 05, 2024

CONTENTS

In this documentation, we will answer your questions and give advice on how to work with BIC Process Design. Discover the possibilities of the new user interface to achieve the optimum in modeling, analyzing and simulating your business processes. The new user interface is constantly extended by new functionality. You can always read about the current state here!

DISCOVER THE NEW USER INTERFACE

To make the transition from the old to the new interface smoother for you, this chapter lists the essential functions.

1.1 Welcome Screen

In transitioning between interfaces, notable differences are observed in the welcome screen. The key distinctions are now presented to you.
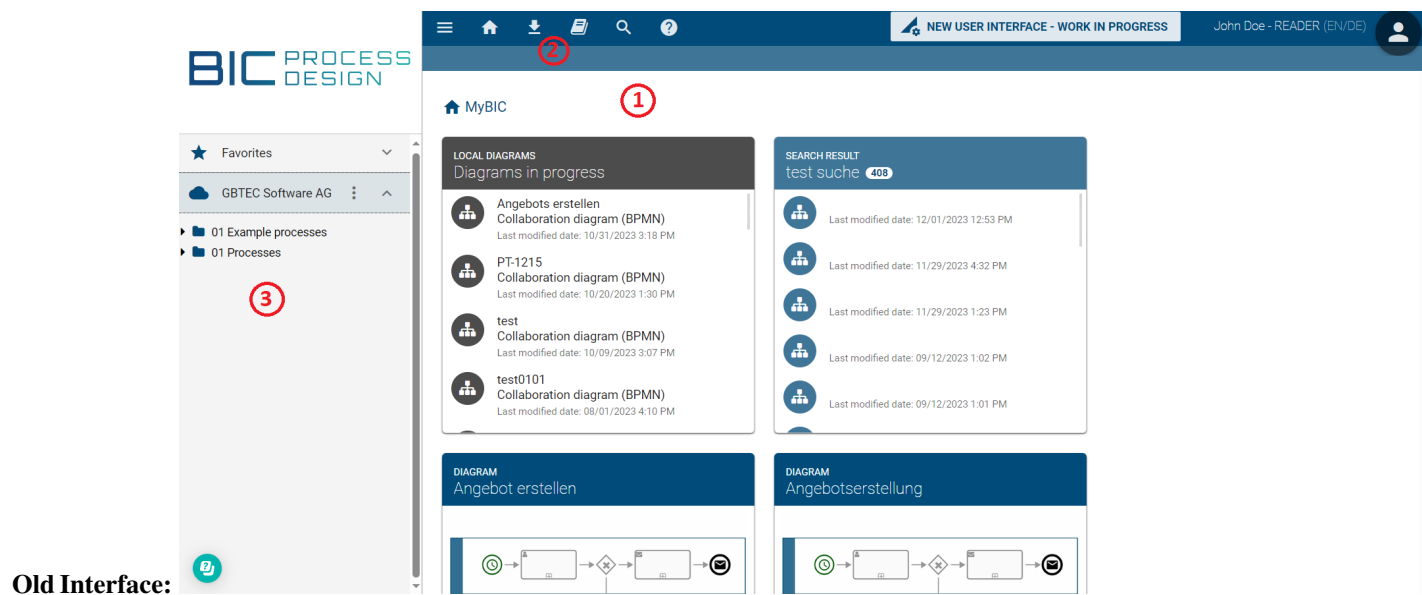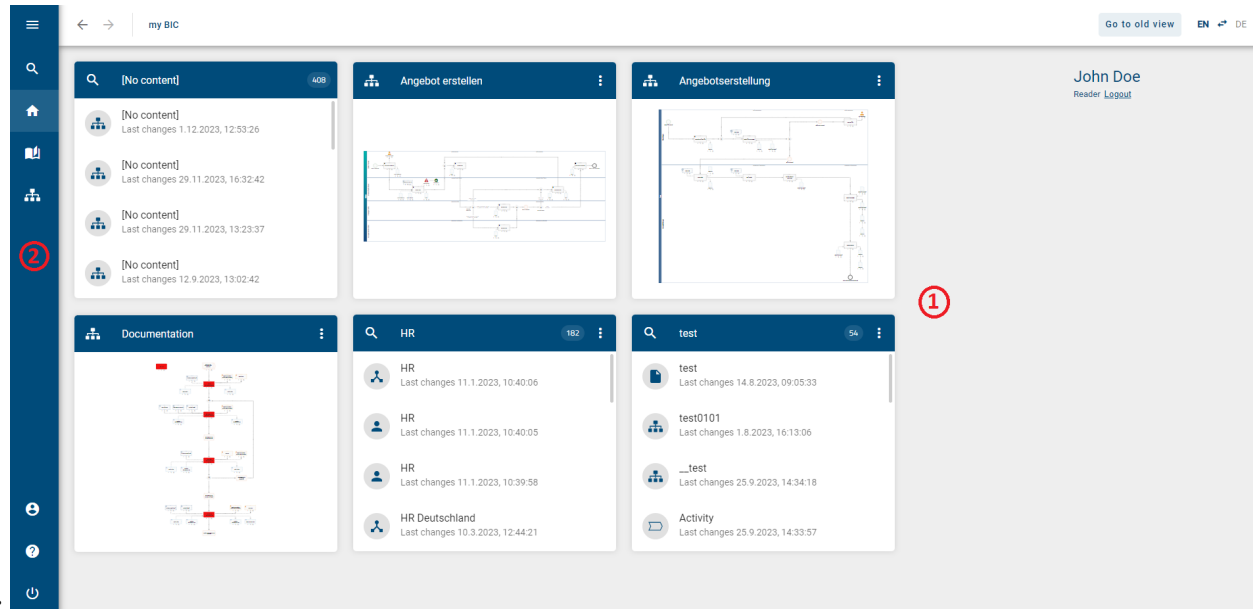
Old Interface:

New Interface:

(1) **Homepage**: In the main area, you will find your *myBIC* page. Additionally, you can now rename the tiles of your favorite charts, catalog entries, and search results, and delete them directly from the *myBIC* page. The *myBIC* page is now displayed by default for every role.

(2) **Menu Bar**: In the new interface, the menu bar is now located on the left side of the screen. Additionally, you can now access your diagrams and profile and log out through the menu bar. Downloading reports is no longer done through the menu bar but through the respective *Options* in a section. In the header, you can see which section you are in.

To get a better overview of the menu bar, you can collapse and expand the menu as needed using the button in the top left corner.
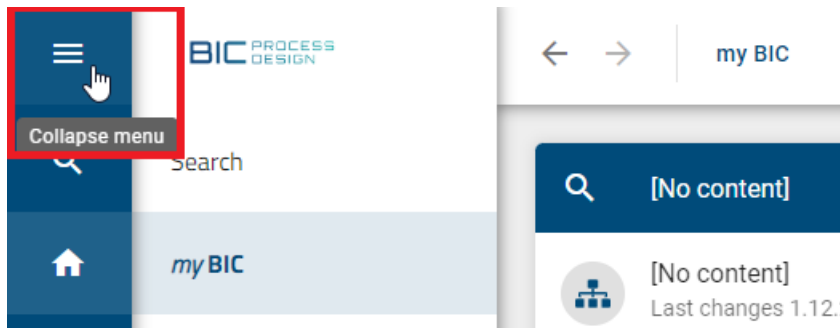
(3) **Diagrams & Repository**: In the old interface, you could access your diagrams and repositories through the left sidebar. In the new interface, you need to navigate to the *Diagrams* section for this.
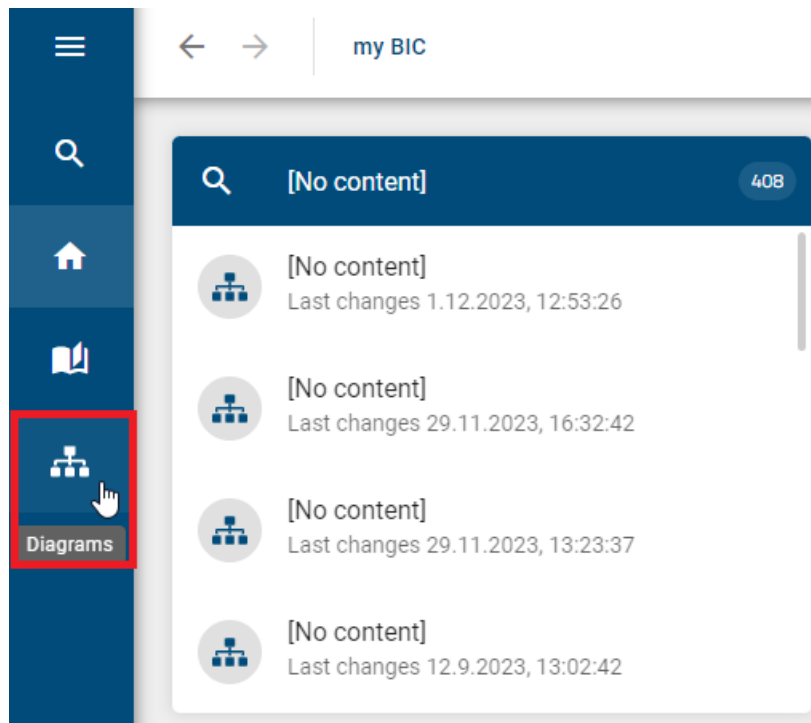
In the new interface, navigation is done both through the menu bar and the arrows in the header. To return to your welcome screen, click on *myBIC* or the *Home* icon in the menu bar.

1.2 Diagrams & Repository

To get an overview of your diagrams and repositories or to create a new diagram in the new interface, you need to go to the *Diagrams* section.
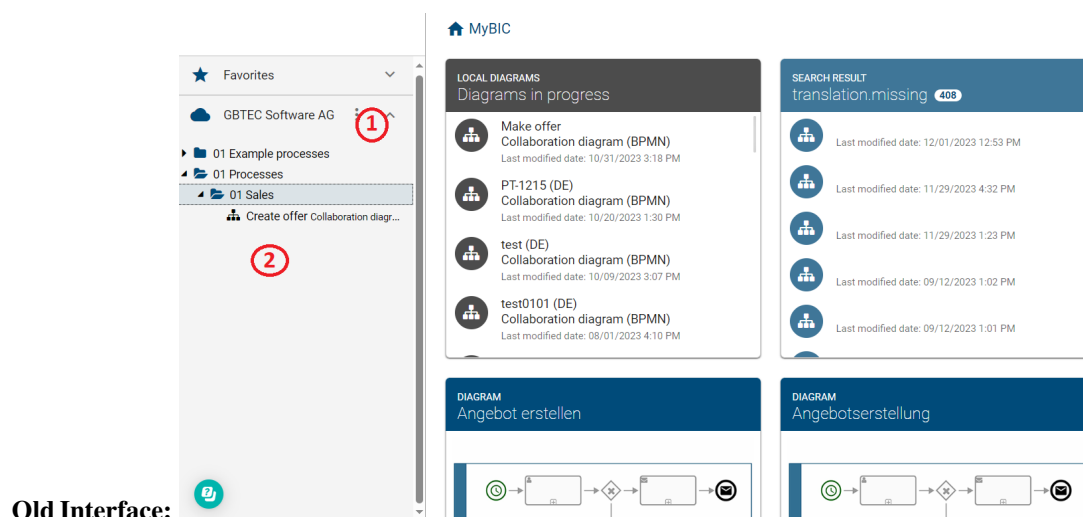
Old Interface:
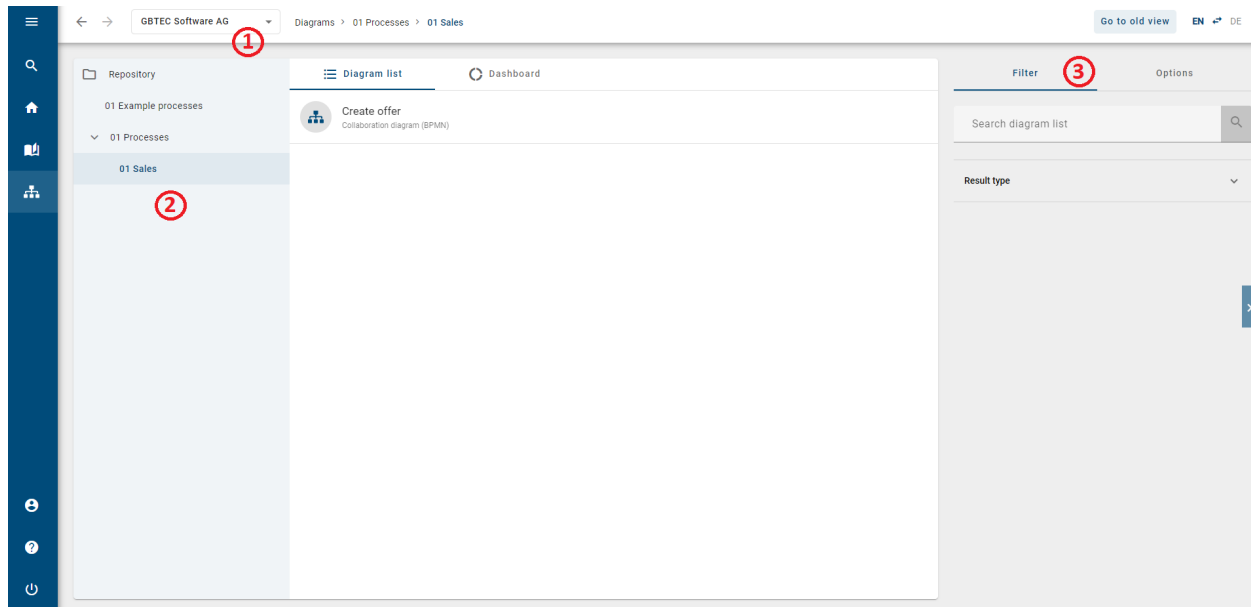
New Interface:

(1) **Switching Repository:** In the old interface, you had to click on the repository's context menu to select a different repository. In the new interface, you can now do this directly in the header.

(2) **Category Tree:** The category tree is structurally similar to the old interface. Additionally, your current path is displayed in the header. In contrast to the old interface, diagrams are now presented in a list view. You will see only the diagrams from the selected category.

(3) **Filter & Options:** In the new interface, you can filter diagrams based on specific criteria or search for specific diagrams in advance. You can also create a matrix report or export the data to Excel through the *Options*.

1.3 Diagram view
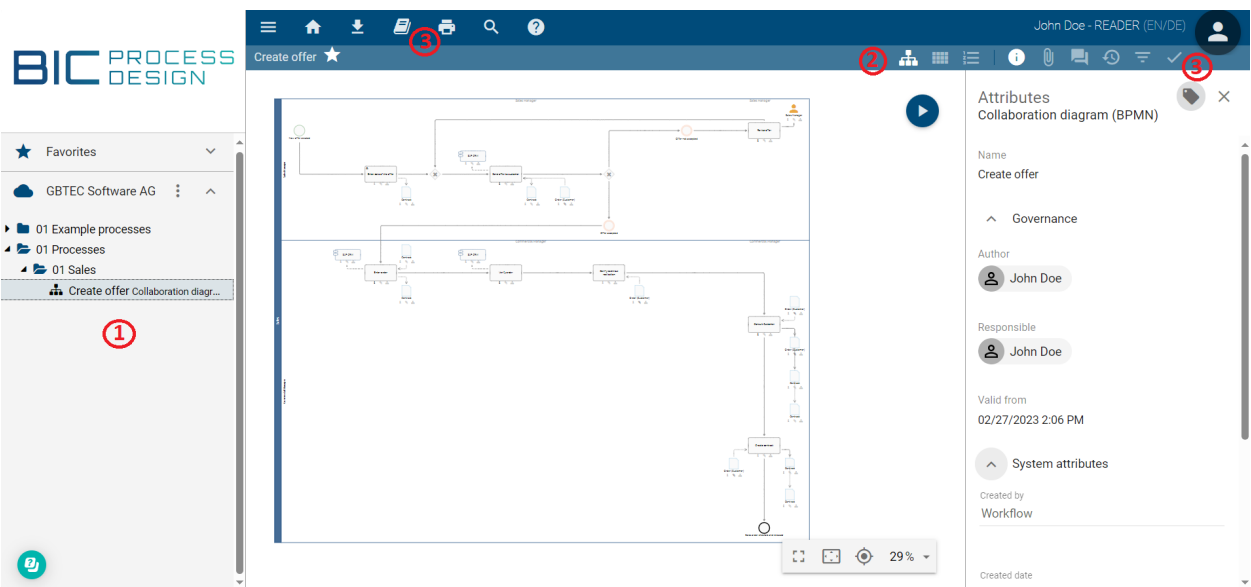
Old Interface:
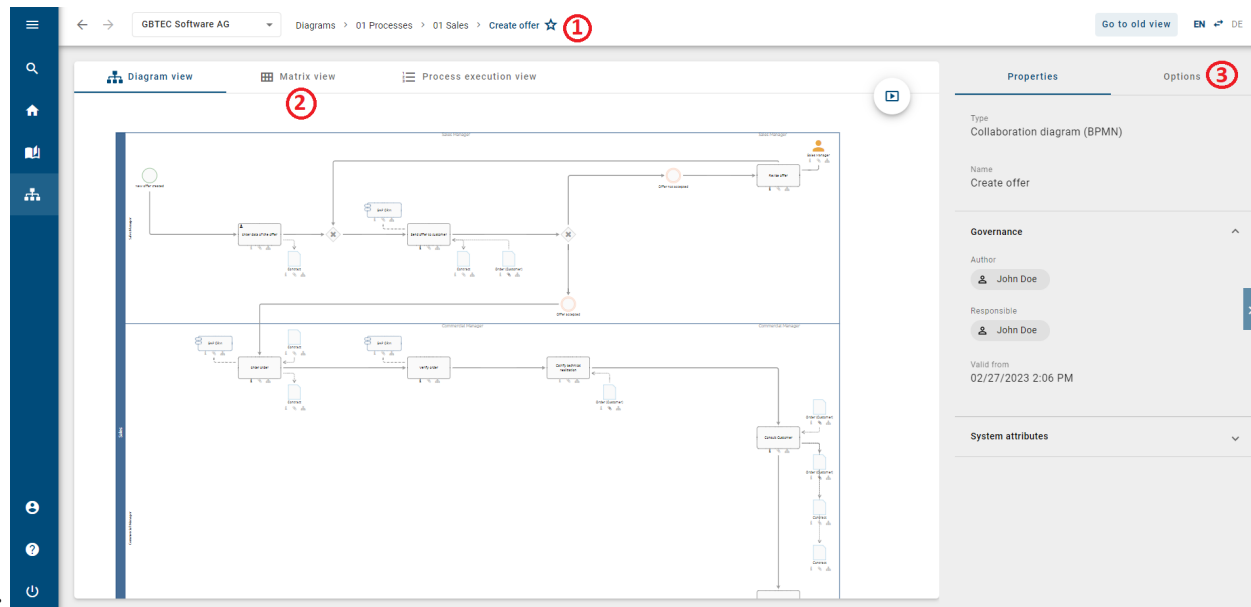
New Interface:

(1) **Category Tree:** In the new interface, the category tree is no longer presented in the same form as in the old interface. Instead, you can now navigate back to your categories through the header. Additionally, you have the option to change your repository at any time through the header.

(2) **Alternative Views:** Navigation to the matrix view and process execution view is now directly above the diagram and no longer in the toolbar.

(3) **Options:** The previous functions, such as comments or printing, which were located in the toolbar and menu bar in the old interface, can now be found under *Options* in the new interface. Additionally, the attributes of the diagram or an individual entity can now be found under *Details*.

1.4 Catalog

Old Interface:

New Interface:

(1) **Filter:** In the new interface, you will find the filter area and search functions in the right sidebar.

(2) **Download Report:** The function to download a report, which was located in the toolbar in the old interface, can now be found under *Options* in the new interface.

(3) **Catalog List:** The catalog list in the new interface is structurally similar to the old interface. The description of a catalog entry is now displayed below the catalog name and no longer beside it.

(4) **Switching Repository & Marking as Favorite:** In the new interface, you now have the ability to switch the repository within the catalog. Additionally, you can mark (filtered) catalog lists as favorites, which will then be saved on your *myBIC* page.

1.5 Search

To initiate a search in the new interface, you need to navigate to the *Search* section through the menu.
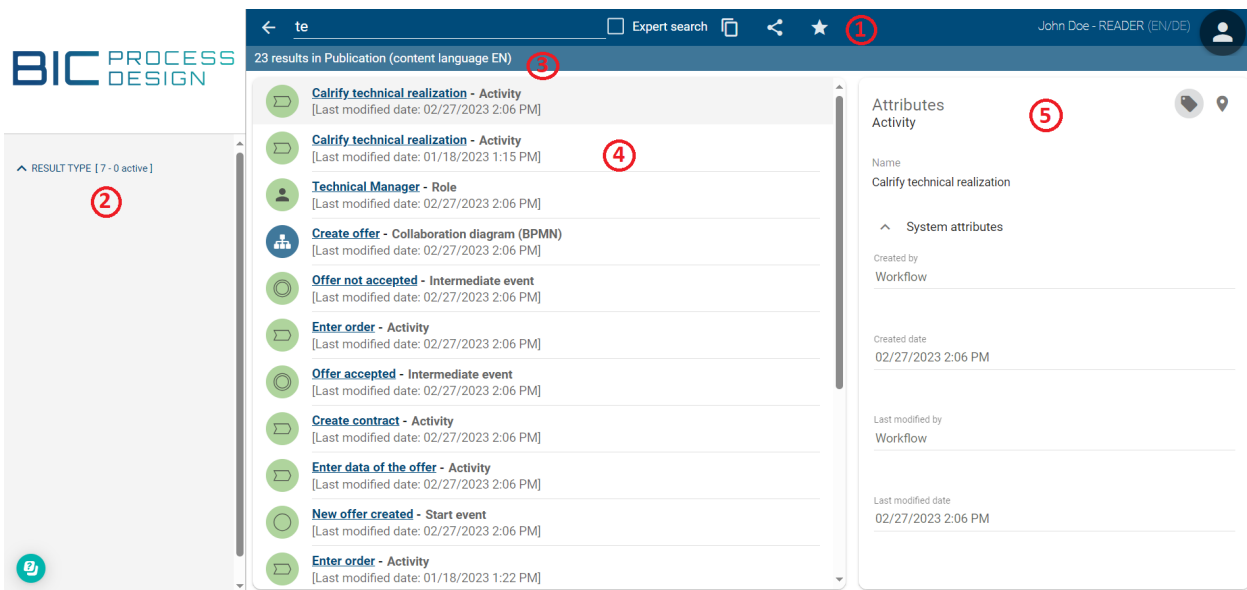
Old Interface:
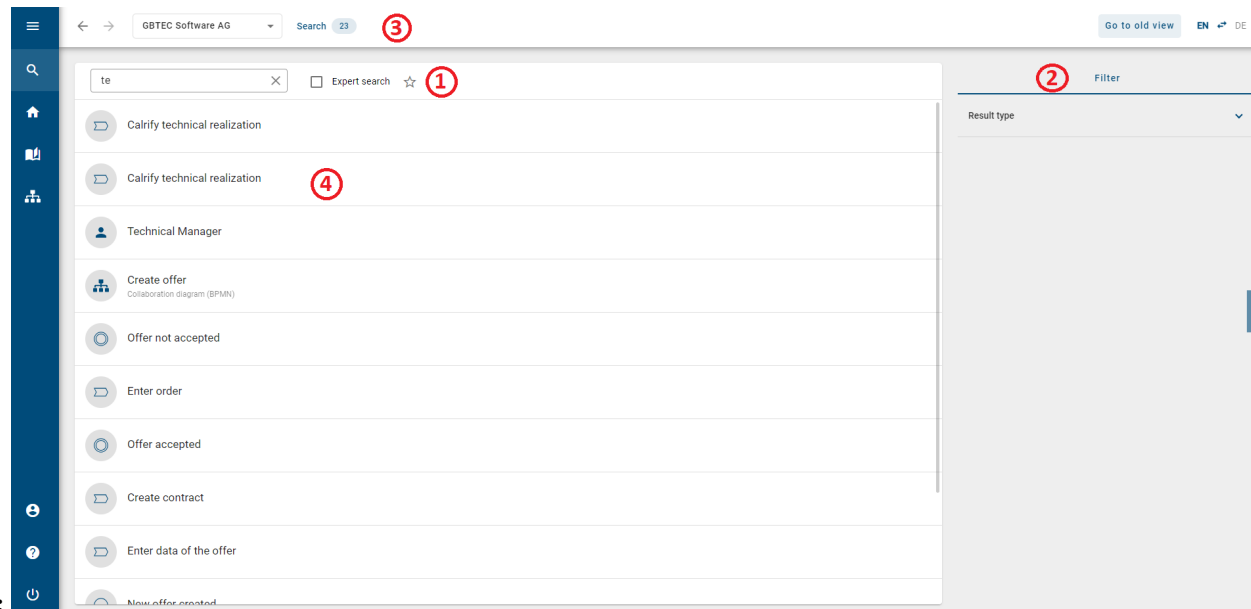
New Interface:

(1) **Search:** In the new interface, the search no longer takes place in the header but in the main area of the *Search*.

(2) **Filter:** In the new interface, you will find the filter area in the right sidebar.

(3) **Number of Search Results:** In the old interface, you could see the number of search results for the publication using the toolbar by default. In the new interface, these results are now displayed in the header bar. Additionally, you can change your repository here to expand the search.

(4) **Search Results:** In the new interface, you will only find the names of matching catalog entries and diagrams in the current content language in the search result list. Hovering over the icon provides information about whether it is a catalog entry or a diagram.

(5) **Details of Search Results:** While in the old interface, the details of the corresponding search result were displayed in the right sidebar, in the new interface, you need to click on the respective search result.
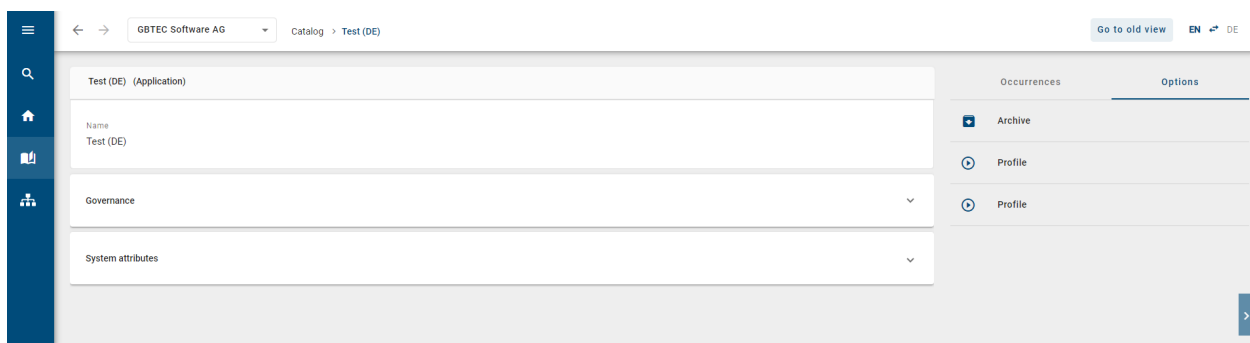
Subsequently, you will be directed straight to the corresponding diagram/catalog entry and will no longer be in the *Search*. This information is also available in the header. Here, you can view all details of the corresponding search result and, if needed, download the archive or the report.

1.6 Profile

In the new interface, the profile is now displayed as a separate menu section. To access it, go to the *Profile* section.

Old Interface:
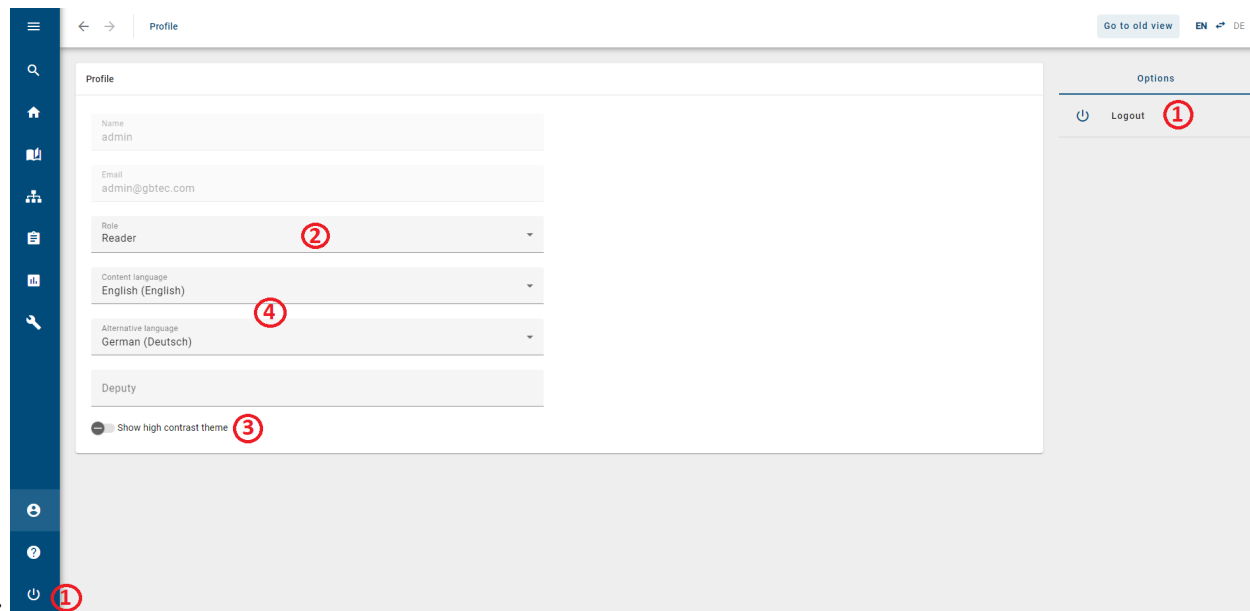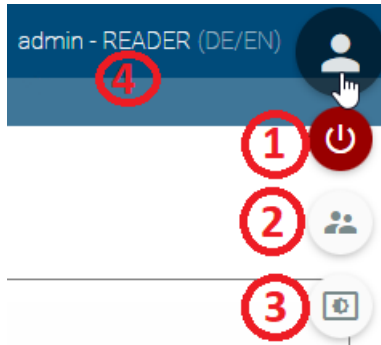
New Interface:

(1) **Logout:** In the new interface, you will find the *Logout* button both on the profile page in the right sidebar and consistently at the bottom of the menu bar.

(2) **Change Role:** The role can be adjusted on the profile page, provided that you have an appropriate role assigned in the user management.

(3) **High Contrast:** The high contrast mode is now more prominently marked on the profile page and can be toggled on and off as needed.

(4) **Change Language:** You can still adjust the language setting consistently in the header. Additionally, you can now set this on the profile page as well.

Furthermore, you can access your short profile from all areas. To do this, click on *Profile* in the menu bar.
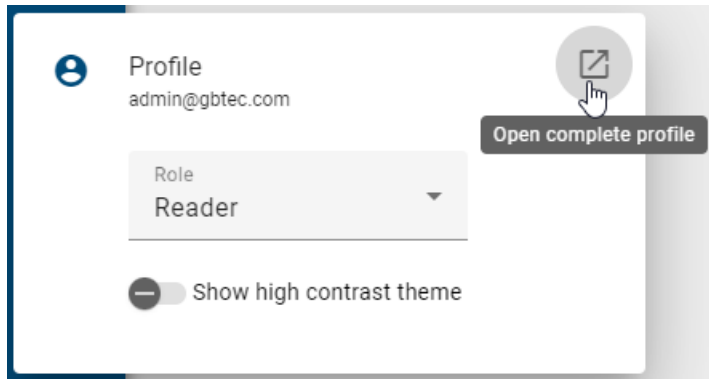
Here, you have the option to change your role and switch to high contrast if needed. To view your complete profile, click on the *Open complete profile* button located at the top right within the short profile.

QUICKSTART

Welcome to the BIC Process Design help.

Welcome screen

After you have logged in, you can see your welcome screen. Details may vary, but the general structure is the same.
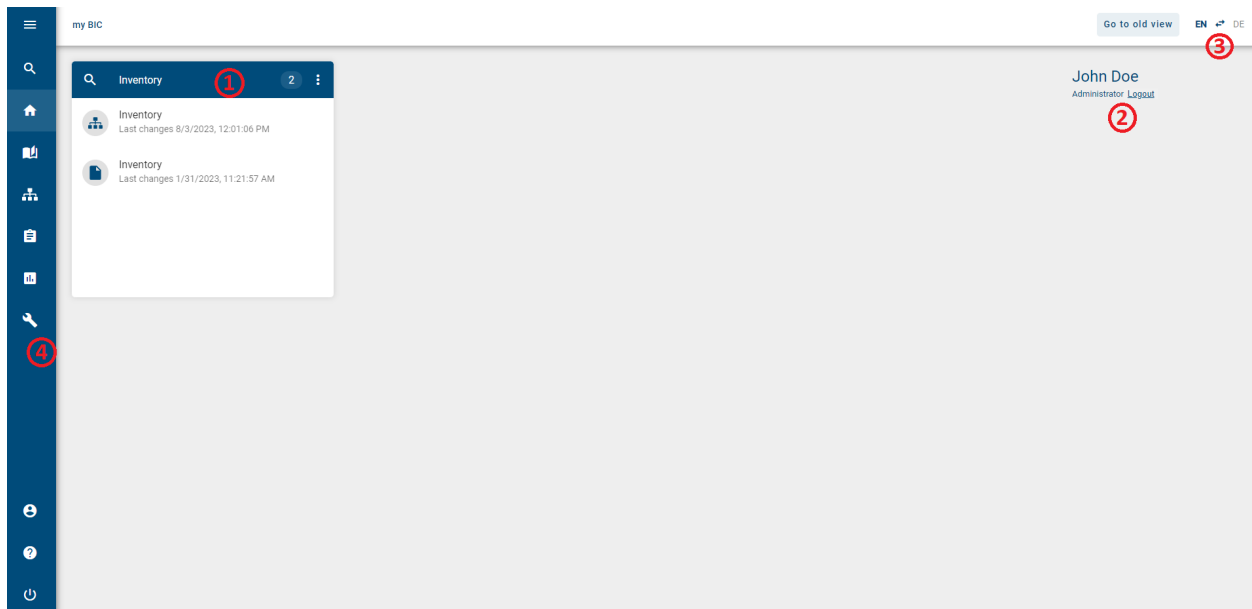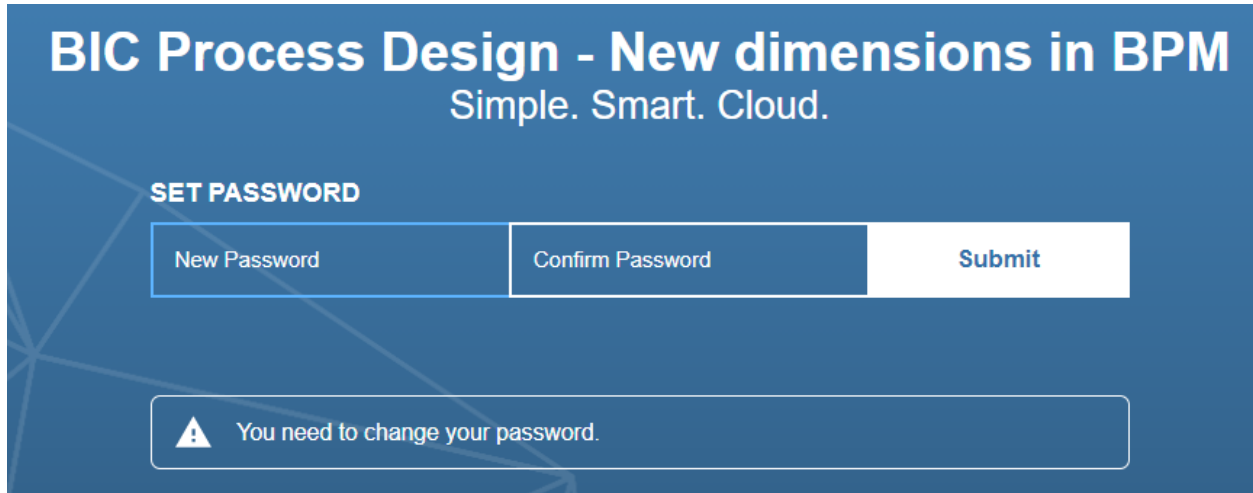
It consists of different elements and options.

(1): In the middle you can see your *MyBIC* site.

(2): On the right-hand side you can see your username, your current role and a field where you can *log out*.

(3): In the top-right corner you have the possibility to switch back to *the old ui*. Here you can also swap your *content and alternative language*.

(4): In the left sidebar you can see the different functionalities of BIC Process Design such as the *catalog* or the *governance cockpit*.

2.1 How do I sign in?

As soon as you are registered as a user in BIC Process Design, you will receive an e-mail with a link to set your password. Open this link and set a password.
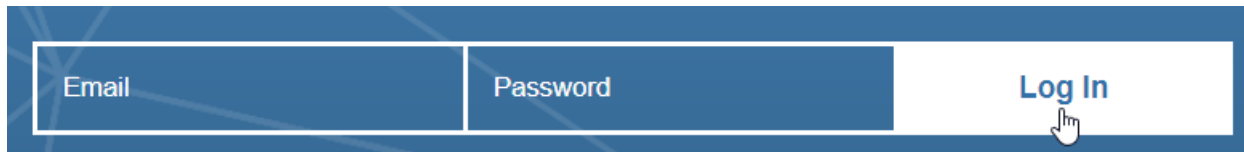
If you confirm via *Submit*, you are logged in to the application.

When you have registered successfully once, you can always log in to your BIC Process Design by entering your e-mail address and the password on the login page.

After successful login you will be informed about a software update and new features of BIC Process Design if applicable.

> **Warning:** Do not log in to the system at the same workstation and the same browser and different credentials (without clearing the cache). This type of operation can lead to inconsistencies and data loss in the worst case. It is not supported by the software.

As an SSO user, you are directly logged in to BIC Process Design by opening the application if you are logged in to you SSO-system. The login page of the application is no longer usable. Your login data are managed by the SSO-system and you do not receive any e-mails with links to set your password from BIC Process Design. Therefore, you can only change your password in the external system. In addition to SSO users, "normal" users can have access to the application and the login page in the same tenant using the corresponding URL parameter.

2.2 How is the login lock configured?

If you make ten consecutive failed login attempts, the account will be locked for one minute. During this lockout period, each login attempt will receive the message *Invalid username or password*. If further failed login attempts are made after the lockout period has expired, the waiting time until the next attempt will be incrementally increased, with a maximum waiting time of up to fifteen minutes.

The login attempt counter is reset every twelve hours or after a successful login. In addition, a one-minute lockout occurs if the time between two consecutive failed login attempts is one second or less.

2.3 How do I sign out?

We recommend you to sign out after finishing your work with BIC Process Design.

You got two options to do so.

1. Select *MyBIC* on the left sidebar. On the right hand side you can see your Username, your current role and a field *Logout*. If you click this field you will be redirected to the Logout-Page.
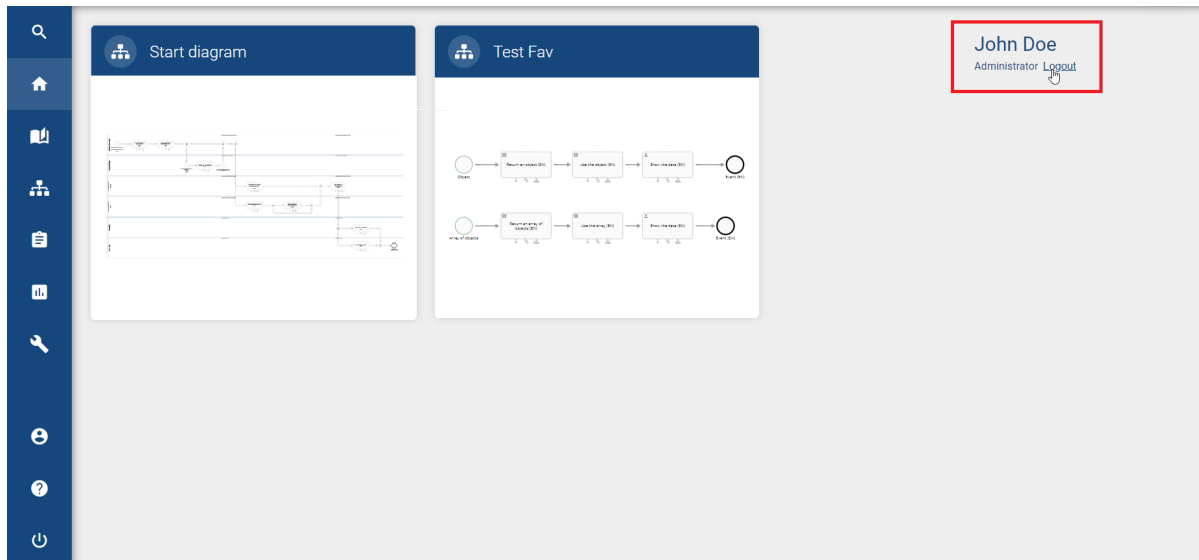
2. Select *Profile* on the left sidebar. On the right hand side you can see the option *Logout*. If you click this field you will be redirected to the Logout-Page.
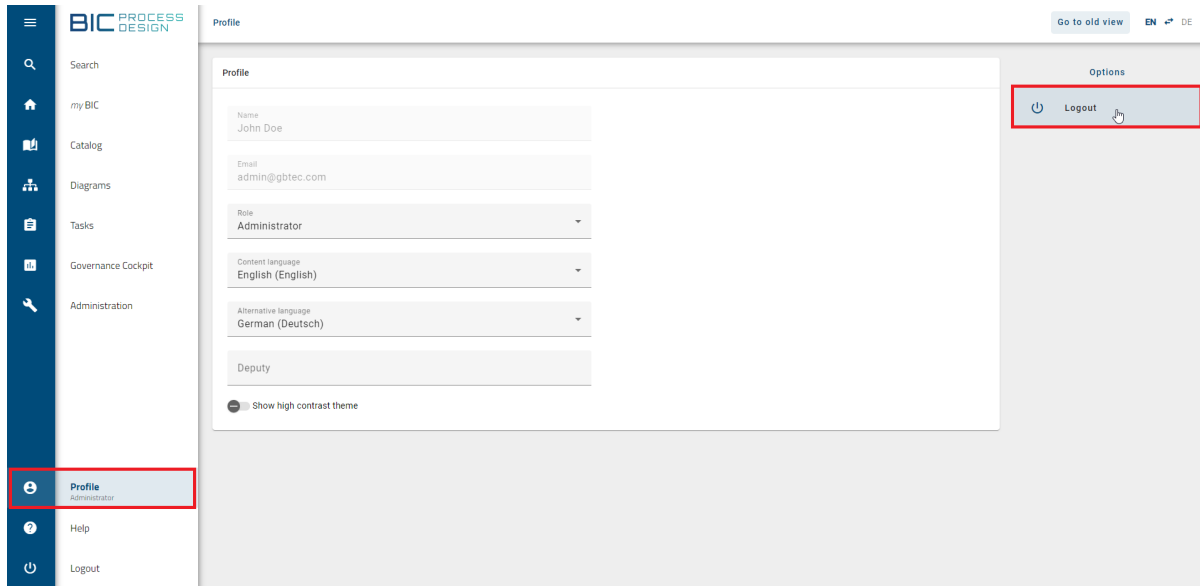
If you have checked out diagrams, you will be notified with a dialog. Please keep in mind that local workstations are stored in the "Local Storage" of your browser. According to your browser settings, it is thus possible that local workstations are rejected by closing the browser. Therefore, always check in your changes to unlock the diagram for further processing. Subsequently you are logged out and are forwarded to the logout page of BIC Process Design.

During your next login, BIC Process Design will redirect you to the repository you have worked in last.

Note: Your session will expire if you are inactive for at least 30 minutes by default. Five minutes before your session expires, you will receive a notification within the application asking you to extend your session. If you remain inactive after the five-minute notification, the application will automatically log you out and ask you to log in again.
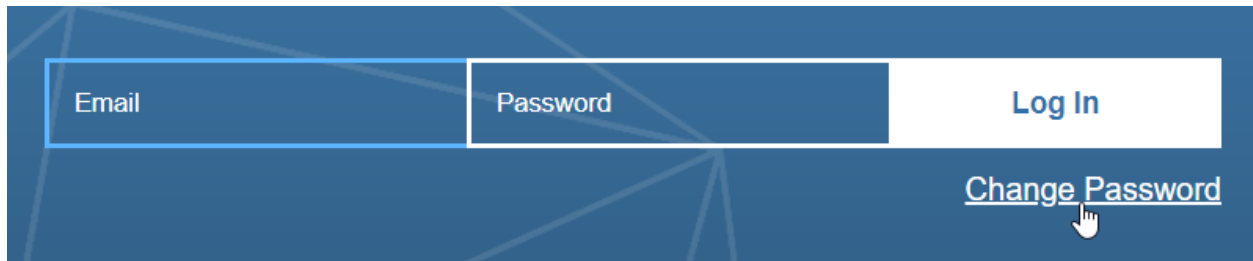
2.4 Where can I find the help?

On the left menu click on the button *Help*. There you can click the option *Help* to get the full documentation of BIC Process Design. Alternatively, you cann click the option *Quick Start* to navigate to the quickstart of BIC Process Design (which is this chapter).
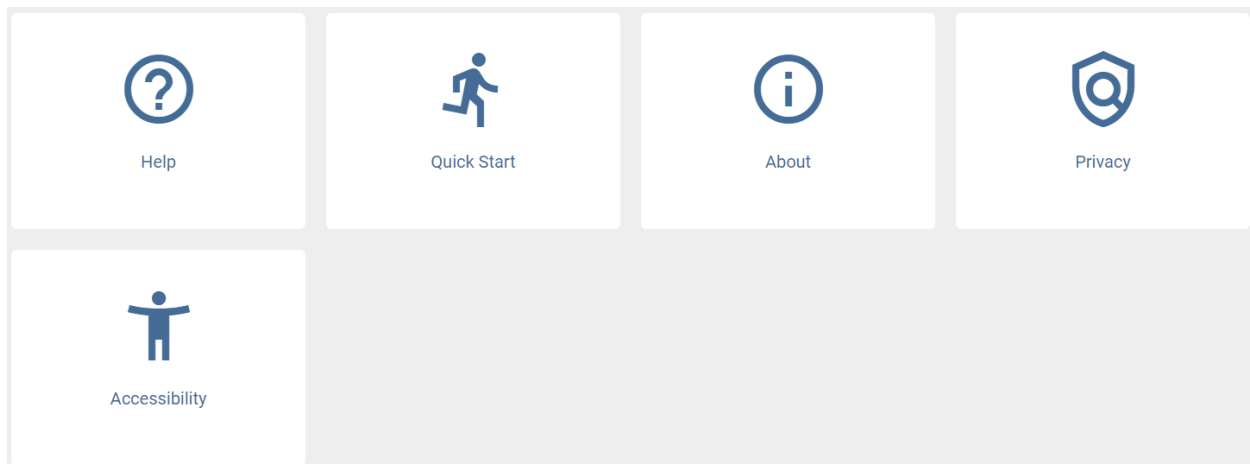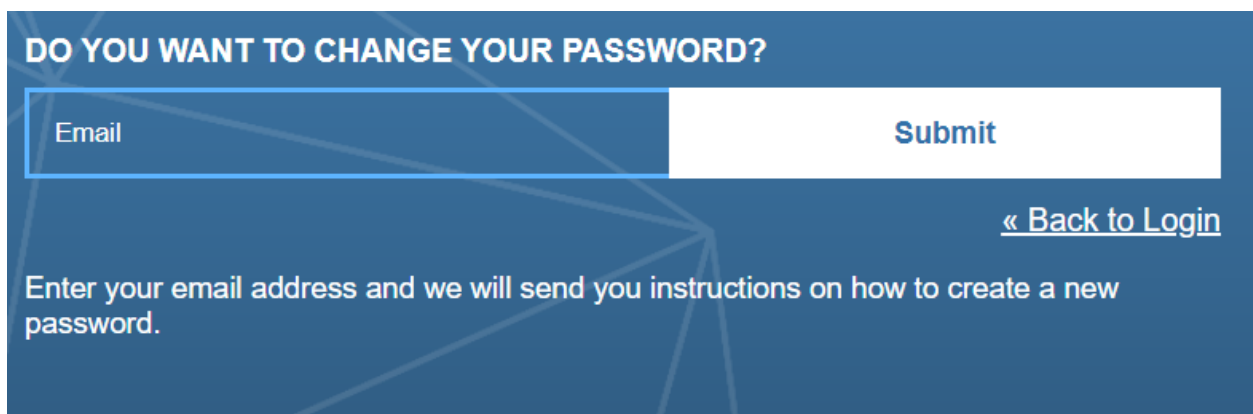
2.5 How do I change my password?

You can change your password on the login screen. Log out if you are already logged in. If you have forgotten your password, you can also reset it by following the steps. To do this, click on *Change password* on the login page.
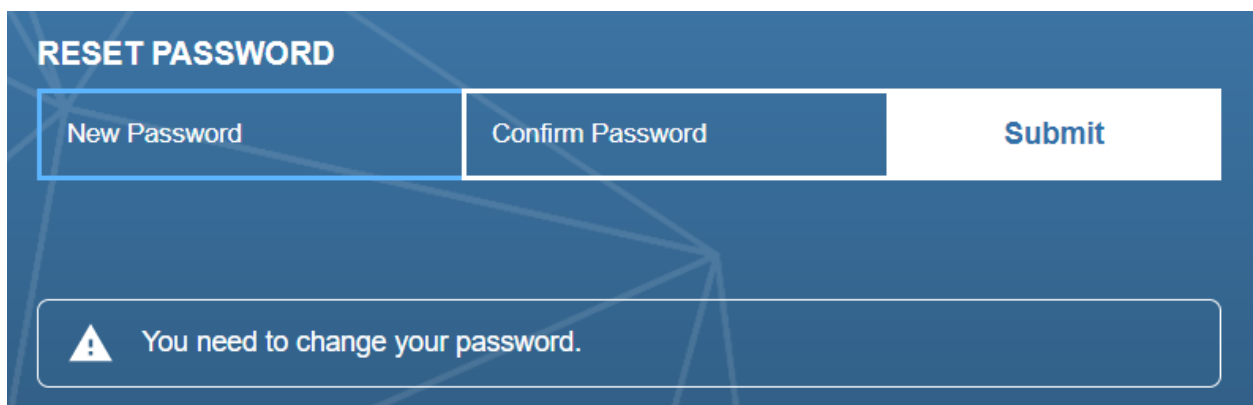
You can then enter your registered e-mail address and click *Submit*.

You will receive an e-mail with a link to set your new password. The link is valid for 5 minutes. Follow this link to the corresponding page where you can enter your new password.

Confirm your input by clicking on *Submit* and your new password will be saved.

Alternatively, administrators can send a link to change the password to every user in the administration area of the old user interface.

Note: Your new password must be at least twelve characters long, contain one number, one special character, one lowercase and one uppercase.

2.6 How can I switch to the old user interface?

In the header of the desktop version of the new user interface, you can find the button *Go to old view*. Clicking on it will take you directly to the welcome screen of the old interface.

Similarly, you can return to the new user interface from the old one via the welcome screen.

2.7 How can I view different repositories?

If you are working with several repositories, you can switch between them in the top bar. The name of the current repository is displayed as first entry of the top bar.

To display another repository, click the name of the current repository to open an alphabetically sorted list of available repositories. If necessary, scroll until the desired repository is displayed.
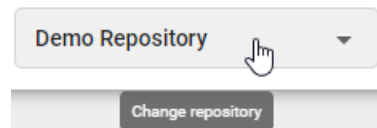
Select the desired repository by clicking its name. You are directed to the myBIC page and eventually see the diagrams of the selected repository.

2.8 How can I change my stage?

You have the opportunity to change your stage according to your *assigned user role*. The different stages are *Public Workspace, Preview* and *Publication*.
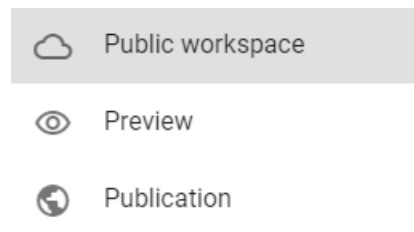
To change your stage, click on your current stage and select the stage you want to go to.
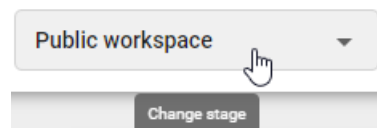
Afterwards you can navigate within the *menu bar* and view the associated content of your current stage.

2.9 How can I navigate through the BIC Process Design menu?

In the left sidebar, the menu items are represented by icons for each application area.
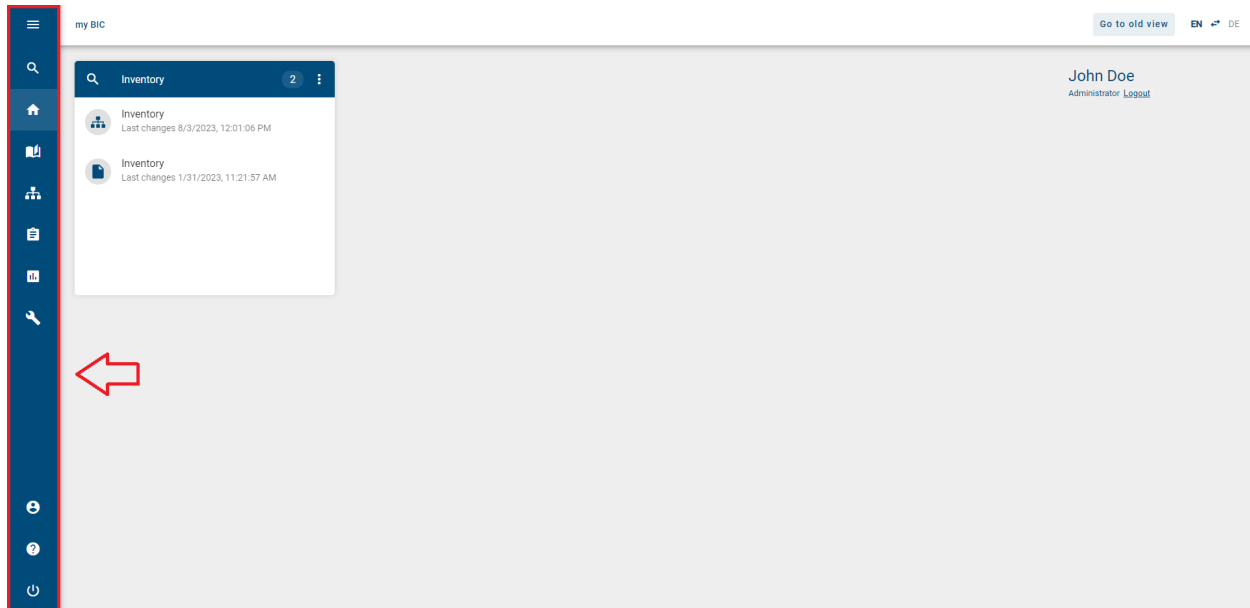
You can move the cursor over a menu icon to display a tool tip for this icon. The corresponding application area opens by clicking the respective *menu icon*.
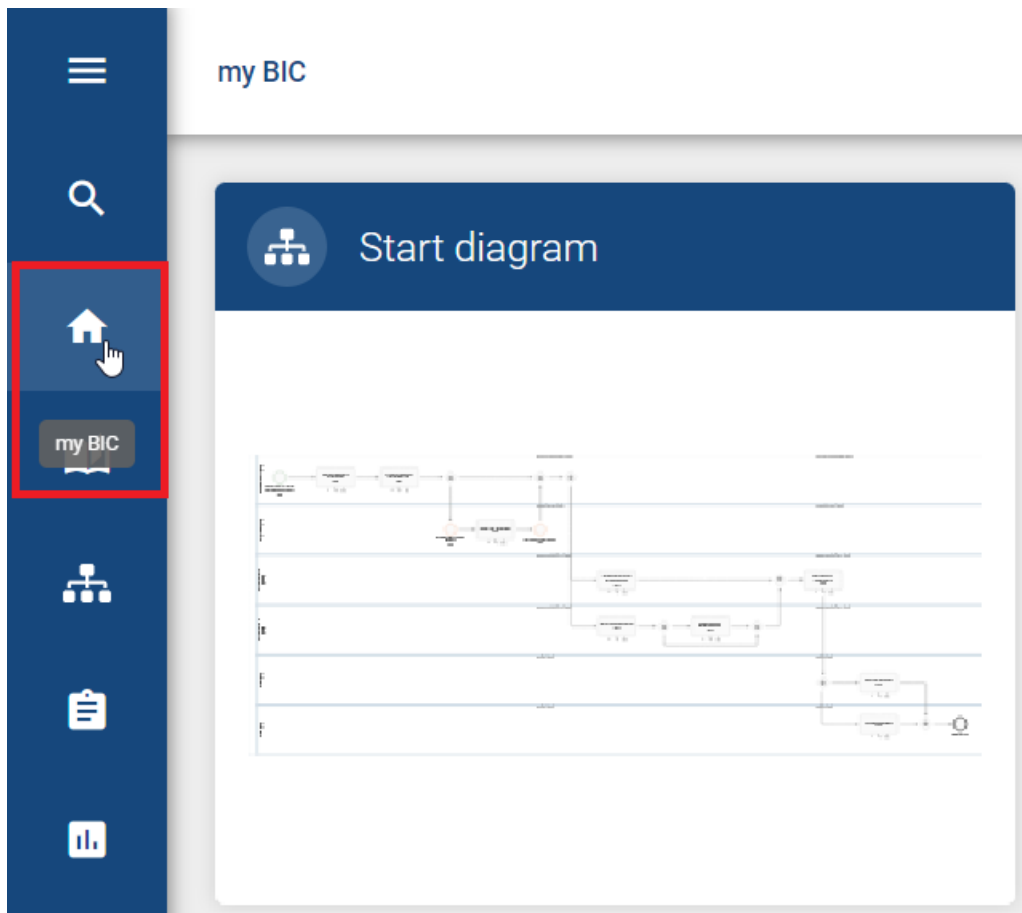
Hint: In the *Tasks* menu item, the number of open tasks is also shown.

2.10 How can I see the descriptions of the menu icons in the sidebar?

After you log in, you will see the collapsed menu reduced to the icons on the left side of the home page. You can expand the menu by clicking on the top icon.
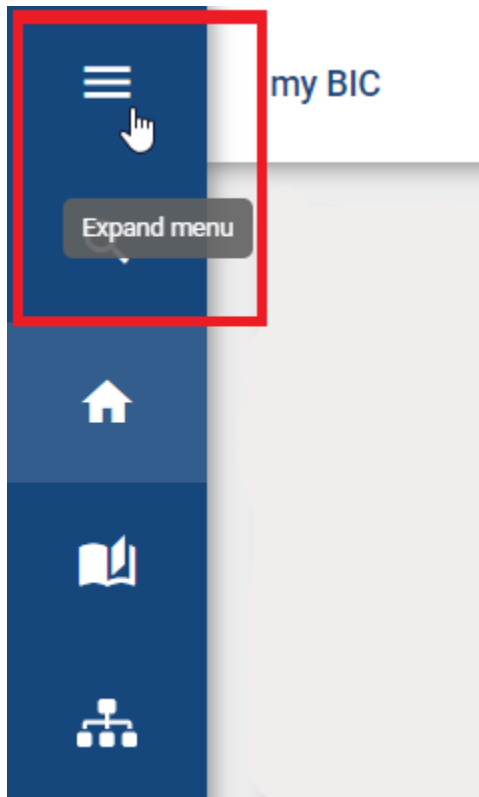
The side menu will expand and you will see the descriptions of the menu icons.
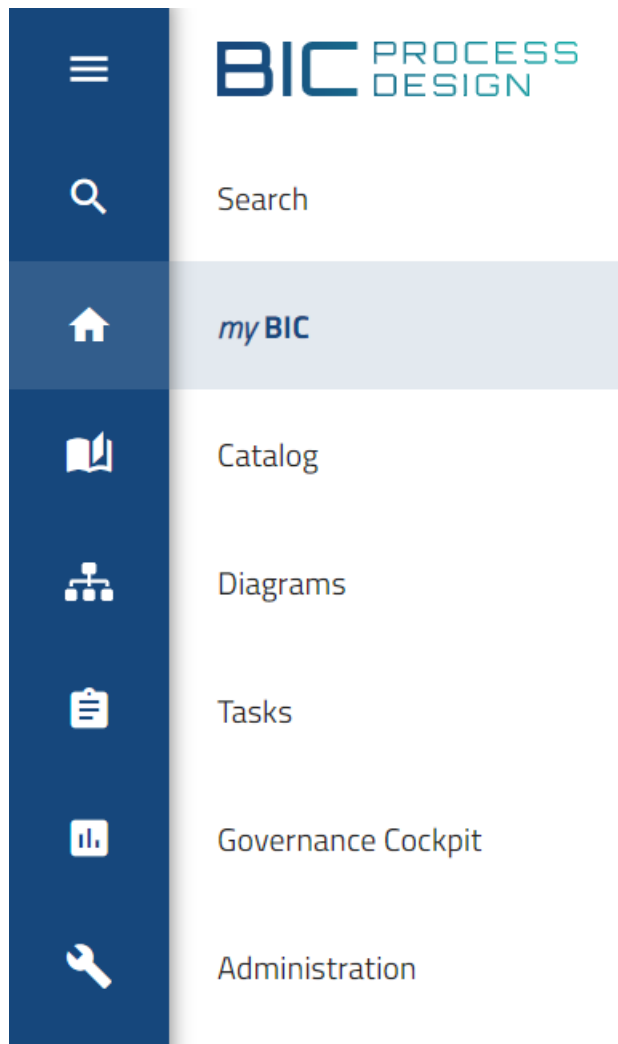
2.11 How can I change my user role?

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.

If you click on the profile icon in the collapsed menu, the short profile will appear. The short profile shows your e-mail address, your active user role and the switch to (de-)activate the high contrast theme.
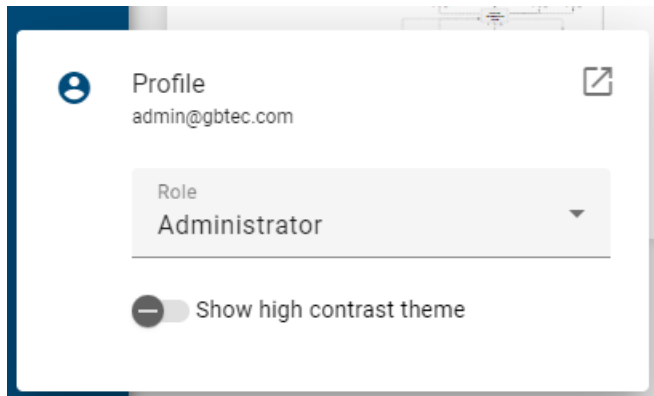
Click on your active user role to select the new desired role in a drop-down menu.
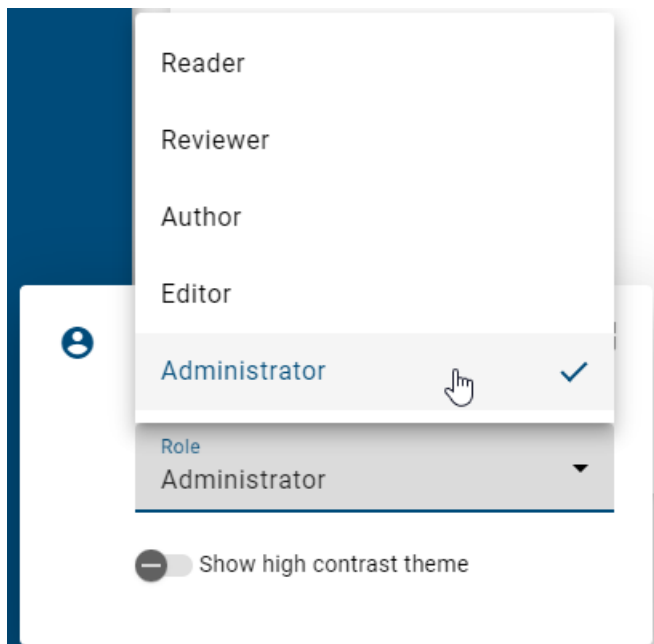
These settings remain until you explicitly change back your active role. This also applies to a new login, which means that the role will not be changed to your highest role automatically.

In the short profile, you can also navigate to the *Profile* area via the button *Open complete profile* to view and adapt further settings for your user, for example determine a deputy.
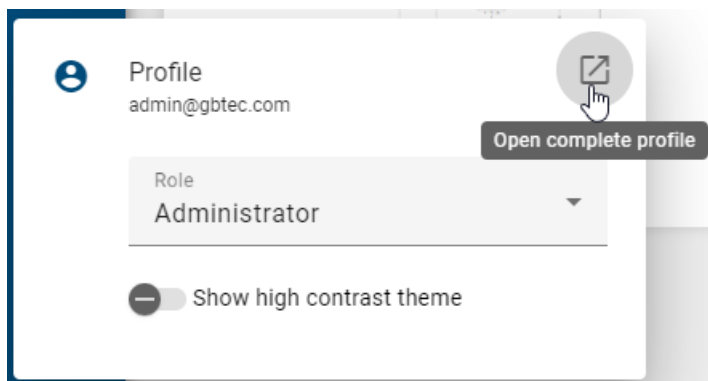
Hint: Changing the user role does not change the rights of your user role, but rather the user interface is displayed according to the selected user role. This means that you can still use functions that are available to higher roles even though you changed your user role to one with less rights. For example, if you have selected the user role *Author* as an *Administrator*, you can still check out diagrams for which you have not been set as "Author" within the *governance attributes*.

MYBIC

The myBIC page can be reached via the menu item named *myBIC*. The following questions arise for myBIC.

3.1 Which tiles do I see in myBIC?

Click on the entry with the same name in the menu to display *myBIC*.
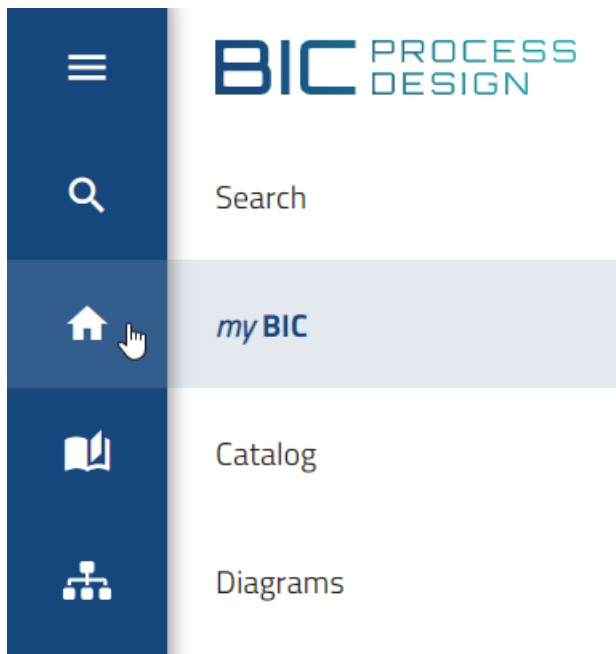
Then you can see the following different tiles:

Start diagram: This tile is displayed, if a company-wide start diagram is set, and shows the preview of this diagram.

Default favorites: Default favorites are tiles that the administrator can create for the users in the administration area. Note that these cannot be removed independently by the user themselves. The display of the default favorites is sorted alphabetically.

Diagram: For each diagram favorite, a separate "Diagram" tile is displayed, which includes the diagram as a preview. The favorites are sorted alphabetically by name, which also form the header of the tile.

Catalog list: For each catalog list favorite, a separate "Catalog list" tile is displayed, named according to your chosen name. The favorites are sorted alphabetically by name. The number of catalog entries is displayed, and the corresponding catalog entries are listed within the tile. If there are many catalog entries, a scroll bar appears within the tile,

allowing you to see all the entries. For each entry, you see the name, the icon of the entry type, and the time of the last change.

Dashboard: For each dashboard favorite, a separate "Dashboard" tile is displayed, named according to your chosen name, which includes the dashboard as a preview. The favorites are sorted alphabetically by name. The icon of the tile is assigned based on the one of the diagram or catalog in which you marked the dashboard as a favorite.

Search result: For each search favorite, a separate "Search result" tile is displayed, named by the favorite. The favorites are sorted alphabetically by name. The number of search results is displayed, and the corresponding results are listed within the tile. If there are many search results, a scroll bar appears within the tile, allowing you to see all the results. For each result, you see the name, the icon of the result type, and the time of the last change.

If no tiles are available, this is noted accordingly. However, if tiles are available, they are sorted according to the start diagram and the favorites. The favorites can be divided into default favorites and personal favorites (diagram, catalog list, dashboard, search result). The tiles are displayed in a fixed order, starting with the start diagram, followed by the default favorites, and ending with the personal favorites.

In the tiles, that represent diagrams and dashboards, you can navigate to the respective diagram or dashboard by clicking on the tile or the tile header. Moreover, you can click on a diagram or object list entry of the search results to be redirected to the respective diagram. If the objects in the search results are catalog items, you can access the detailed view in the catalog by clicking on them.
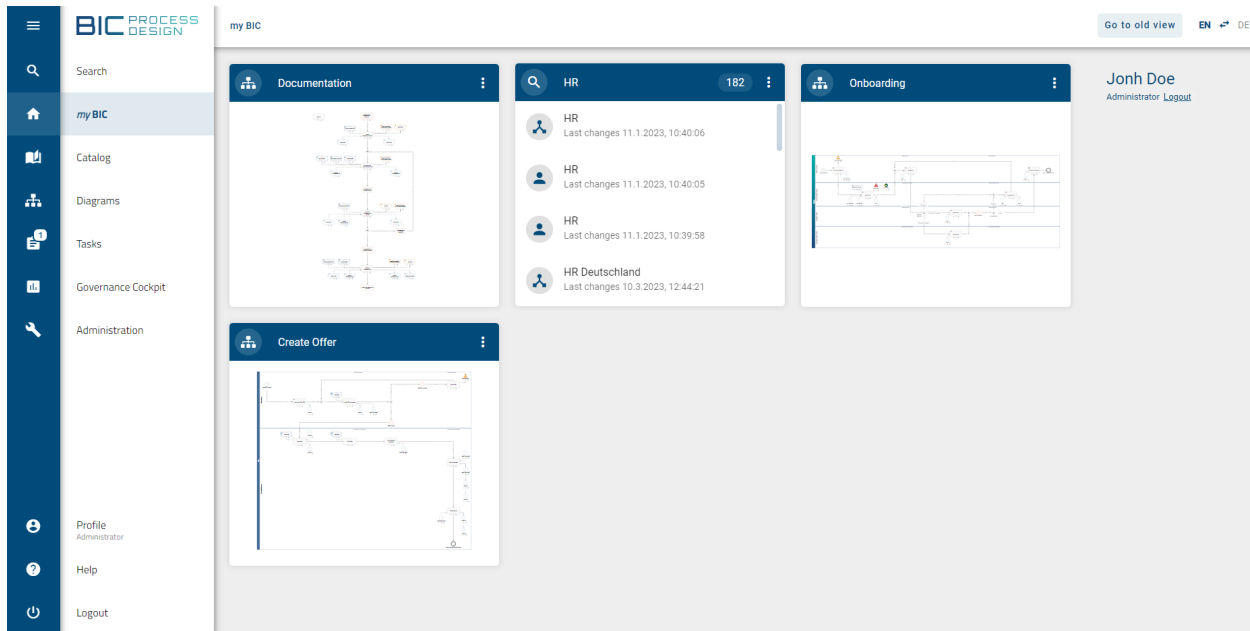
In the mobile view, you get a list instead of tiles. By clicking on a diagram or dashboard in the list entry, you will be forwarded directly. For a catalog list favorite or search favorite, all catalog entries or search results are first listed with one click and can then be opened as described above.

Note: A diagram-specific preview is available if the diagram has been changed since version 5.3.0 and if it is in preview or publication stage. Otherwise, a preview will be displayed for the respective diagram type.

3.2 How can I remove a favorite from my myBIC page?

You can remove a *favorite diagram, a favored catalog list, a favored dashboard* or *favored search result* directly from your myBIC page. Use the menu to navigate to the myBIC page and find the tile you want to remove. Open the context menu in the header of this tile.
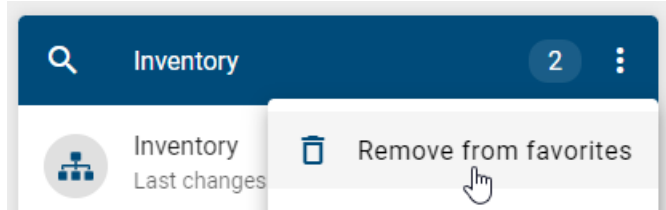
Select the option *Remove from favorites* there. The tile disappears from your myBIC page directly.

Note: Users cannot remove default favorites that have been configured in the administration. Therefore, no context menu is displayed at these tiles. Further information can be found in the linked user documentation of the old user interface.

3.3 What user information and options do I see in myBIC?

In the options on the right side of the desktop view, or in the options in the mobile view, you will find your user name and your active user role. Additionally, you can log out of the application. To do this, click on *Logout*.
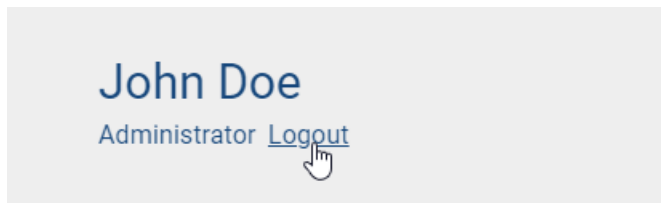
More information and options are available in *your profile*.

ADMINISTRATION

The administration can be reached via the menu item named *Administration*.
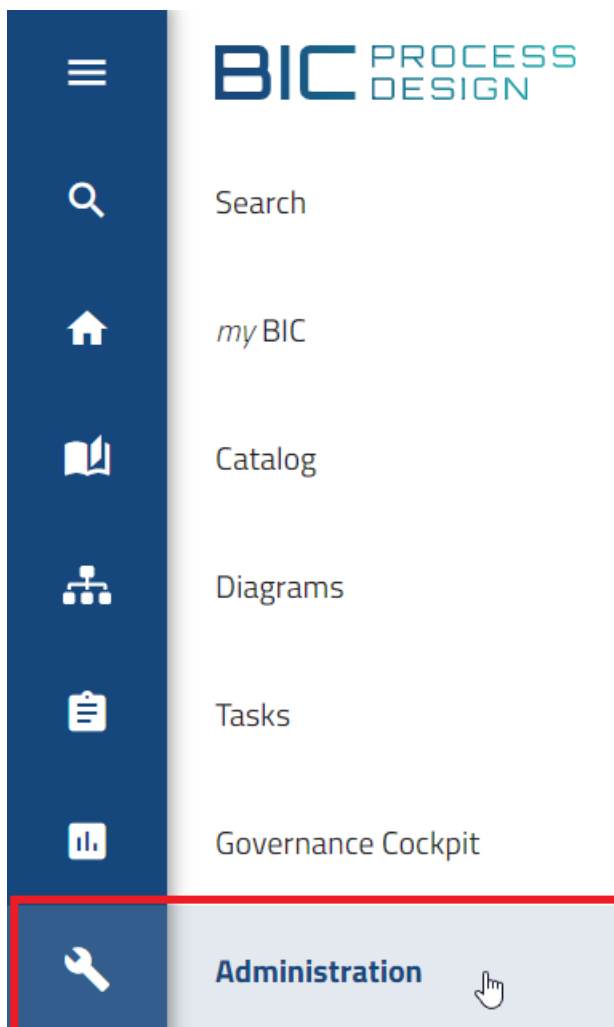
You can use the breadcrumb navigation in the administration. If you have opened a tile of the administration, you can switch to the start page of the administration via the header bar.

4.1 User management

In the *User management* tile, you will find an overview of all existing users and have the option to manage your users and creating a user and license report.
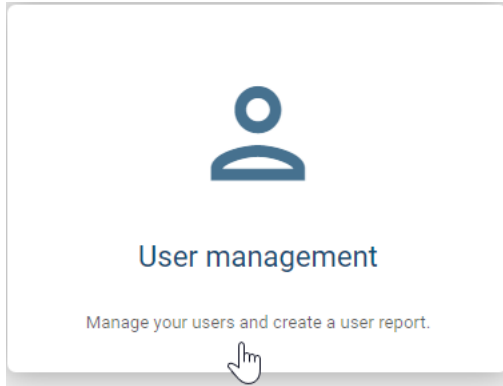
Once you have clicked on the tile, you will be shown a list of all existing users with their individual data. The content area of this list presents columns with the user details, and each user is displayed in a separate row with personal information such as *Name, User role, Language* and *Email*.

Hint: Please note that the functions of the *User management* tile are not available in the mobile view.

4.1.1 How can I create a user?

To create a new user, click on *Create user* in the options panel next to the list.
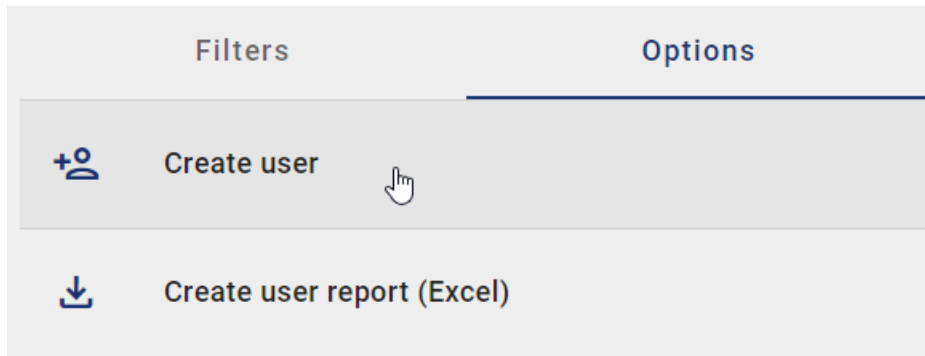
This will open a dialog window where you need to enter the user's name and email address. Additionally, you have the option to set the user's language and assign the *BIC Process Design role*. Furthermore, there is an option to create the user via SSO.

To create the user, click on *Create*. Alternatively, you can discard the input by clicking on *Cancel*.

The new user will now be displayed as the first entry in the list. Upon reloading the page, the user list will be displayed in alphabetical order.

4.1.2 How do I edit a user's details?

In the user details, you can set or change user-specific information. This includes *Name, Email, Language, Process Design Role, Process Execution Role*, and the *assigned user groups. Here* you can find out which permissions the BIC Process Design and BIC Process Execution roles have.

Navigate to the list of users and select the user whose details you want to edit to view their user-specific information.

In the respective input fields, you can then set or change the user details.

After making a new setting, it will be saved directly, and you will receive a success message. If the saving fails, you will receive an error message.

4.1.3 Which user roles are available and which permissions do they have?

In general, you have five different user roles for Process Design, with different authorizations that build on each other. Your active user role is displayed on the MyBIC page under your name or in the *profile*.

Reader: Readers only have access to the publication stage. This means these users are able to see published diagrams and all attributes, symbols, catalog entries and documents which are associated with these diagrams. In the publication area readers can create comments and reports and also use the print preview function. In addition they can add diagrams to their favorites.

Reviewer: Reviewers have similar access to the publication stage as Readers and possess the same permissions. Additionally, Reviewers have access to the preview stage and can view and work on assigned governance tasks (publication, depublishing, resubmission) if they are designated as a reviewing authority for a specific diagram or catalog entry. However, Reviewers are unable to initiate a governance workflow themselves.

Author: Authors have essentially the same rights as Reviewers. They also have access to the public workspace. This allows them to see all catalog entries and diagrams in the public workspace. This generally allows them to model diagrams and automatically generate catalog entries. To use these features, users with the Author role must be entered as *Author* in the attributes of the corresponding diagram or object. This allows Authors to be used specifically for modeling individual diagrams or editing individual objects.

Editor: Similar to authors, the role of Editor is used to edit and create diagrams. Unlike authors, Editors do not have to be set within the diagram attributes to model a diagram. Additionally, editors have the ability to make cross-diagram changes. This means users with the role of Editor have the right to manually create, edit, or delete catalog entries and are authorized to accept or decline catalog entries. Furthermore, editors have the ability to assume administrative tasks for governance workflows. They have the authority to view and manage all governance workflows. In the governance cockpit, editors have the same rights as administrators, which means they can delegate or cancel workflows.

Administrator: Administrators have all the rights that other user roles have. In addition, they have special administration rights. These include access to the administration area, the right to create, delete, and rename repositories, as well as the ability to unlock diagrams.

Accessible workspaces	Administrator	Editor	Author	Reviewer	Reader
Public workspace	entitled	entitled	entitled	not authorized(*)	not authorized(*)
Preview	entitled	entitled	entitled	entitled	not authorized(*)
Publication	entitled	entitled	entitled	entitled	entitled

(*)Read-only access can be granted to individual diagrams in the public workspace (view share diagram from public workspace)

If you use BIC Process Execution, you have the possibility to set the user's role for this application as well.

ProcessApp Administrator: As a *ProcessApp Administrator*, you have access to the administration area and can manage all available options.

ProcessApp Analyst: As a *ProcessApp Analyst*, you have access to the monitoring dashboard and can monitor all processes.

ProcessApp Creator: As a *ProcessApp Creator*, you can model executable processes in Process Design. If you want to further edit a diagram and you have this role, you have the possibility to open the editor by right-clicking an activity in the context menu. Alternatively, you can also open the editor by selecting the activity and choosing the *Editor* section from the *Details* menu. There, you will find a button that allows you to open the editor. Only users with the *ProcessApp Creator* role have the option to use the Test ProcessApp button in the preview stage or in the public workspace within the diagram view in Process Design and work on tasks.

ProcessApp User: As a *ProcessApp User*, you can initiate processes and see how far along they are. You can use the Create Case button in the diagram view of Process Design at any stage and work on tasks if you have the *ProcessApp User* role.

ProcessApp Participant: As a *ProcessApp Participant*, you can have active tasks and work on them.

Warning: Please note that both the *ProcessApp User* role and the *ProcessApp Participant* role are currently required to edit and manage tasks.

Hint: Please note that these roles are not hierarchical. This means that if, for example, you are assigned the role of *ProcessApp Administrator*, you do not automatically have access to the rights of other roles. To obtain additional rights, you need to select multiple checkboxes of the *Process Execution roles*.

4.1.4 How can I delete a user?

To delete a user, there must be at least one user existing. Click on the desired user in the list to expand their user details. Then, you will see the option *Delete user*.
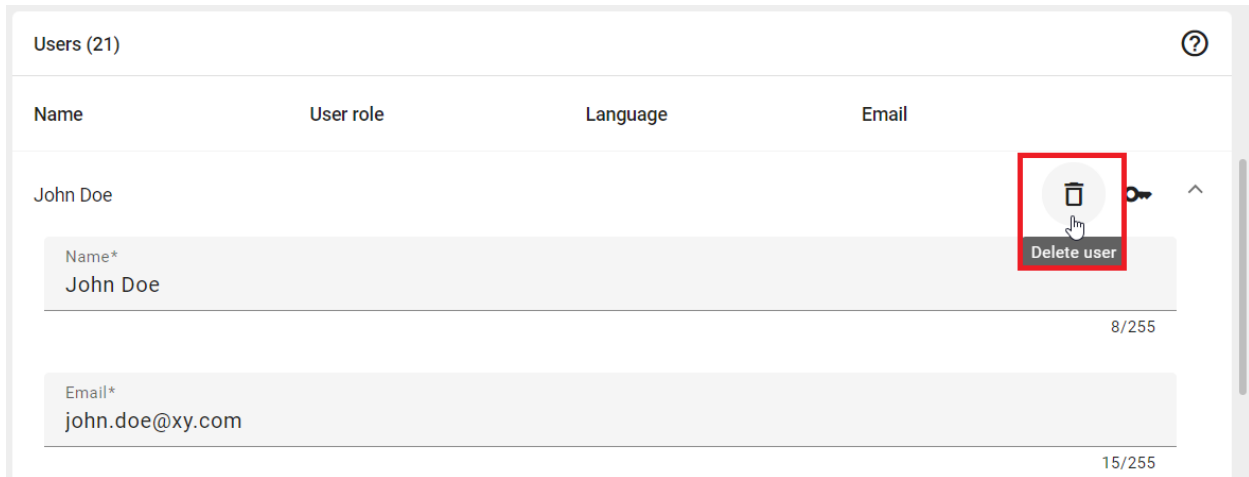
Subsequently, a dialog window will open, where you must confirm your deletion. Click on *Delete* to confirm the deletion permanently, or on *Cancel* to abort the deletion.

Afterward, the user will be permanently deleted and removed from the list.

4.1.5 How can I reset a user's password?

To reset a user's password, navigate to a user in the list and expand their user details. Then, you will see the option to *Reset password*.
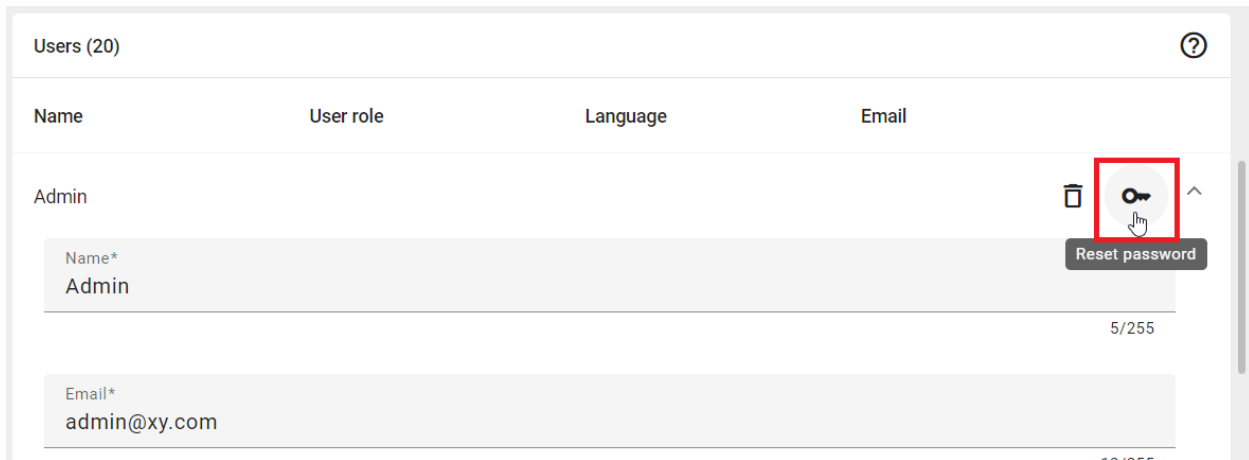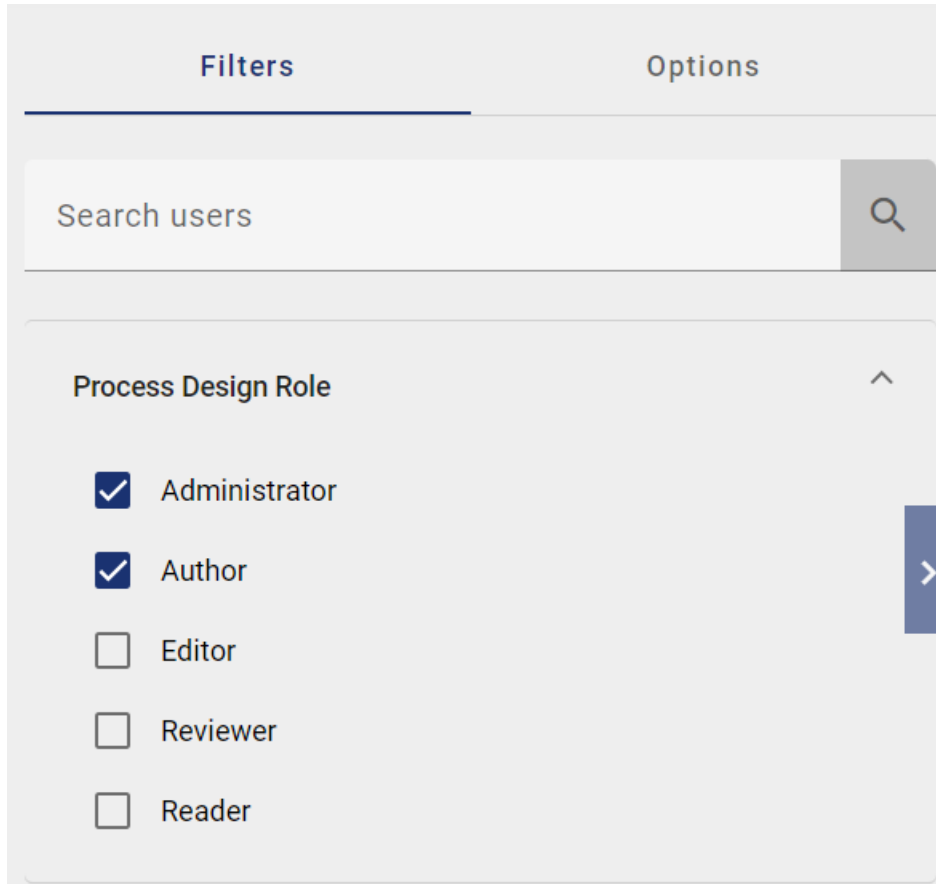
This will open a dialog box. If you click *Reset*, an automatic email with instructions on how to reset the password will be sent to the selected user. To cancel the operation, click *Cancel*.

4.1.6 How can I filter by user roles?

You have the option to filter the list of users by their roles. If necessary, switch to the *Filter* tab in the right sidebar. There, you will see the *Process Design Role* filter, and you can select which user role to filter by. Additionally, you have the option to search for users using the search field.

Afterward, only the users in the list that match your entered filter options will be displayed.

Note: If the user list is already filtered, a new search further reduces the list based on the selected filter options

---

4.1.7 How do I create a user report?

To create a user report, go to the *Options* and click on *Create user report (Excel)*.

Filters	Options

+👤 Create user

⬇ Create user report (Excel)
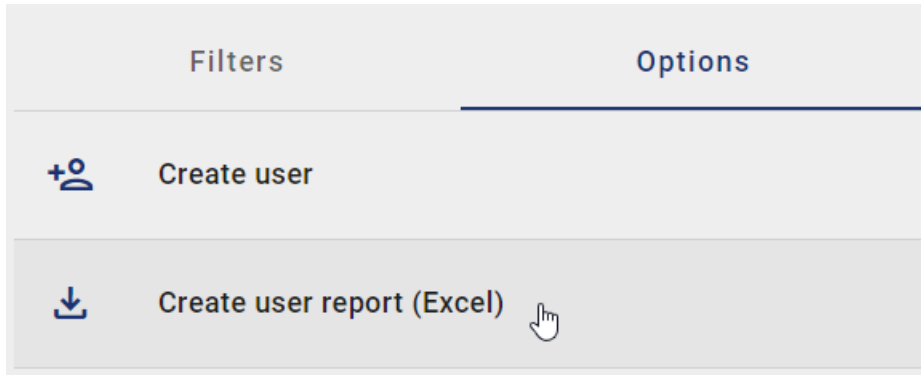
Once the user report is generated, a message will appear at the bottom right corner of the screen. This message contains a download link through which you can download the user report.

✓ User report created (Excel)
Download ✖
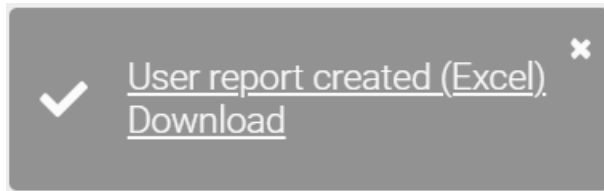
4.2 User groups

In the *User groups* tile, you can create and manage user groups.

👥

User groups

Create and manage user groups.
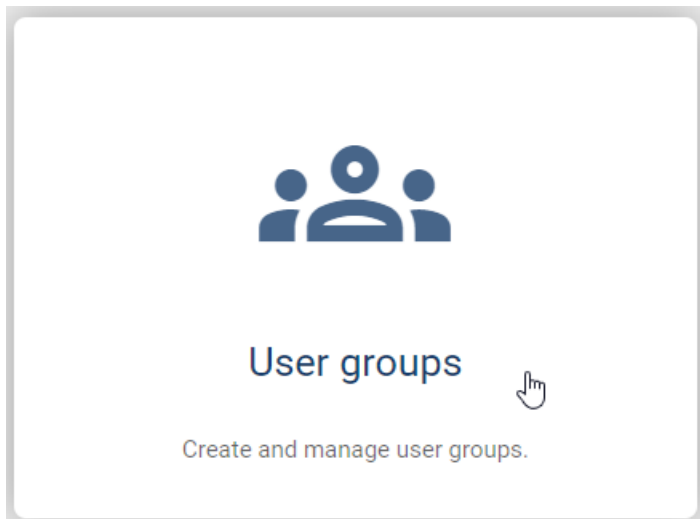
After clicking on the tile, an alphabetically sorted list of all existing user groups appears.

Hint: Please note that the functions of the *User groups* tile are not available in the mobile view.

4.2.1 How can I create a user group?

To create a user group, navigate to the options area next to the list and click on *Create user group*.
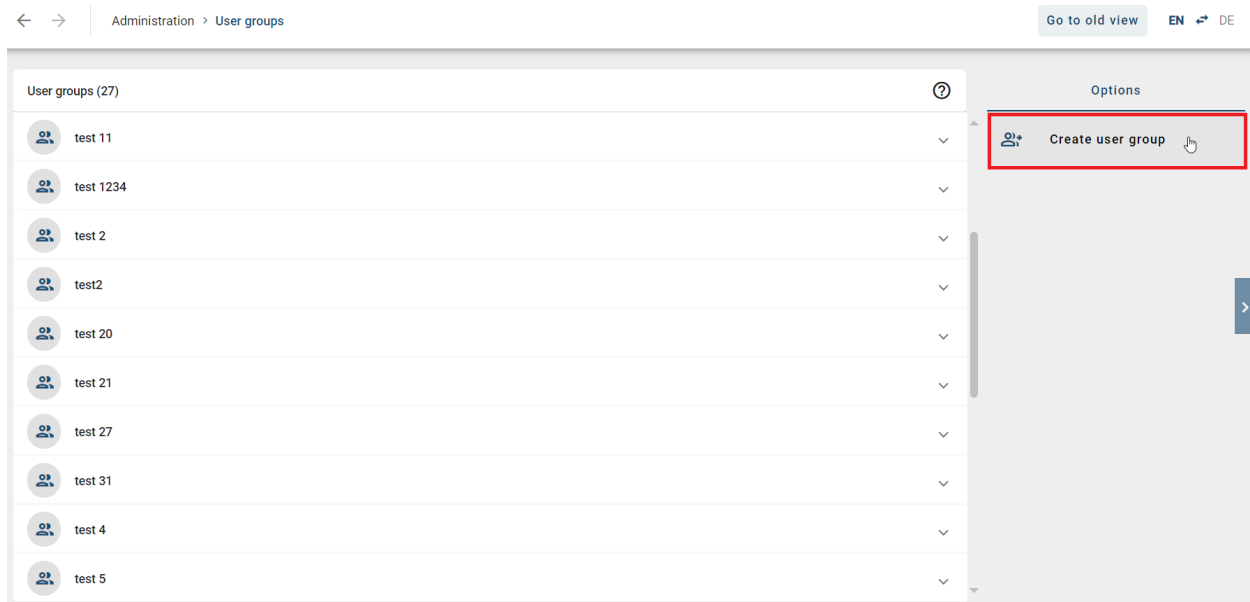
This will open a dialog window where you need to enter the name for the new user group.

Once you have entered at least one letter or number, you can click *Create* to create the user group. To discard the input, click *Cancel*.

The new user group will now appear as the first entry in the list. Upon reloading the page, the user group will be displayed in alphabetical order.

4.2.2 How can I rename a user group?

To rename a user group, there must be at least one user group available. Click on the desired user group to expand it. Then, you will see an input field with the current name of the user group.
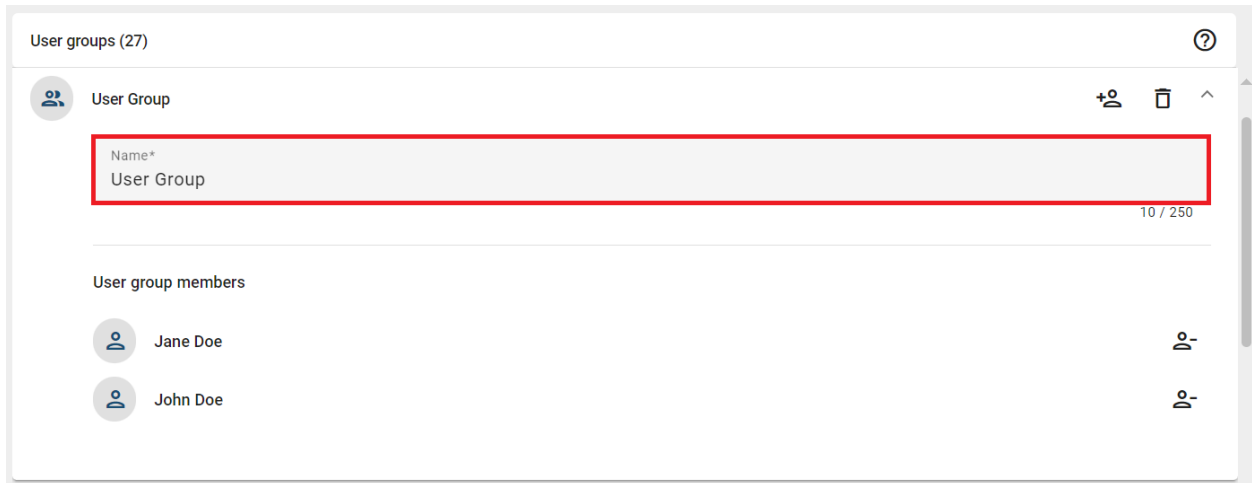
The input field is not read-only, and you can change the name as many times as you want, as long as at least one letter or number is present. Once you add, edit, or delete at least one letter or number, your changes will be immediately visible.

4.2.3 How can I delete a user group?

To delete a user group, click on the desired user group to expand it, and select *Delete user group*.
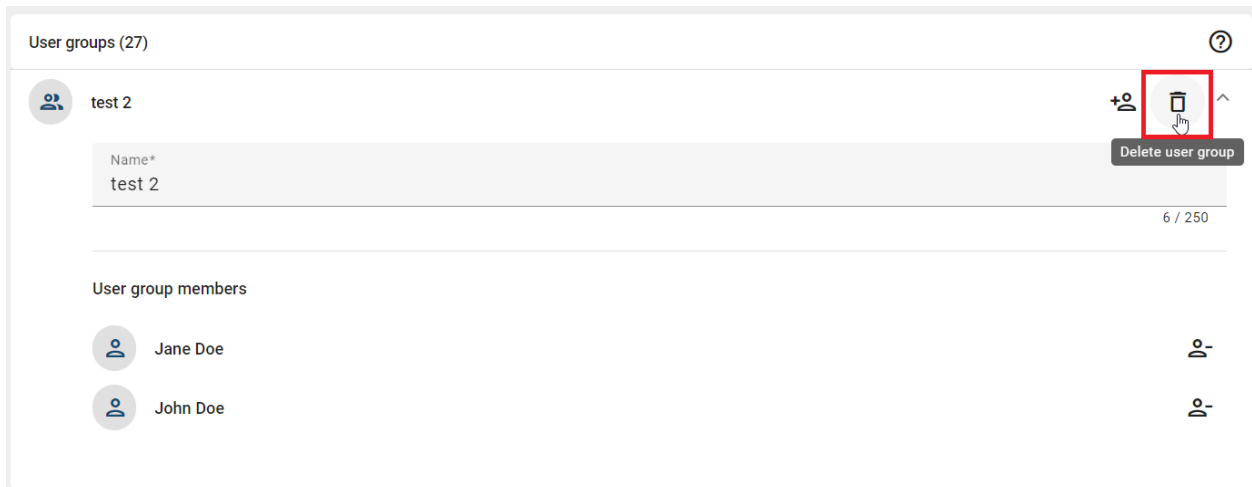
A dialog window will appear, prompting you to confirm your deletion. Click *Delete* to confirm the deletion permanently, or *Cancel* to abort the deletion.

Subsequently, the user group will be permanently deleted and removed from the list.

4.2.4 How can I add a user to a user group?

If there is at least one user group available, you can add users there. Click on the user group to expand it, and then select *Add user*.
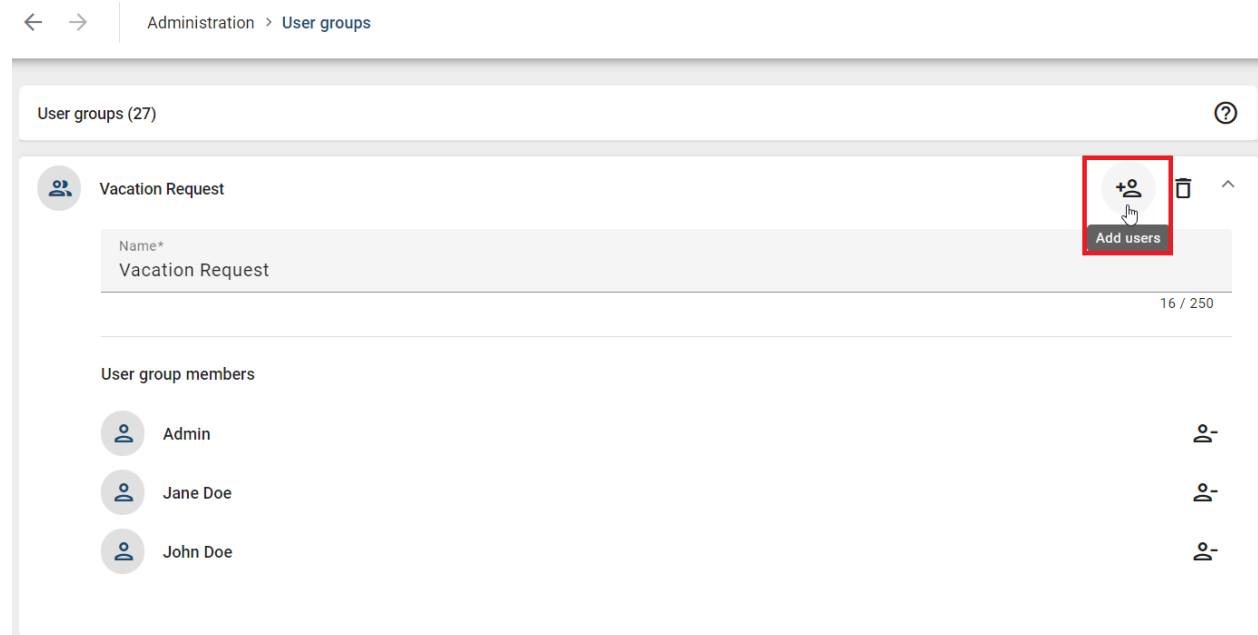
This will open a dialog window. You will see a search field and an alphabetically sorted list of users who are not part of the user group. You can search for users and select the ones you want to add to the user group.

Add users

Select the users you want to add to the user group.

Search user   🔍

3 selected

👤 **Admin A**
ADMINISTRATOR | admin@gbttec.com ☑

👤 **Admin B**
REVIEWER | d@de.p ☐

👤 **Admin C**
AUTHOR | asd@asd.com ☐

👤 **User 1**
ADMINISTRATOR | user.1@gbtec.com ☑

👤 **User 2**
ADMINISTRATOR | aabb@gbtec.com ☑

👤 **Test User**
READER | test@test.com ☐

Cancel   Add

Once you have selected at least one user, click *Add* to add them to the user group. To discard the selection, click *Cancel*.

The newly added users will then be displayed in the user group.

4.2.5 How can I remove a user from a user group?

If there is at least one user group with at least one user, you can remove the users from the user group. Click on the user group to expand it, and select *Remove user* next to the user.
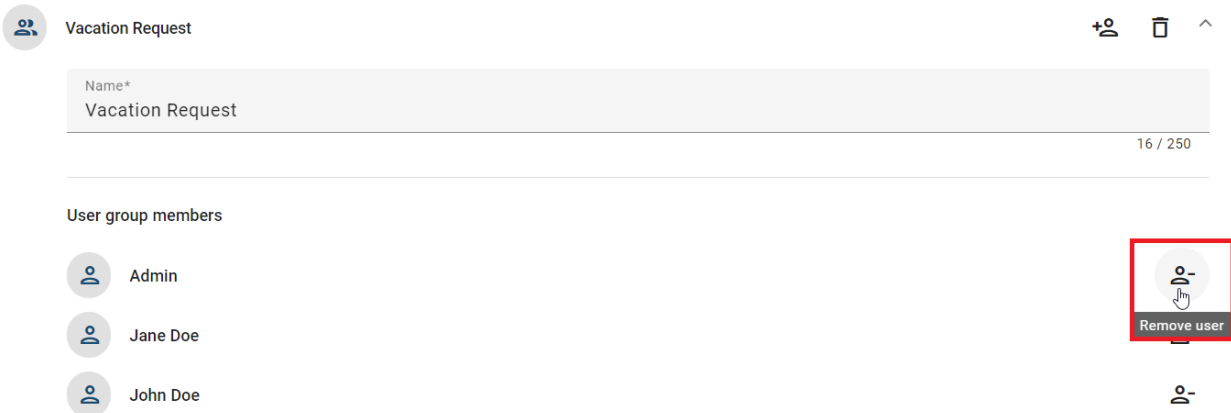
Subsequently, the user will be removed from the user group. If necessary, you can *add users* back to the user group.

4.3 User logins

4.3.1 How can I analyse the system usage?

If you click on the menu entry for *Administration* in the menu bar, you will see the tile *User logins*.
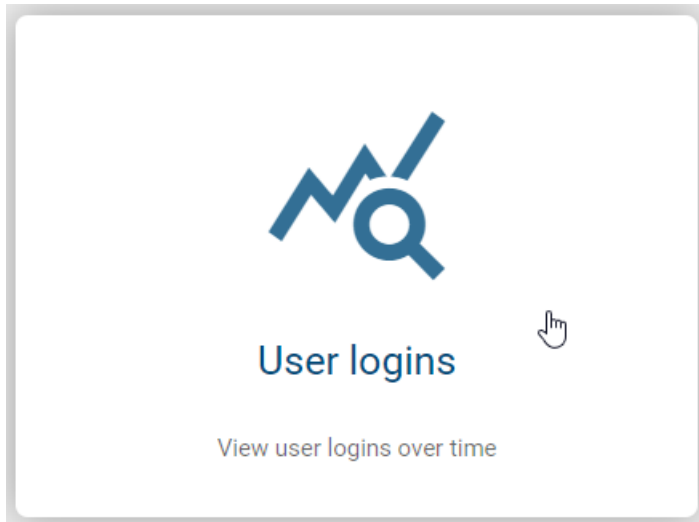
Afterwards, a diagram appears which graphically represents the number of user logins over the last 12 months. This visualization of the user logins enables you to check how often the application is actually used by a client.

You can see the exact login frequency of a specific month in a tooltip by hovering the mouse cursor over the graph.
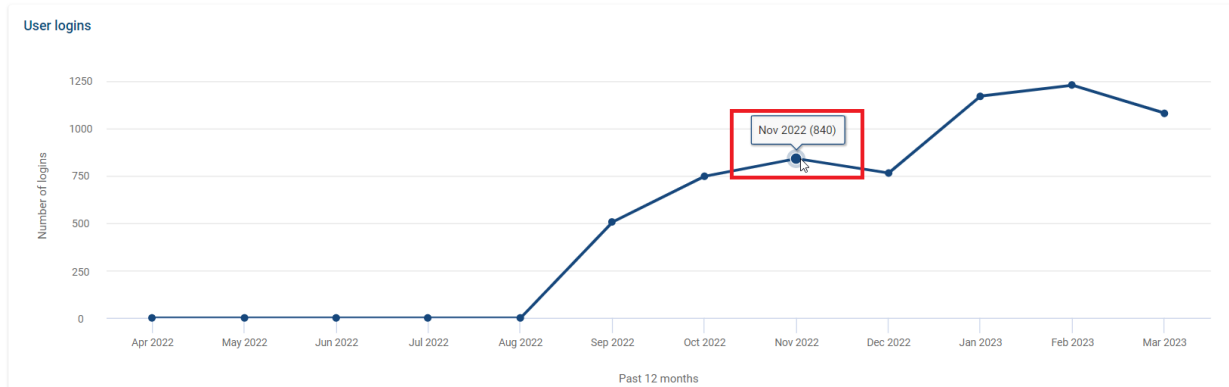
Hint: The number of logins can be higher than the number of users in a company because every single login of a user is counted. This means that if, e.g., a user signs in to the system several times in one day, each login will be counted.

4.4 Repository

In the *Repositories* tile, you will find an overview of all existing repositories and have the option to create new repositories.
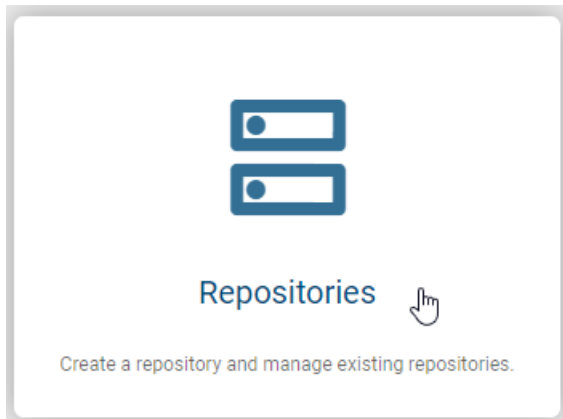
After clicking on the tile, you will be presented with an alphabetically sorted list of all existing repositories in your active language. Depending on the chosen language, the alphabetical arrangement of repositories may vary.

Hint: Please note that the access restrictions defined for a repository can prevent navigation to the content of a repository within the user interfaces. In order to reliably control access to individual contents of a repository, it is recommended to apply the access restrictions specifically to the content elements such as *diagrams* and *catalog items*.

4.4.1 How can I create a new repository?

To create a new repository, click on the *Create repository* button in the upper right corner. This will open a dialog window where you need to provide a name for the new repository. Once you have entered at least one letter or number, you can click on *Create*. If you choose to *Cancel* instead, your input will be discarded, and no new repository will be created.

Create repository

Enter a name for the repository in your active content language*
Documentation

Cancel Create

Your new repository will now appear as the first entry in the list in your current language. After refreshing the page, the repository will appear in the correct position in the alphabetical order.

You can now select the new repository from the drop-down menu under *Diagrams* and *Catalog*.

4.4.2 How can I edit a repository?

If at least one repository is available, you can edit its properties. This includes renaming the repository and adjusting access restrictions.

To edit a repository, click on the corresponding list entry. Alternatively, you can select the *Edit properties* option from the context menu. This will open a dialog window where you can make the desired changes.

Edit repository

Name*
Demo Repository

Access restriction
admin

Cancel Confirm

If you want to restrict access to the repository to specific users, user groups, persons or organization units you have the option to enter the corresponding name in the *Access restriction* field. This input is optional and therefore not

mandatory.

Afterwards, select *Confirm* to apply the changes or *Cancel* to discard the changes.

Hint: Please note that the access restrictions defined for a repository can prevent navigation to the content of a repository within the user interfaces. In order to reliably control access to individual contents of a repository, it is recommended to apply the access restrictions specifically to the content elements such as *diagrams* and *catalog items*.

4.4.3 How can I delete a repository?

If there is at least one repository available, you have the opportunity to delete a repository. To do this, open the context menu of the corresponding repository and select the *Delete* option.

Following that, a dialog box will appear where you need to enter the name of the repository you want to delete. Once you have entered the name correctly, you can click on *Delete*. If you wish to cancel the deletion process, click on *Cancel*.

Delete repository

Are you sure you want to delete "Documentation"?

⚠ **Warning note**

You are going to delete "Documentation". The repository and its data are irrevocably deleted. This action cannot be undone. Please consider exporting the repository before deleting it to avoid accidental data loss.

Enter repository name to confirm*
Documentation

Cancel   Delete

The repository has been successfully deleted and will no longer be displayed in the list.

4.4.4 How can I publish a repository?

To publish a repository, you need to be assigned the *Administrator* role. Navigate to the *Diagrams* section in the menu and click on the context menu next to **Repository** in the category tree. Select the *Publish* option.

A dialog window will appear where you need to enter a comment and the name of the repository you want to publish.

To finalize the publishing of your repository, click *Publish*. Alternatively, you can cancel the process by clicking *Cancel*.

After successful publication, you will receive a notification at the bottom right corner of the screen. If the publication fails, you will receive an appropriate error message.

4.4.5 How can I export a repository?

To export a repository, you need to be assigned the *Administrator* role. Navigate to the *Diagrams* section in the menu and click on the context menu next to **Repository** in the category tree. Select the *Export* option.
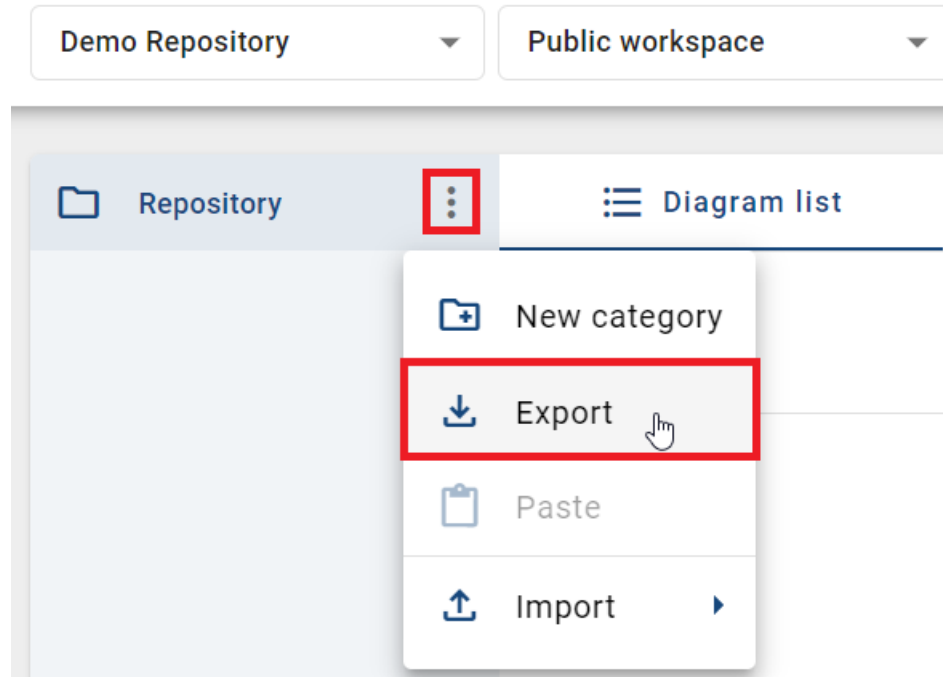
Afterward, a notification will appear at the bottom right corner of the screen, indicating that the export is being created. Once the export is completed, you can download the repository archive using the provided link in the notification.
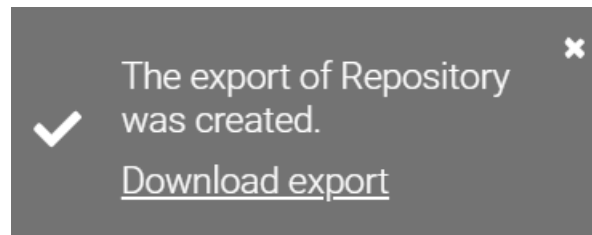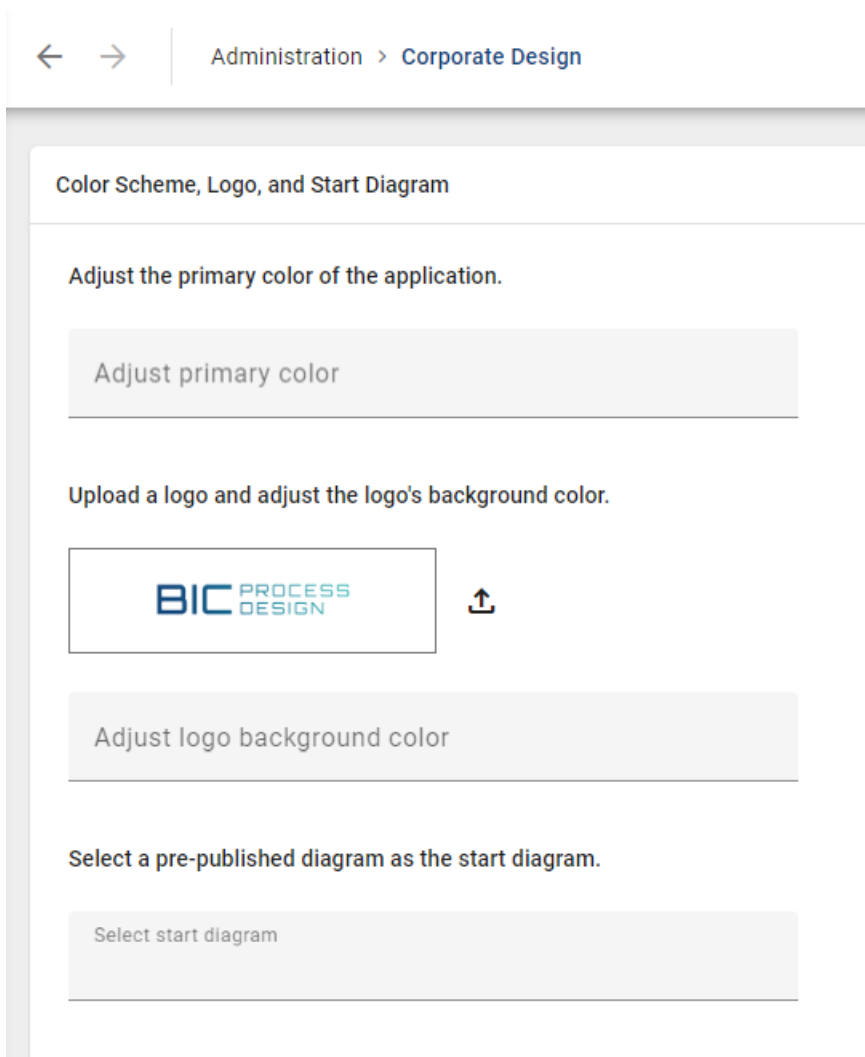
4.5 Corporate Design

4.5.1 How can I customize the appearance of the application?

In the *Corporate Design* tile, you can customize the color scheme of the application, upload a logo, and create a start diagram.
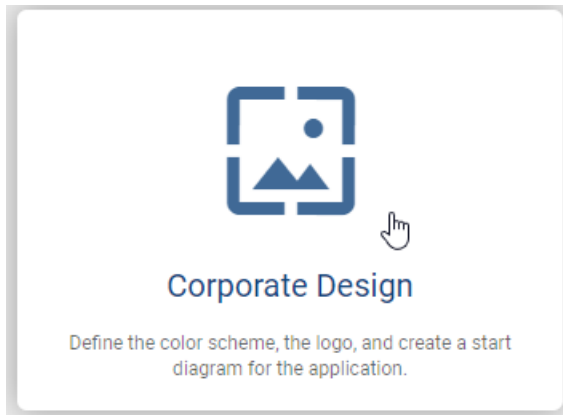
After clicking on the tile, you can choose the primary color of the application, upload a logo, and adjust its background color. When selecting colors, you can either enter a HEX code manually or choose a color from the color palette.

To select a start diagram, which will then be displayed for every user on the *myBIC* page, at least one diagram must already be published.

Once you have made at least one change, it will be automatically saved and applied. To view the changes, refresh the

page.

Hint: Please note that the functions of the *Corporate Design* tile are not available in the mobile view.

4.6 Catalog

4.6.1 How can I edit the details of catalog object types?

In the *Catalog* tile, you have the option to edit the catalog object types.
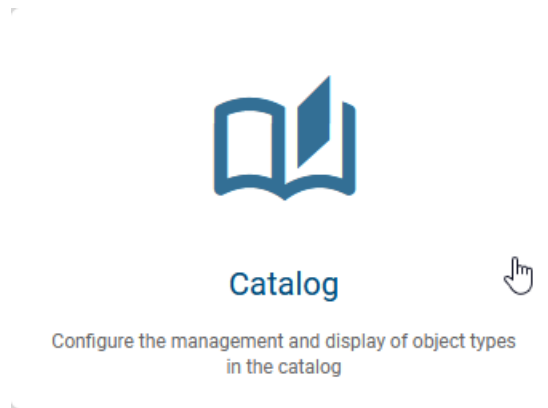
Once you have clicked on the tile, you will be directed to the details page, where all object types are listed in alphabetical order according to the browser language. Each entry in the list shows the name and symbol of the object type.

If you click on an entry in the list, you will be taken to the object type settings, where you can make various settings for the respective object type.
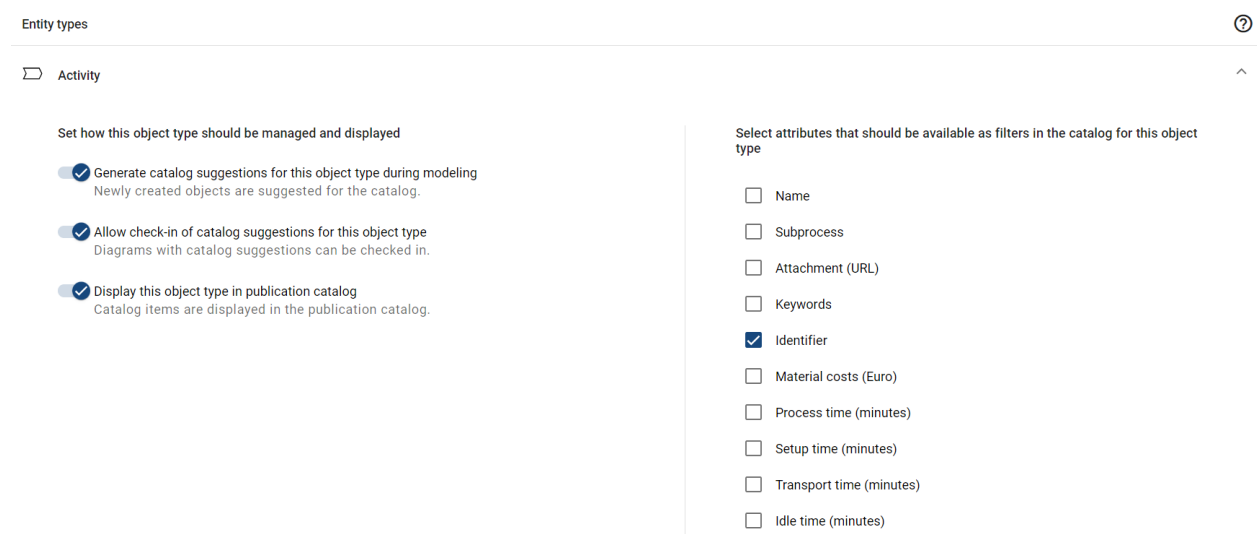
On the left-hand side, you have various setting options for how the selected object type should be managed and displayed. These can be activated or deactivated using a toggle switch.

On the right-hand side is a list of attributes that are available as filters in the catalog for this object type. These can be activated or deactivated by clicking on the respective checkbox.

Click on the arrow at the top right to collapse the object type settings for the selected object and return to the list of all object types.

Note: If saving the new value fails, an error notification is automatically sent in the form of an error message.

Hint: Please note that the functions of the *Catalog* tile are not available in the mobile view.

4.7 Languages

4.7.1 How can I define languages for my users?

In the tile *Languages*, you can set the default languages as well as additional content and alternate languages for your users.

Languages

Select the languages you want to use as content and alternate languages, and set the default language.
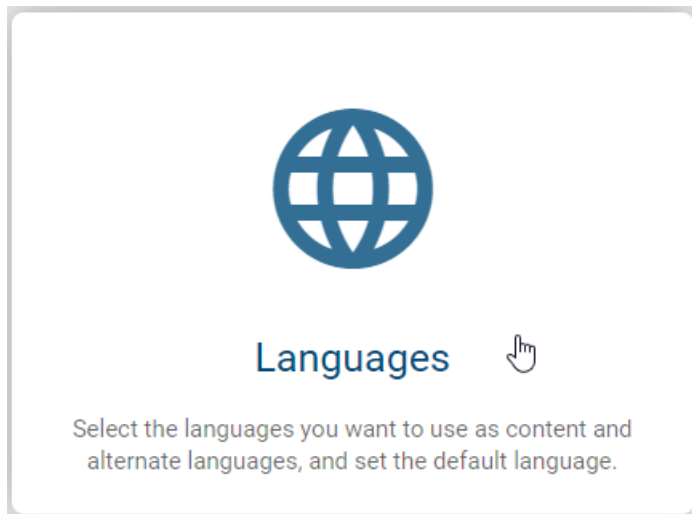
After clicking on the tile, an alphabetically sorted list of all languages supported by BIC will appear. By clicking on a selected language, you can define the content and alternate languages. To set a language as the default, click on the *Web* icon within the language entry.
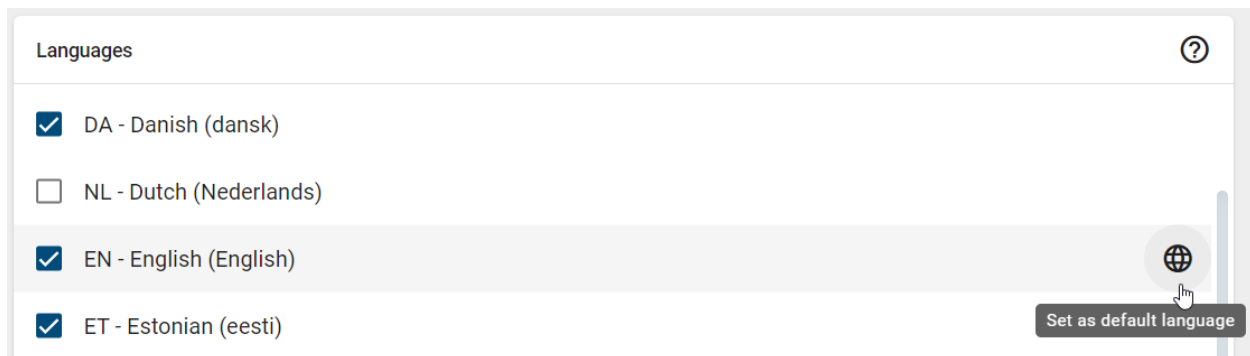
Hint: Please note that the functions of the *Languages* tile are not available in the mobile view.

4.8 Archive

In the *Archive* tile, you can configure the settings for the archive and define the access permission for *Reader*.
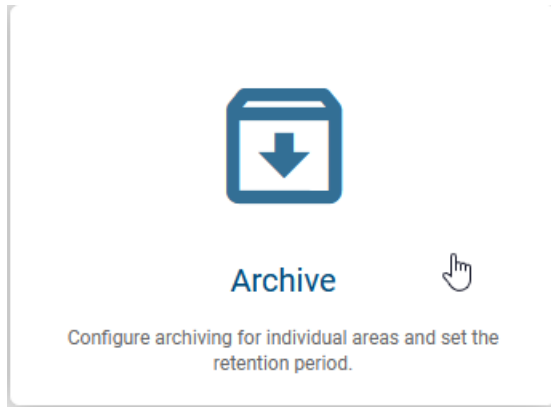
Hint: Please note that the functions of the *Archive* tile are not available in the mobile view.

4.8.1 How can I change archive settings?

As an administrator, you have the option of customizing the settings for the archive in the *Public workspace*, *Preview*, and *Publication* areas across all diagrams. In addition to activating or deactivating the archive, it is also possible to configure the retention period individually.

The archiving status can be activated or deactivated using the toggle switch. If you activate archiving, the input field becomes active and can be edited. If archiving is deactivated, the input field remains locked, and the corresponding value is displayed in read mode.

If archiving is activated, you can use the input field to change the retention period as required. Any changes are saved immediately, and a notification of the successful changes appears at the bottom right-hand side of the screen.

4.8.2 How can I set access permission for Reader?

In the archiving settings, you can set access permissions to archives for the *Reader* user role. If you have disabled access, *Reader* **cannot** access or compare archived versions of diagrams and objects in the publication.

To set access permissions, scroll down to the bottom of the archiving settings and toggle the switch under *Access*.

4.9 Method

In the *Method* tile, you can manage your methods, customize the colors of the symbol types and configure the diagram layout.

Method

Manage your methods, customize symbol colors, and configure the layout for diagram types.
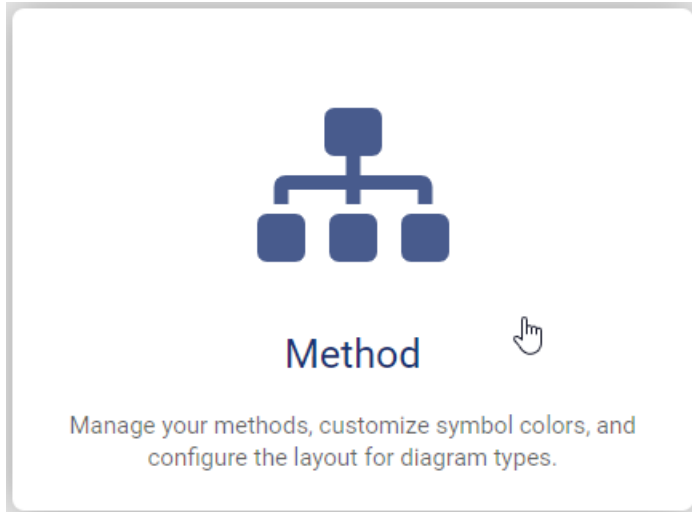
Hint: Please note that the functions of the *Method* tile are not available in the mobile view.

4.9.1 How can I import a method?

When you open the *Method* tile, you will find the *Options* in the right sidebar. To import a method, click on *Import*.

Options

Import

Export
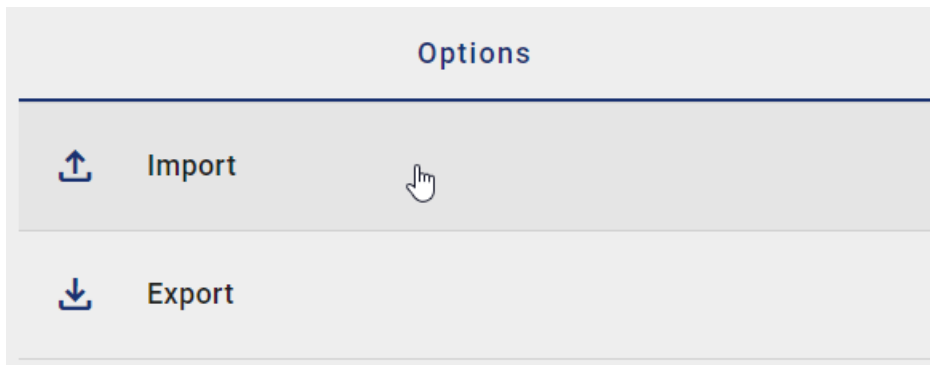
You can then select and import a JSON file from your local storage.

If the import was successful, you will receive a corresponding message and can view the current method in the read-only field.

4.9.2 How can I export a method?

When you open the *Method* tile, you will find the *Options* in the right sidebar. To export your current method, click on *Export*.

The current method will be exported directly as a JSON file.

4.9.3 How can I configure the standard colors of the symbols?

You have the option to set the color scheme of a symbol type to a personal standard for all stages of your BIC Process Design. Diagrams from the archive will always be displayed with the current color settings. For each symbol type, you can set the border, background, and font color.
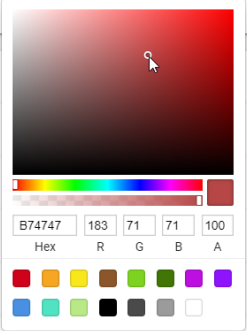
> **Warning:** Please note that the colors you choose here will affect all stages, including **diagrams in publication**. Also, please consider the notes on configuring certain symbol types.

When you open the *Method* tile, navigate to the *Symbol types* tab. You will see a list of all the configurable symbol types from your current method. Select the desired symbol type to adjust the color.

Next, click on the respective color field that you want to adjust. You can select a color value from the color palette or enter a HEX code.

Note: Please note that if no color is set, the symbol will be displayed in BIC Process Design's default color. If you have set a color value and want to return to the default color, please clear the input field.

After configuring the symbol type colors, select the *Mass application* option in the right sidebar. This will open a dialog window where you need to confirm your changes.

Apply symbol type colors to all diagrams

You have made changes to the symbol type colors. These changes will be applied immediately to all diagrams in all stages. Do you want to apply the changes now?

> ⚠ **Important note**
>
> Changes to the symbol type colors will have an immediate effect on all diagrams in all stages. Please carefully read the documentation before proceeding to avoid unintended changes.

Cancel   **Apply changes**

To apply your color changes to all diagrams in all stages, click on *Apply changes*. To cancel the process, click on *Cancel*.

Your changes will then be visible in all diagrams after a refresh.

Note: It is also possible to *format individual symbols using the symbol palette*. The color formatting done there will be applied to all stages and will not be overwritten by later changes to the general color configuration explained here.

4.9.4 How can I import or export symbol colors?

You can import and export your own color settings for symbol types. This allows you to switch between different symbol colors.

Hint: Please note that changing the symbol colors will affect **all** diagrams in all stages.

To import or export your symbol type colors, open the *Method* tile and navigate to the *Symbol types* tab. In the right sidebar, you will find the respective options.

Import:

If you have edited your symbol type color settings externally or want to re-upload and use previous versions, select the *Import* option.
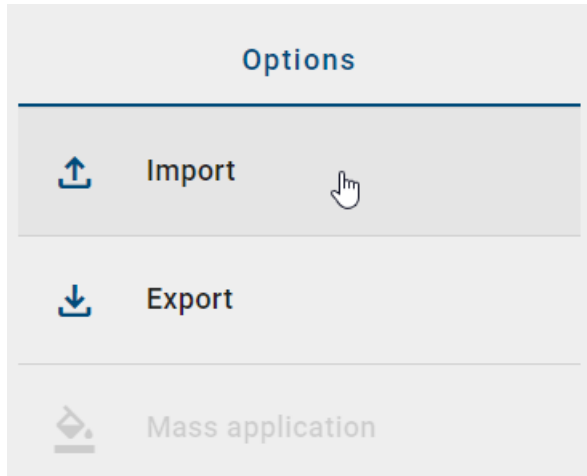
Select a JSON file and click on the *Mass application* option to apply the color settings.

> **Warning:** Please note that if you upload your own JSON file, all symbol IDs you use in it must be correct and present in your method. If you use symbol types that are not present in the currently used method, this may result in unexpected behavior.

Export:

To export your current color settings as a JSON file, click on *Export*.
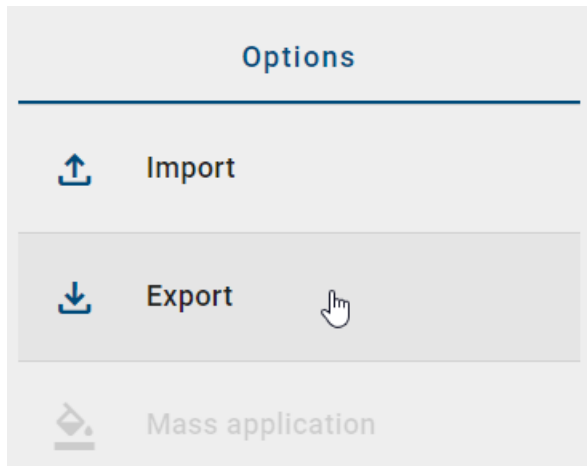
4.9.5 How can I set the layout of a diagram type?

The layout assistant is designed to assist you in arranging the process flow, focusing on sequence flow and activities. You can configure and customize the EPK, WKD, and BPMN diagram types by default.

When you open the *Method* tile, navigate to the *Diagram layout* tab. On the right sidebar, you will find a list of the available diagram types and their corresponding diagram IDs. To edit the layout of a diagram, click on a diagram type.

BIC Process Design
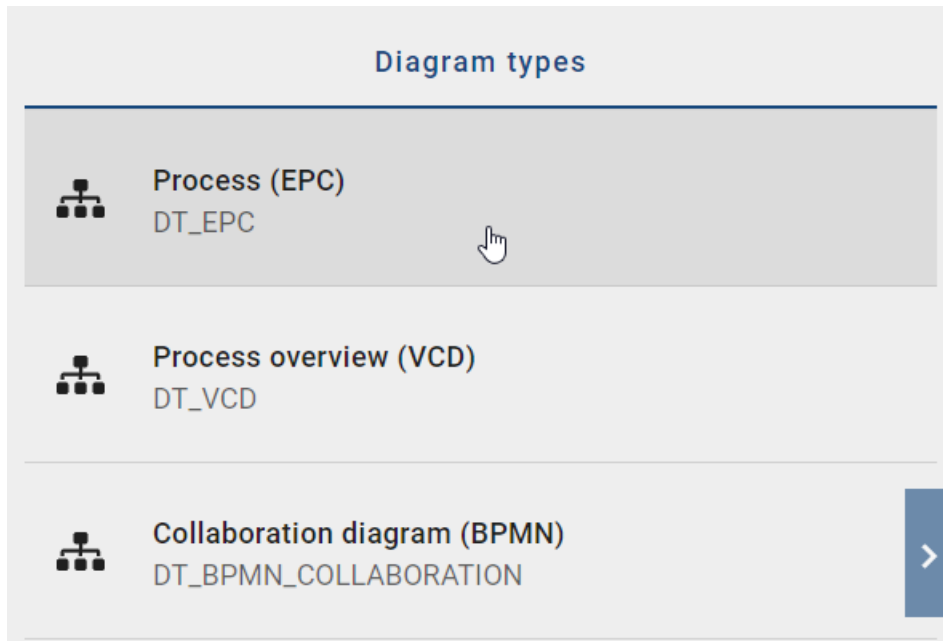
In the main section, you will find the settings for the selected diagram type, which are described in detail below:

Modeling orientation: Here, you can choose between *Horizontal* and *Vertical* to determine the alignment of the layout assistant. The direction refers to the process flow, represented by, for example, sequence and message edges between activities.

Horizontal/Vertical distance (cm): This defines the distance in the process flow by entering numbers. It represents the horizontal and vertical distance in centimeters between two symbols connected by a sequence or message edge.

Horizontal/Vertical satellite distance (cm): This input defines the horizontal and vertical distance between satellites in centimeters.

Satellite positioning: To set the position of satellites, click on the corresponding quadrant and edit the input field. Specify which object type with which relationship to the activity should be automatically placed here during layouting. You can also set the maximum number of symbols arranged vertically above each other. If the number exceeds during layouting, a new column of vertical arrangement will be created. Once you've saved your input by pressing the Enter key, it will be displayed as a chip in the quadrant. If needed, you can remove the chip by clicking on the quadrant.

Quadrant Ports: Quadrant ports correspond to the edge ports of the satellites of an activity. By clicking on a quadrant, you can choose between two selectable ports - *Horizontal* and *Vertical*. Your selection is saved immediately.
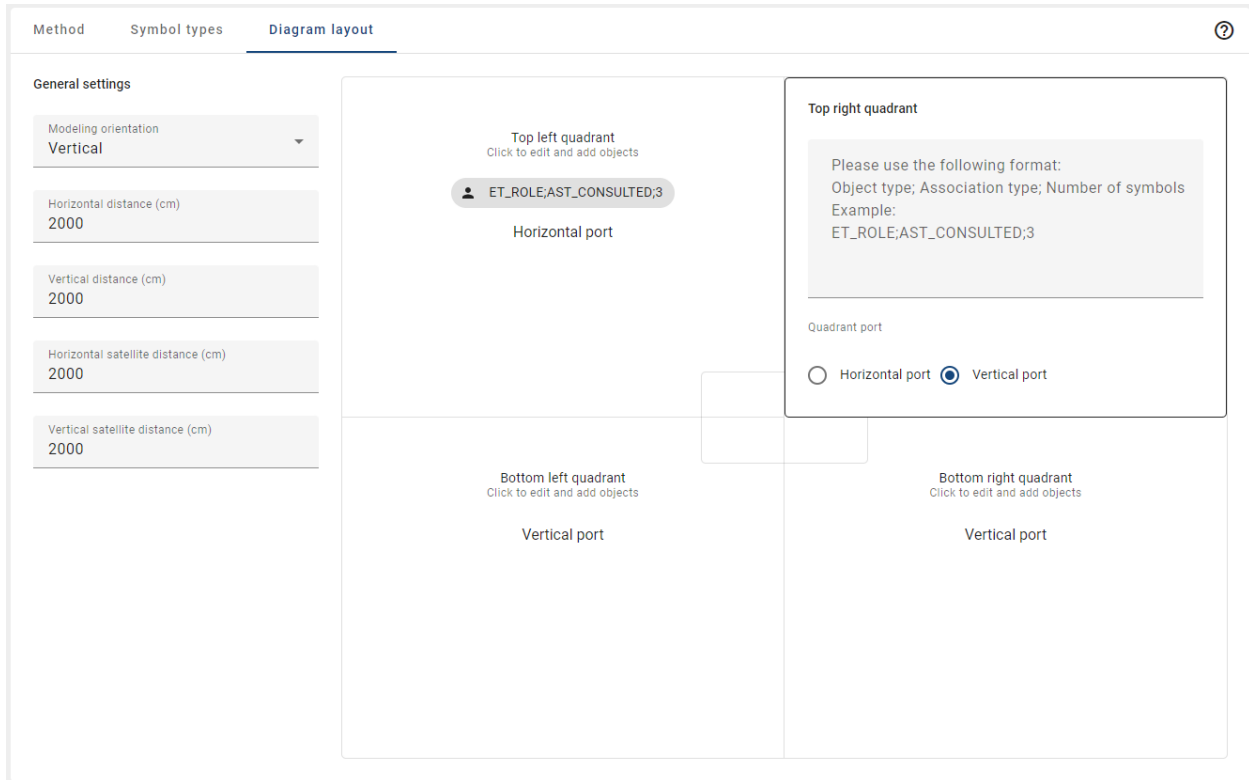
The default settings defined for the layout assistant will be overridden with this configuration. If no individual behavior is defined, the *layout assistant uses the default*.

Note: Chips can only be generated for object types that exist in the method. There is no further validation of your input. Note the existing *object types and association types*.

4.10 Search

4.10.1 How can I select attributes as search facets?

In the *Search* tile, you can select attributes as search facets to set filters for the central search and the list of diagrams.
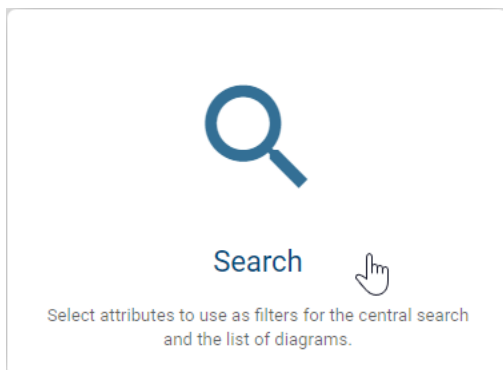
Click on the *Search* tile to access the details page. The alphabetically sorted list displays all attribute types from the current method.

By clicking on an attribute, you can activate or deactivate it. As an administrator, you have the option to remove an attribute type as a search filter or save an unselected attribute type as a search filter.
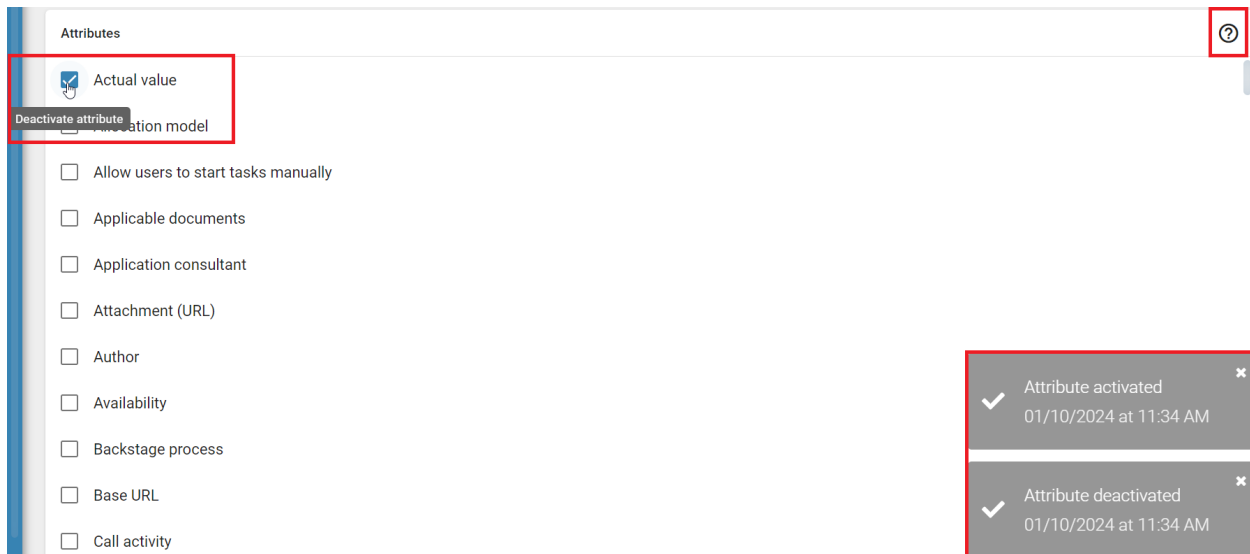
Hint: Please note that the functions of the *Search* tile are not available in the mobile view.

4.11 Workflows

4.11.1 How can I set the validation scope for language-dependent mandatory attributes?

In the *Workflows* tile, you can configure the validation scope for mandatory attributes to specify the languages to be checked.
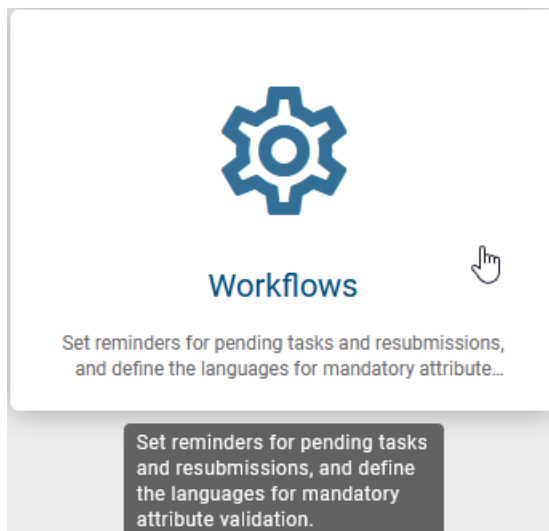
After selecting the tile, you can choose the validation scope for mandatory attributes from the available options:

- **Arbitrary content language:** The mandatory attribute must be maintained in at least one content language.

- **Only enabled default content language:** The mandatory attribute must be maintained in the activated default content language, even if it has been maintained in other languages.

- **All enabled content languages (default setting):** The mandatory attribute must be maintained in all enabled content languages.

Note: You can define the *default and content languages* in the administration.

Workflows

Language dependent attributes

Set the scope of validation for language-dependent attributes to determine which content languages must have a value when the workflow starts. The setting is applied only to newly started publication workflows.

Select the validation scope:
All enabled content languages

Arbitrary content language

Only enabled default content language

All enabled content languages ✓

When a new validation scope is selected, the publishing workflow verifies that all mandatory language-dependent attributes for entities and diagrams comply with the selected scope.

Note: Please note that the new validation scope will only apply to a publishing workflow that has been started after the change was made.

Hint: Please note that the functions of the *Workflows* tile are not available in the mobile view.

4.11.2 How can I set the workflow task reminder?

You can also configure a reminder interval for unfinished tasks in the *Workflows* tile. Therefore, click on *Reminders* to display the setting options for *Task reminders*.

Tasks

Set the reminder interval for sending reminders about unfinished tasks. Task owners will be regularly reminded of their unfinished tasks until they are completed. Please note that changes apply only to new tasks.

Enter a reminder interval
7   days

This section allows you to set the reminder interval (in days) for open, unfinished tasks. The default interval is 7 days, meaning that users with open tasks will receive reminders once within this timeframe. You have the flexibility to customize the interval by entering your preferred number of days in the corresponding field. The changes to the reminder interval take effect immediately and will be applied to all new tasks. A notification confirming the successful changes will appear at the bottom right of the screen.

Hint: Please note that the functions of the *Workflows* tile are not available in the mobile view.

4.11.3 How can I set the resubmission reminder?

In the *Workflows* tile, you as an administrator can configure when reminders for upcoming resubmissions should be sent. To do this, click on *Reminders* to display the setting options for *Resubmissions*.

The time (in weeks) for resubmission reminders is specified here. The respective responsible individuals receive a one-time notification at the chosen time regarding the remaining validity period. Changes are saved instantly, and a notification confirming the successful update is displayed at the bottom right of the screen. This update applies to all new resubmissions.

Hint: Please note that the functions of the *Workflows* tile are not available in the mobile view.

4.12 MyBIC

In the *MyBIC* tile, you can create standard favorites and make them available to your users on the MyBIC page.
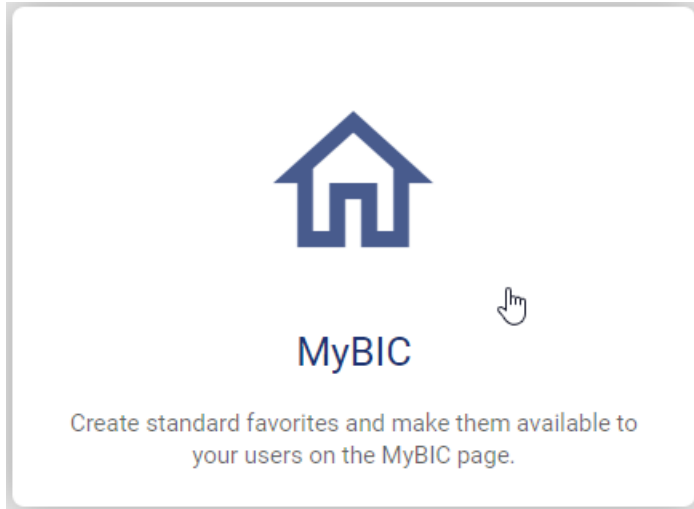
After clicking on the tile, a list will appear sorted in descending order based on the creation date. This list displays the names of the standard favorites and the assigned user groups. If the name is not available in your browser language, a corresponding hint will be provided.

Hint: Please note that the functions of the *MyBIC* tile are not available in the mobile view.

4.12.1 How can I create a new standard favorite?

After clicking on the *MyBIC* tile, you can create a new standard favorite by clicking the button located at the bottom right.
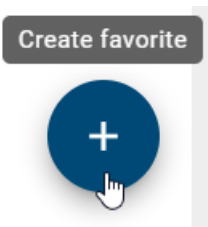
This will open a dialog window where you must enter the URL of the search result or diagram for the standard favorite, along with a name. Optionally, you can also enter user groups and the name in other languages.

Create Favorite

Enter the URL of your search result or chart*

Enter a title (en) for the favorite*

0/255

Select user groups (optional)

Title in other languages

Title DE

Title ES

0/255

0/255

Title AR

Title PL

Cancel   Create

Once you have entered a URL and a name, you can create the standard favorite by clicking on *Create*. It will then be displayed as the first entry in the list. To discard the input, click on *Cancel*.

4.12.2 How can I delete a standard favorite?

To delete a standard favorite, there must be at least one standard favorite. Click on the standard favorite you want to delete in the list to expand it.

You will then see the option to delete the standard favorite at the top right of the entry.

Standard favorite

Delete favorite

Enter the URL of your search result or chart*
/tenantsId/4231cb99-ffb8-4857-8aea-621e23ce06d7/repositoriesId/a9648ed4-

Enter a title (en) for the favorite*
Standard favorite

Select user groups (optional)

After clicking on the *Delete favorite* option, the standard favorite will be deleted immediately and removed from the list.

4.13 Print

4.13.1 How can I configure the default settings for the header and footer?

In the *Print* tile, you have the option to configure the header and footer by default for each printout.
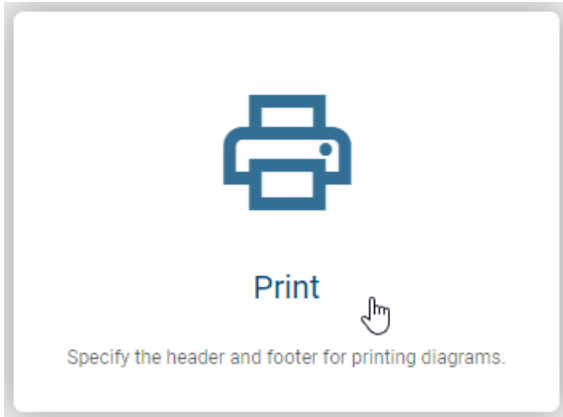
After clicking on the tile, three selection fields for the header and footer will be displayed. Here, you can specify what information should be displayed on the left, centered, and/or right side of the header and footer. For example, you can choose the logo, date, or page number, with many other options available.
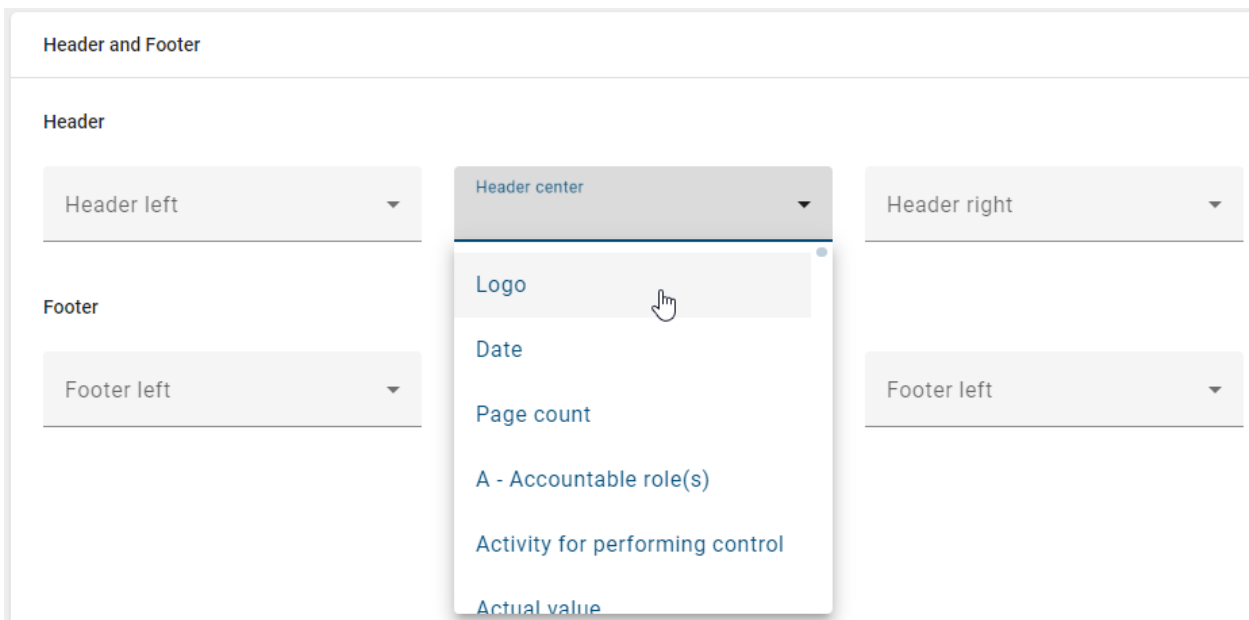
Hint: Please note that the functions of the *Print* tile are not available in the mobile view.

4.14 Reports

In the *Reports* tile, you can create reports and configure existing reports.
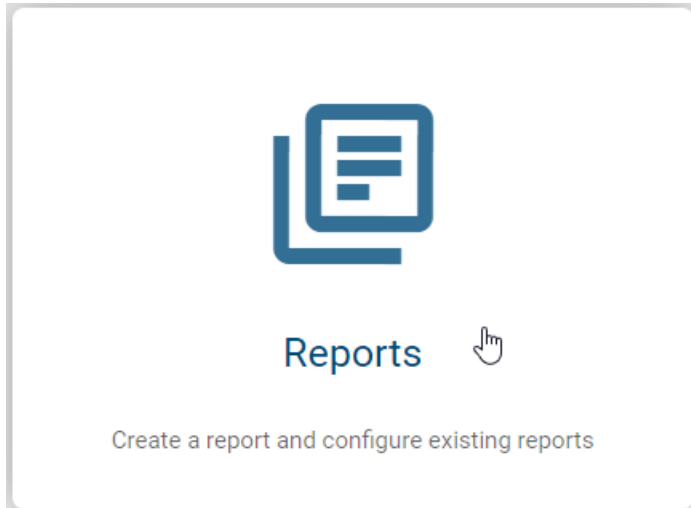
After clicking on the tile, a list of all existing reports is displayed.

Hint: Please note that the functions of the *Reports* tile are not available in the mobile view.

4.14.1 How can I create a new report?

After clicking on the *Reports* tile, you will find the button *Create new report* located at the bottom right corner of the screen. Click on it to create a new report.
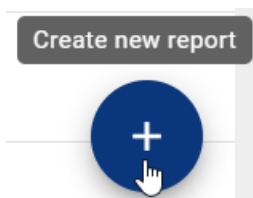
This will open a dialog window where you can configure the report's content in JSON format.

Create a custom report

You can configure the content of the report.

```
┌─ Report descriptor* ─────────────────────────────────────────────┐
│ {                                                                 │
│     "executionContext": {                                         │
│         "type": "diagram",                                        │
│         "stereotypes": {                                          │
│             "include": []                                         │
│         }                                                         │
│     },                                                            │
│     "templateHandlings": [                                        │
│         "SINGLE"                                                  │
│     ],                                                            │
│     "roles": [],                                                  │
│     "descriptions": [                                             │
│         {                                                         │
│             "locale": "en",                                       │
│             "value": "Custom report"                              │
│         },                                                        │
└───────────────────────────────────────────────────────────────────┘
```

Cancel   **Create**

Click on *Create* to create your custom report. To cancel the process, click on *Cancel*.

Once the report is created, you will be redirected to the details page of the new report, where you can further configure the report as needed.

4.14.2 How can I configure an existing report?

To configure an existing report, there must be at least one report in the list. When you click on a report, you will be taken to the report descriptor where you can configure the report in JSON format.

In the descriptor editor, you can change the following settings:

1. *Availability*: You can activate or deactivate a report for diagrams or categories for BIC Process Design by using the variable *enabled*. The report is activated if the value is set to "true". To deactivate the report you have to change the value to "false".

2. *ReportId*: BIC Process Design provides the following default reports: Manual (diagramManual), Manual with assignments (diagramManualWithAssignments), Process costs/simulation (processCostAnalysis), Matrix report (diagramMatrix) and Profile (diagramProfile bzw. entityProfile). The default reports are described in the section about *available exports*.

The reportId defines which default templates will be shown and taken as fallback to generate an export if no customized template has been uploaded for a diagram type. Please note that - currently - there is only a default template for the reportId "diagramManual" as fallback.

```
{
    "enabled": true,
    "id": "6a664f1e-86c9-b3b1-f490-1b0c7ce7f135",
    "origin": "biccloud-report-service",
    "reportId": "processCostAnalysis",
    "outputFormat": "xlsx",
    "names": [
        {
            "locale": "de",
            "value": "Prozesskosten/Simulation"
        },
        {
            "locale": "pl",
            "value": "Koszty procesu/symulacja"
        }
```

3. *Format*: You can use the *outputFormat* variable to specify the format of the output of the report. The following formats are supported for the respective reports:

   - Profile (diagram): *docx*, *pdf*, *pdfa*, *pdfa2b*

   - Profile (catalog entry): *docx*, *pdf*, *pdfa*, *pdfa2b*

   - Manual: *docx*, *pdf*, *pdfa*, *pdfa2b*, *html*, *mhtml*, *txt*, *odt*, *rtf*

   - Manual with assignments: *docx*, *pdf*, *pdfa*, *pdfa2b*

   - Matrix Report: *xlsx*, *pdf*, *pdfa*, *pdfa2b*

   - Process costs/Simulation: *xlsx*, *pdf*, *pdfa*, *pdfa2b*

Here *pdfa* corresponds to the "PDF/A-1b" format and *pdfa2b* to the "PDF/A-2b" format.

Note: The format *pdfa* does not support images with transparency. Therefore it is recommended to use *pdf2b* if images and icons should be present in the report.

```
{
    "enabled": true,
    "id": "6a664f1e-86c9-b3b1-f490-1b0c7ce7f135",
    "origin": "biccloud-report-service",
    "reportId": "processCostAnalysis",
    "outputFormat": "xlsx",
    "names": [
        {
            "locale": "de",
            "value": "Prozesskosten/Simulation"
        },
        {
            "locale": "pl",
            "value": "Koszty procesu/symulacja"
        }
```

4. *Names*: The variable *names* specifies the displayed name of the report within the user interface of BIC Process Design. For each language that is supported by BIC Process Design you can set a different value. This difference can be seen as soon as the browser language has been changed.

```
{
    "enabled": true,
    "id": "6a664f1e-86c9-b3b1-f490-1b0c7ce7f135",
    "origin": "biccloud-report-service",
    "reportId": "processCostAnalysis",
    "outputFormat": "xlsx",
    "names": [
        {
            "locale": "de",
            "value": "Prozesskosten/Simulation"
        },
        {
            "locale": "pl",
            "value": "Koszty procesu/symulacja"
```

5. *User roles*: With the *roles* variable you can define the user roles which are authorized to export the respective reports.

```
          locale": "ar",
          "value": "تكاليف العملية/المحاكاة"
      }
   ],
   "roles": [
       "AUTHOR",
       "ADMINISTRATOR"
   ],
   "templateHandlings": [
       "NONE"
   ],
   "executionContext": {
       "type": "diagram",
       "stereotypes": {
          "include": [
```

6. *Context*: Here you can specify whether the report is available in the context of a diagram, category, catalog entry, or the entire catalog. You can do so by setting the value of the variable type to "diagram", "category", "entity", or "catalog". Within one descriptor, there can only be one value for the context variable. Therefore, there are two different descriptors for reports that should be available in both contexts. These can be edited separately. If your report is available for a catalog entry, such as the profile, "catalog" should remain entered here.

```
       "NONE"
   ],
   "executionContext": {
       "type": "diagram",
       "stereotypes": {
          "include": [
              "DT_BPMN_COLLABORATION",
              "DT_EPC",
              "DT_VCD"
          ]
       }
   },
   "domainObjectType": "ReportExecutionDescriptor"
}
```

7. *Stereotypes*: For reports that are available in the diagram or catalog entry context, you can define which diagram or object types are allowed to use this report. This is possible by writing the IDs of the respecting diagram/object types into the *include* variable. The report is available for all types if no value has been set for this variable or if

the variable contains the value "all".

```
        "NONE"
    ],
    "executionContext": {
        "type": "diagram",
        "stereotypes": {
            "include": [
                "DT_BPMN_COLLABORATION",
                "DT_EPC",
                "DT_VCD"
            ]
        }
    },
    "domainObjectType": "ReportExecutionDescriptor"
}
```

Once you have made changes and adhered to the JSON format, you can click on *Save*. Your changes will then be saved immediately.

If you want to exit the report descriptor without saving your changes, you will receive a notification.

4.14.3 How can I upload a new report template?

To upload a new report template, there must be at least one report in the list. Click on a report to access its details, then select the *Report templates* tab. From there, you can find the *Upload report template* button located at the bottom right of the screen.
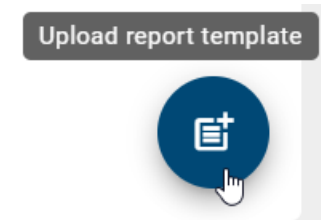
Once you click on the button, you can select and open a file from your local storage. A dialog window will open where you can select the diagram type and language for the uploaded file. All diagram types of the current method and all content and alternate languages defined in the administration are available for selection.

Select the context for the report template

Select the diagram type and language of the uploaded report
template for which the template should be used.

Select diagram type   ▼

Select language   ▼

                                          Cancel | Save |

Click on *Save* to upload the report template. The uploaded report template will then appear in the list, sorted alphabetically by file name. To cancel the process, click *Cancel*.

4.14.4 How can I update an existing report template?

To upload a new report template, there must be at least one report in the list. Click on a report to access its details, then select the *Report templates* tab. If there is at least one report template available, click on the context menu (three dots) of the report template to be updated and select *Upload*.

⬆ Upload

⬇ Download

🗑 Delete
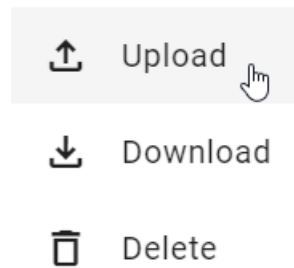
Afterward, you can select a new file from your local storage to update your report template. The file name will be adjusted according to the new file, while the diagram type and language will remain unchanged.

4.14.5 How can I download a report template?

To download a new report template, there must be at least one report in the list. Click on a report to access its details, then select the *Report templates* tab. If there is at least one report template available, click on the context menu (three dots) of the report template to be updated and select *Download*.

⬆ Upload
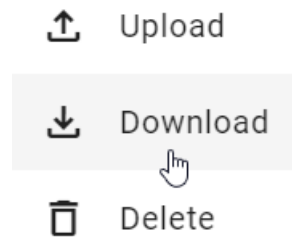
⬇ Download

🗑 Delete

The report template will then be downloaded immediately.

4.14.6 How can I delete a report template?

To upload a new report template, there must be at least one report in the list. Click on a report to access its details, then select the *Report templates* tab. If there is at least one report template available, click on the context menu (three dots) of the report template to be updated and select *Delete*.

⬆ Upload

⬇ Download
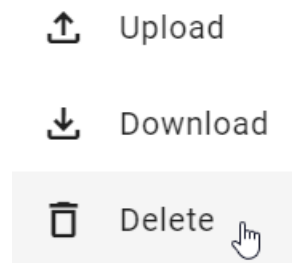
🗑 Delete

The report template will then be immediately and irreversibly deleted.

Note: Please note that only custom report templates can be deleted. If you have *updated* a standard template and want to delete it, the report template will be reset to the standard template.

4.15 Details

In the *Details* tile, you can set the visibility of the attribute bar in the publication and configure the profile for diagram and object types.
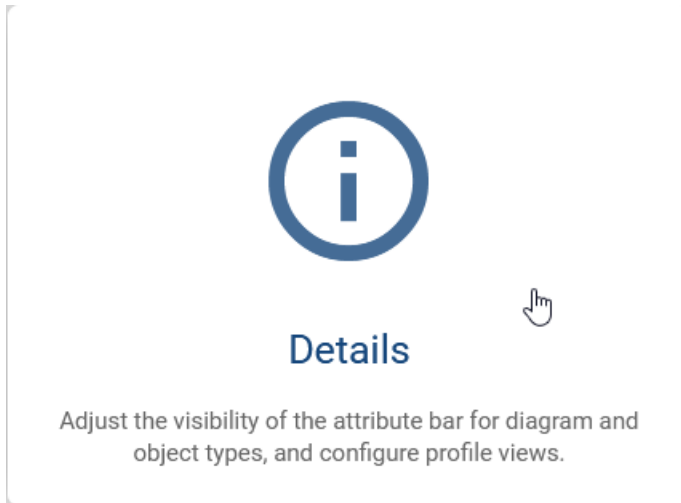
Hint: Please note that the functions of the *Details* tile are not available in the mobile view.

4.15.1 How can I display the attribute bar in the publication?

After clicking on the *Details* tile, you can choose either the list of available diagram types or the list of available object types from your method. You can expand a list entry by clicking on it.
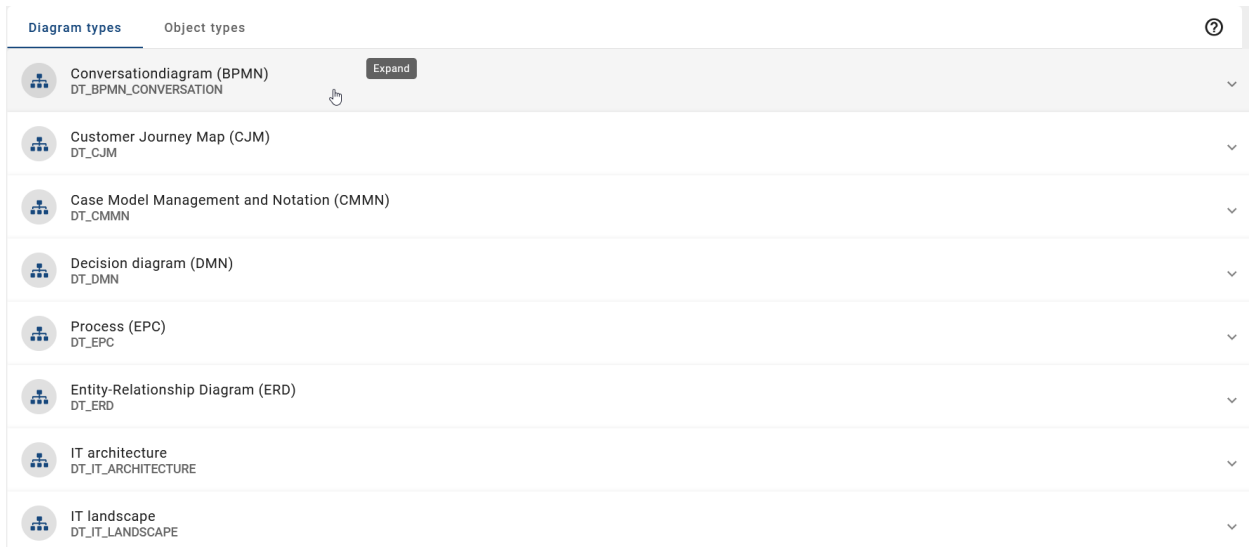
The *Display attribute bar in publication* option is enabled by default for all diagram and object types. To hide the attribute bar in the publication, toggle the switch. Your changes will be applied immediately.

4.15.2 How can I change the visibility of the profile?

In the *Details* tile, you can set whether the associated profile should be displayed for each diagram and object type. To open the detail settings for a list entry, simply click on it.

The current visibility status is shown in the *Show profile for this type* field, where type is replaced by either *Diagram type* or *Object type*. To change the active setting, simply click on the corresponding toggle switch. Your changes will be applied immediately.

Clicking on the diagram or object type will return you to the overview.

4.15.3 How can I configure the profile?

In the *Details* tile, you can configure the profile for both diagram and object types. Initially, you will see the default settings, which you can then modify. This includes attributes such as description, as well as relationships to other object types like responsible and contributing roles, input, and output.

To modify the profile, click on a list entry to open its detail settings. If necessary, adjust the *visibility of the profile*. You can then view the existing configuration in the editing field and make any changes needed.

- **Attributes:** You can add or remove diagram or object attributes using the attribute type ID. In the following example, the object attribute "Name" is displayed next to the "Description". To do this, the attribute type ID must be added to the `"attributes"` section:

```
"attributes": [
            "AT_DESCRIPTION",
            "AT_NAME"
    ],
```

- **Associations and entities:** In `"sections"`, specific relationships to object types, selected association types or specific object types can be output individually. Its representation takes place in various subsections named `"titles"`, in which the issues and designations in the profile are defined. The following subsection example looks for "roles" contained in the diagram with "C - Consulted" the relationship to another entity. For this, the ID of the `"entityType"`, in this case `"ET_ROLE"`, and the `"associationType"`, here `"AST_CONSULTED"`, must be specified. These roles are then listed in the profile section named `"Cooperation"` in English browser language and `"Mitwirkung"` in German browser language.

```
{
                "titles": [
                        {
                                "locale": "en",
                                "value": "Cooperation"
                        },
                        {
                                "locale": "de",
                                "value": "Mitwirkung"
                        }
                ],
                "entityType": "ET_ROLE",
                "associationType": "AST_CONSULTED"
},
```

If only one relationship type or entity type is requested, the other type should remain undefined by `""`.

To save your changes, click on the *Save* button located at the bottom right within the detail settings. You may need to scroll down to locate the button. Subsequently, the configuration will be validated, meaning the syntax of the JSON structure will be checked, and upon successful validation, it will be saved.

Clicking on the diagram or object type will return you to the overview.

Tip: For a list of existing stereotypes and related IDs, see *this section*.

4.16 Translation Service

If you click on the menu entry for *Administration* in the menu bar, you will see the tile *Translation Service*.

Translation Service

Set up a DeepL account to provide the translation service to your users in the public workspace.
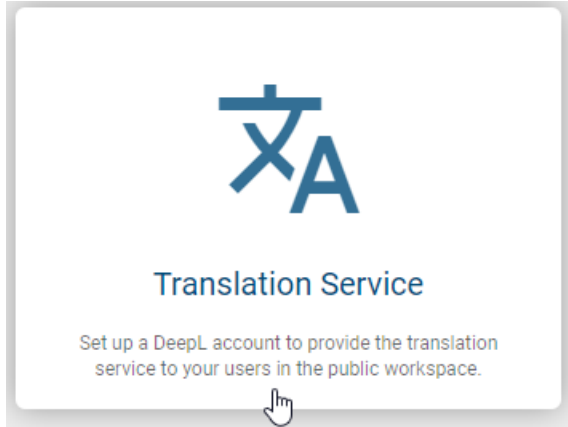
You have the option to grant your users access to the translation service in the public workspace by linking your DeepL account. Your account must be created through DeepL.

4.16.1 How can I test my DeepL API configuration?

In the *Translation Service* tile, you have the option to enable or disable the Translation Service Connector.

Clicking on the tile will take you to the configuration page. Here, you can enter the API key from your DeepL account and test the access. If no API key has been entered, the option to test the configuration will be disabled at this point.
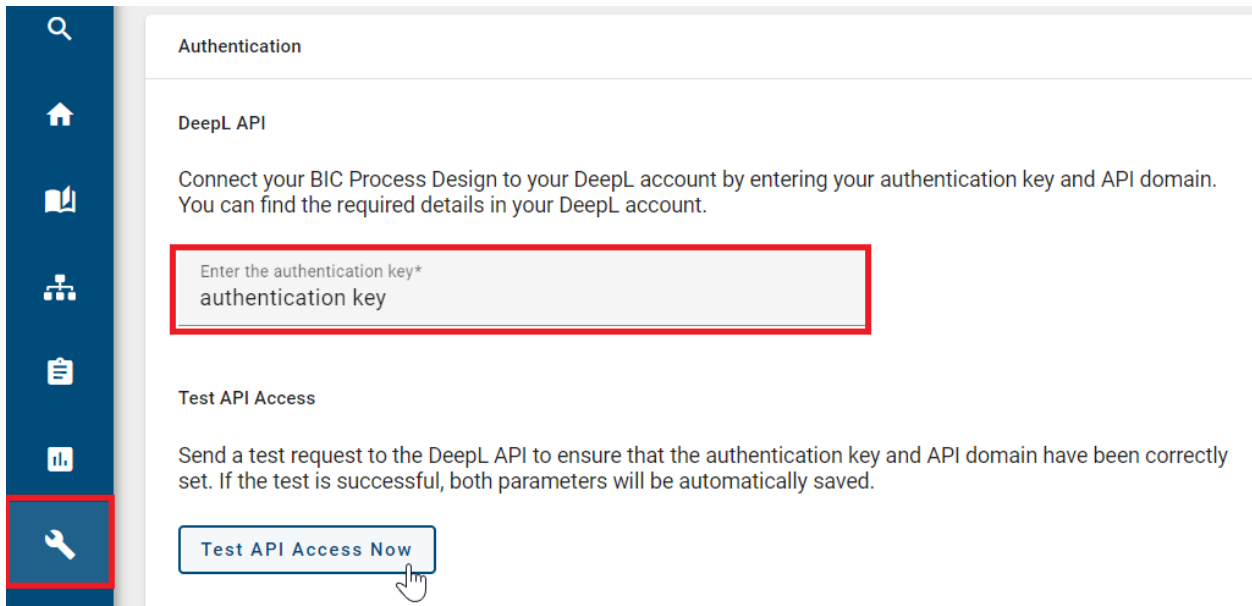
Note: With the test option enabled, you will send a test request to the DeepL translation endpoint. The entered API key will be used for authorization. If the authorization fails, you will receive an error message.

4.16.2 How can I remove my DeepL API configuration to delete my login data?

If your DeepL credentials are linked, you can delete the DeepL API configuration and login information.

Deleting the login information will remove your access credentials from the database. After requesting deletion, you will receive either a success message or an error message indicating the current status.

Note: Please note that the option to delete the login information is disabled if no login credentials are linked.

DIAGRAMS

5.1 Where can I find diagrams and categories?

Use the menu to navigate to the *Diagrams* section. In this section you will find all diagrams (possibly sorted in categories) of the current repository.
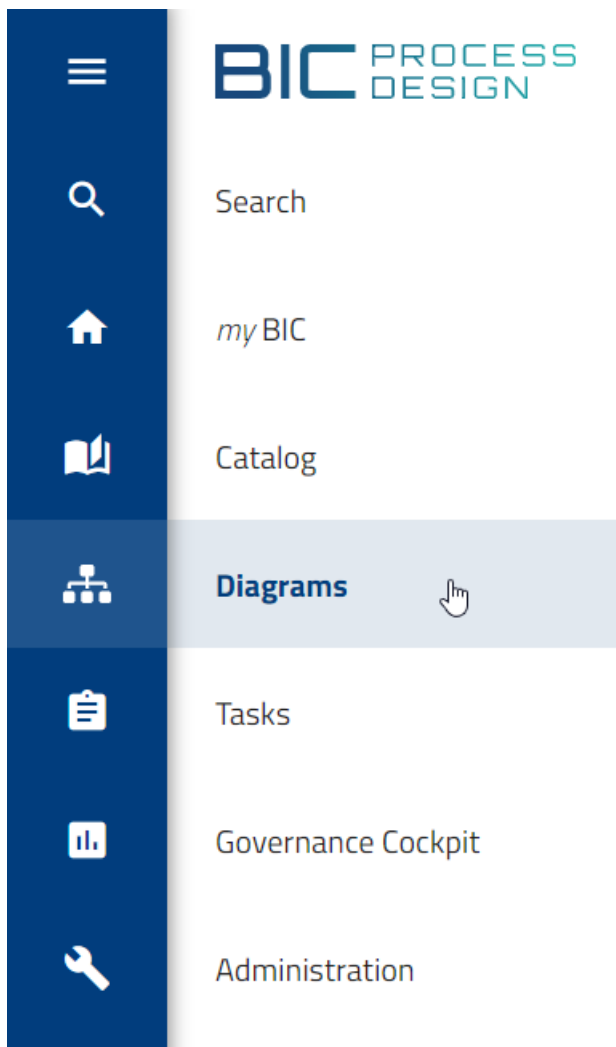
You can choose between the views *List*, *Gallery* and *Dashboard*. Initially, the diagram list is presented to you. Then the main area of your screen shows the categories and diagrams that have the current repository as their immediate

parent category.

Hint: If you are in the public workspace and open an empty category, you will be directed to a default page explaining that there are no diagrams in this category yet. You can then either open subcategories, use the diagram search or click on the plus symbol to create a new diagram.
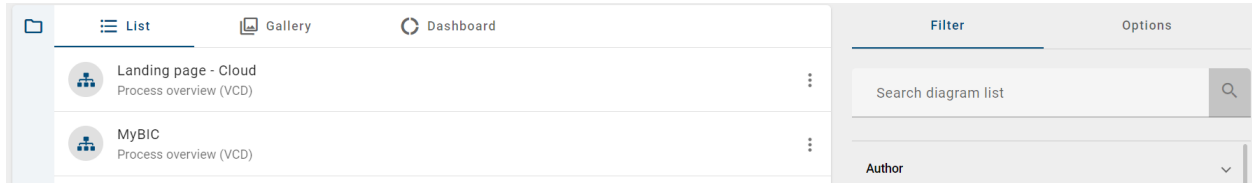
For each diagram, you will see the name in the current content language and the corresponding diagram type in the UI language below. Clicking on a diagram list entry leads you to the corresponding diagram view, from where you can access *alternative views*.

In the vertical bar on the left side of the main area, you can find the categories. Click *Open categories* to open the panel. You can either click on the *folder* icon or on the complete vertical bar.
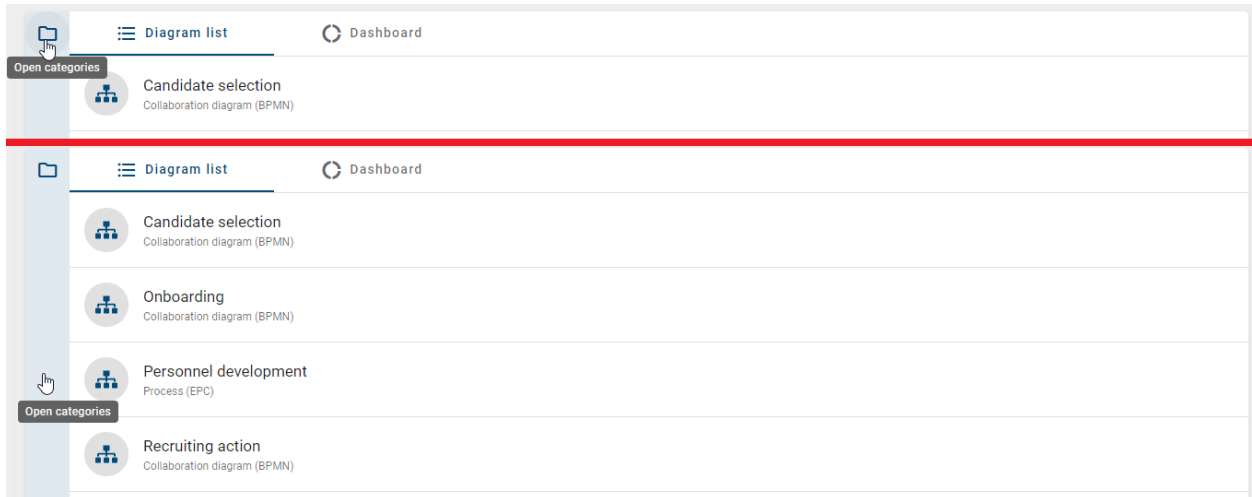
Then all categories that are subordinated to the current repository are listed in an explorer menu. A category can be expanded by clicking on its name. The diagrams in this category will be listed in the main area now.
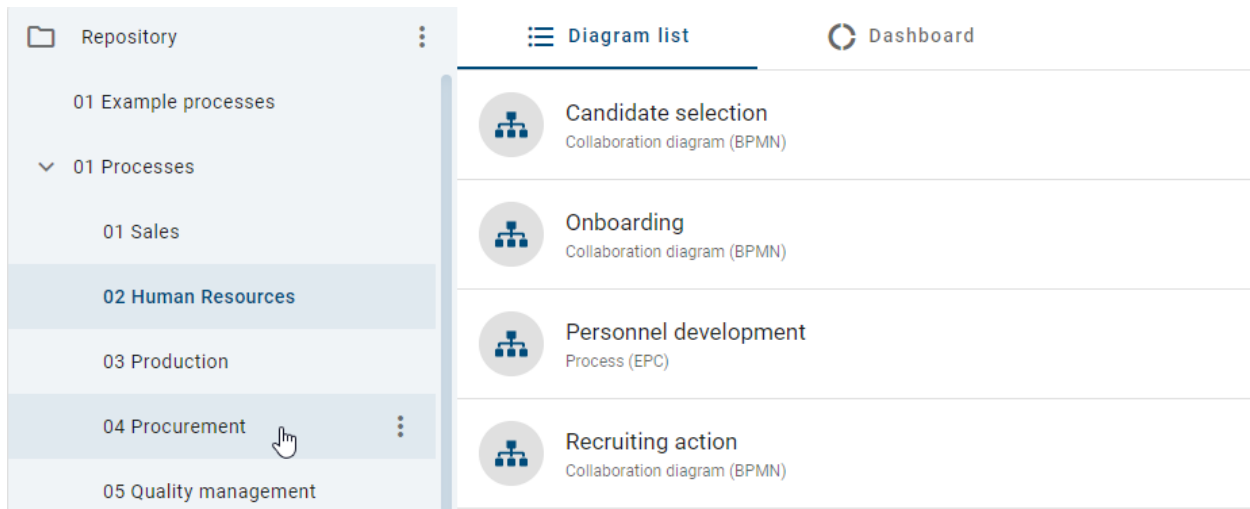
Categories can also contain subcategories which is indicated by an arrow next to the category name. A subcategory can be opened analogously by a click on its name or on the arrow next to its name. You can always navigate in the category tree using the *breadcrumb navigation* in the header bar. If you like to minimize the category explorer, select the *Collapse categories* button.
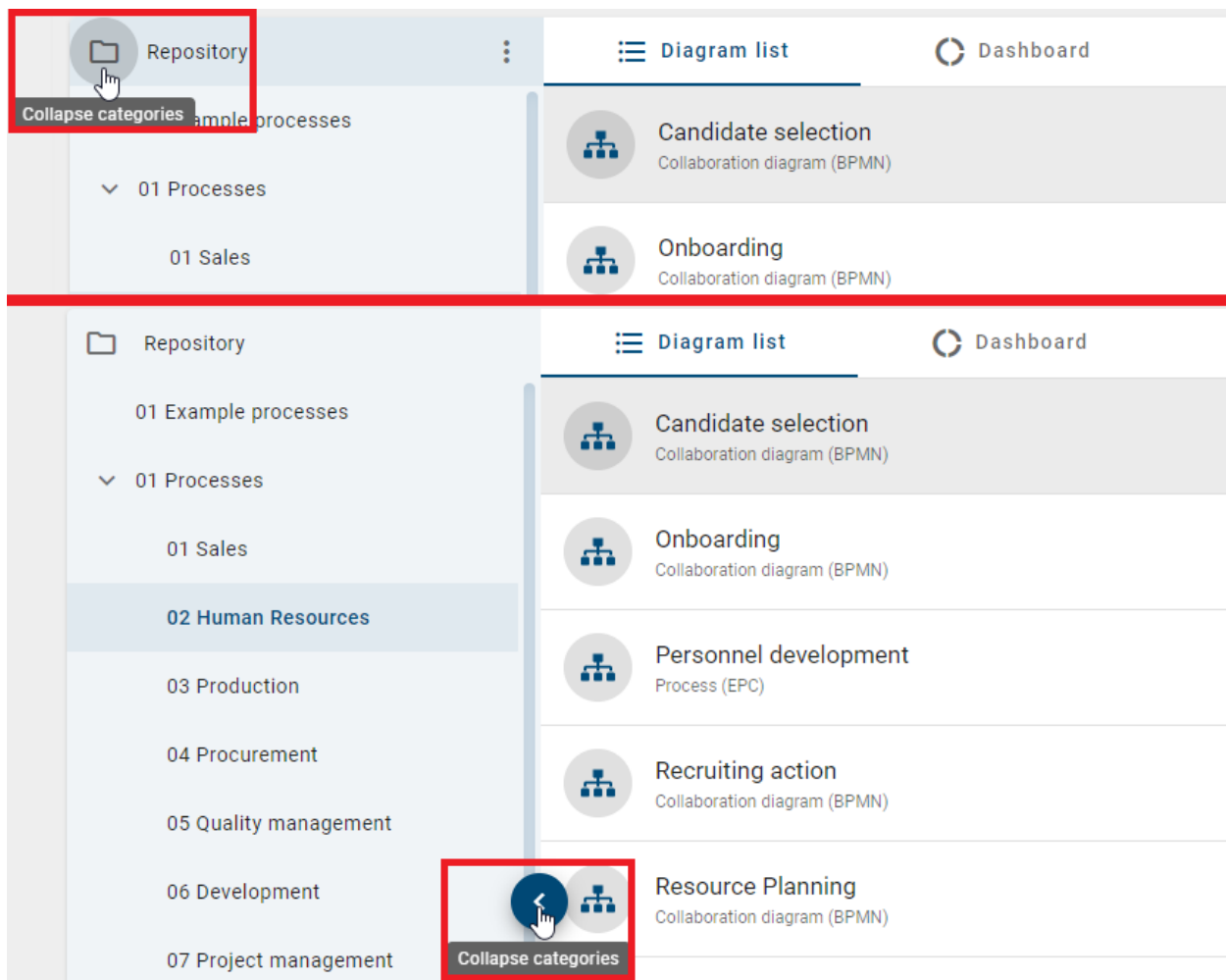
Tip: *Toggle the menu bar* to enlarge your main area.

You have the opportunity to adjust the size of the category panel. Click with the mouse on the right border of the category panel. Then you can drag the blue upcoming line with the hold mouse to the left (minimize) or the right (enlarge).
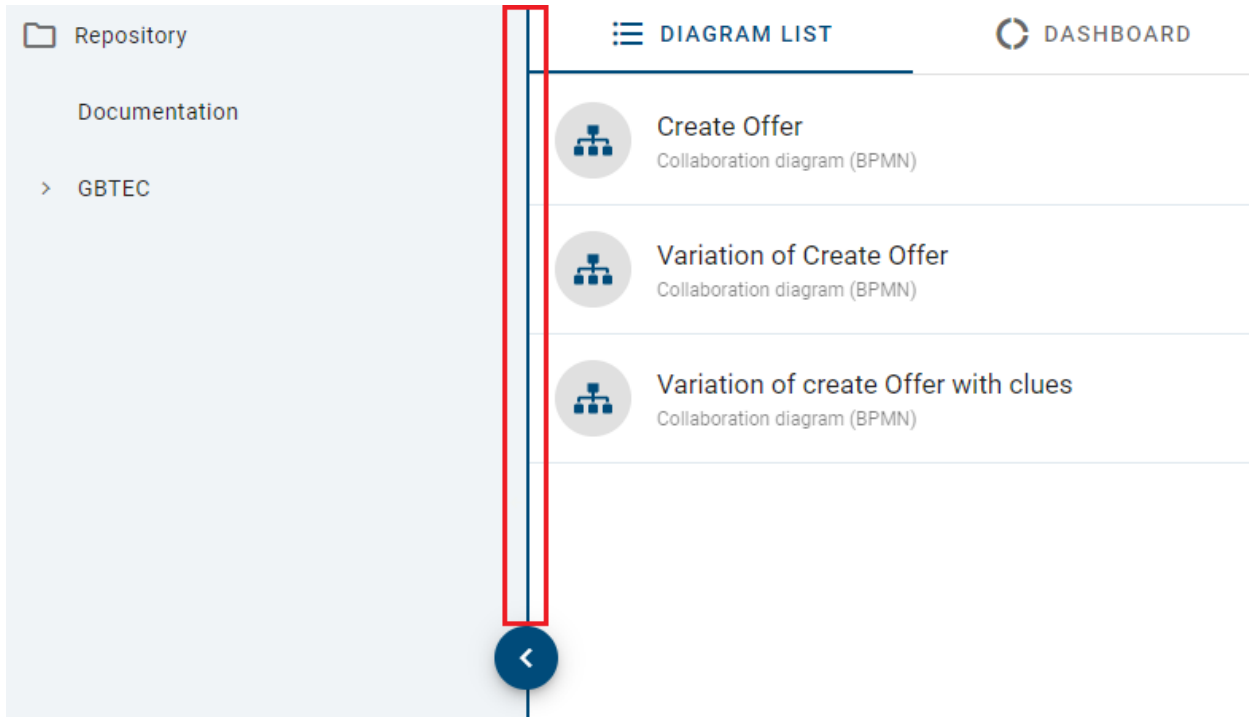
On the right side of the screen, the desktop view first shows the options and the *filters*. Different exports are currently offered as options. These functions generate Excel files for you with the content and additional information on all diagrams in the category. See the *Exports* chapter for more information.

5.2 How can I create a diagram?

You can create a new diagram by clicking on the button at the bottom right corner of the diagram list.

After clicking on it, the option of the *Quick Modeler* is available.

If you have selected the Quick Modeler option, give your new diagram a name and upload the corresponding BPMN file. You can find the template for it *here*.

Note: Please note that only users with the roles *Administrator* and *Editor* can import an Excel file. Authors who normally do not have access to the created diagram are excluded from this import function.

If you select the *AI-generated BPMN process* option, give your new diagram a diagram name.

Note: Please note that only users with the roles *Administrator* or *Editor* can create an AI-generated BPMN process.

Then click on *Create*, to view your new diagram.

5.2.1 Quick Modeler

The Quick Modeler is an Excel file containing a table necessary for quick modeling. Within the Excel file, you'll find a detailed introduction to the Quick Modeler, along with a template featuring an example.

```
Download Quick Modeler Template (Excel)
```

Hint: Currently, this Excel file is necessary to *create a new diagram*.

Hint: Please be aware that the Excel file is currently available only in English.

Note: Please note that only users with the roles *Administrator* and *Editor* can import an Excel file. Authors who normally do not have access to the created diagram are excluded from this import function.

5.2.2 AI-generated diagrams

How can I create an AI-generated BPMN process?

Using the *AI-generated BPMN process* option, you can leverage artificial intelligence (AI) to create your diagram. Upon selecting this option, you need to provide a name in the designated input field. Once you've entered a name, the *Create* option becomes active.

After creating the new diagram, *Arty* will appear with the generation process. This can take a few minutes. Following this, you will either be redirected to the diagram view to preview your diagram or receive an error message.

Note: Please note that only users with the *Administrator* or *Editor* roles can create an AI-generated BPMN process.

Hint: This function is performed by *Arty*, our AI Modeler. It is part of the AI Modeler package, which requires a separate license.

How can I request additional resources for an AI-generated diagram?

When creating an AI-generated BPMN process, you can optionally generate additional resources (documents, applications, risks). To do this, click on the *Generate process with resources* button. Please note that this option is deactivated by default.
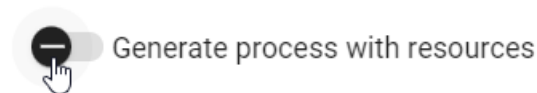
Additional resources can only be included in the modeling if the *Generate process with resources* option is activated.

Hint: This function is performed by *Arty*, our AI Modeler. It is part of the AI Modeler package, which requires a separate license.

5.3 Functions in category explorer

To select a function for a diagram category, you need to be assigned as an *Administrator, Editor* or *Author role* and be in *Public Workspace*. *Here* you can find how to change the stage. Below you will find an overview of the functions and the permissions of the roles.

	Author	Editor	Administrator
Create new category	Authorized	Authorized	Authorized
Publish	Authorized	Authorized	Authorized
Export	Not authorized	Not authorized	Authorized
Import	Not authorized	Not authorized	Authorized
Delete	Authorized(*)	Authorized(*)	Authorized(*)
Rename	Authorized(*)	Authorized(*)	Authorized(*)
Cut	Authorized(*)	Authorized(*)	Authorized(*)
Paste	Authorized	Authorized	Authorized

(*)The function can only be executed in the context menu for diagram categories and not for the repository.

5.3.1 How can I create diagram categories?

You can create diagram categories in the category explorer. Open the *explorer menu* and click on the context menu (three dots) next to your repository folder. Select the option *New category*.
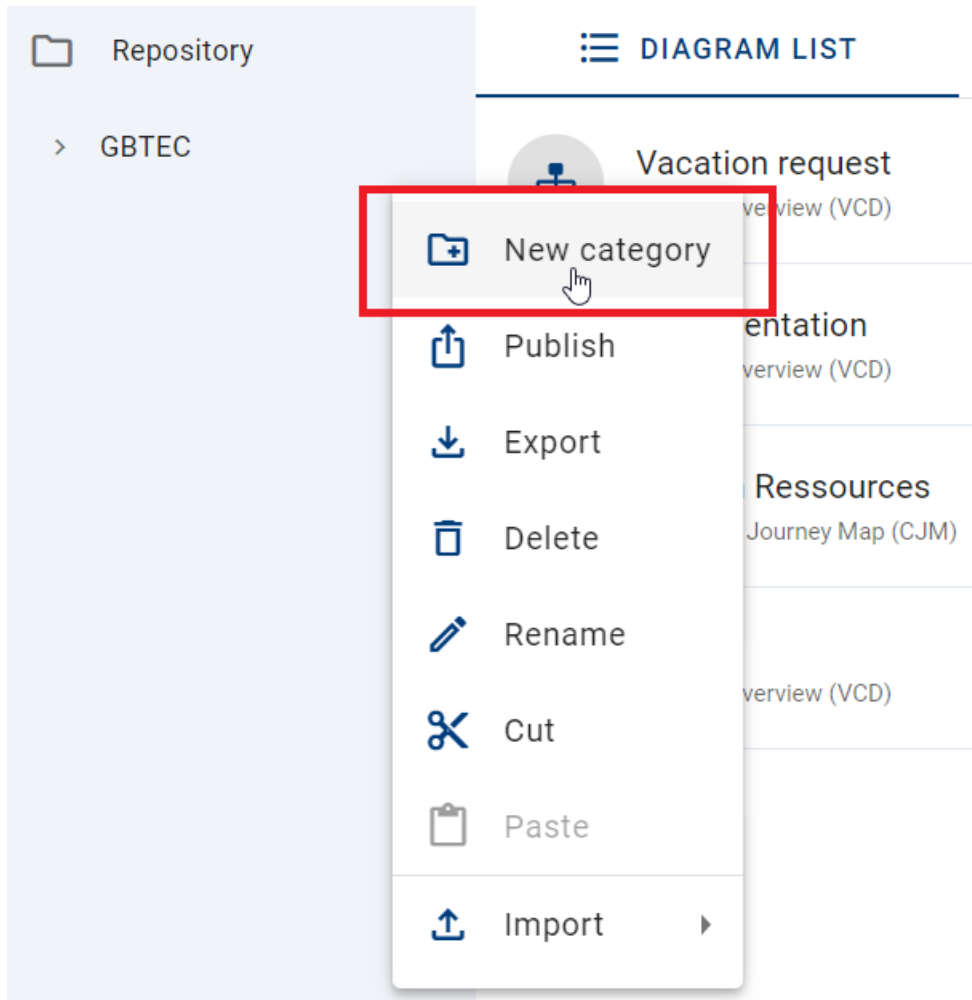
Enter the category name and confirm with *Create*. The diagram category will be shown in the category explorer alphabetically sorted.

Hint: You can also create subcategories for already existing main categories. Therefore you can click on the context menu next to the category name and repeat the process. The created categories will be listed as subcategories for the selected main categories.

5.3.2 How can I rename diagram categories?

If you want to rename a diagram category name, you need to click on the context menu (three dots) and select *Rename*.
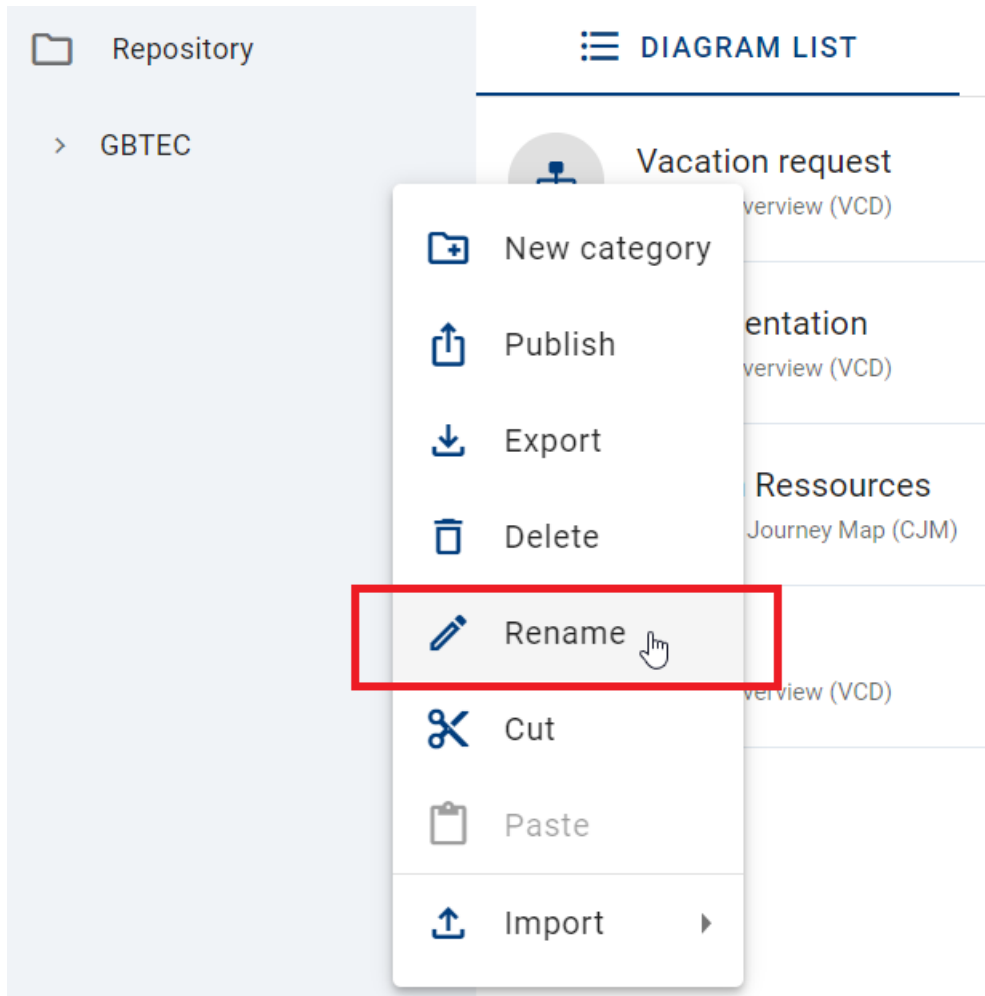
In the upcoming displayed dialog window, you can enter a new name for the selected category. Type the new name into the input field and select *Rename*. To discard the renaming, click the *Cancel* button.

After the renaming is completed, the updated diagram category name is visible in the category explorer. Concurrent user need to refresh the view to see the made changes.

Note: You need to enter at least one character to complete the renaming.

Note: The renamed diagram category will only be displayed in your *content language*.

5.3.3 How can I delete diagram categories?

You can delete main and subcategories according to your needs. Click on the context menu (three dots) next to the category name and select *Delete*.
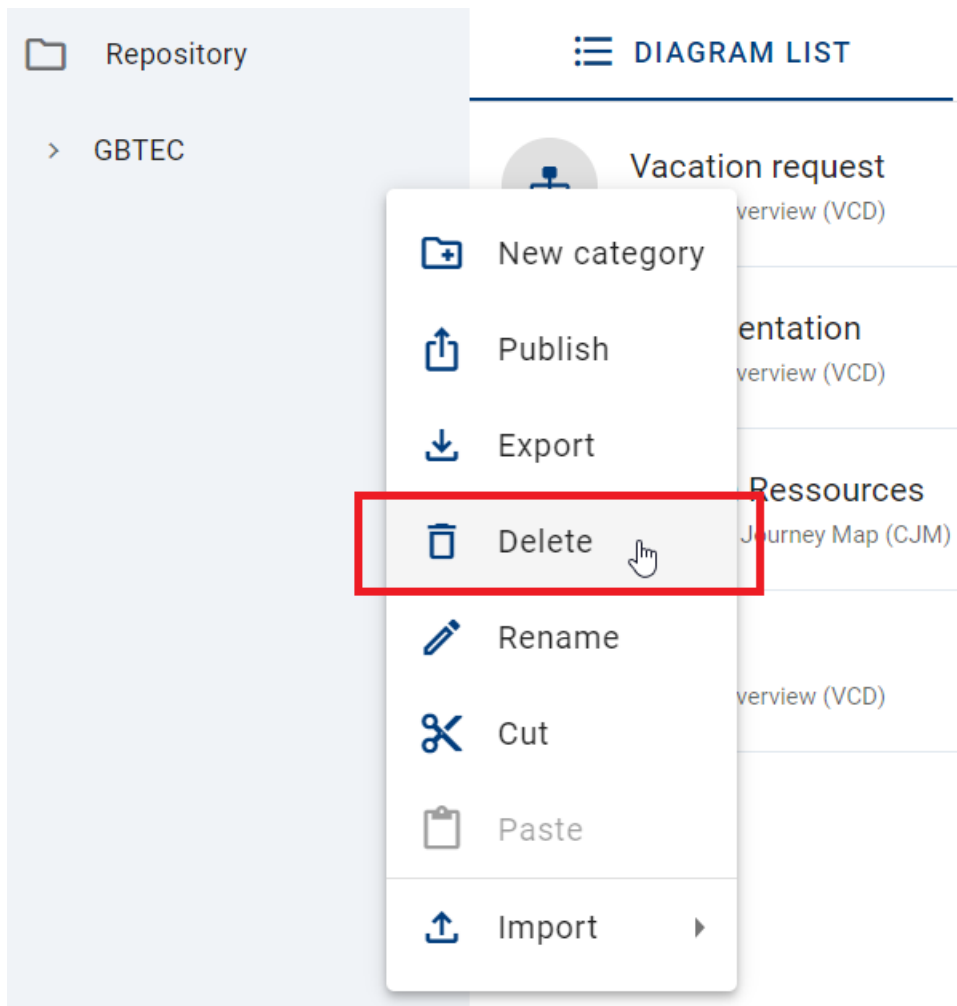
Then a dialog window appears. If you do not want to delete the category, you can close the window by clicking on the *Cancel* button.

Delete category "02 Organization"

You are going to delete "02 Organization" and all subordinated diagrams and categories.

> ⚠️ **Important hint**
>
> You are going to delete "02 Organization" and all subordinated diagrams and categories. This cannot be undone. Please type the category name to confirm the deletion.
>
> Enter category name*

Cancel   Delete

Enter the category name und click on *Delete* to complete your deletion.

Delete category "02 Organization"

You are going to delete "02 Organization" and all subordinated diagrams and categories.

> ⚠️ **Important hint**
>
> You are going to delete "02 Organization" and all subordinated diagrams and categories. This cannot be undone. Please type the category name to confirm the deletion.
>
> Enter category name*
> 02 Organization

Cancel   Delete

Hint: If the category contains subordinated diagrams and categories, they will be deleted as well. This cannot be undone.

5.3.4 How can I cut and paste diagrams and diagram categories?

Cut and Paste diagrams

To insert a diagram from one diagram category to another diagram category, you can use the *Cut* function. Open the diagram category where the desired diagram is located. Click on the context menu (three dots) in the diagram list and select *Cut*.
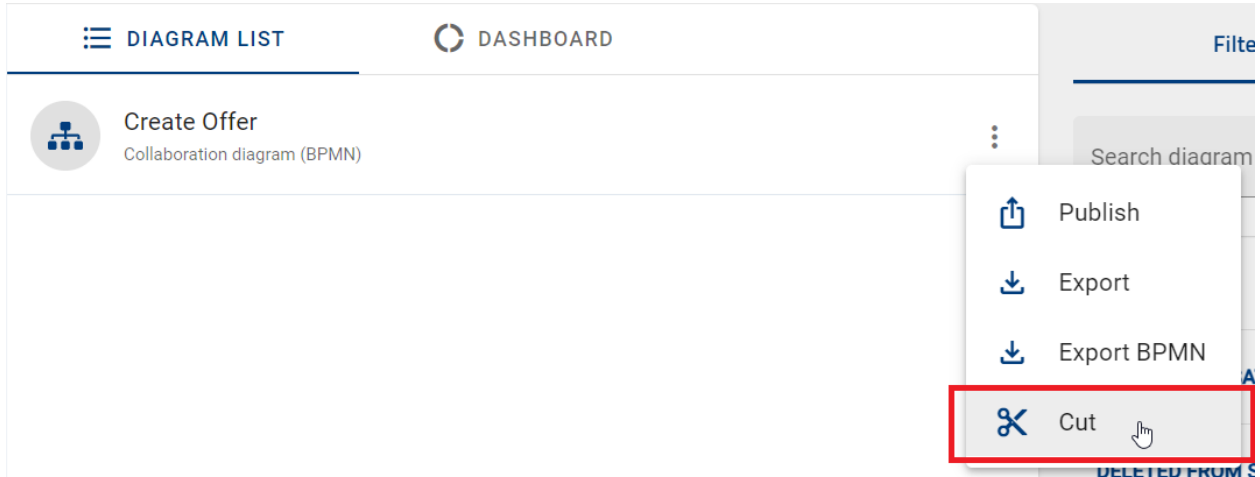
Select the diagram category in which you want to insert the diagram. This can be done for both main categories and subcategories. Click on the context menu of the category and select *Paste*.
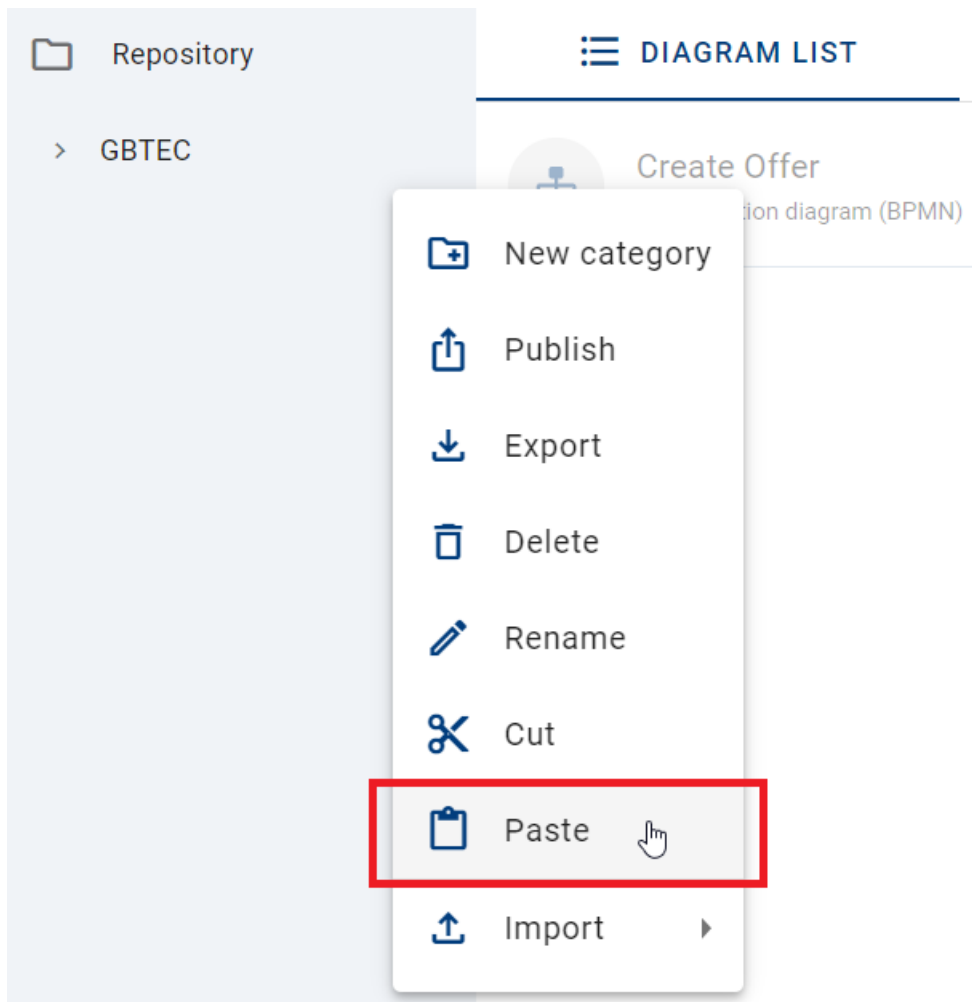
The selected diagram will then be removed from the original category and pasted into the selected category.

Cut and Paste diagram categories

To reorganize a diagram category, click the context menu next to the desired diagram category name and select *Cut*.
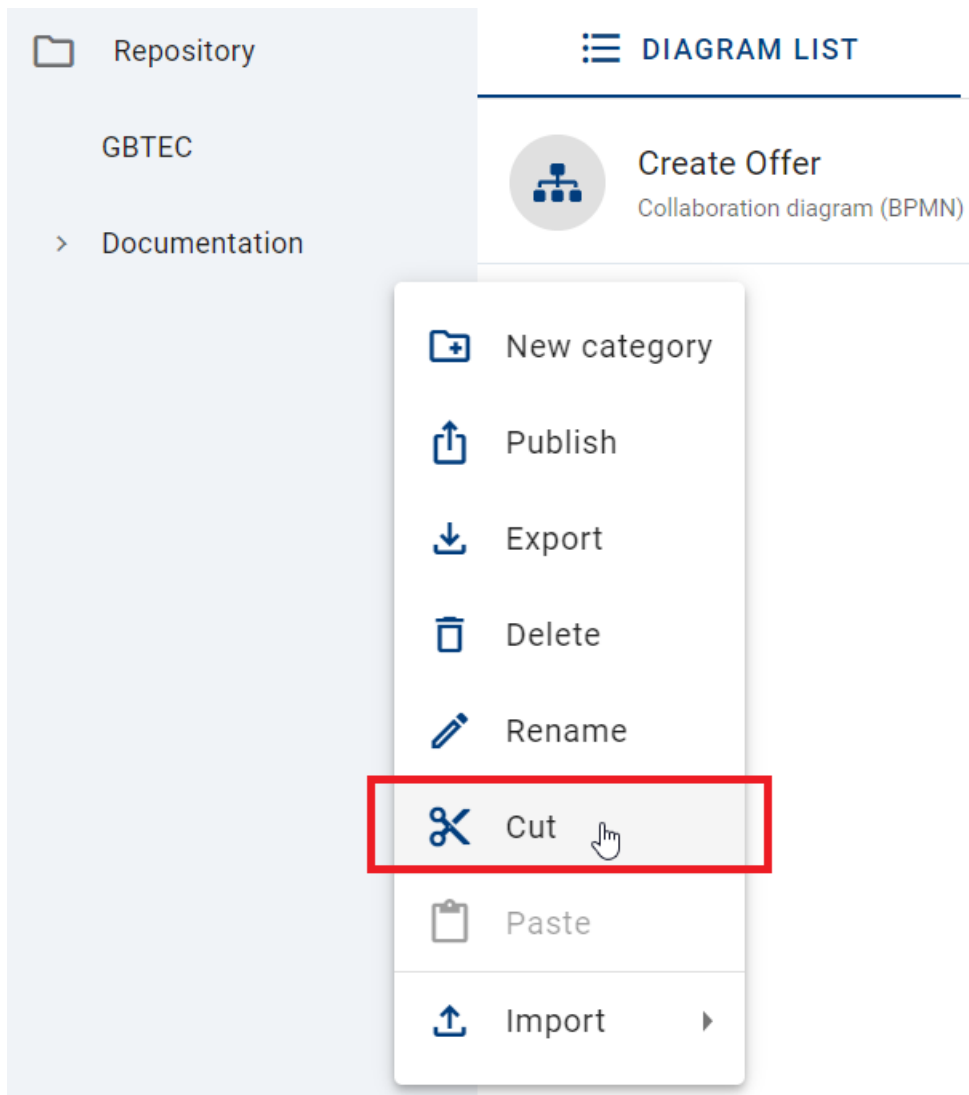
This will cut every subcategory (if any are provided) and all containing diagrams in the category as well. To paste the cut-out category, click on the context menu where you want to insert it and select *Paste*.
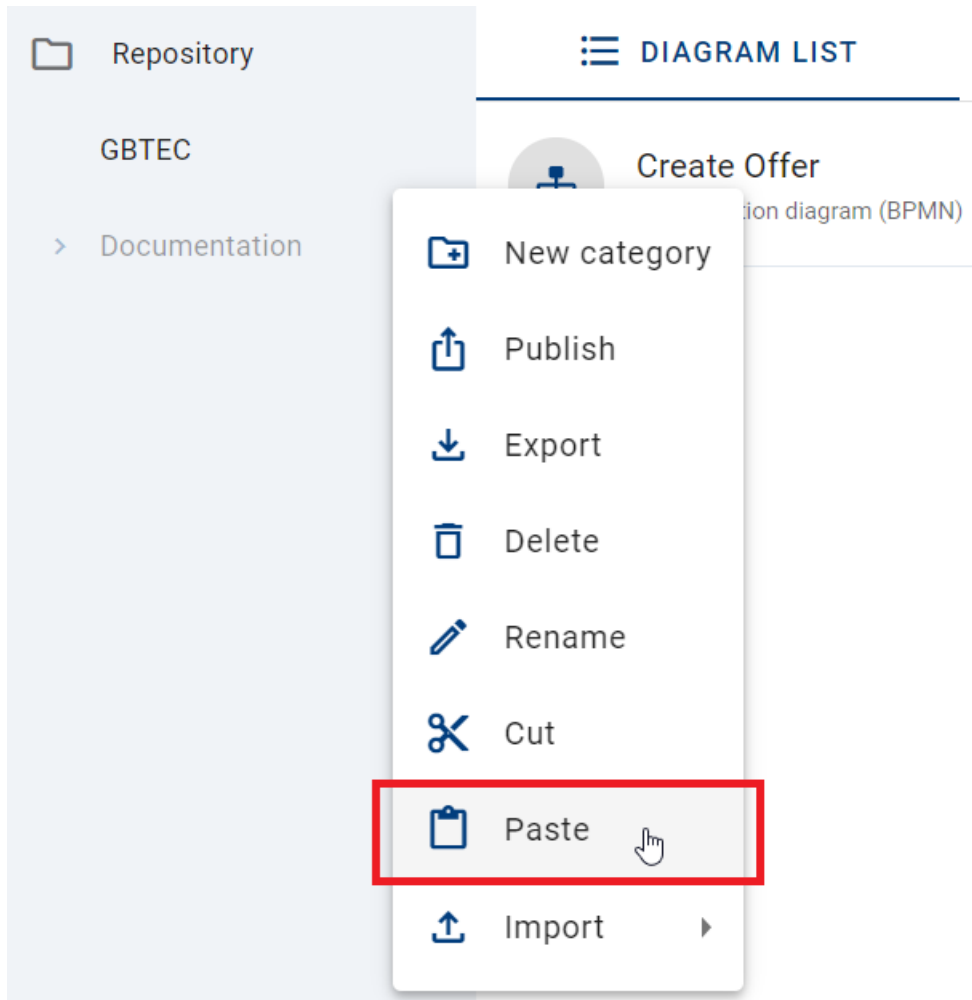
The procedure will be cancelled if you

- cut out a new diagram,
- press the ESC key,
- refresh the page or
- change the repository.

5.3.5 How can I publish diagram categories?

To publish your diagram category, click on the context menu (three dots) next to name and select *Publish*.
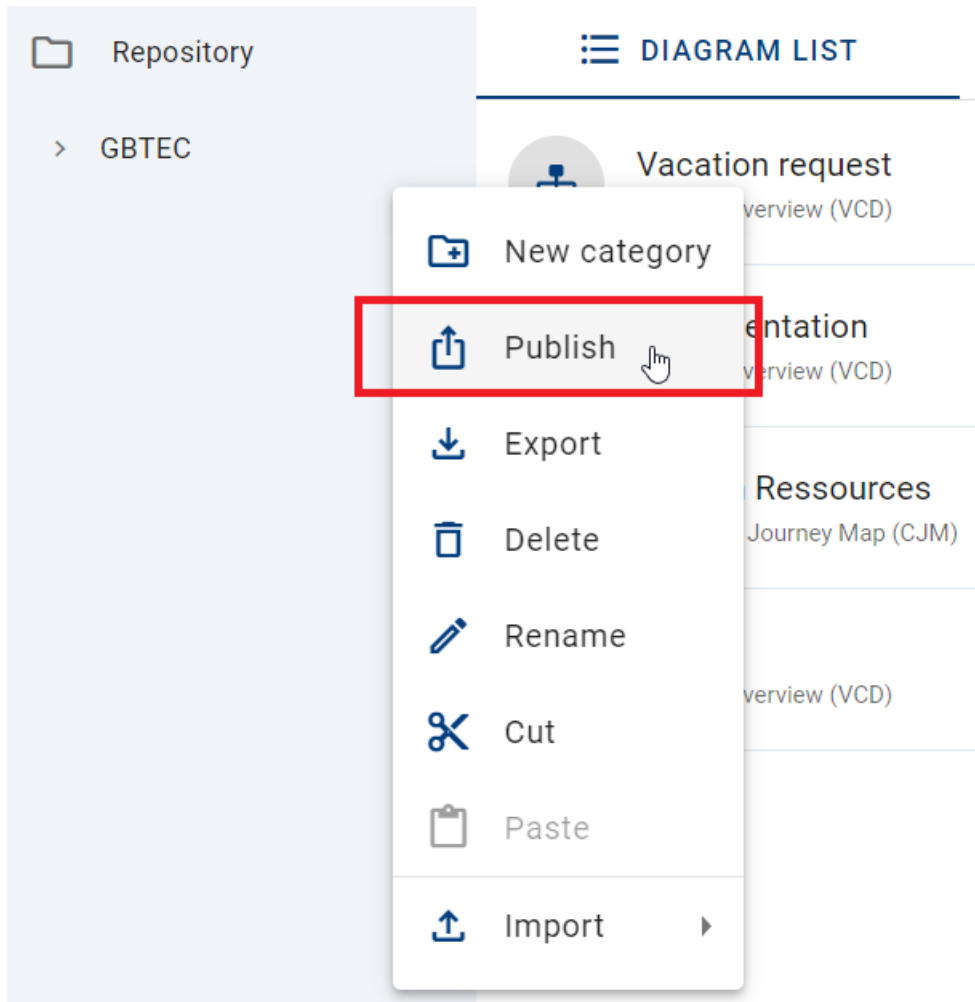
In the upcoming dialog window you have to enter the category name and the reason for the publication and click *Publish*. If you want to discard the publication, select *Cancel*.

Publish category "02 Organization"

Please give a reason for publication

Enter your comment*
All diagrams are ready to be published.

39 / 1024

☐ This is an editorial change without additional review or approval.

⚠ **Important hint**

You are going to publish "02 Organization" and all subordinated diagrams. A governance workflow for each diagram will be initiated. Please type the category name to confirm the publication.

Enter category name*
02 Organization

Cancel   Publish

Hint: When you want to publish a diagram category, you are going to publish all subordinated diagrams as well. For each diagram a *workflow* will be initiated.

Note: You can also publish your repository. Select the context menu next to the repository and follow the same steps.

5.3.6 How can I export diagram categories?

Export in context menu (three dots)

You can export diagram categories by clicking on the context menu and selecting *Export*.
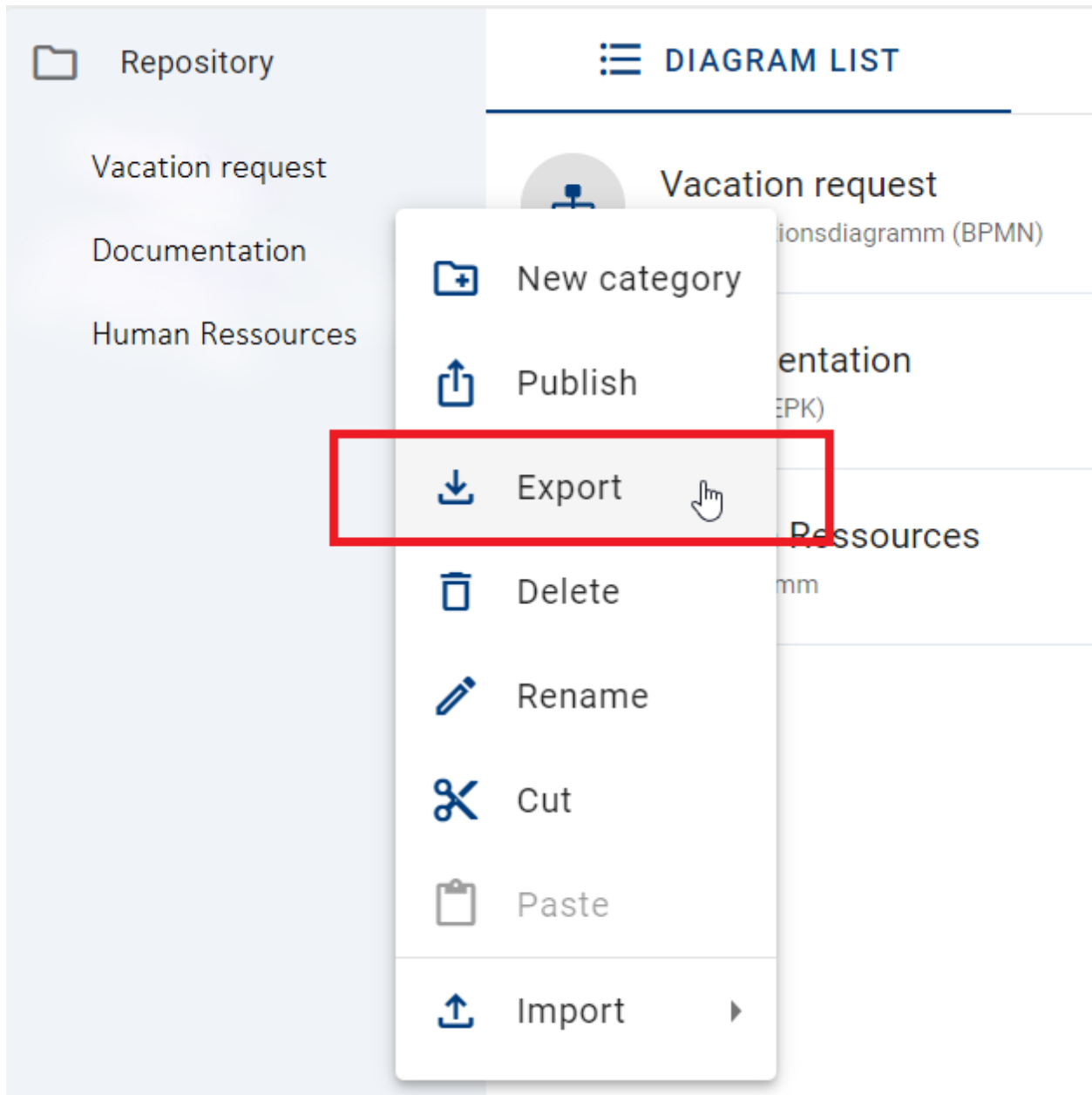
An archive of the diagram category will be created. The notification, which appears at the bottom right side of the screen, informs you about the start of the export.

Export in Options panel

You can also export a diagram category in the *Options* panel. Click on *Reports & Exports* and select the *Create the report* button next to *Export Category*. The notification at the bottom right side of the screen informs you about the start of the export.
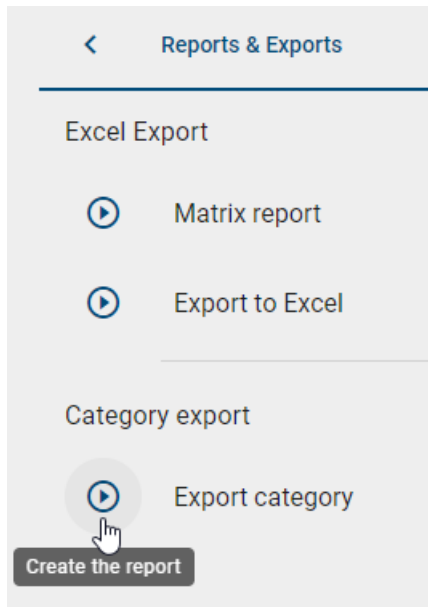
When the export is successfully completed, you will receive another message. This notification contains a link, that enables you to download the export.
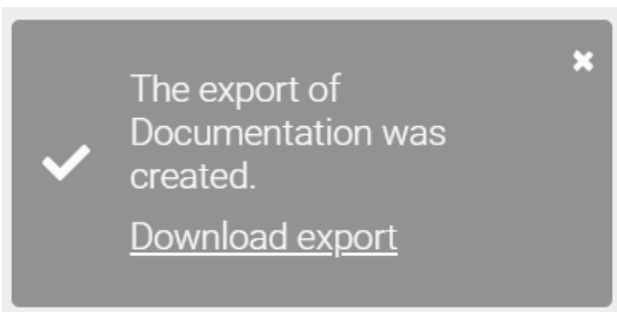
Once the export has been created, you will find a *Download the report* button in the *Reports & Exports* section of the *Options* panel. There, you can download the export.
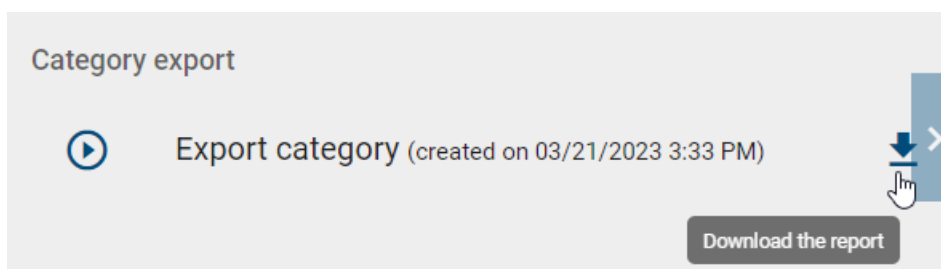
5.4 Gallery

When you open the *Diagrams* section from the menu, you can switch to the *Gallery* in the main area.
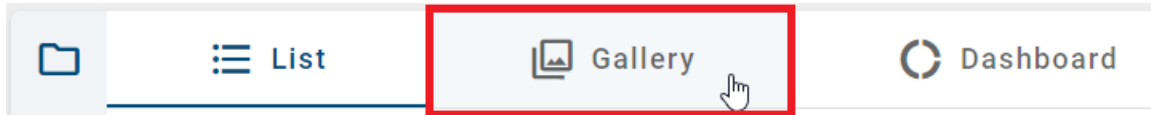
In the gallery, you have the option to preview all diagrams from a selected category. Furthermore, the diagram name in the current content language, the diagram type in the current browser language, and a preview image of the diagram are displayed. If the category explorer is open, you can close it to enlarge the diagram preview.
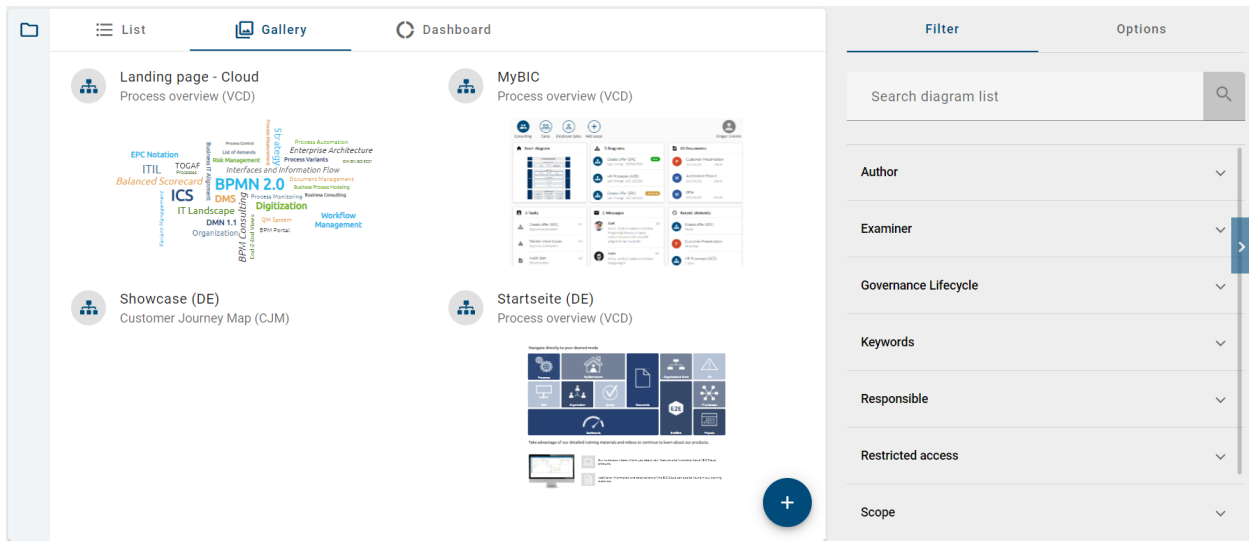
The right sidebar shows the *filter*. If you select one or more facets there, the charts will be updated to count only the diagrams which satisfy the filter criteria.

If you have activated one or more facets in the filter and switch to another view, the filter will remain active, and only the filtered diagrams will be displayed in the list.

Hint: Please be aware that the options *Import* and *Bulk edit* are not available in the *Gallery* view.

5.5 How can I analyze diagram attributes in the dashboard?

If you open the *Diagrams* section using the menu, you can switch to the *Dashboard* in the main are of your screen.
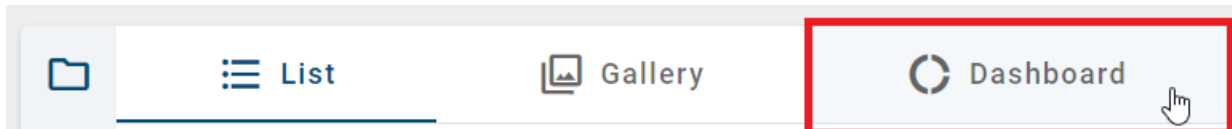
The dashboard view enables you to analyze the diagram attributes of all diagrams contained in your current repository. A donut chart is displayed for each available diagram attribute type. An attribute type is available as soon as it is set visible in the method and is maintained in at least one diagram. The number in the middle of a chart tells you how many different facets of the attribute are currently present in the repository.
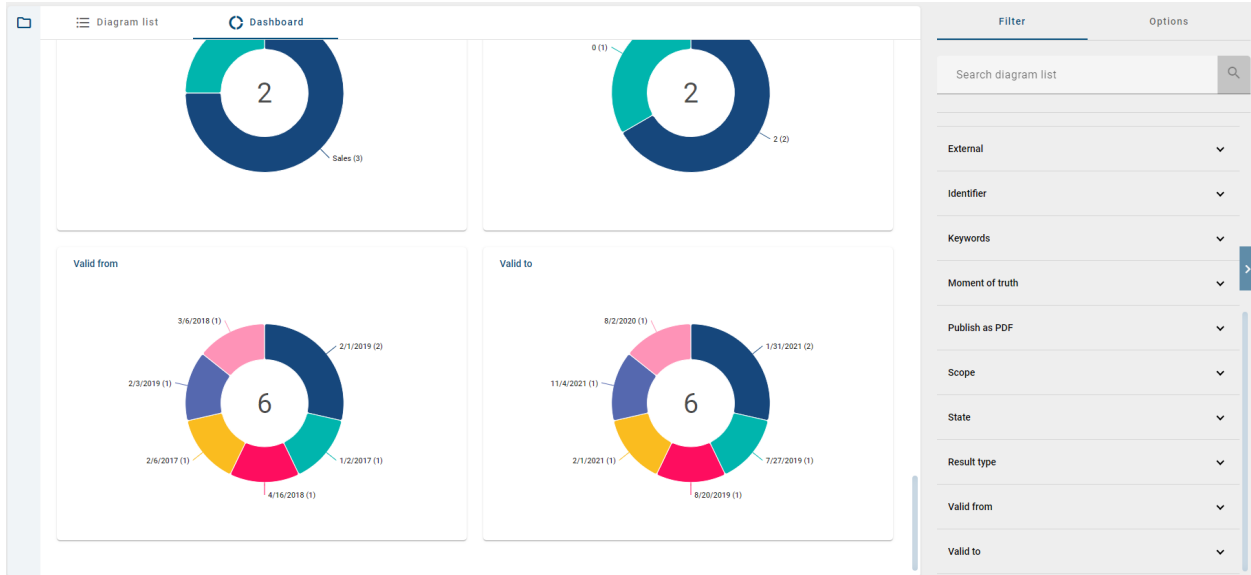
The right sidebar shows the *filter*. If you select one or more facets there, the charts will be updated to count only the diagrams which satisfy the filter criteria.
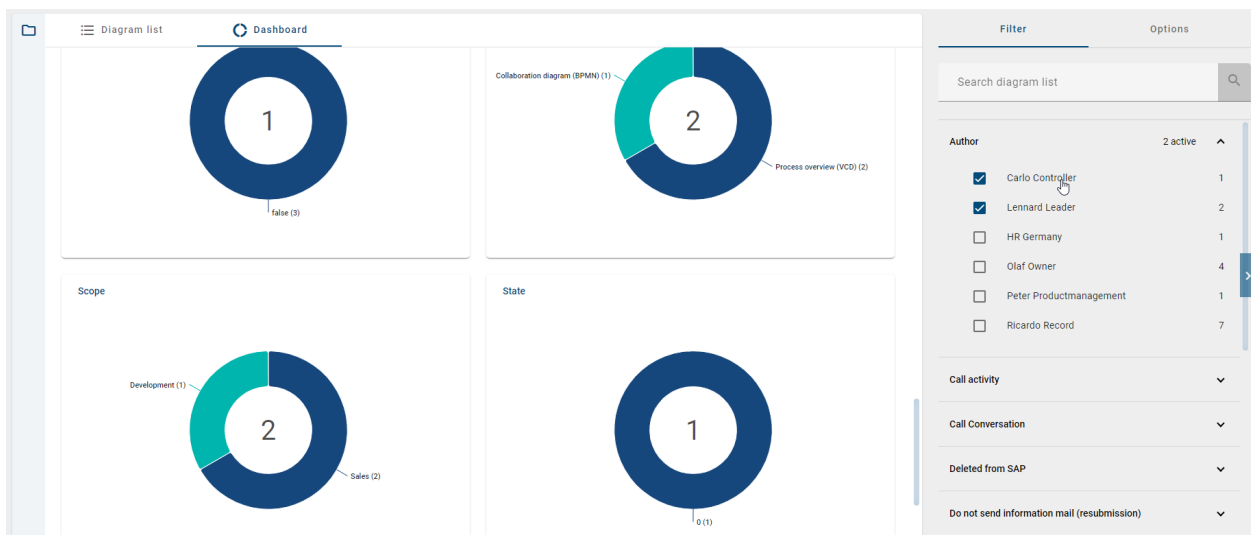
Vice versa, you can select one or more facets of a chart in order to filter for a characteristic.
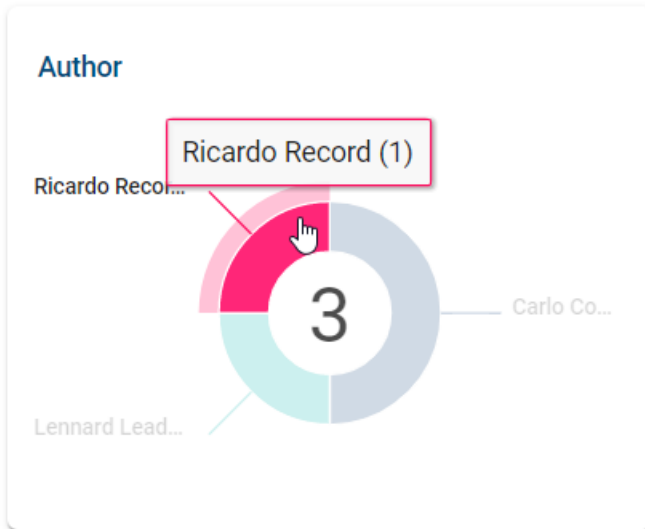
If you activate one or more facets in the filter and switch to another view, the filter is still active and only the filtered diagrams are listed there.

5.6 How can I return to a recently opened diagram?

If you are in a *diagram view*, you can return to a recently opened diagram by clicking the option located to the right of the process execution view. This option is only available if you have previously opened at least one diagram.
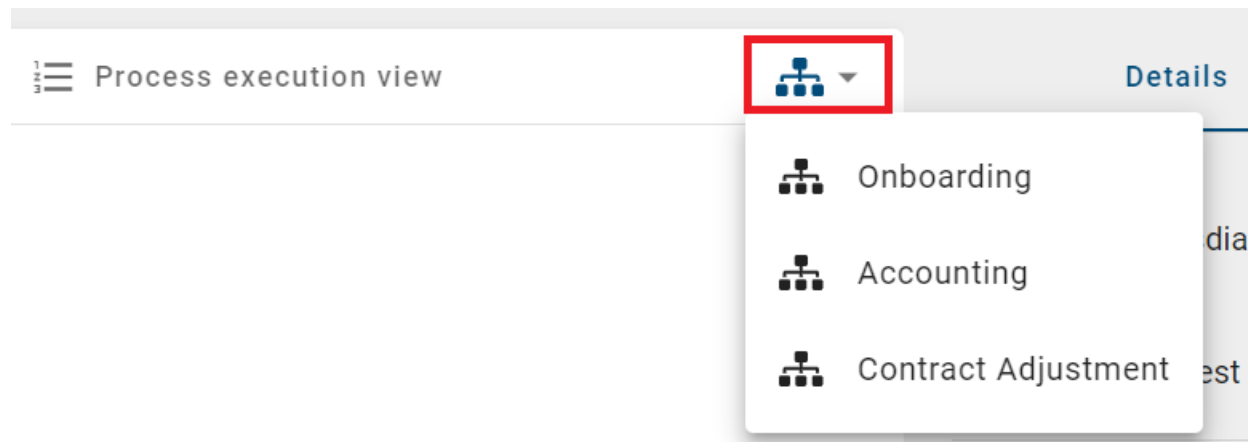
The list of recently opened diagrams is sorted chronologically in descending order and is limited to a maximum of five entries. If you have opened more than five diagrams recently, the oldest entry is removed from the list and the most recently opened diagram is added.

After clicking on a recently opened diagram, you will return to this diagram in the stage you have last opened.

5.7 Filter and search diagrams

5.7.1 How can I filter the diagrams?

When you are in the *diagrams list* or the *dashboard*, you have the possibility to filter your diagrams. On the right-hand side of the list you can see the option *filter* and all attributes.
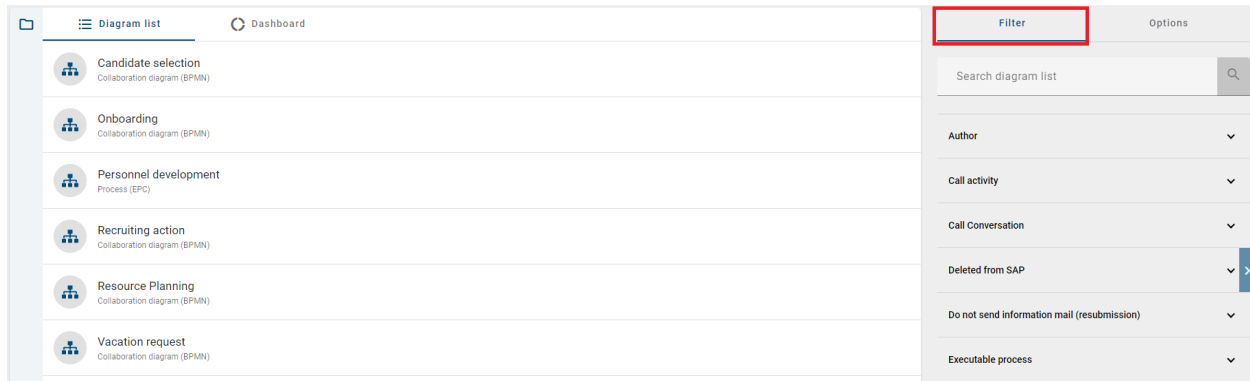
When you click on an attribute, a list with its facets will appear. Here you can choose which facets should be displayed. You have the possibility to choose more than one facet. If you activate one or more facets and switch between the *diagrams list* and *dashboard*, the filter is still active and only the filtered diagrams are shown in the respective view.
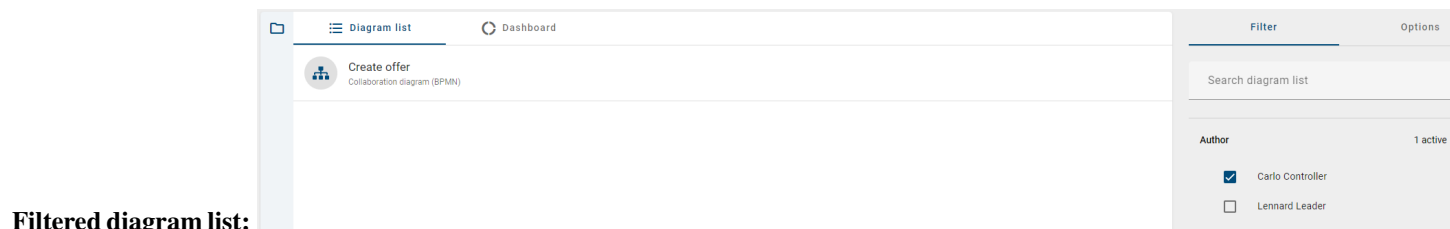
Filtered diagram list:

Filtered dashboard:

If you remove all filters or click on the entry *diagram* again all diagrams will be displayed in the list resp. dashboard again.

Tip: If you have user rights *Reviewer* or higher, you can use the additional filter facet *diagram views*.
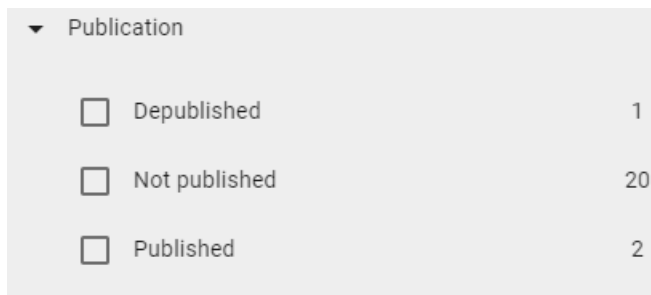
5.7.2 How can I filter diagrams by their current state?

With the *Governance Lifecycle* filter, you can filter diagrams according to their currently active workflow, their publication or their revision. This gives you a better overview of the status of the diagrams.

If you want to apply this filter, you must be in the *Public workspace*. In the *Filter* tab, you can open the *Governance Lifecycle* filter.
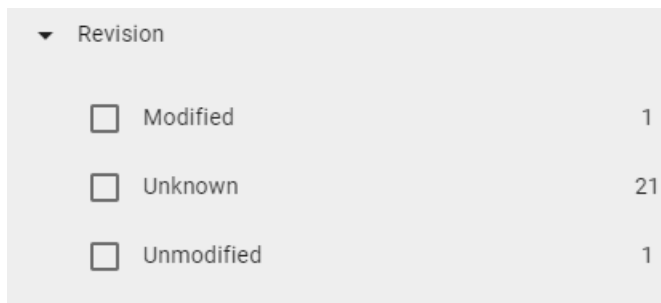
Publication

If you open the *Published* subfilter and at least one diagram has been published, you can filter for the corresponding diagrams by clicking on *Depublished*, *Not published* or *Published*.

Revision

If the *Revision* subfilter is expanded and at least one diagram has a revision status, you can select a specific revision status as a filter. You can filter diagrams according to the following revision statuses: *Modified*, *Unmodified* and *Unknown*. Changes to a diagram cannot be displayed until it has been republished. Until then, it has the revision status *Unknown*.

Workflow

If you have expanded the *Governance Lifecycle* filter, you also have the option of opening the *Workflow* subfilter. Here you can then filter whether a workflow is active for the diagram. A distinction is made between *Depublication*, *Publication* and *Resubmission*.

You will then see a filtered list and a number of all diagrams that are in the corresponding area.

Hint: The *Governance Lifecycle* filter is available from version 7.14.0. To display all published diagrams in the filter, you must check the diagrams out and back in at least once.

Note: All filtered results are sorted alphabetically by browser language.

Hint: The *Governance Lifecycle* filter is also available to filter *catalog items* by their *Workflow*, their *Publication* or their *Revision*.

5.7.3 How can I search for diagrams?

You have the possibility to search for diagrams by using the *search function* in the diagram list. The search will look for coincides in the diagram titles as well as the *attributes of the diagrams*. The search results may also include access-restricted diagrams that you cannot open.

Click on the *Search diagram list* field in the *Filter* panel. Enter the search term and confirm by pressing the *Enter* key or clicking on the magnifier glass.
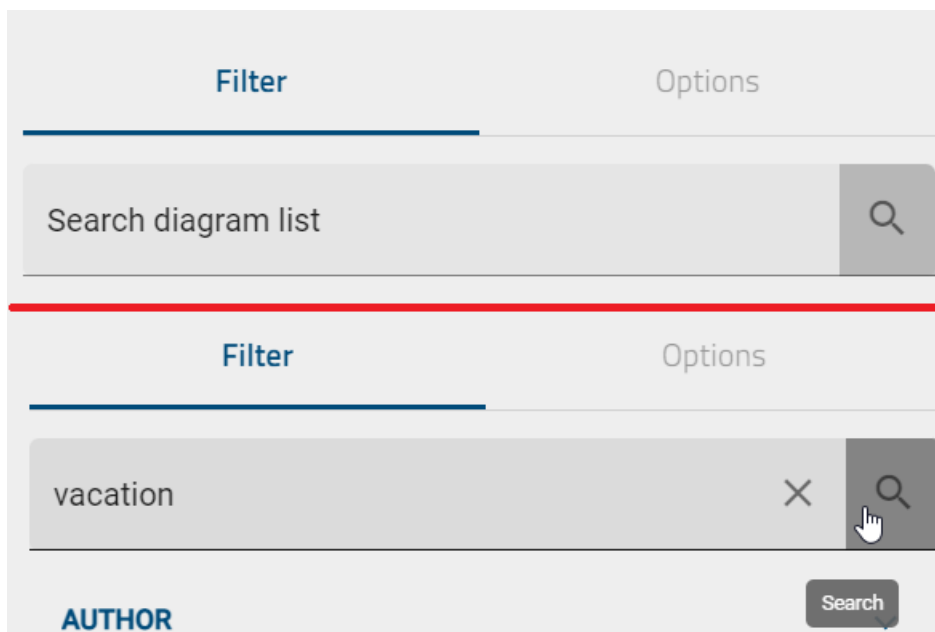
You will then see all the search results that contain the specific term.

If there are no matching diagrams for your search term, the main area will show a corresponding hint as well as the button *Toggle language & search again*. You can select this button to set the alternative language as your content language and restart the search in this new content language.

If you want to display your entire diagram list again, click *Clear search* next to the magnifier glass icon to reset your list.
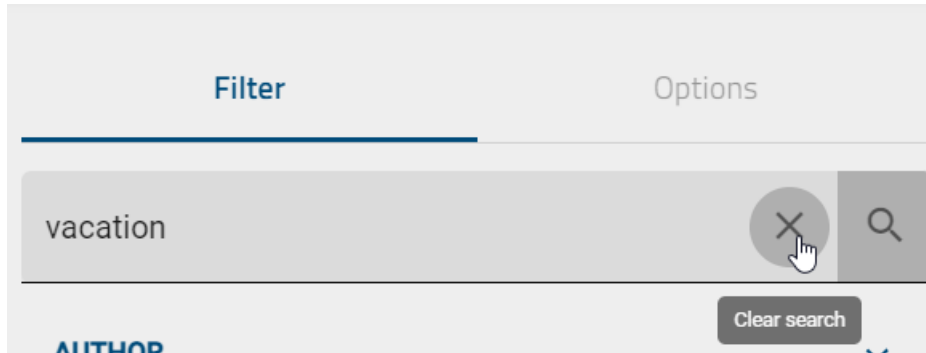
Hint: *Here* you can find an overview of the different options you have for search terms.

5.8 Bulk Edit

If you want to edit the same type of attributes in multiple diagrams as an administrator or editor, you can do so using the *Bulk Edit* feature. To do this, go to the *Options* of the diagram view while being in the *Public Workspace* and select *Bulk Edit*.
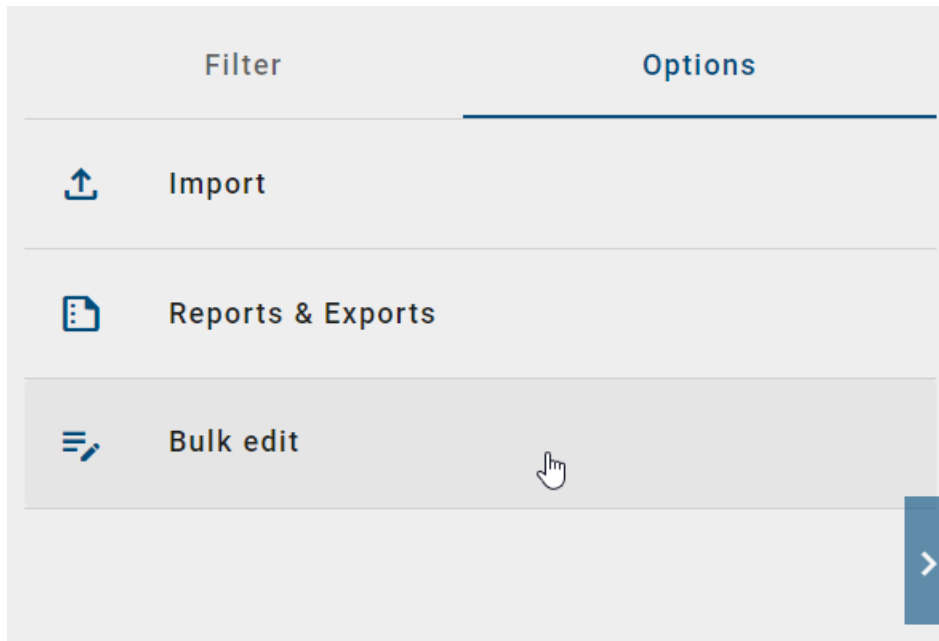
Subsequently, you will enter the Bulk Edit mode for the respective category in which you are currently located. All (filtered) diagrams within the category will be displayed to you in a list view. Select the diagrams you want to edit, and click on *Start bulk edit*.
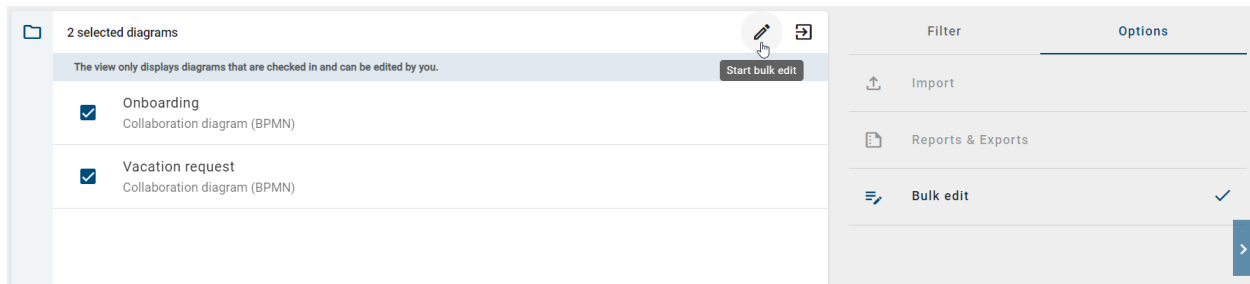
This will open a dialog window where you first need to choose the attribute type you want to edit. Once you have selected an attribute type, you can set the action to replace the attribute value. Enter the new attribute value and choose what it should be replaced with.

Click on *Update* to apply the changes, or on *Cancel* to discard any changes.

Once you click on *Update*, a confirmation window will appear. Enter the corresponding confirmation term to confirm the bulk edit.

If the corresponding attribute values in the selected diagrams are updated successfully, you will receive a success message. Otherwise, an error message will appear.

5.9 Which alternative views on diagrams are available?

When you open a diagram, you first go to the diagram view. Here the diagram name is always displayed in the headline and the diagram version of the current stage is presented.
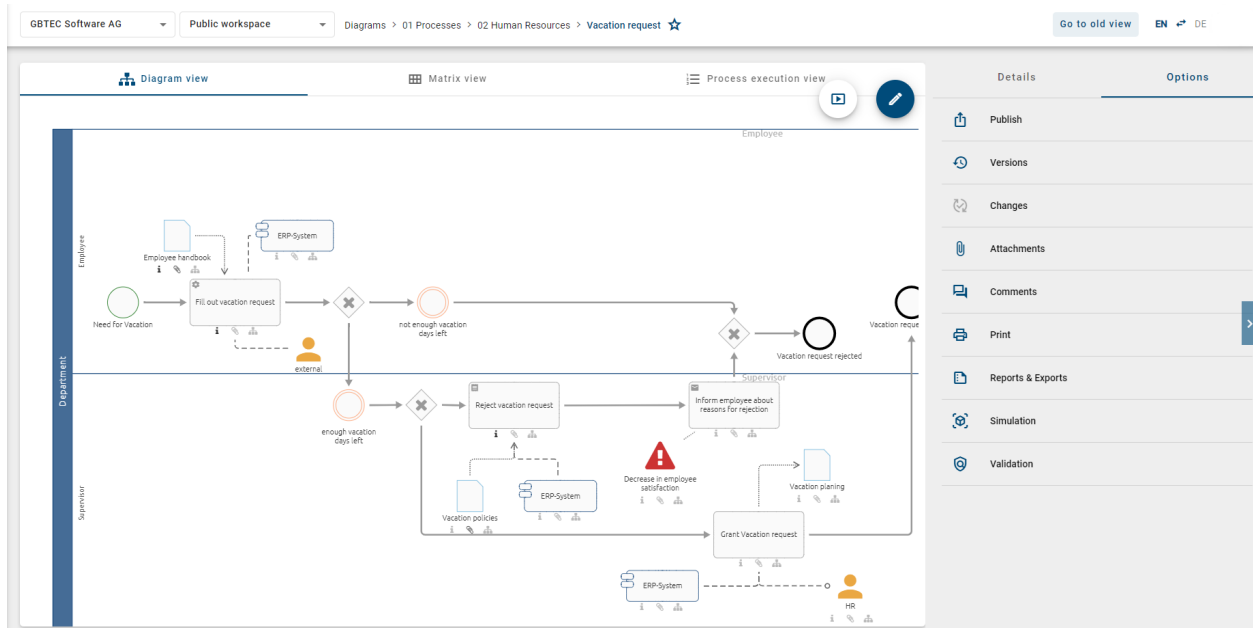
In addition to the diagram view, you can view the matrix (1) and the process execution (2) here for the diagram types *"Collaboration diagram (BPMN)"* und "Process (EPC)". The matrix is also available for the "Process overview (VCD)". All these alternative diagram views refer to the same diagram version. Depending on the current view of the diagram, you have different options, which you can find in the sidebar on the right.

The different diagram views and their options are explained in more detail in the following chapters.

5.10 Diagram view

5.10.1 How do I get to the diagram view?

This view is initially set if you have opened a diagram and presents the diagram version of the selected stage. The graphical representation of the diagram is always svg-based.

If the diagram view is not opened, you can display it by clicking on *Diagram view*.
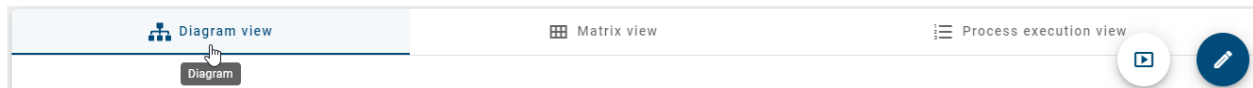
Note: The graphical diagram view offers you an easy handling over the left mouse button, known from Google Maps.

5.10.2 How can I view the details in the diagram view?

In the diagram view, the hub on the right shows the *Details* of the diagram by default. If they are not displayed, open the right sidebar if necessary and switch to the *Details*.
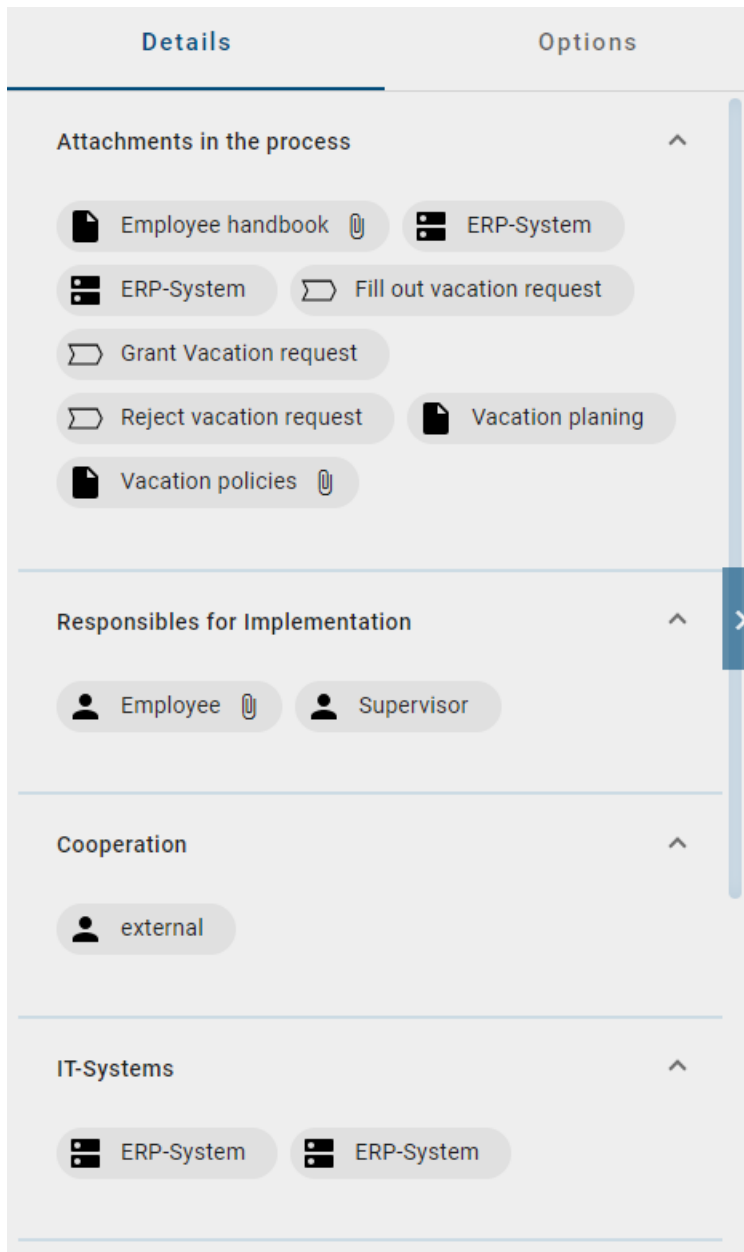
When you select a symbol in the diagram, the details associated with the symbol are displayed. If you deselect a symbol by clicking on an empty space in the diagram, you see the diagram details again. *Optionally*, you can right-click on a symbol and select the entry *Show attributes* of the appearing context menu to display the details of the currently selected symbol.
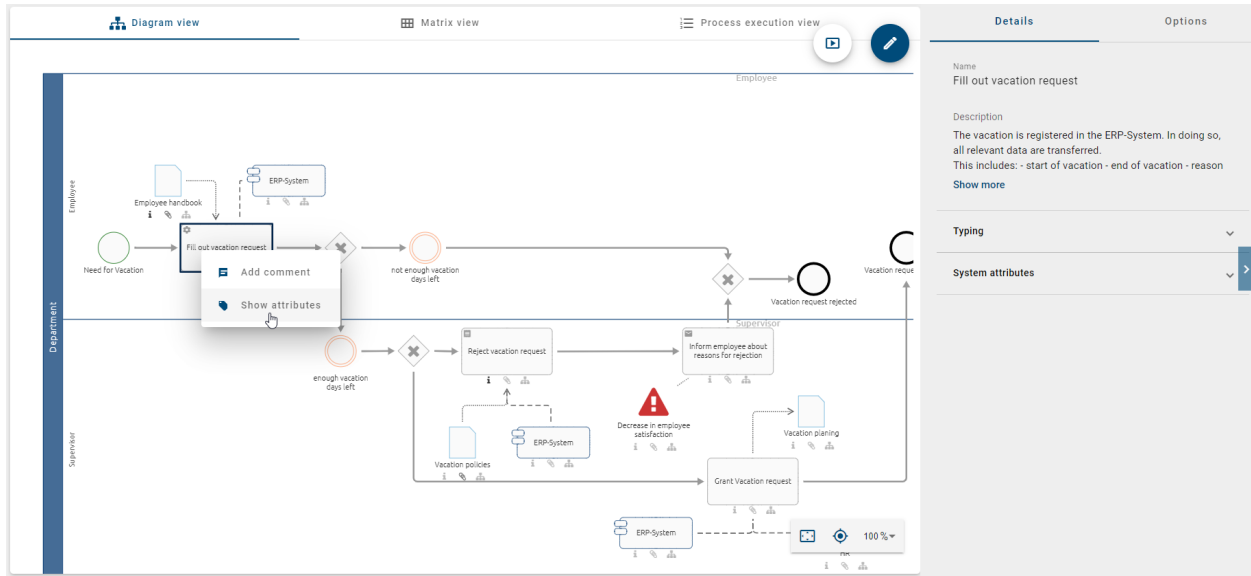
You can find an explanation of which contents are displayed to you as details in the *corresponding chapter*.

5.10.3 Which options do I have in the diagram view?

To display the options of the diagram view, click on *Options* in the right hub.
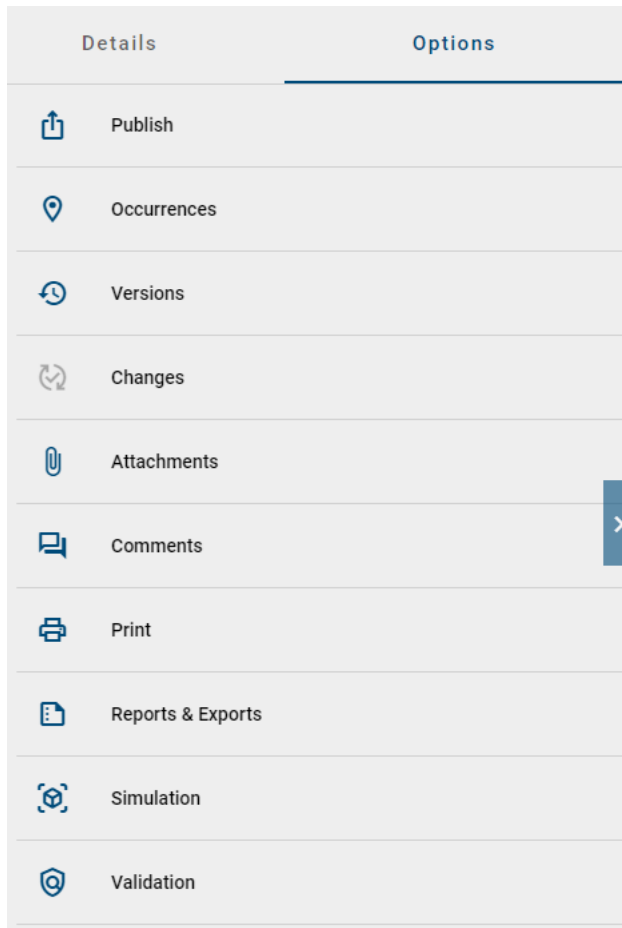
The following options are now available for diagrams or symbols and the corresponding chapters are linked for further explanation:

- *Publish* the diagram
- *Occurrences* (only for symbols)
- *Versions*
- *Changes*
- *Attachments*
- *Comments*
- *Print*
- *Reports & Exports*
- *Simulation* (optional)

Once you have opened one of these options, you can use the *back* arrow in the sidebar to navigate back to the main options menu.

Tip: If a symbol has an attachment, you can also display it by double-clicking on the symbol.

5.11 Matrix

5.11.1 How do I get to the matrix?

You only have the option to display the matrix, if you have opened a VCD, EPC or BPMN diagram in the repository. Then click the *Matrix view* button.

Depending on the process flow (BPMN and EPC), or depending on the location on the diagram (VCD), the matrix displays all the activities of a diagram in rows. All actors, such as roles and responsible applications (e.g. pools), form the columns in alphabetical order. In the matrix cells, the association type between the activity and the resource is displayed (R-Responsible, I-Informed, C-Consulted, A-Accountable). The following columns are about inputs, outputs, applications and risks of the diagram. The objects associated with an activity are then listed alphabetically as chips in the corresponding field. If an attachment exists for an object, the chip contains a paper clip symbol. By clicking on this paper clip, attachments can be accessed directly. See the *profile* for a more detailed description.

You also have the option of viewing all modeled relationships between a role and an activity in the matrix view. If the same role has several relationships to an activity, all of these relationships are displayed in the matrix view.

Note: The matrix is not available in the mobile view.

5.11.2 How can I view the details in the matrix?

In the matrix, the hub on the right shows the *Details* of the diagram by default. If they are not displayed, open the right sidebar if necessary and switch to the details.
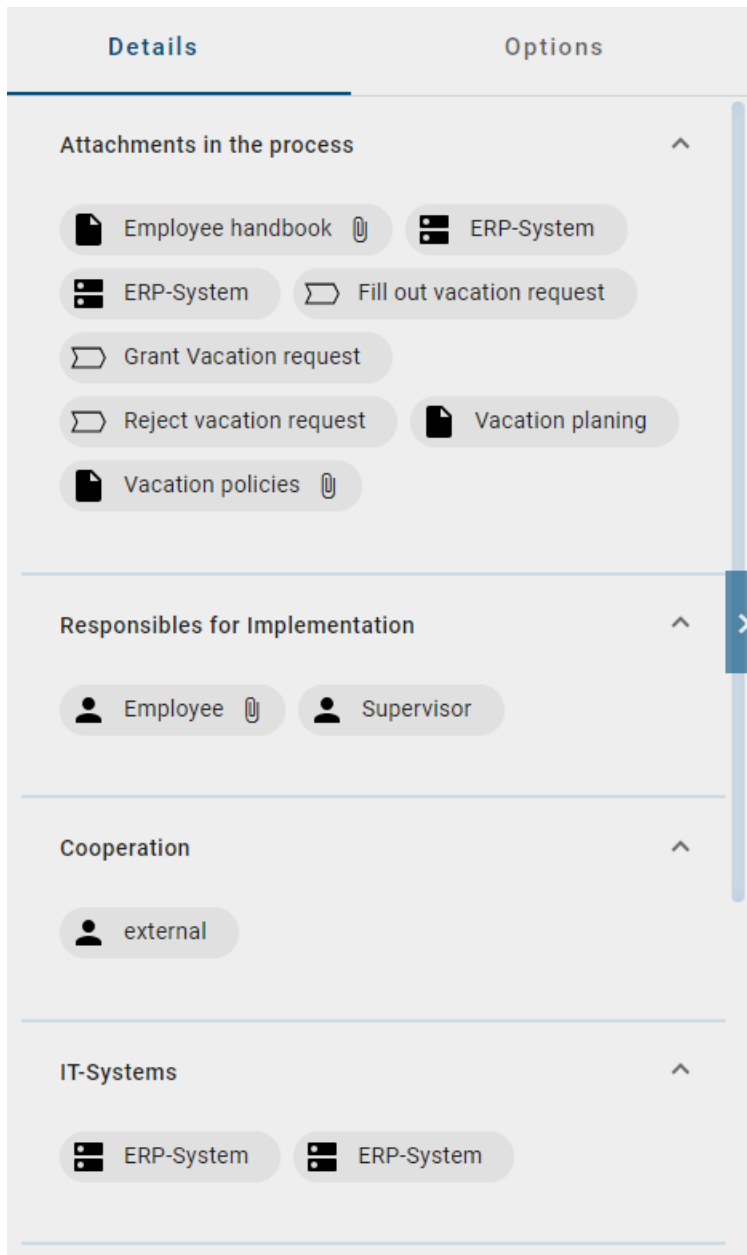
By clicking on activities or chips of the matrix, the associated details are automatically displayed in the options. This selection can be deselected in the desktop version by clicking again, so that you now see the details of the diagram.

You can find an explanation of which contents are displayed to you as details in the *corresponding chapter*.

5.11.3 Which options do I have for the matrix?

To display the options of the matrix, click on *Options* in the right hub.
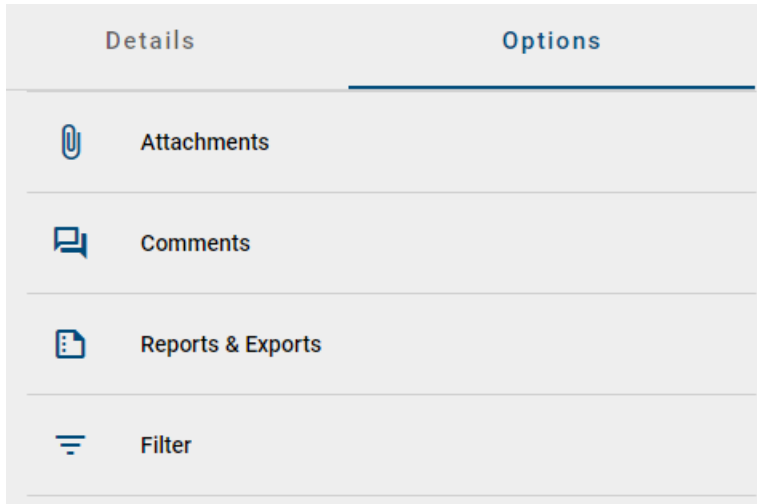
The following options are now available and the corresponding chapters are linked for further explanation:

- *Attachments*
- *Comments*
- *Reports & Exports*
- *Filter*

Once you have opened one of these options, you can use the *back* arrow to navigate back to the main options menu.

5.11.4 How do I filter the matrix?

Looking at your diagram in the matrix view you can use the *filter* option. If you click on *filter*, the column headers of the matrix are shown as filtering options. An eye icon on the left side of a column header displays its visibility. Every column is visible initially.
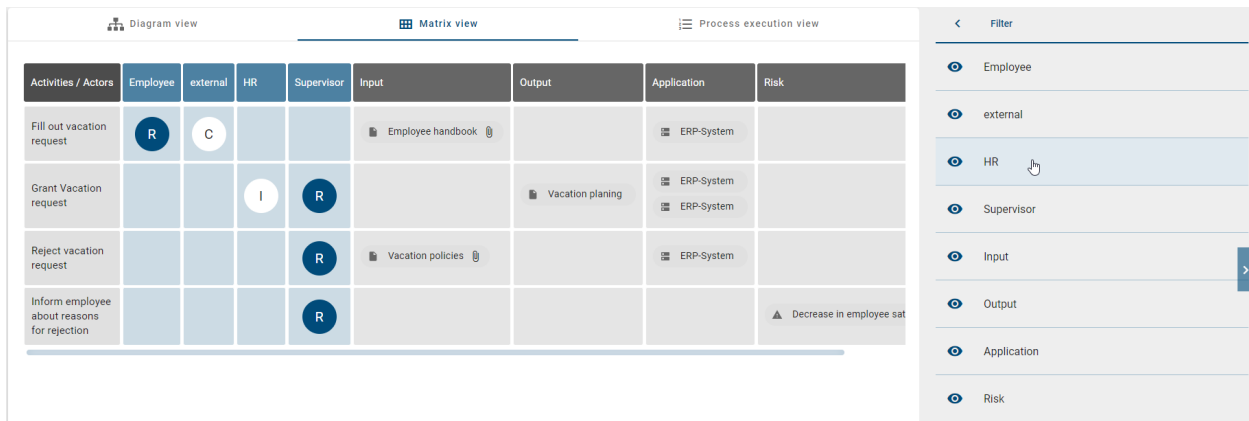
You can deselect a column of your matrix by clicking on the corresponding header. The column is not visible anymore and the header as well as the now crossed out eye icon are greyed out.

Another click on the column header enables the visibility again. If you navigate back to the main options menu using the *back* arrow, the filter is reset. All columns are displayed again.

5.12 Process execution

5.12.1 How do I get to the process execution?

You only have the option to display the process execution view, if you have opened an EPC or BPMN diagram in the repository. Then click the *Process Execution* button.

Based on your modeling in the Diagram view, you can now see the process execution in the middle of your screen. The activities, decisions and related events are listed here.

The activities represent the individual tasks in the process. Below each activity name, the responsible resource is displayed if it has been modeled in the diagram. When you select an activity, you can use the *options to display the details* and thus obtain more information about the task.

The process flow means the sequence of activities and is initially determined by the software for the user. The decisions corresponding to the gateways in the diagram are made based on the probability of the process flow. The most probable process flow is automatically displayed. You can maintain the *Probability* for each activity in its *attributes*. If no probability has been maintained, the position of the node is decisive instead. Loops are not considered for automatic decisions. Overall, only the sequence flow forms the basis for the path.

The process flow is thus divided by the decisions into segments or sections, in which successive activities are placed. The activities are consecutively numbered starting with 1. The segments displayed depend on the decisions made. Each segment has its own background color for the activity numbers. The respective segment can also be identified by its heading, which includes the name of the gateway and the sequence of the selected path in the process. If a gateway was not named there, only the name of the sequence is displayed. If the sequence also has no name, you will see the name of the subsequent activity at this point. In front of the heading, the route icon belonging to the segment will always be shown. On the right of the headline you will see the *Change decision* button with which you can decide on your own and thus influence the following tasks. This is how a gateway can be noticed in the process flow, whereby a distinction is made between the following gateways:

- *Exclusive or:* By clicking on *Change decision*, a menu shows you all possible decisions. Here you can only select one alternative, which adjusts the list of subsequent activities. The section of an "Or" decision ends with the last activity before the next gateway or the end of the process. The background color of the numbering does not change within this segment.
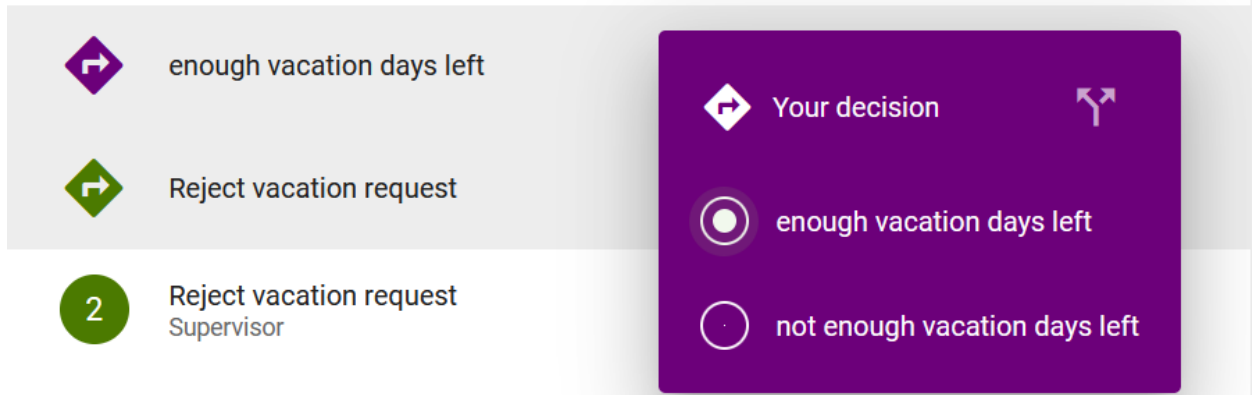
- *Inclusive or:* In this case, one possible path of the process is initially listed. By clicking on *Change decision* you can select another path or several paths at the same time. A path then corresponds to a subsegment. Within this segment, the numbering of each subsegment has the same background color in different transparency levels.

- *Parallel:* In the case of an "And" gateway, all parallel paths of the process are listed one below the other, since all paths are executed. One path corresponds to one subsegment. Within this segment, the numbers of each subsegment have the same background color in different levels of transparency. Nevertheless, a decision can be made here by clicking on *Change decision* to highlight individual segments.
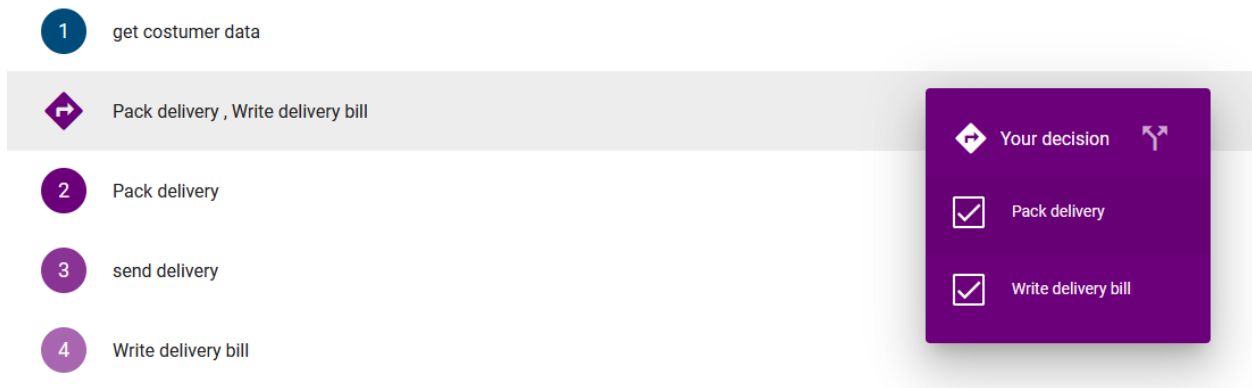
Note: Multiple starting points for the path are also displayed as an exclusive gateway above all activities.

Overall, the numbering is continuous across all segments and subsegments. The end of the process flow is marked by the corresponding event and by a flag instead of a number. If there is no end event but an activity at the end of the process, the end is inserted virtually and named accordingly, as shown below.
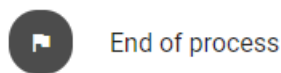
Further options to work with the process execution are described in the *following chapter*.

5.12.2 How can I perform process execution tasks?

To obtain an overview of the progress of a running process instance, you can mark the individual activities as completed in the process execution. This is only visible to you.

Navigate to the *Process execution* of the desired BPMN or EPC diagram. There you can see the activities to be executed and make decisions at gateways. For a detailed description please refer to the *associated chapter*.
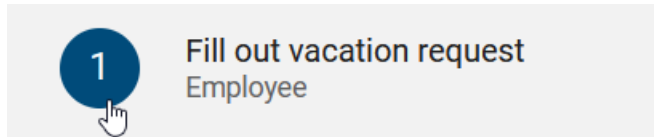
If you have completed a task, you can mark it by clicking on the number in the corresponding activity. There you will then see a check mark for the status "Done".
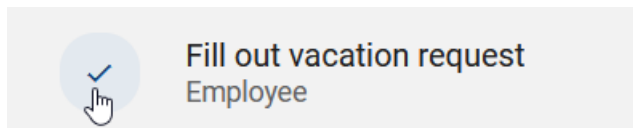
The tasks can be marked as completed in any order. To reset the status of the tasks, for example, after a complete run of the process, *navigate to the Options* and choose *Reset process flow*.
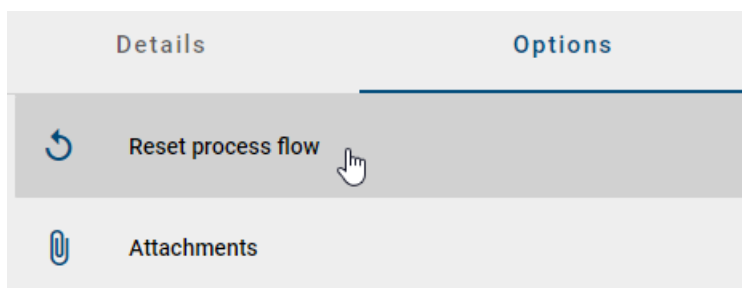
In addition, when a decision is changed in the process, the status of all subsequent and possibly already completed tasks is reset.

Tip: For an optimal work with process execution and extensive functionalities in dealing with process instances we refer to our product BIC Process Execution!

5.12.3 How can I display the details in the process execution?

In the matrix, the hub on the right shows the *Details* of the diagram by default. If they are not displayed, open the right sidebar if necessary and switch to the *Details*.
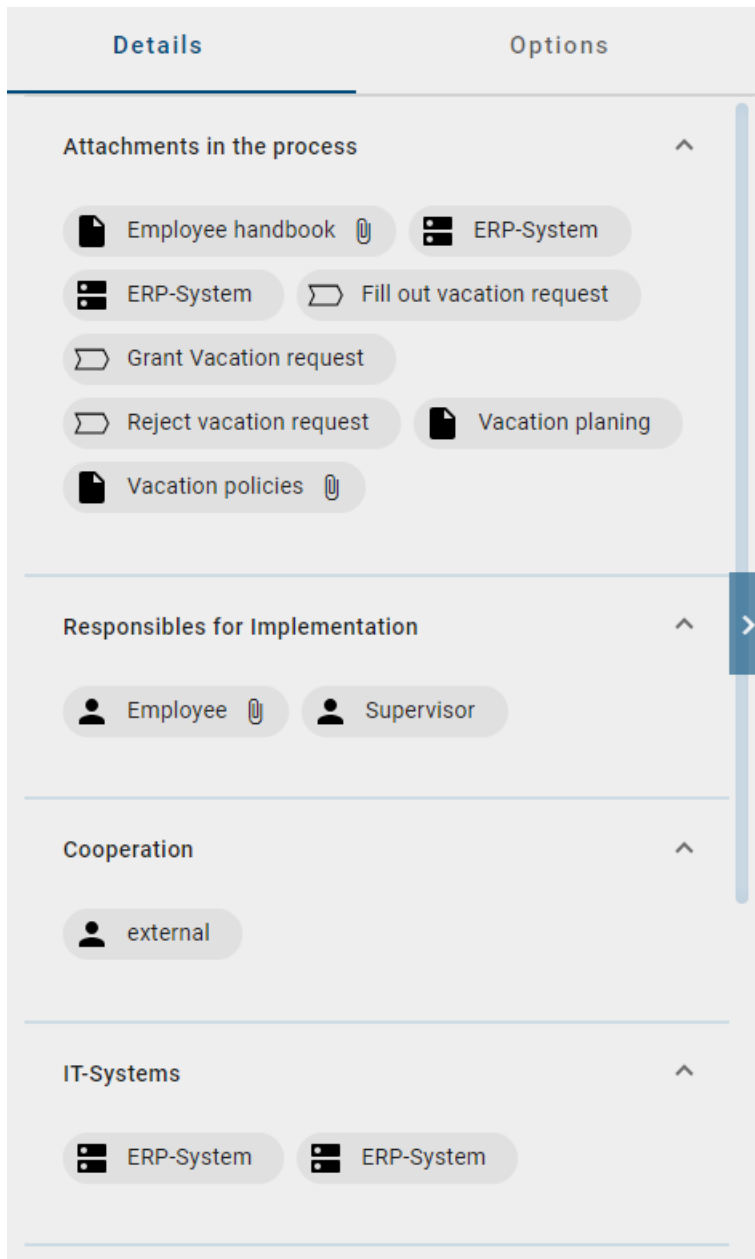
When you select a task in the process execution, the details associated with the task are displayed.

You can find an explanation of which contents are displayed to you as *Details* in the corresponding chapter.

5.12.4 What options do I have for the process execution?

To display the process execution options, open the right sidebar if necessary and click on the *Options* button.
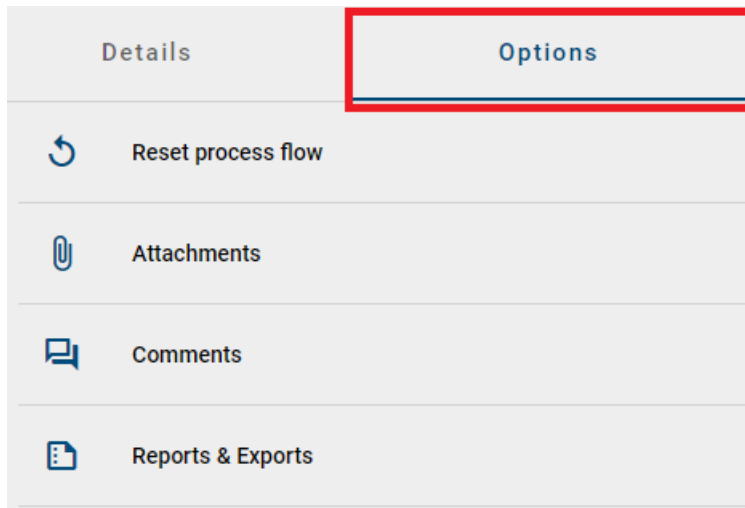
The following options are now available and the corresponding chapters are linked for further explanation:

- Reset process: As a result, the status of completed tasks is "Open" again and decisions made are reset to the default setting.

- *Attachments*

- *Comments*

- *Reports & Exports*

Once you have opened one of these options, you can use the *back* arrow to navigate back to the main options menu.

5.13 Options in a diagram

When you open a diagram, more *Options* are displayed by default in the hub on the right. A selected view in this bar remains in the desktop version after reloading. You can also *Collapse* and again *Expand* the sidebar. To do this, click on the button having the same name in the desktop version, which is located in the middle of the right edge of the screen. This setting is stored in your account, which means the hub will always remain closed or opened until you change it manually. This applies to any view changes, such as diagram switching or switching to *Matrix* or *Process Execution*.
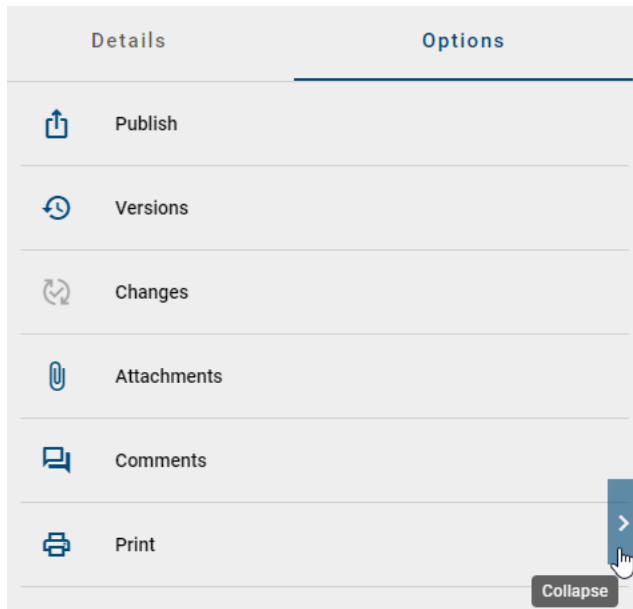
Instead, in mobile view, you will find a 3-dot context menu in the top right corner of the screen to display the options. After clicking on an option, it will be displayed full-screen on the screen. To return to the diagram, click the *X* icon in the top left corner.
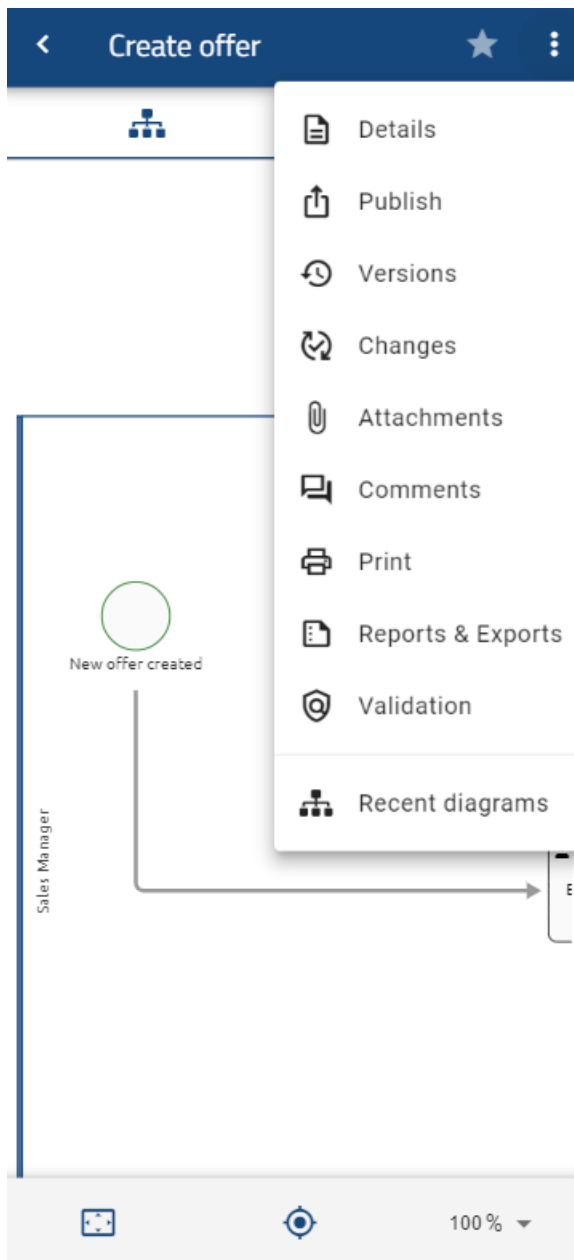
The options depend on the current view of the diagram. To find out which options are available in your open view and where you can see them, navigate to the corresponding chapter for the *diagram view*, *matrix* or *process execution*.

5.13.1 What is displayed in the diagram as attachments?

You have already navigated to the *Options* of a diagram in the hub on the right. There you can open the *Attachments*.
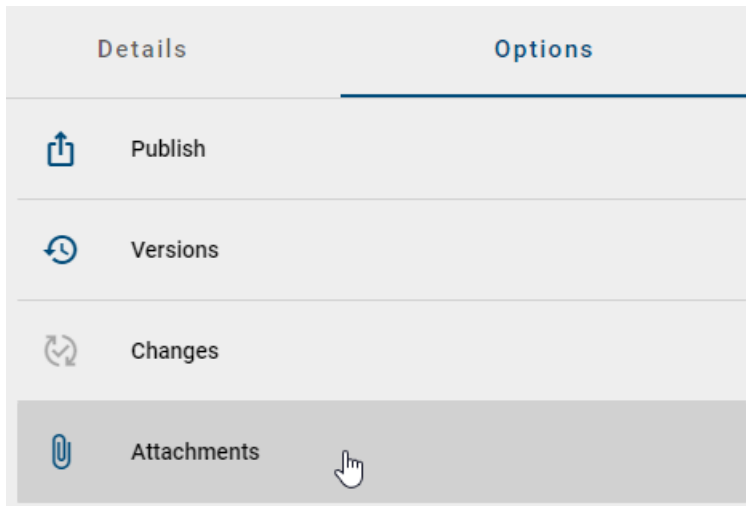
The attachments are divided into two different sections: Files and links. Both sections can be expanded and collapsed. In addition, the number of attachments listed is shown in the section header on the right.
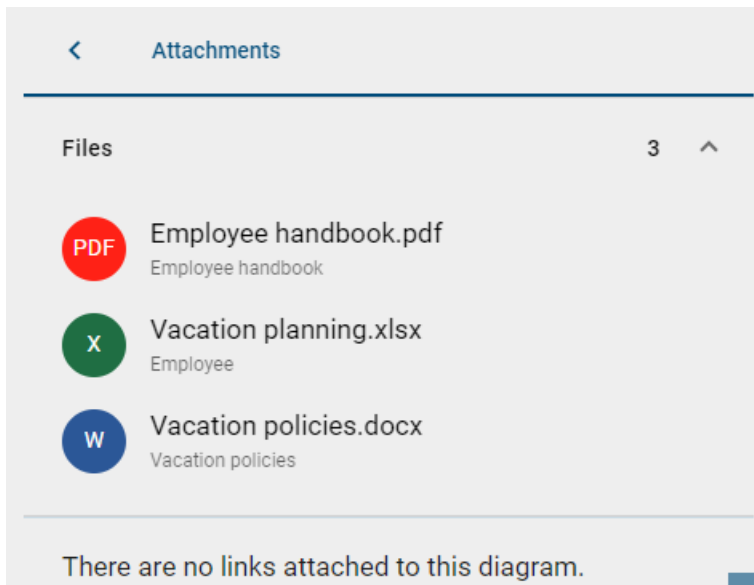
The **Files** list all files added to the diagram alphabetically, using the diagram or object attribute named *Attachment (URL)*. For each list entry, you will see the title, if this has been assigned, or the name of the file instead. Below the title, the associated object in the diagram or the diagram itself, if the attachment is part of the diagram attributes, is named. For each entry you will also see a chip, which either displays the default file icon or highlights special file types, such as pdf and office files, for easier differentiation. With a click on a list entry you can download the corresponding file directly.

The **Links** list all URLs added to the diagram alphabetically via the diagram or object attribute named *Attachment (URL)*. For each list entry, the title of the attachment, if this has been assigned, or the URL is displayed here. The URL is also displayed below. With a click on a list entry the URL is opened automatically.

Attachments can also be displayed or accessed via chips in the *profile* or in the *matrix* view.

5.13.2 How can I view the occurrences of symbols in checked in diagrams?

If you have opened a checked in diagram and want to display the occurrences of a symbol, proceed as follows.

First select the desired symbol in the main area. Then, in the right side bar, select the entry *Occurrences*.
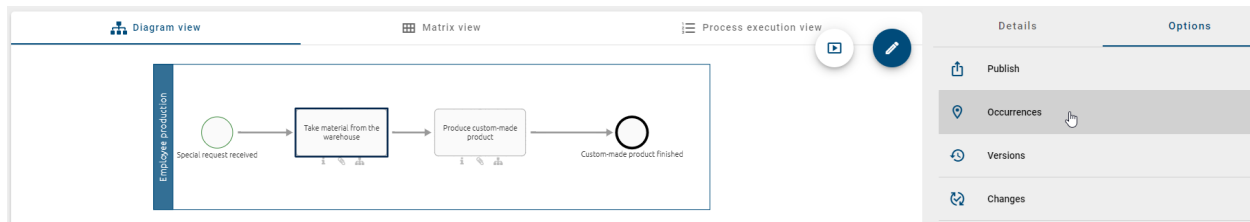
A list will be displayed within the right side bar, which contains an entry for every use of the given object.

By clicking on a list entry, you can then navigate to another diagram in which the object is reused, or display the occurrences in the current diagram.

Tip: You can also access occurrences of symbols in checked out diagrams. You can find more information towards this *here*.

5.13.3 How can I get a full list of occurrences in the diagram options?

Panel for new occurrences

When you open the occurrences view of a diagram, a list of one or more panels appear displaying the connections of the selected entity to other catalog or diagram entities. Each list entry includes numbers representing the count of sub-entries.

Panel for occurrences in catalog items

When the selected entity is assigned to another catalog entry, a sub-entry with the name of the respective catalog entry is displayed as the title. The subtitle contains the name of the associated attribute type, while the icon identifies the entity type.

Panel for occurrences in diagrams

When the selected entity is used in another diagram as a diagram attribute, a subordinate list entry appears with the name of the relevant diagram as the title. The subtitle displays the associated attribute type name, and the icon represents the general diagram icon.

If the selected entity has an association with another entity in this diagram, a subordinate list entry appears with the name of the relevant entity as the title. The subtitle indicates the name of the associated entity type, and the icon displays an abbreviation of the association type.

If the selected entity is used in this diagram but has no association with another entity, a subordinate list entry appears with the entity's name as the title. The icon displays a generic symbol to indicate that there is no association with another entity.

5.13.4 How can I comment on a diagram?

The *Comments* of a diagram are available in the *Options* for *every diagram view*.
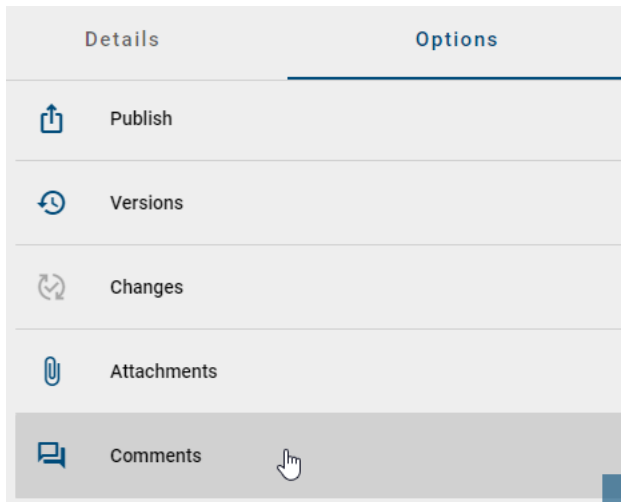
By clicking on the *Comment* entry, the comment bar opens on the right-hand side. In the comment bar you can now see comments on the diagram on top - if already submitted. If *comments on objects* of the diagram are existing, they are grouped below.
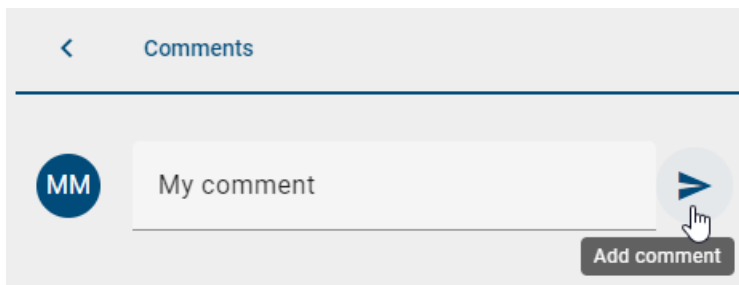
Click on the field *Enter comment to diagram* to write a new comment. Your comment will appear in the comment bar after you confirmed by clicking the *Add comment* button. Each comment is displayed with the information about the submission date and the name of the commentator as a chip.

Alternatively, you can also add a comment to the diagram via the context menu. This appears by a right-click in a free space of the diagram.
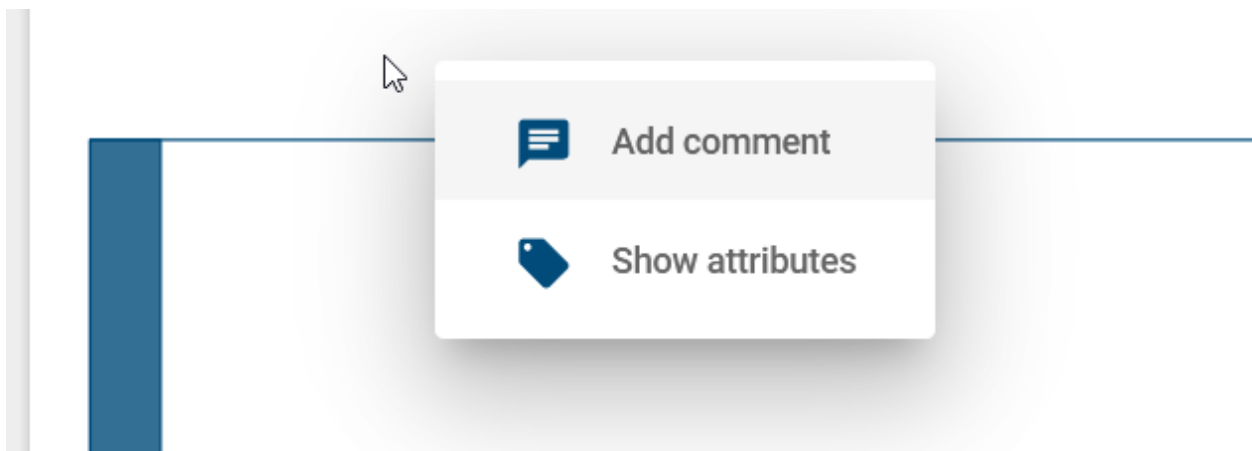
Choose the entry *Add comment* to enter and *add* a comment by a click on the equivalent button.

Some users receive an e-mail notification of the new comment. This is described for each stage in the following:

- **Public Workspace**: A notification is sent to the *Author* and to users involved in the conversation.
- **Preview**: A notification is sent to the *Examiner* and to users involved in the conversation.
- **Publication**: A notification is sent to the user or user group mentioned in the attribute *Responsible* and to users involved in the conversation.

Note: Please note that you do not receive notifications about your own comments.

Note: Comments depend on the area. This is caused by different work states and versions in each area. For example, users in the publication cannot see comments from the public workspace.

You can *edit* or *delete* a comment by a click on the desired entry in the context menu of your comment.
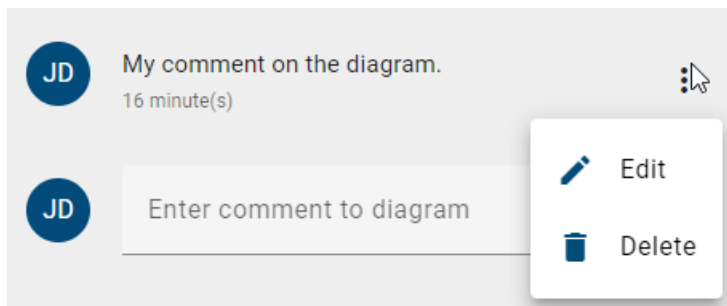
Warning: Deleting comments is done immediately when you select the function. You will not be asked for confirmation again.

Note: Administrators and Editors are able to edit or delete all comments. All other user roles can use these features only for their own comments.

5.13.5 How can I comment on an object?

Objects can be commented independently in each version of a diagram. These comments are not diagram overlapping.

Right-click on the object you want to comment on. Select *Add comment* in the context menu.
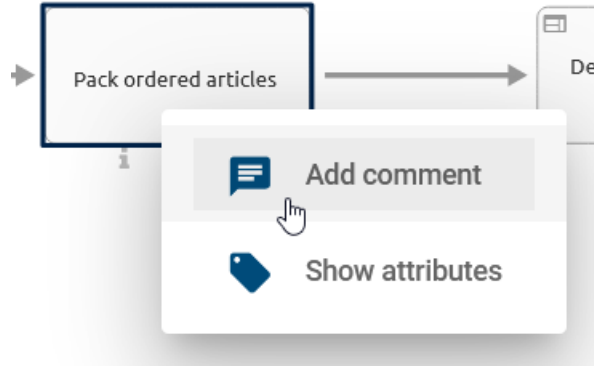
A dialog window opens. Here you can *Add a comment* in the equivalent field and confirm by a clicking the *Add* button.

If you do not want to submit the comment, cancel the process with a click on the equivalent button or outside the dialog window. Alternatively, you can use the *ESC* key.

After you confirmed the process, your comment is visible in the comment bar for all users who have access to the stage. You can look at the comment bar by selecting the entry *Comments* in the options. If a comment has been submitted for an object, the name of the object appears in the bar and you can view it by a click on the name.
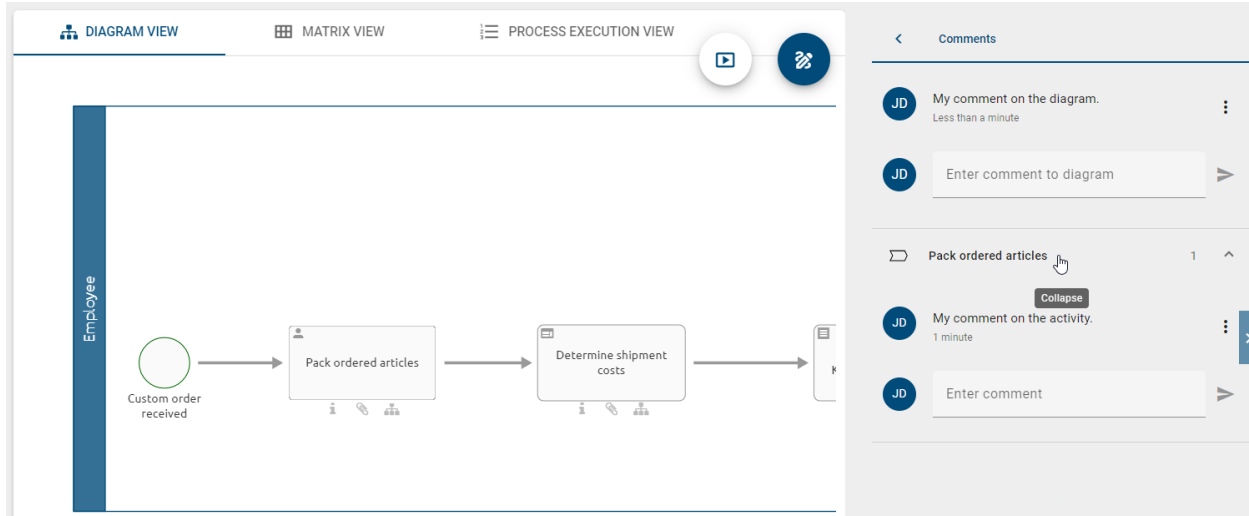
In case an object has already been commented, you can alternatively *enter a comment* in the corresponding field. Confirm the input by a click on *Add comment*.
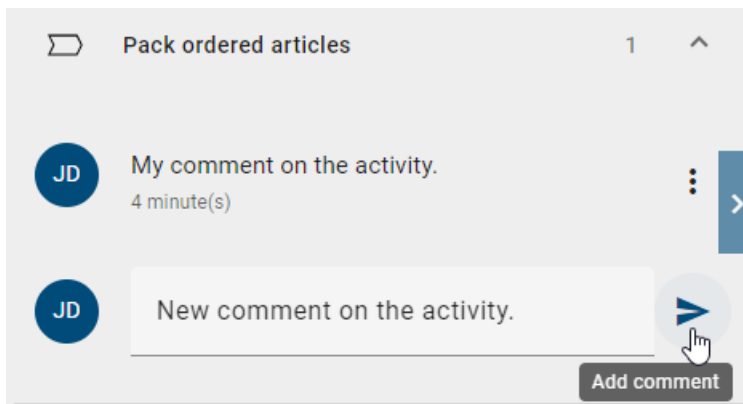
Some users receive an e-mail notification of the new comment. This is described for each stage in the following:

- **Public Workspace**: A notification is sent to the *Author* of the diagram and to users involved in the conversation.

- **Preview**: A notification is sent to the *Examiner* of the diagram and to users involved in the conversation.

- **Publication**: A notification is sent to the user or user group mentioned in the attribute *Responsible* of the diagram and to users involved in the conversation.

Note: Please note that you do not receive notifications about your own comments.

Note: Comments depend on the stage. This is caused by different work states and versions in each stage. For example, users in the publication can not see comments from the public workspace.

Each user can edit and delete his own comments. Furthermore, administrators can also make these changes to **all** existing comments.

Open the comments via the options. Navigate to the comment you want to edit or delete by clicking on the list entry of the corresponding object.

In the context menu you have the option to *Edit* or *Delete* the comment.
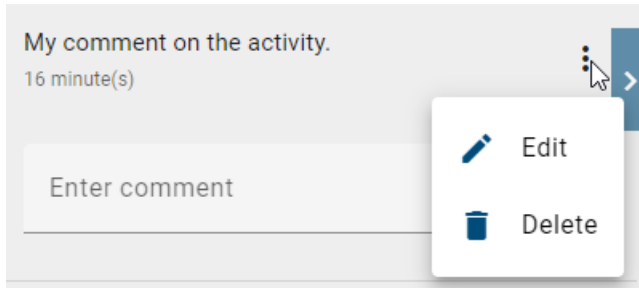
The editing needs to be saved to apply the changes.

Warning: The deletion of comments is executed right after you click this option in the context menu. You will not be asked for further confirmation.

5.13.6 How can I highlight an object with a comment to indicate its position in the diagram?

When you open the comment panel of a diagram, and there is at least one comment for an object, you can view all comments made for that object under its name. In this context, you have the option to highlight the corresponding object with the selected comment directly in the diagram.
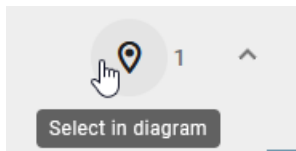
The object with the selected comment will then be highlighted in the diagram view.

Note: Please note that the selection of an object with its corresponding comment will be removed once you leave the comment panel, close the comment field of the selected object, choose another comment of an object, or the last comment of an object is deleted.

5.13.7 How can I track the changes in a diagram?

In the diagram view, you can display the changes in the diagram compared to its *other versions*. In the public workspace, this option gives you an insight on the changes that have been made in the diagram by the other modelers. If you view the changes of a diagram in preview or publication stage, you will notice what has been changed in the latest releases of the diagram.

To view the changes, switch to the *Options* tab in the right side bar and select the entry *Changes*. There exists no previous versions of the diagram, if this entry is deactivated.
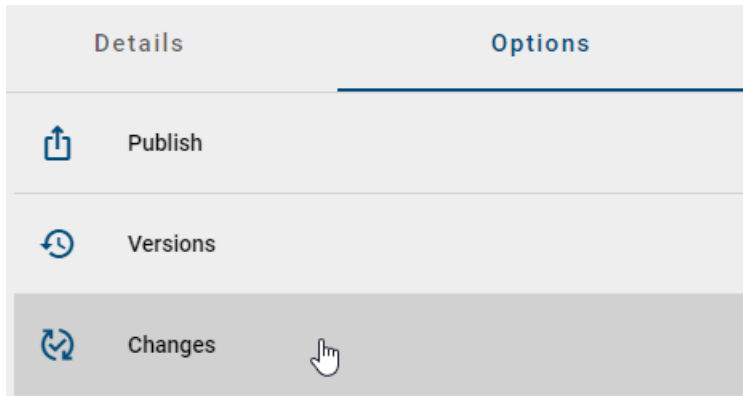
For a detailed insight of changes in a diagram, you can go to the chapter *Model comparison*.

5.13.8 How can I print the graphic of a diagram?

To print the graphic of a diagram, navigate to the *Options* and select the option *Print*.
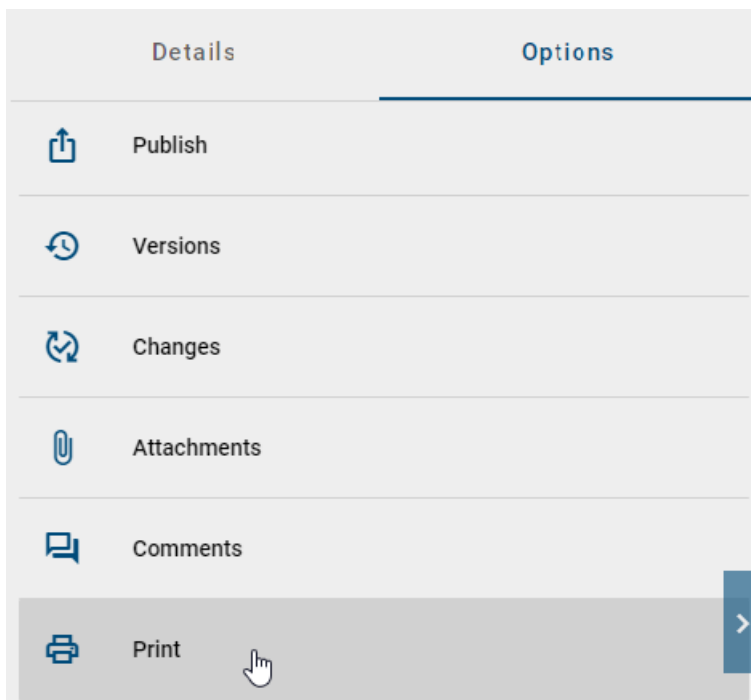
You will be shown a print preview with default settings, which can be customized if needed.

The choice of the output format is made through the dropdown menu, where you can set the preferred format for the graphic printing. You have the option to select from the formats PDF, PNG, JPEG, and SVG.
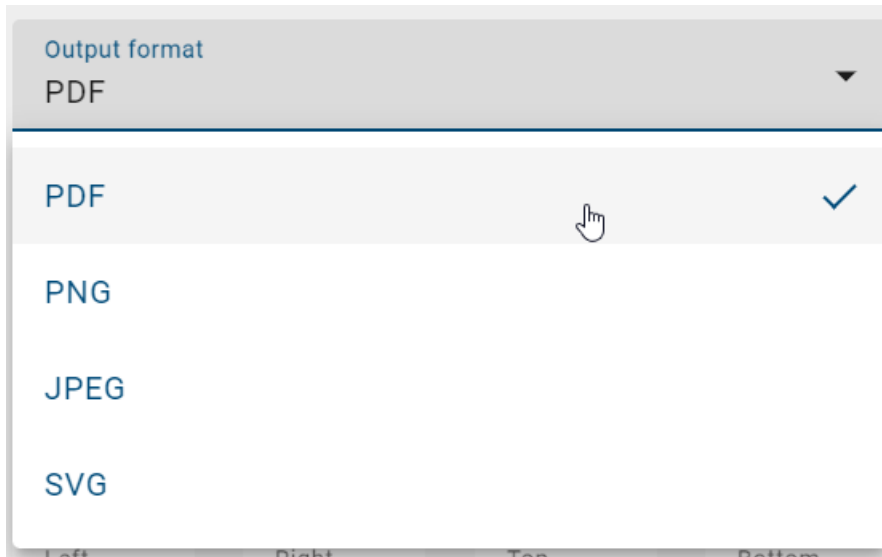
Furthermore, you can modify additional pre-settings in the print menu and customize the printing as desired:

- Paper format (A0, A1, A2, A3, A4, A5, B3, B4, B5, LEGAL, LETTER)
- Orientation (Landscape, Portrait, Automatic)
- Margins (positive integers)
- Resolution (only PNG and JPEG)
- Include header and footer (only PDF)
- Print in black and white
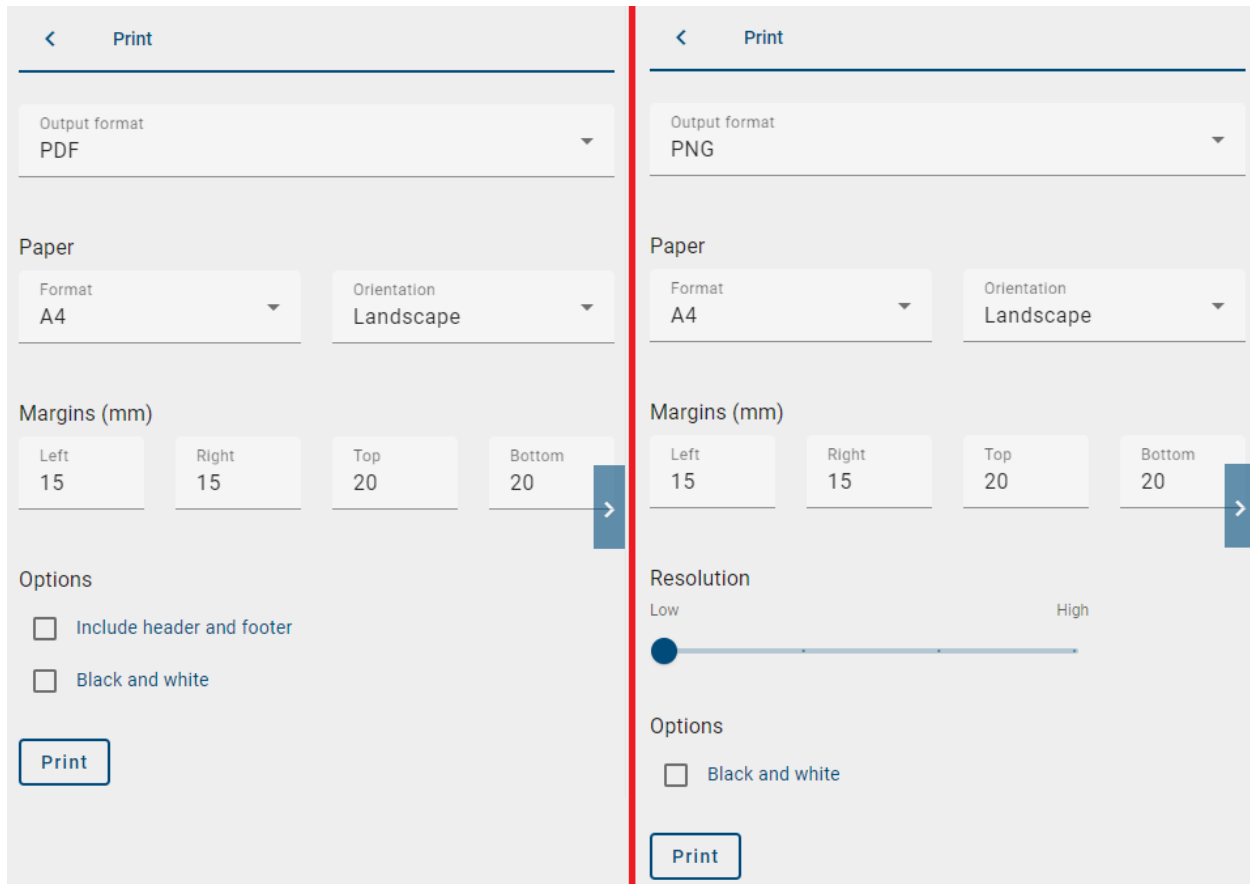
After configuring your print settings, click on *Print* and your graphic will be rendered. You will be notified with a message in the bottom right corner.

Once the rendering process is complete, a download link will be provided for you. Clicking on the link will initiate the download of a file with the diagram's name in your current content language.
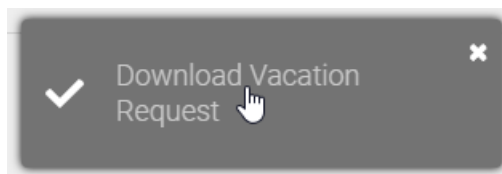
Hint: Please note that texts in the supported languages Arabic, Chinese, Greek, Hindi, Japanese, Korean, Persian, Thai, and Vietnamese may not be displayed correctly in the printed PDF document. For Greek and Vietnamese text, the *Roboto* font is used, while for all other listed languages the *Noto Sans* font is displayed. Additionally, please note that Cyrillic text may not be accurately rendered in the fonts *Handlee*, *Inconsolata*, and *Titillium Web* and in such cases, it will be displayed in the *Ubuntu* font.

5.13.9 How can I make diagrams and their entities available in other languages?

In the diagram view, as an administrator, editor, or assigned author, you have the option to translate diagrams and their entities into other languages that are supported by BIC. To do this, navigate to the *Options* panel in the public workspace and select the option *Translation mode*.
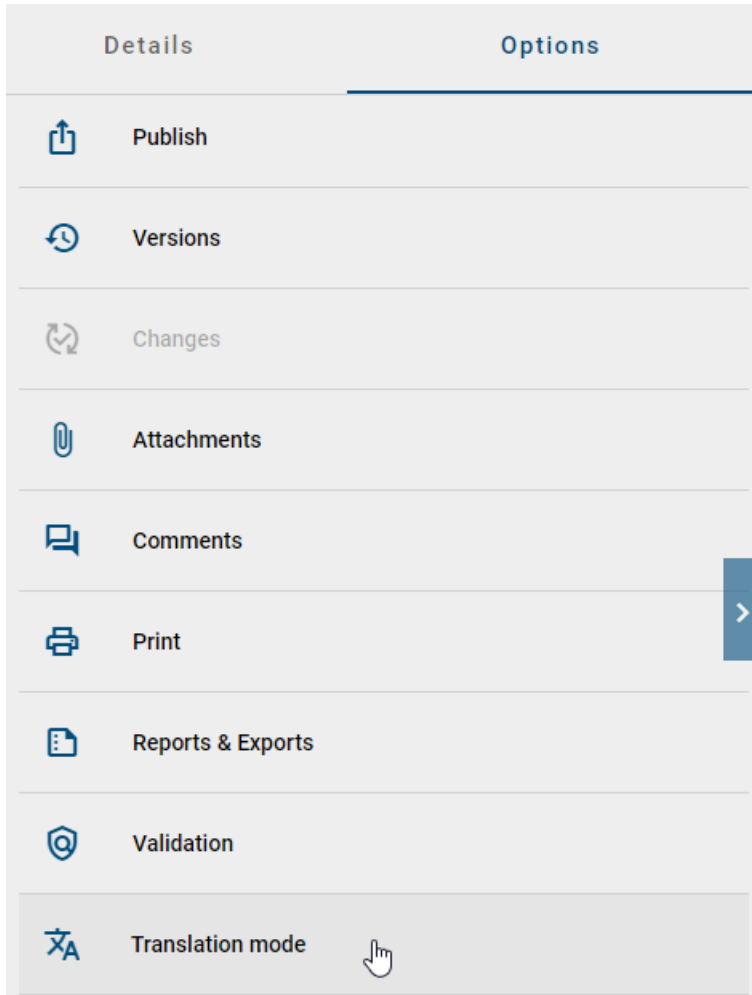
If the diagram is locked, you will receive a corresponding notification as soon as you hover over the option.

After opening the translation mode, you will have access to a list of all entities used in the diagram. Additionally, you can translate the diagram so that it is displayed in the respective languages in the diagram list.

By clicking on the desired entry, you can translate the name, description, keywords and attachments (URL).

If the *DeepL translation service* is enabled, you can generate translation suggestions for attributes *Name, Description,* and *Keywords* in other languages. To do this, only a language-dependent attribute needs to be maintained in the active content language, which serves as the basis for the translation suggestion.

The option for the translation suggestions is automatically disabled if an input field already contains text. Conversely, the option is activated automatically when an input field's existing input is removed.

If you want to request a translation for a language-dependent attribute, select the *Create translation suggestion* option in the respective input field. This will send a request to the DeepL API, which will automatically generate translation suggestions.

To save the translations, click on *Save changes*. Otherwise, you can *discard the changes*.

Note: You will be notified of unsaved changes in the respective entry.

DETAILS

If you are looking at a diagram, the right sidebar shows the *Details* of the diagram initially. You can select an object to view its details in the side bar instead. Moreover, you can switch to the *Options* by selecting the equivalent tab in the side bar. They are described in more detail *here*.
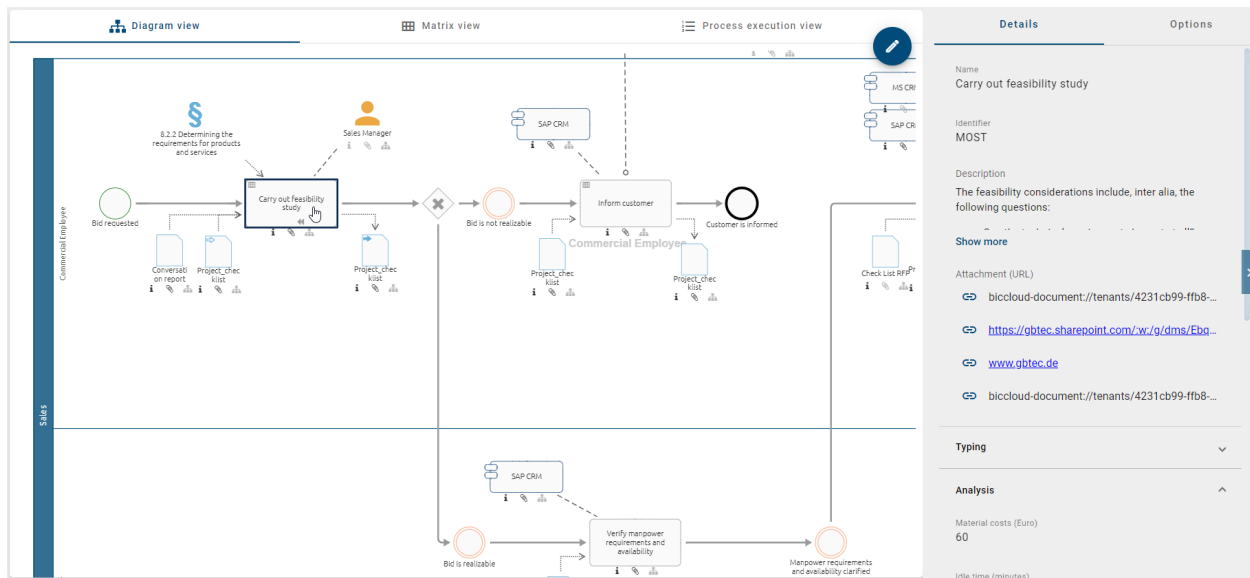
The details can show the *attributes* or the *profile* of the selected diagram or object, depending on the administration setting. Administrators can configure this for each diagram and object type. In the following, the default profile of an activity and a BPMN diagram is presented. However, administrators can also configure which information will be displayed in the profile of each diagram type (resp. object type).

The profile of the selected diagram or object is displayed, if it is activated for the respective type in the administration area. If the profile is deactivated, *all attributes maintained* for the selected diagram or object are shown in the details instead. However, note that it is possible to deactivate that attributes are shown in publication. This can be done for each diagram type (resp. object type) in the administration. Thus, you might not find any attributes in the details of (for example) specific object types in publication.

6.1 What is displayed to me in the profile?

Note the *conditions above* for displaying the profile. As part of the details, you can view the following contents in a profile by default, depending on the selection and diagram view. By clicking on a heading, you can hide/extend the corresponding attribute values.

Default diagram profile: By default, the profile view shows the description of the diagram, responsible and contributing roles, used IT systems, documents and business objects, as well as the risks and controls in a diagram. In addition, information about the responsible person as well as release and expiry dates are visible. The last group is always the *system attributes* group.

Default activity profile: The profile view of an activity contains the following information in default, if these are directly related to the selected activity in the diagram or are maintained in the attribute bar: type, name and description of the symbol, responsible and contribution roles, IT systems, inputs, outputs, risks and key performance indicators. The last group is always the *system attributes* group.

Note: If an entity is a catalog suggestion, you will be informed accordingly next to the symbol type.

Note: Please note that the "Profile" is only visible in the details, if this was specified in the administration. Furthermore, the content of the profile may vary depending on the configuration, object type and diagram type.

You can select the chips to navigate to a linked diagram resp. to view the details of the referenced object.

Tip: If the attribute *Keywords* is visible in the profile, you can start a *global search* for a keyword by selecting it. You

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will be navigated to the search results list.

Tip: If you have maintained a *description* of an object, the corresponding attribute symbol **i** is highlighted on the object. To see a preview as tooltip, hold the mouse over this symbol.

6.2 What is displayed to me in the attributes?

Note the *conditions above* for displaying details which can vary for the different diagram views and stages. As part of the details, you can view the diagram or object attributes by default, depending on the selection and diagram view, if the profile is not provided.

In this case, all attributes that are maintained in the selected content language will be displayed in the details. By default, further attribute groups, such as *Governance* or *System Attributes*, are hidden. By clicking on the respective heading, you can view those attributes.

In the attributes, other objects or diagrams can be used.

Objects: If other objects, such as person objects or roles, are maintained as attribute values, they are represented as chips in alphabetical order in the details. With a click on this chip you can navigate to the details of the corresponding object within the side bar. By clicking on the *back* arrow in the sidebar header, you can return to the original view.

Diagrams: In the details, other diagrams can be linked and stored, for example using the attribute *Subprocess*. These diagrams are then displayed as chips in alphabetical order. With a click on this chip you can navigate directly to the *linked diagram*. The name of the current diagram is always displayed in the menu bar.
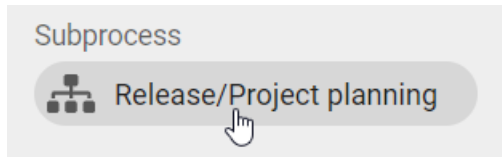
Tip: If the subprocess of an object is maintained, you can navigate to the linked diagram *by double-clicking* on the object.

Tip: If the attribute *Keywords* is maintained, you can start a *global search* for a keyword by selecting it. You will be navigated to the search results list.

6.3 How can I access attachments in the details?

Attachments can occur in the details in two cases. On the one hand, the *attribute "Attachment (URL)"* can be listed alphabetically sorted for the selected diagram or object. On the other hand, objects that have maintained an attachment can also be displayed in the details of the selected diagram or object, for example when they are part of its profile. You can directly access these attachments without navigating to the referenced object.

If the attribute *Attachment (URL)* is displayed, you can open or download a linked attachment directly by clicking on the corresponding entry (case (1) in the screenshot below). Note the possibility to *copy the link to the attachment* here.

In case that other objects are linked here, they are displayed in a chip. If this chip shows a paper clip, an attachment is present. Clicking on the paper clip (case (2) in the screenshot below) either opens the attachment directly or a selection menu instead, if there are several attachments. Links can then be opened and attachments can be downloaded.
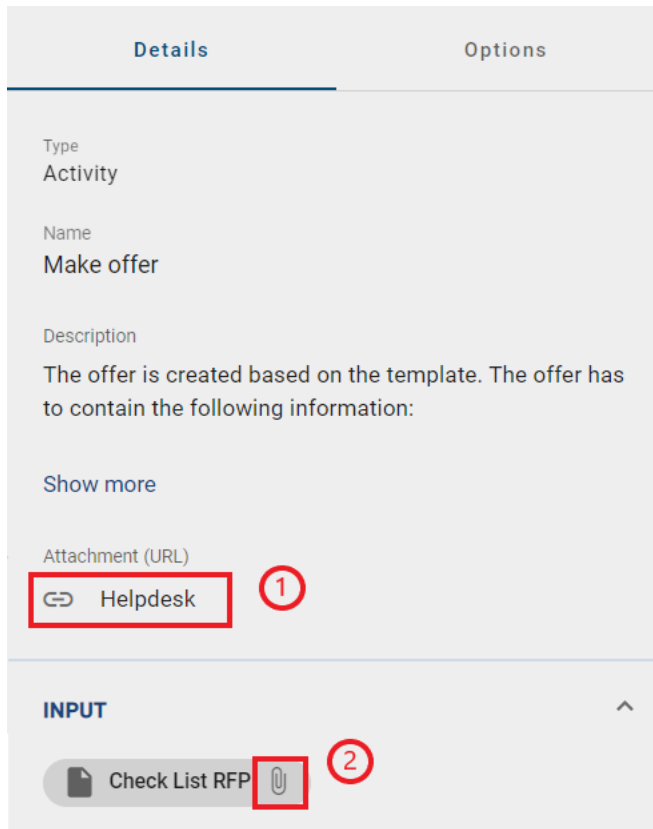
Hint: If you click on the link to a PDF document with the shortcut *Ctrl + Click*, a new window will open with a preview of the PDF document using your browser's integrated PDF viewer. From there, you can download the PDF document by clicking on the Download button, which is located at the top center. Alternatively, you can click directly on the link to download the PDF document without a preview.

Hint: You can access attachments via the paperclip icon in the respective activity. Alternatively, in the diagram view, you can select the details of a diagram in the right sidebar and choose the corresponding file. If a file is not supported within the application, the download will start automatically.

Tip: You can also use the options to display all attachments of the diagram.

6.4 How can I download files?

You have the possibility to *attach files to objects*. Then, the files can be downloaded in the details. To do this, open the diagram and click on the object containing an attachment. Then, the right side bar shows the details of the selected object where the attachment is listed. A single click on the name of the attachment starts the download of the attached file.

Moreover, you have the possibility to copy a link with which you or other users can download the attached file directly. Simply click on the *Copy URL* button that is on the right of the attachment.

The link is now copied to the clipboard.

If you share this link and another user opens it, the attached file will be downloaded automatically.

Note: If the user was not logged in before it will send him to the sign in page. After a successful log-in the download will start automatically. This guarantees that no unauthorized person can download your files.

If the diagram or object is deleted the link does not work anymore.

MODELING

7.1 First steps

The modeling of a diagram is done in the new design interface.

You can check out your diagram to edit it. It is then locked for other users. After completing the editing, you have to *check in* the diagram again, so that other users can see the changes and continue to work on the diagram.

The design surface

The screen of the designer provides different functionalities and is divided into three areas.

Explorer: On the left side you can see the Explorer in which your repository and the categories containing checked-out diagrams are displayed.

Editor: The Editor represents your working area in which you can model and edit your diagrams as well as the necessary *symbol palette*.

Menu bar: The upper area of your screen displays further functionalities that you can use to model your diagram.
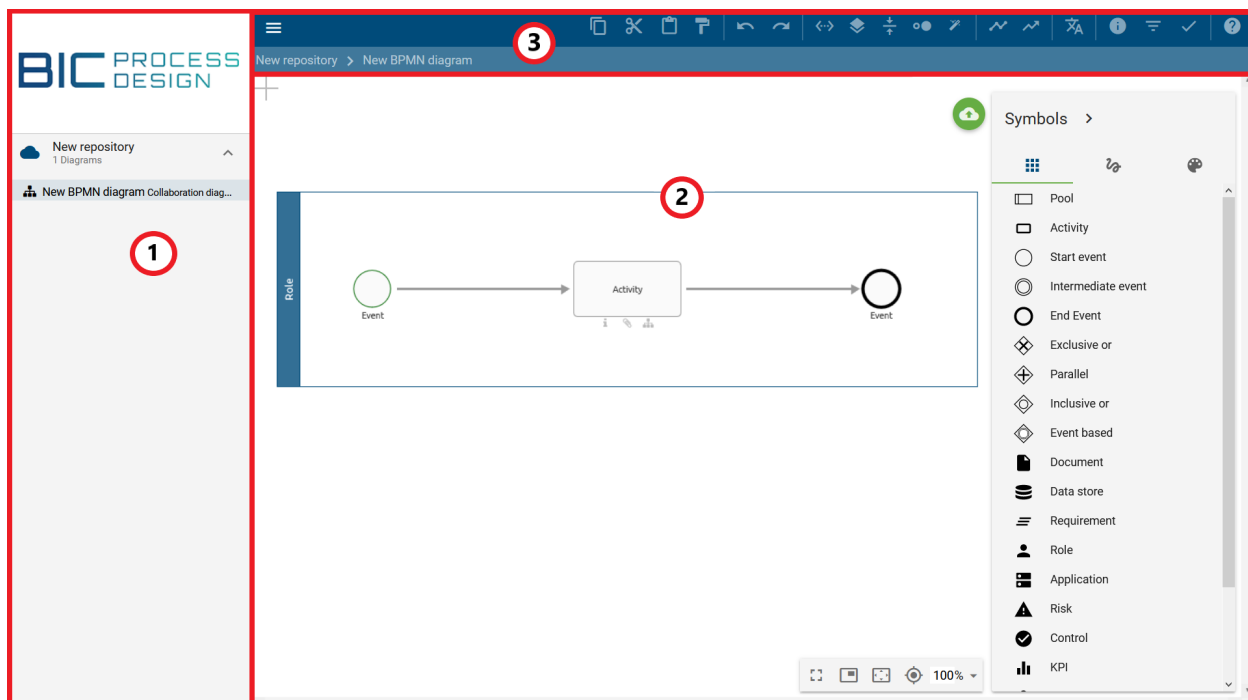
Figure: The surface of BIC Process Design is divided into Explorer (1), Editor (2) and Menu bar (3).

7.1.1 How do I edit/check out diagrams?

Authorized users (Administrators, Editors and assigned Authors) can access the new design interface in diagrams in the public workspace. If you open your diagram in *diagram view* and no other user has currently checked it out, the *Checkout* button appears in the upper right corner.

A click on the button opens the editor in a new browser tab, whereas the diagram is locked for other users. This prevents the parallel editing of one diagram by different users. If you checked out the diagram before, a button to enter the edit mode is displayed which opens the diagram editor again.
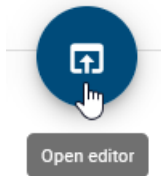
If the diagram has already been checked out by another user, you will see a lock icon. To receive information by whom and when the diagram was checked out, you can move the mouse to the icon.

In case the diagram has been checked out by another user and you are an administrator, you can unlock the diagram using the *open* lock button.

Note: If you check out a diagram in the designer, you will be able to edit it even in offline mode. You can save and check-in the changes as soon as you work online again, provided that you did not refresh or close the browser tab.

7.1.2 How do I save changes?

The user can save the editing of a diagram, but the changes are not yet available for other modellers. They are stored in the "Local Storage" of the used browser.
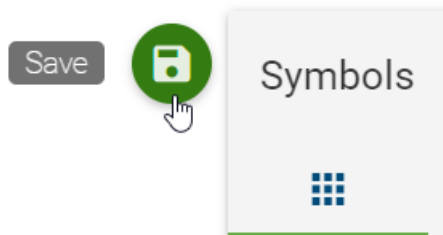
By checking in, the current state is being transferred to the BIC Process Design server and is visible in the public workspace. The diagram is released now so that other authorized users can edit it.

Hint: If *OCL rules* of the severity *blocker* (that are defined in the current method) are violated by the modeling, it is not possible to check-in the diagram. Moreover, the check-in is prevented if *not catalog suggestions* are used in the diagram. Further information can be found in the linked sections.
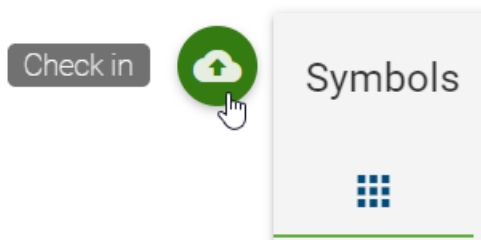
The editor is closed after you checked in the diagram and the information that the check-in was successful is displayed. By a click on *close application* the browser tab is closed.

Your diagram has been successfully checked in.

If you want to check your diagram out again, you can do this in the BIC Design
Portal. You can also choose one of your checked out diagrams in the list to the left to
edit.

CLOSE APPLICATION
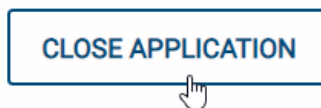
Warning: According to your browser settings, local workstations may be discarded when the browser is closed or by clearing browser data. Regular check-in is therefore highly recommended.

7.1.3 How do I cancel the editing of diagrams without saving?

If you changed a diagram, but you do not want to check in these changes and transfer them to the local workspace, you have the following options to discard the changes:

Open the context menu of the corresponding diagram.

Select the entry *Remove local version*. Confirm the subsequent query to irrevocably delete your changes. The diagram is now unlocked to other users.
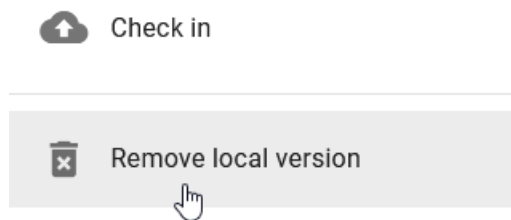
7.1.4 Where can I find help while modeling?

Click on the question mark in the upper menu bar to view the user documentation in a new browser tab. You will be navigated to this chapter of the documentation.
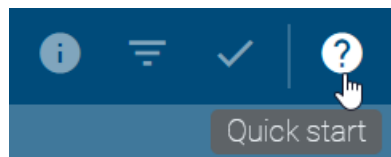
7.2 Objects

7.2.1 How do I add objects to a diagram?

Symbol palette

Objects can only be modeled in checked out diagrams. The symbols available for modeling vary for each diagram type. If you check-out your diagram, you will see the symbols which are available on the right-hand side of the editor (in the symbol palette).
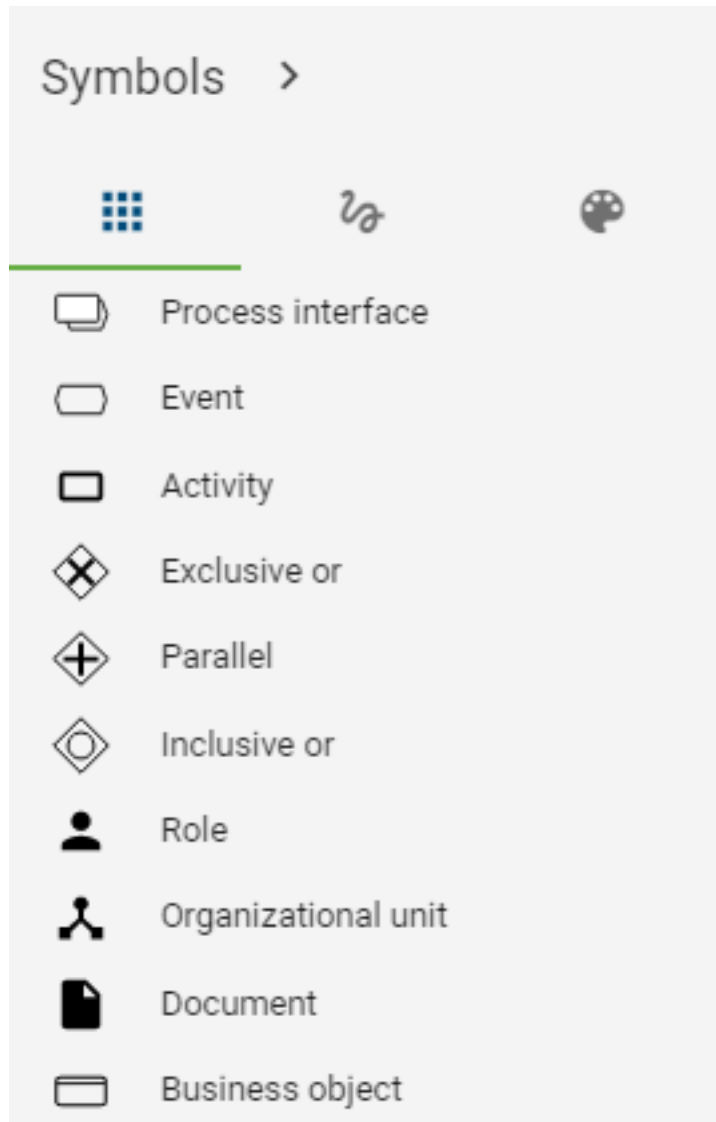
You have several options to place symbols from the symbol palette into the editor.

Drag & drop: Select a symbol that you want to place in your model and drag & drop it into the editor. After placement, the text field of the symbol is automatically selected so that the symbol can be named individually. Also note the *rename* section when naming. Repeat this step for all desired symbols.

Stamp mode: You can use the stamp mode (the corresponding symbol is highlighted in the symbol palette), where you can create additional symbols of the same type. Select a symbol with a single click and place it by clicking into the editor. You can exit the stamp mode by pressing the ESC key or by clicking on the symbol in the symbol palette again.

Mini symbol palette

As an alternative to modeling with the symbol palette, it is recommended to use the mini symbol palette which displays all objects that can be connected to your current symbol.

Place or select a symbol in the editor. On the right side of the symbol, some symbols will appear, that can be connected to the selected symbol.
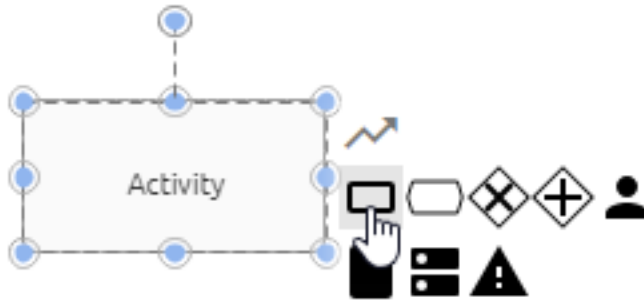
A connection between two symbols will be automatically created by placing a new symbol. The following options are now available. Also note the possible *shortcuts*.

Drag & drop: Select one of the symbols and place it in the editor while pressing the mouse button.

Releasing the mouse button creates the symbol including the connection.
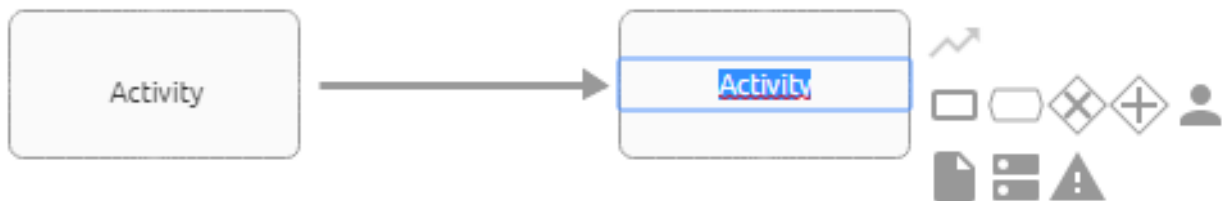
Quick Modeler: If the user simply clicks on an item in the mini symbol palette (no drag), a new object will be created immediately. The new node is placed centered at the same distance from the predecessor to the last symbol. The direction depends on the predecessor, because the new node is placed on the opposite side of the predecessor. If there is no predecessor, then to the right of the node and at a preset distance.

You can create multiple descendants for a node.
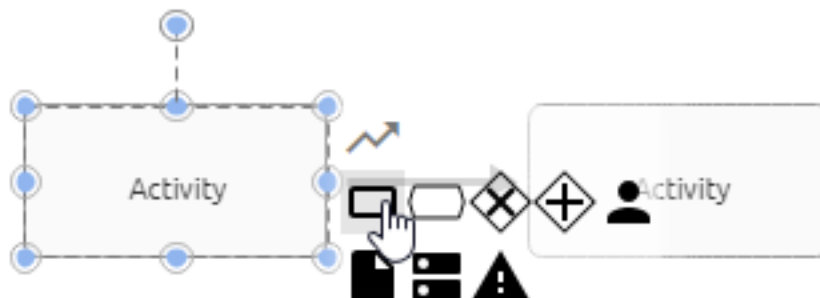
These are automatically created among each other using the Quick Modeler. Since the connection is centered, which means at the center port in the middle of the icon, it may overlap other symbols.
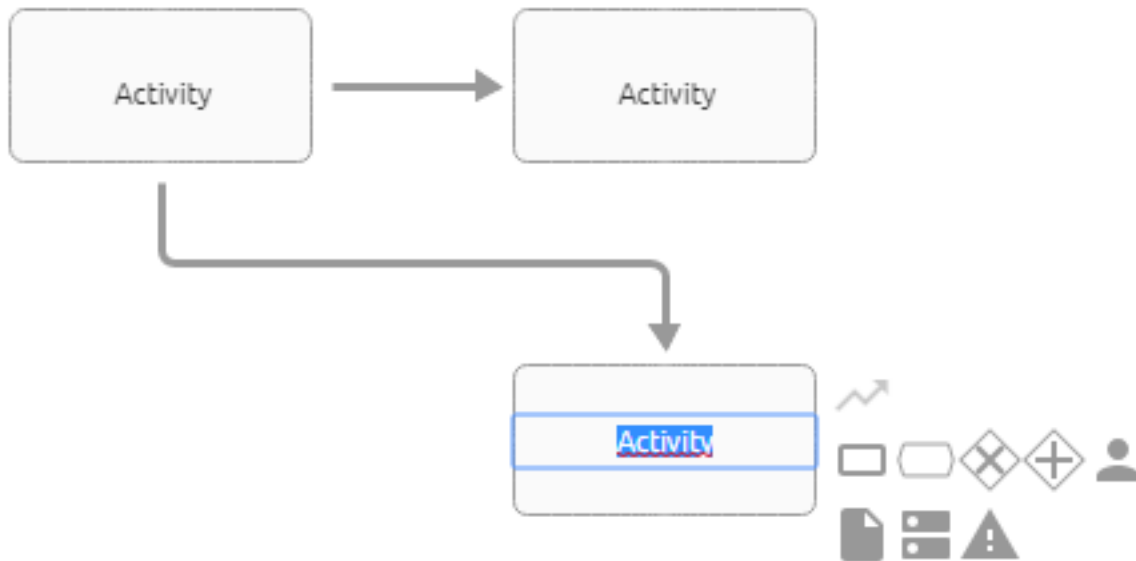
You can then *reposition connections*. Successors of successors are modeled either one below the other or one after the other, depending on the maximum distance to the predecessor in the x- and y-direction of the editor. By changing the position of the symbols you can adjust the behavior of the Quick Modeler.

The text field of the new symbol is selected so that it can be named individually. Also note the *rename* chapter.

Note: Depending on the symbol and the method, a selection menu for the automatically created edge may appear after placement from the mini symbol palette. To create the symbol, a selection must be made in this menu.

7.2.2 How can I create a personalized symbol palette?

In the symbol palette, you can add objects that you frequently model to your personal favorite symbols. Hold the mouse over any entry in the symbol palette in the *Symbols* tab. A star frame appears next to the entry if it has not been marked as a favorite.
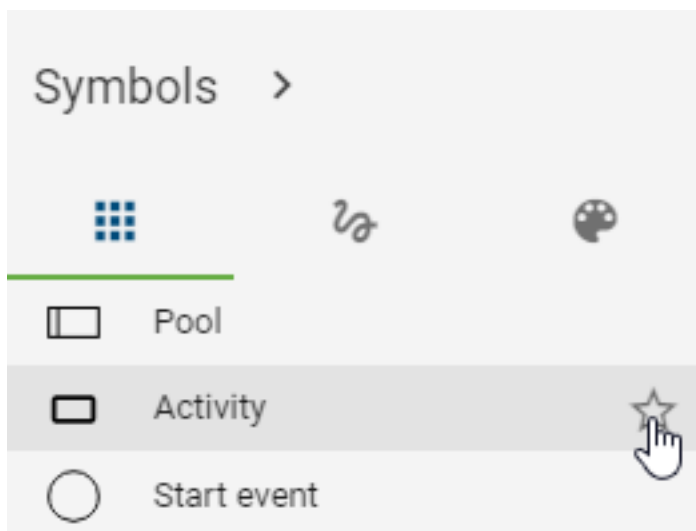
By clicking on the star you can add this object to your personal symbols. The star frame then remains filled in, marking your individually selected symbols.
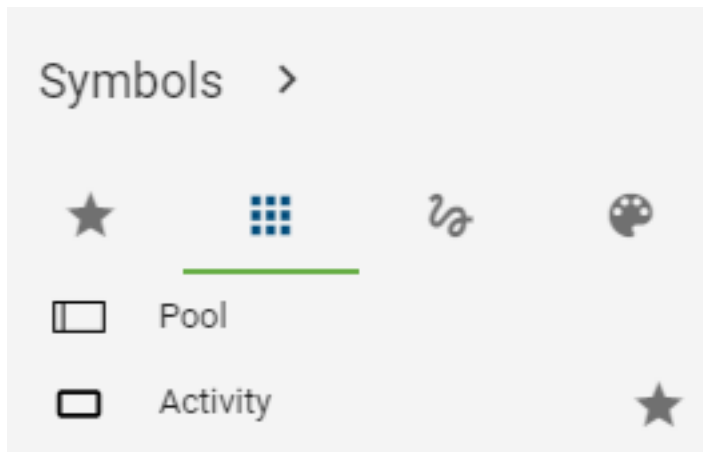
By marking an entry, the tab *Favorite Symbols* appears in the first place in the symbol palette. There, only your personal symbols are filtered and can be modeled from here. The order of entries is taken from the *Symbols* tab.
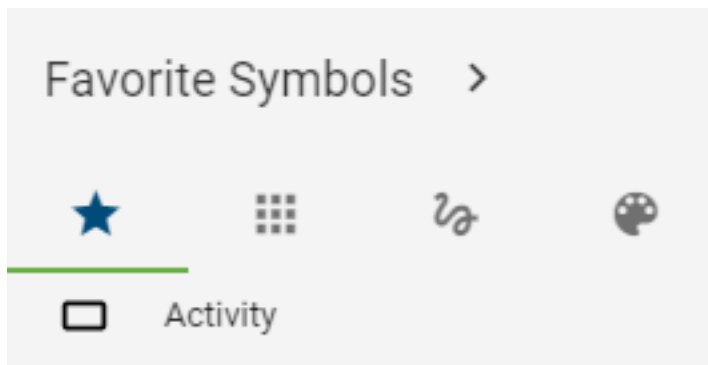
These settings are saved per user and per diagram type, so that each user can determine his or her individual symbol selection in each diagram type.

7.2.3 How can I remove favorites from my personalized symbol palette?

Got to the symbol palette to the tab *Symbols*. Navigate to the entry, which you want to remove from the favorite symbols. These are recognizable by the filled in, permanently visible star.
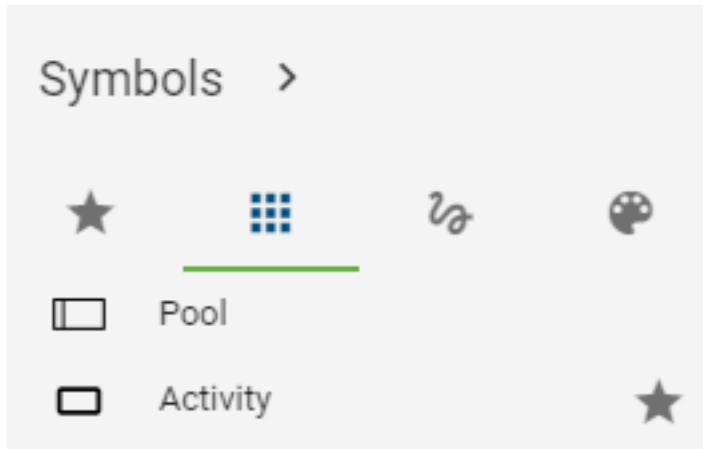
To remove symbol, click on the star. Thus, only the frame of the star is visible, if you hold the mouse over the symbol. If no symbol is marked as favorite, the *Favorite Symbols* tab disappears in the symbol palette. This tab is only visible if at least one entry is favored.
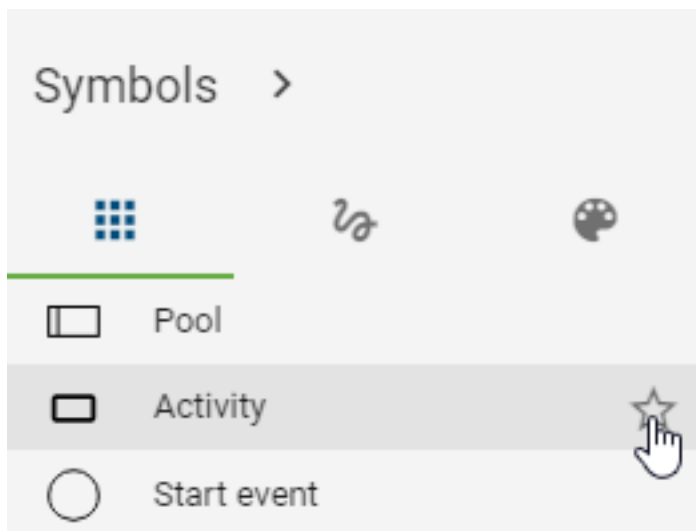
7.2.4 How do I create forms and graphical symbols?

Use the symbol view to navigate to the freeform symbols by selecting the second button in the *symbol palette*.
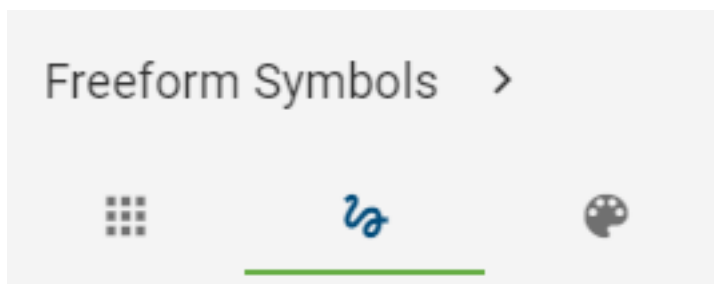
Select a freeform icon from the list and place it in the editor.

For example, the following freeform symbols are available: rectangles, ellipses, text fields, triangles, cubes, arrows, etc.. You can label freeform symbols by using the multilingual text field. By double-clicking or pressing the F2 key

after selecting the symbol, you can also trigger the input field. In addition, freeform symbols have some attributes. You can search for these objects, allow catalog suggestions, which you can configure via the freeform object in the administration area of BIC Process Design. An exception is the line symbol, which does not have these properties.

7.2.5 How can I hide the symbol palette?

The *Favorite Symbols*, *Symbols* and *Freeform Symbols* can be hidden or collapsed with the symbol palette. Click on the *Collapse* button next to the title.
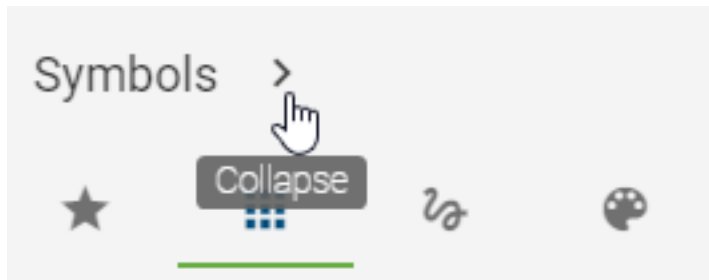
Now the symbol palette is collapsed and the associated title is hidden. Only the individual icons of the object types are displayed. If you hover over an entry, you can see the associated object type name as a tooltip.
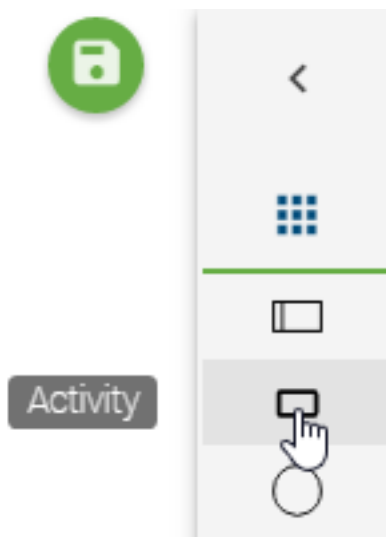
Modeling by drag & drop and stamp mode works unchanged. By clicking the displayed title icon, the tab changes between *Favorite Symbols*, *Symbols* and *Freeform Symbols*.
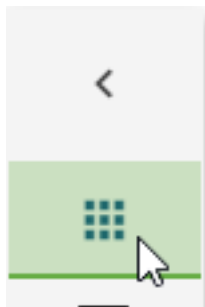
Click on the *Expand* button to unfold the opened tab of the symbol palette and to show it completely.
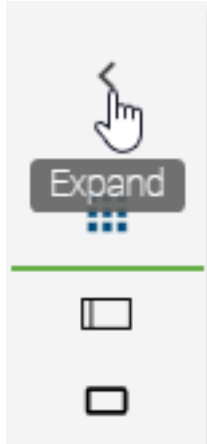
Note: The symbol palette "Format" does not contain symbols. Collapsing this tab is not possible, otherwise the options would not be selectable.

7.2.6 How do I move an object?

You can reposition an object by drag & drop. To do this, select the object with the left mouse button and keep it pressed while you navigate the mouse to the desired position. The object moves with your mouse. If the desired position is outside the current diagram section, you can also *move the diagram view* field by pressing the right mouse button or using the scroll wheel while holding the object with your left mouse button. When you release the left mouse button, your object is placed at the mouse position.

Optionally, you can use the arrow keys on your keyboard to move the object in all directions.

Note: You can also move a *multi-selection of objects* using this procedure.

7.2.7 How do I change the size of an object?

Select the object you want to change with a single click.

Press the left mouse button to alter the size of the object by using the blue points along the edge. Release the mouse at the desired position.
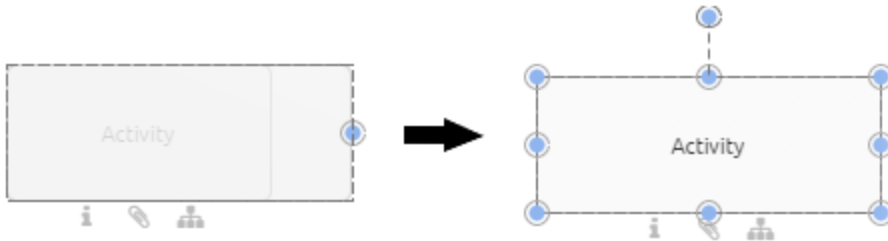
7.2.8 How can I switch the symbol of an object?

Within the modeling process of your diagram you have the possibility to change the symbol of an already modelled object. This can help you to dynamically change the view on single elements in your diagram according to your needs.

To change the symbol of an object within your diagram proceed as follows:

Right click on the symbol you want to change within the checked out diagram. The context menu for the object appears.
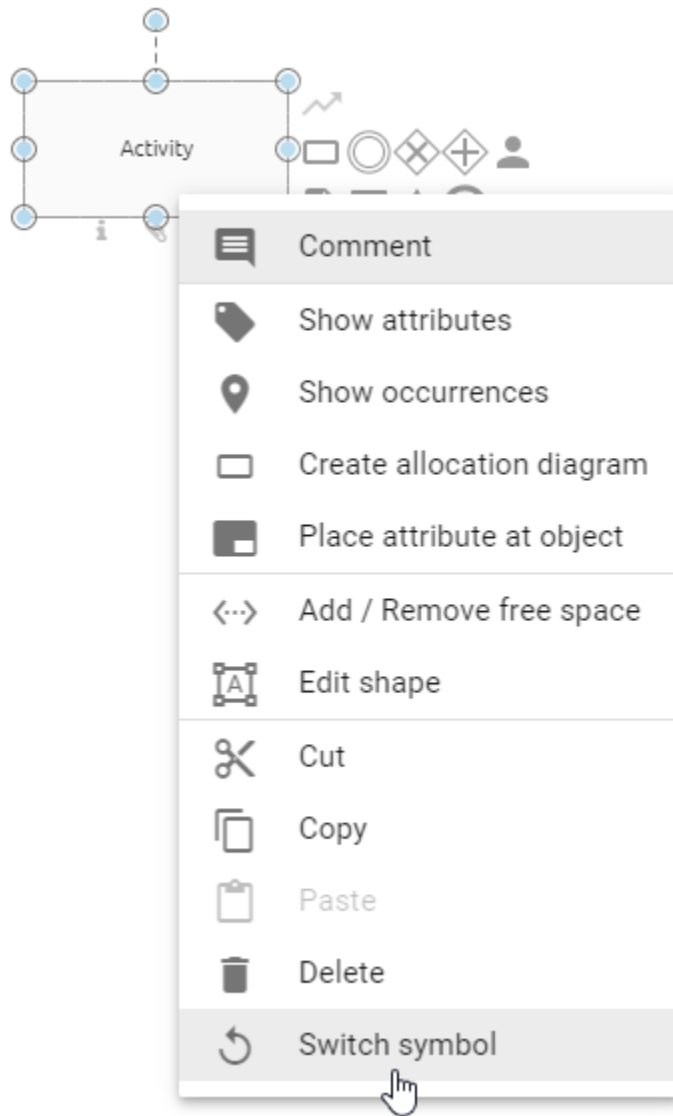
Select the entry "Switch symbol". You will get a list of all symbol types, which are allowed for the given diagram type.
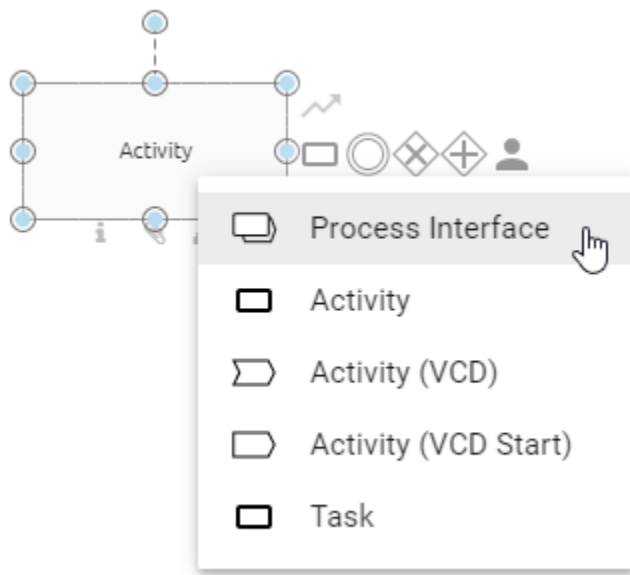
After you have selected the desired symbol type, it will be displayed in your diagram.

Symbols of container objects, such as pools, cannot be changed as soon as the object concerned already contains elements. In this case, the function for changing the symbol for this object is no longer available and is greyed out in the context menu.

Note: Symbols that are already part of a pool cannot be switched into the symbol type pool. By switching the symbol, *placed attributes* will be reset to their default. If no attributes are placed at the symbol by default, then no attribute will be placed after changing the symbol.

7.2.9 How can I label or rename objects in the editor?

The writing area is displayed directly after *modeling an object* or by double-clicking on the object. A suggestion list for all the catalog entries used in the diagram is displayed then. You can select a proposal with a mouse click or label the object. When labeling, you can also choose from a suggestion list with catalog items of the server that contain the entered term. Otherwise, end the entry with a single click in the editor.
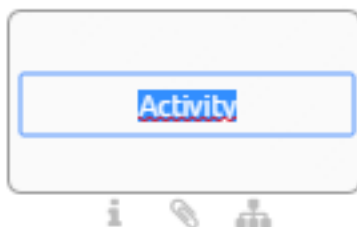
Optionally select the object by clicking on it once and press *F2* so that the writing area is displayed.

You can also rename symbols using the *attribute bar*.

Note: Note some peculiarities when renaming and editing attributes of symbols in diagrams that are *catalog items*.

7.2.10 How can I name activities in the editor using AI?

Once you have checked out a diagram in the editor, you can select an activity from the context palette and place it on the canvas. Our AI assistant, *Arty*, will then generate a list of various activity names, which will be displayed under *Name suggestions from Arty*. The suggestions are based on the content of the diagram and will be presented in your current content language.
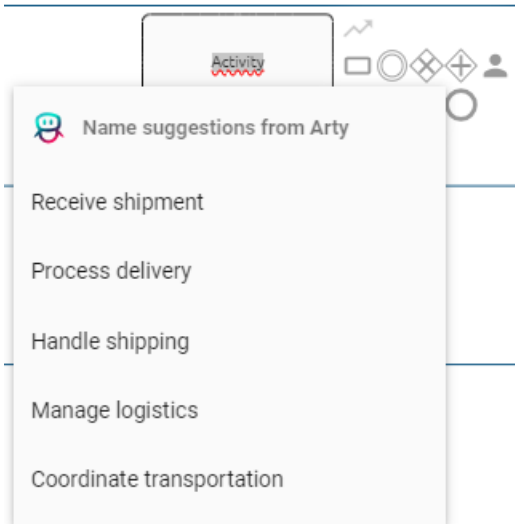
You now have the option to either select a suggestion by clicking on it or manually label the activity. If you prefer to enter a name manually, simply click on the activity's name label. Alternatively, you can select catalog items from a suggestion list of *Catalog objects* that contain or are similarto the entered term. To finalize the entry, click anywhere else in the editor.
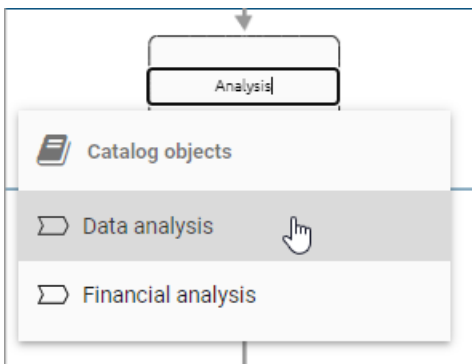
Hint: This function is performed by *Arty*, our AI modeller. It is part of the AI Modeler package, for which a separate licence is required.

7.2.11 How do I change the size, line breaks and the position of text fields (labels)?

You can change the size of some text fields which contains the name of a symbol. For example, if the name is very long, you have the option to display it in two lines (by alterting the size of the label) and to shift automatic line breaks. Alternatively, you can add *manual line breaks*. The text field can be positioned as you like.

Change size

Select a text field by clicking on it.

Alter the size by using the blue points along the edge of the text field. Release the mouse button at the desired position.
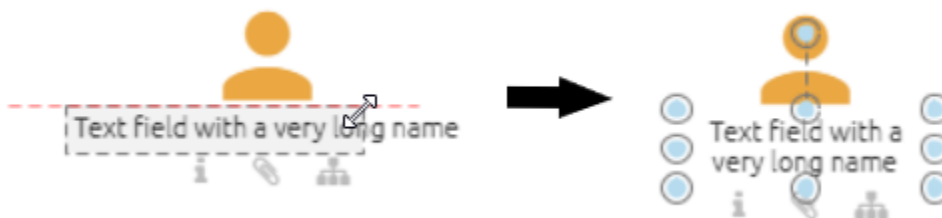
Position

Select a label by clicking on it. Then click again, keep the mouse button pressed, move the field and release the mouse button (drag & drop).
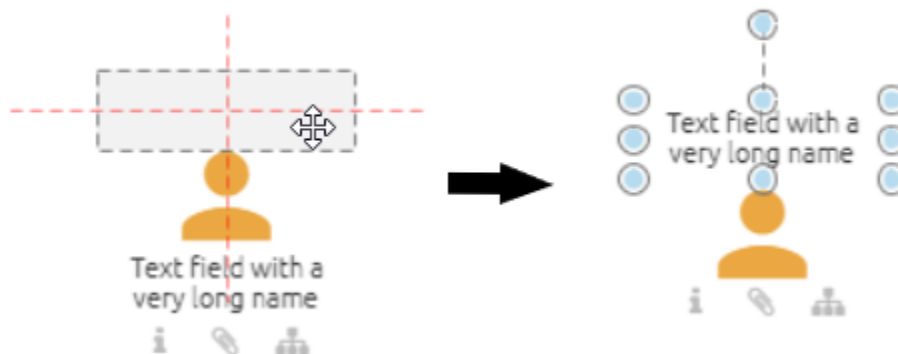
Note: Note that the size and position of the text fields of symbols with block form, such as activities, cannot be changed. For those symbols, the label is located in the respective symbol. Furthermore, manual line breaks cannot be seen in the catalog, but are visible in the reports.

7.2.12 How can I place attributes at objects?

Some attributes of objects can be placed in the diagram. This includes all text attributes of the object that were maintained in the attribute bar.

Right-click on the symbol in the diagram to open the context menu and select *Place attribute at object*.
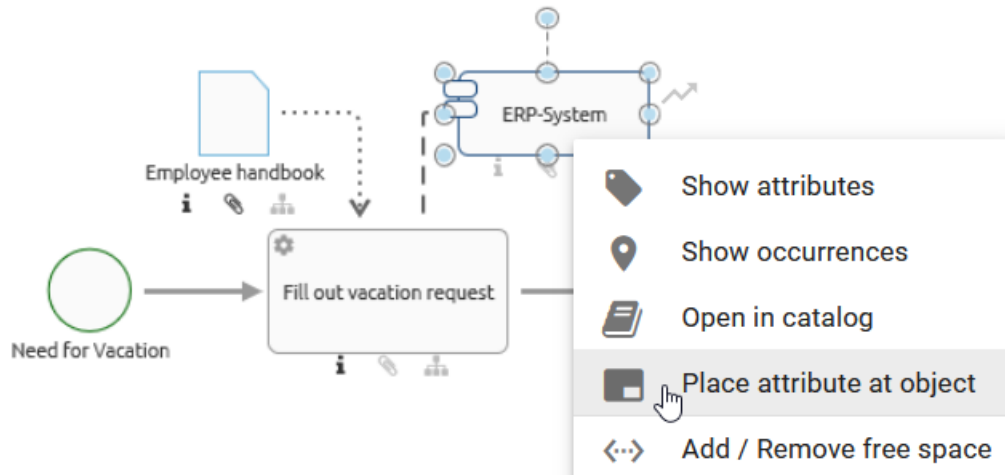
A window *Attribute placement* opens, in which you can select the desired attribute. All text and assignment attributes that are already maintained at the object are displayed here. If you want to select a text attribute that is not listed, you must first complete it in the attribute bar and repeat the first step.

The selected attribute then appears at the bottom right of the icon. You can *change the position* and edit the text field by double-clicking it, if it is not an assignment. The changes are applied to the attributes of the object. The placement

also gets updated, if the attributes are changed in the attribute tab. Assigned persons, organizational units and diagrams are displayed as text, with several assignments in an attribute separated by a comma.
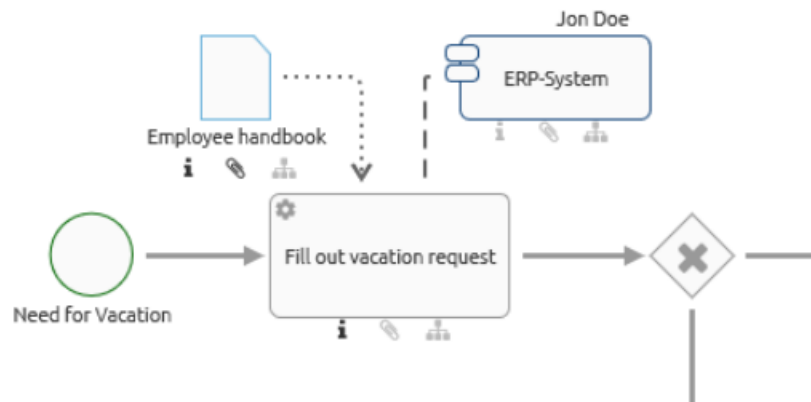
Note: Please note that tables you have used in the description attribute cannot be displayed in the diagram. In addition, the table border of a description is not rendered on mouseover pop-up when you move the mouse pointer over the *i-symbol* on the activity in the diagram.

7.3 Connections

7.3.1 Where can I place a connection to an object?

All possible options for placing a connection are indicated with a red dot when you hold the connector with the mouse over different points of an object.

If you link objects using the **outer port**, the connector will stay fixed at that side of the object even when you shift it.
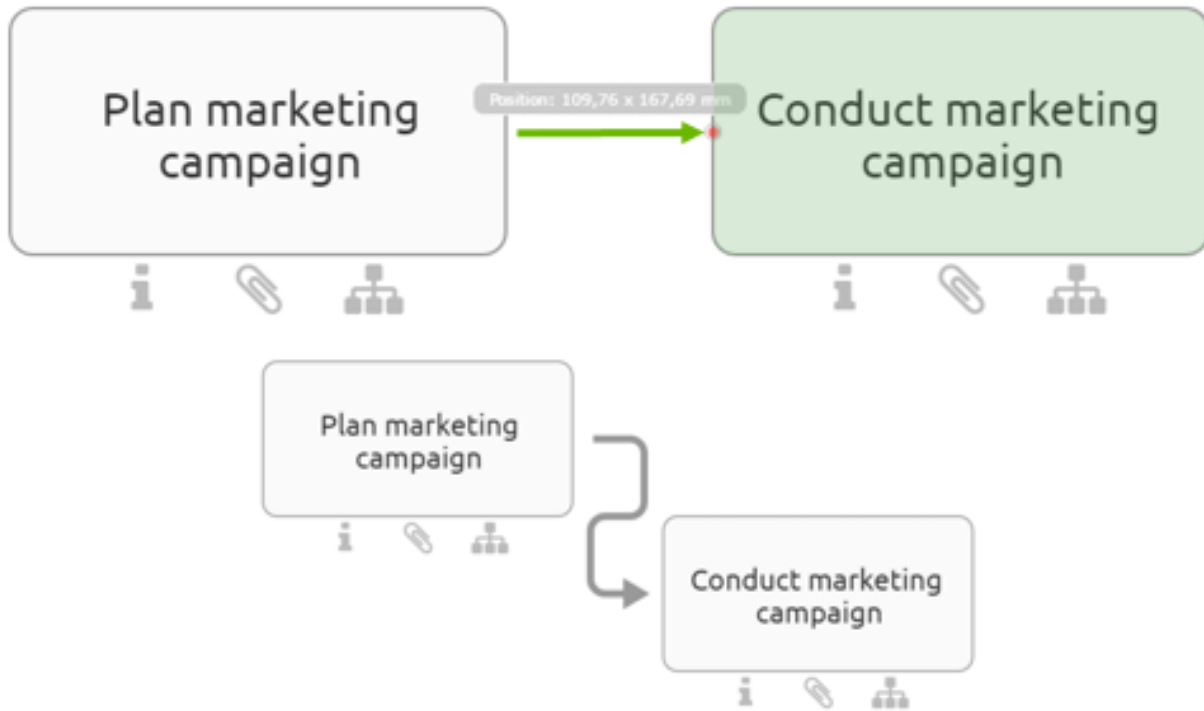
If you link objects using the **centerport**, the connector will move when you shift the object.
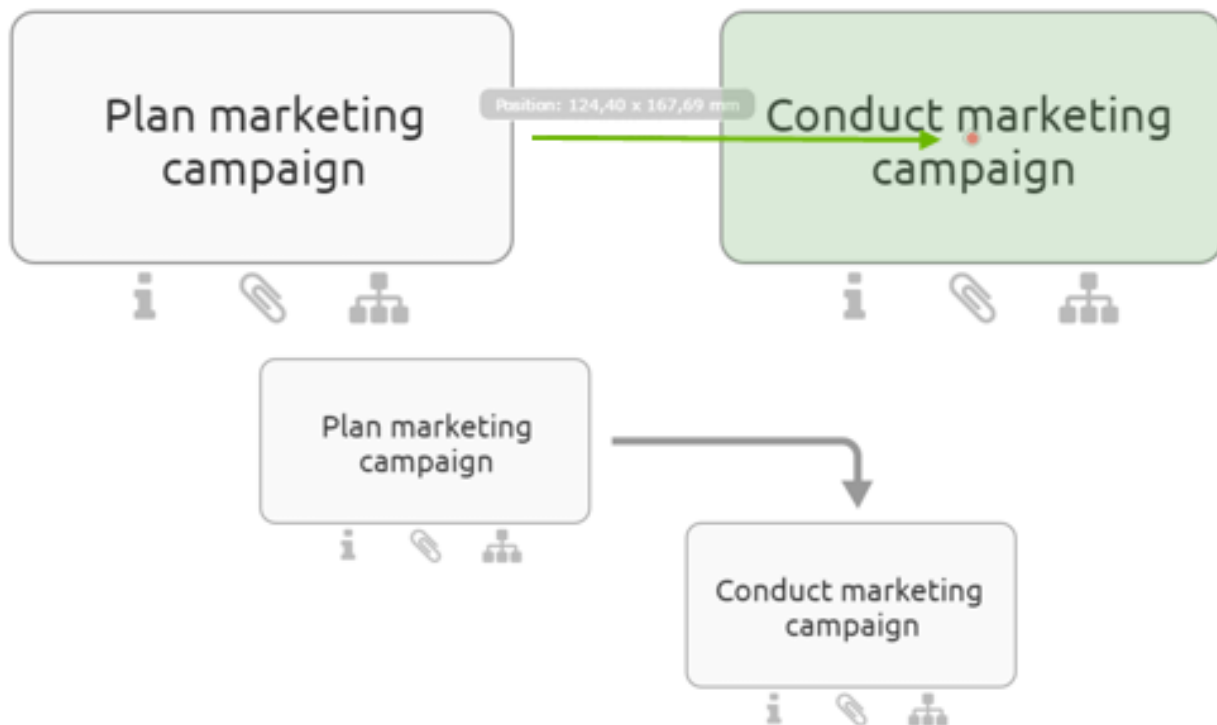
Connection can be added via drag & drop or by selecting the start and end ports (depending on the connection type). This is explained in the following.

7.3.2 How do I change the link type?

You can connect symbols using an *orthogonal* or *diagonal* connection. Orthogonal connections are horizontal or perpendicular resp. they are a combination of such lines. A connection of the type *diagonal* goes straight from the start to the end port without any bending. The active connection type is displayed in the menu bar as *Change link type* button. Select the button to change the type.

The symbol of the button changes accordingly: orthogonal - angled arrow, diagonal - straight arrow. If you draw a new connection between two symbols, the connection will be straight resp. orthogonal.
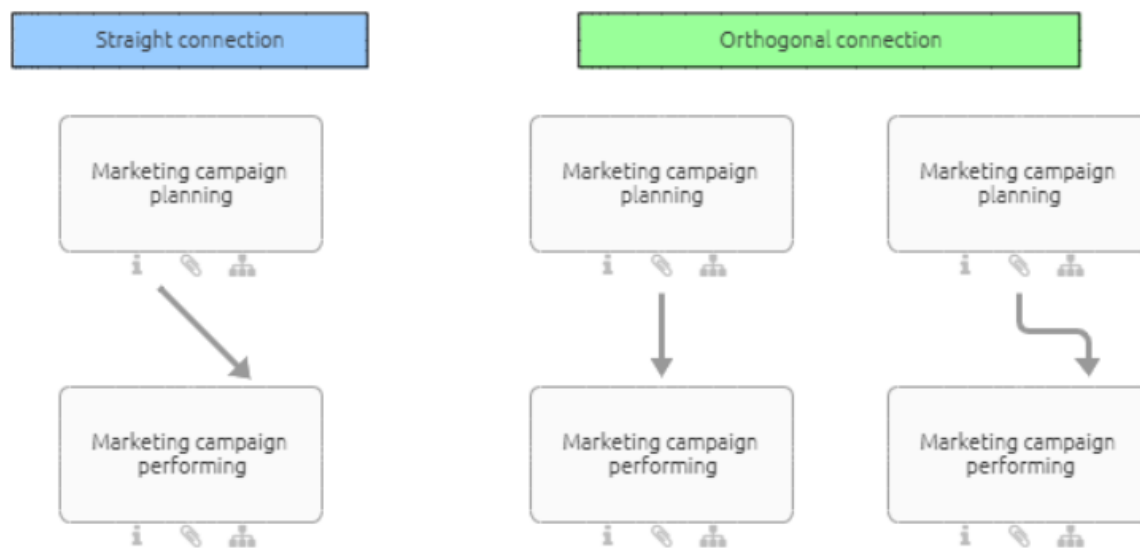
7.3.3 How can I connect symbols orthogonally?

You have the following options to add an *orthogonal* connection between two symbols. The *connection type* can be switched in the menu bar. If the connection type button shows an angled arrow, the connection will be *orthogonal*

Insert the desired two symbols into the editor or open a diagram with at least two symbols which can be linked (e.g. an event and an activity).

Connection icon

Select one of the symbols in the editor. A connection icon appears in the mini symbol palette (upper right corner next to the symbol).

Select the connection icon and afterwards a desired point at the other symbol. A sequence is added between the two symbols.

Connection Mode

If you activate the connection mode, you can add several connections. In the menu bar, click *Connection Mode*. A red dot appears on the edge of the icon when you hold the mouse pointer over it. This dot shows the possible start points. Select the point where you like to start your connection.
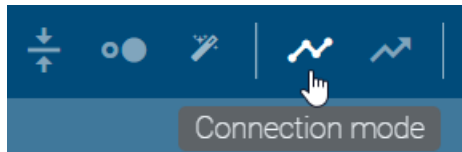
Then hold down the mouse key over the second symbol and select the location where you want to place the end of the connection. A sequence is added between the two symbols. Deselect the symbol afterwards by a click on a free space. Then you can start a new connection.

To terminate the connection mode, click on the *connection mode*-button again.

Port area

Hold the mouse over the edge of a symbol for a while without clicking it. The connection mode becomes active. Now you may add a new connection as described for the connection mode. The connection mode will be deactivated automatically after you added one connection.

7.3.4 How can I connect symbols diagonally?

You have the following options to add an *diagonal* connection between two symbols. The *connection type* can be switched in the menu bar. If the connection type button shows a straight arrow, the connection will be *diagonal*

Insert the desired two symbols into the editor or open a diagram with at least two symbols which can be linked (e.g. an event and an activity).

Connection icon

Select one of the symbols in the editor. A connection icon appears in the mini symbol palette (upper right corner next to the symbol).

Select the connection icon and draw a connection between the current symbol and another by using the drag & drop function.

Connection Mode

In the menu bar, click *Connection Mode*. A red dot appears on the edge of the icon when you hold the mouse pointer over it. Click on one of the symbols where you want to start the connection.
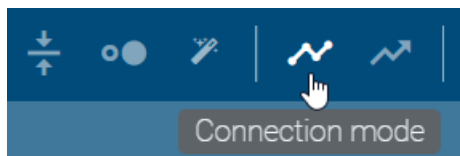
Press and hold down the mouse key and move to the second symbol. Release the mouse key at the location where you want to place the end of the connection. Then click on the *connection mode*-button again to terminate the connection mode.

Port area

Hold the mouse over the edge of a symbol for a while without clicking it. The connection mode becomes active.

Now you may add a new connection via drag & drop as described for the connection mode. The connection mode will be deactivated automatically after you added one connection.

7.3.5 How do I change an existing link to another link type?

Select an existing connection between two symbols and open the context menu by right-clicking. After that select the *Change to straight connection* or *Change to orthogonal connection* entry. The connection is then changed.
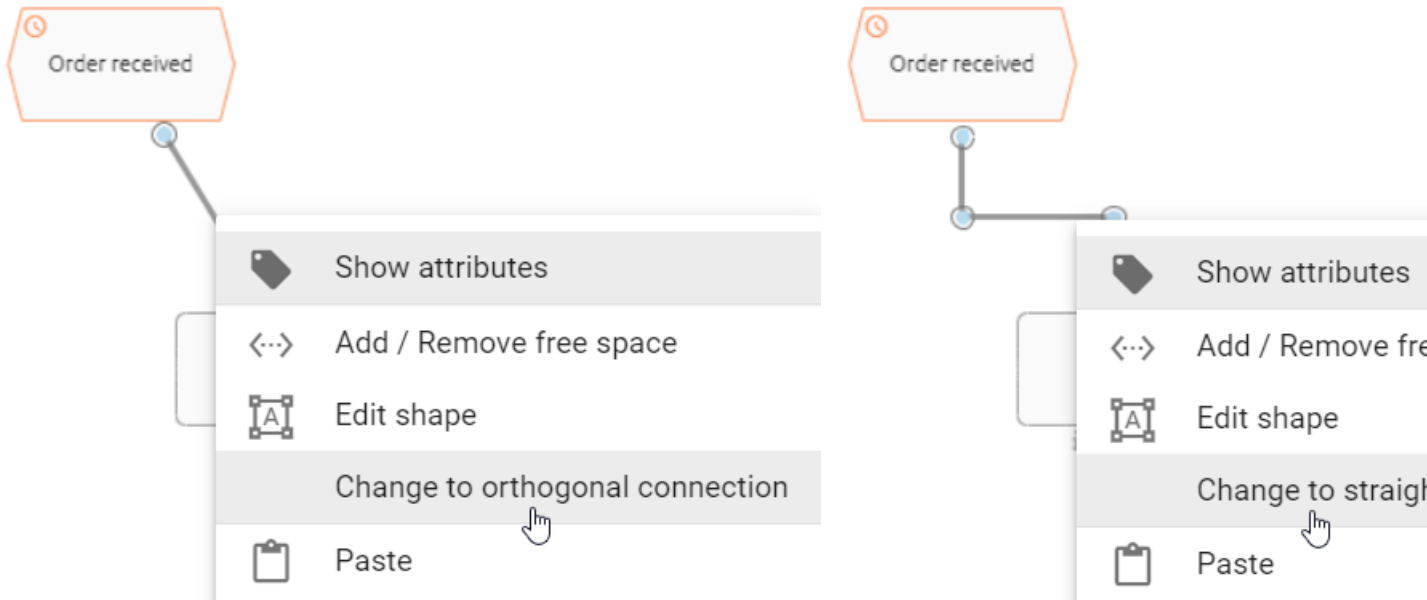
7.3.6 How can I change an existing link?

The connection sequences are created automatically when a connection is created. You can change both its path as well as the input and output.

Select the connection you want to change.
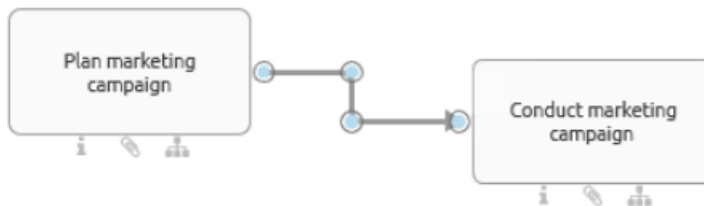
Change path

You can move the blue points of a connection by using the drag & drop function.
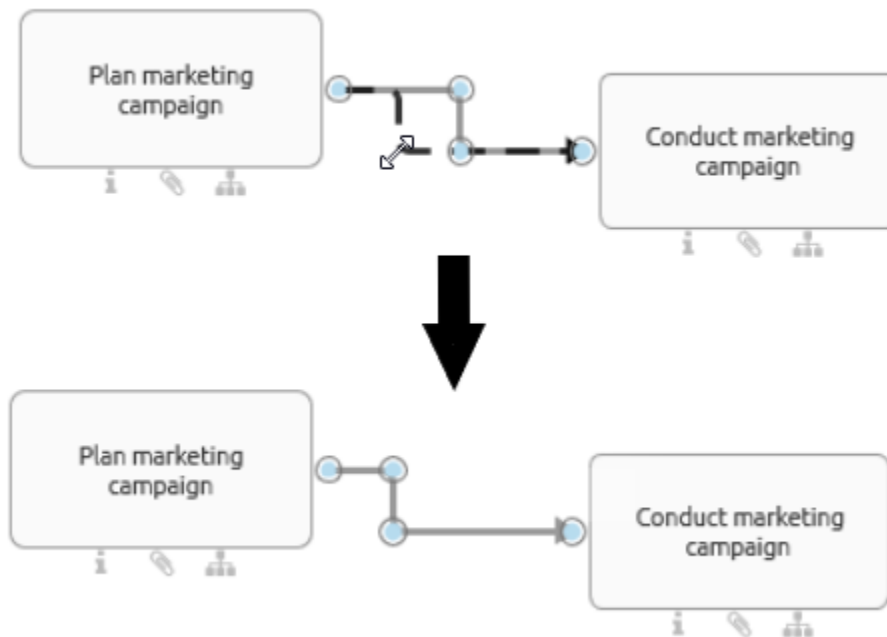
If you want to create a new nook, click on the desired location and drag a corner into the connection.

Change the port of an existing link

Use the blue points on an object to change the location of the connection on the same symbol. Simply drag & drop the existing link to another dot along the edge. Any possible inputs or outputs are indicated by red dots.
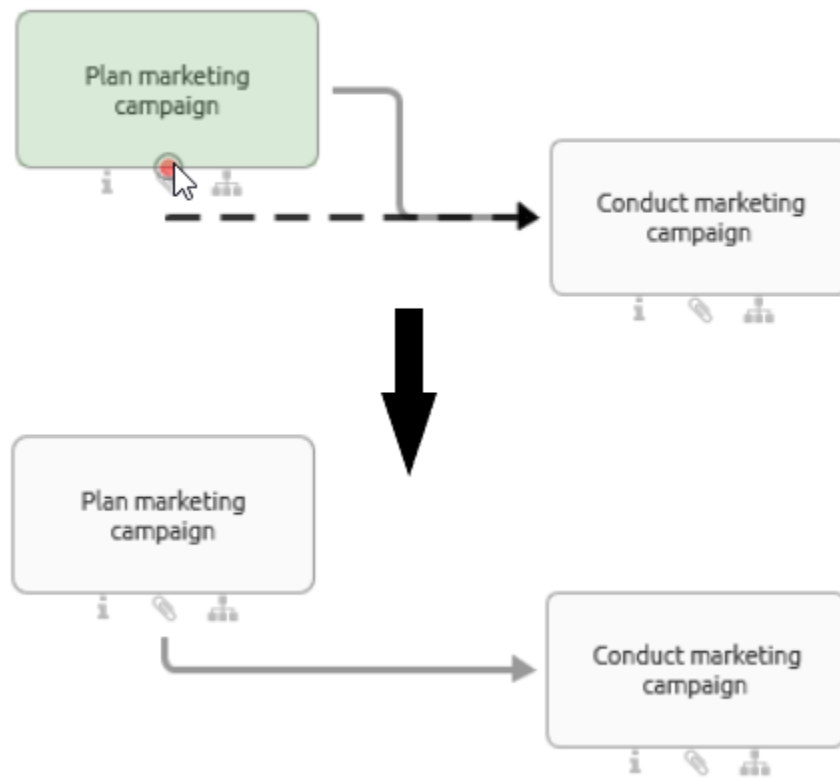
Note: Existing connections cannot be moved from one symbol to another symbol.

7.3.7 How can I label or rename connections?

The label is directly displayed by double-clicking on the connection. You can now label the object. Click somewhere within the editor to finish the entry.

Optionally select the connection by clicking on it once and press F2 so that the label is displayed.
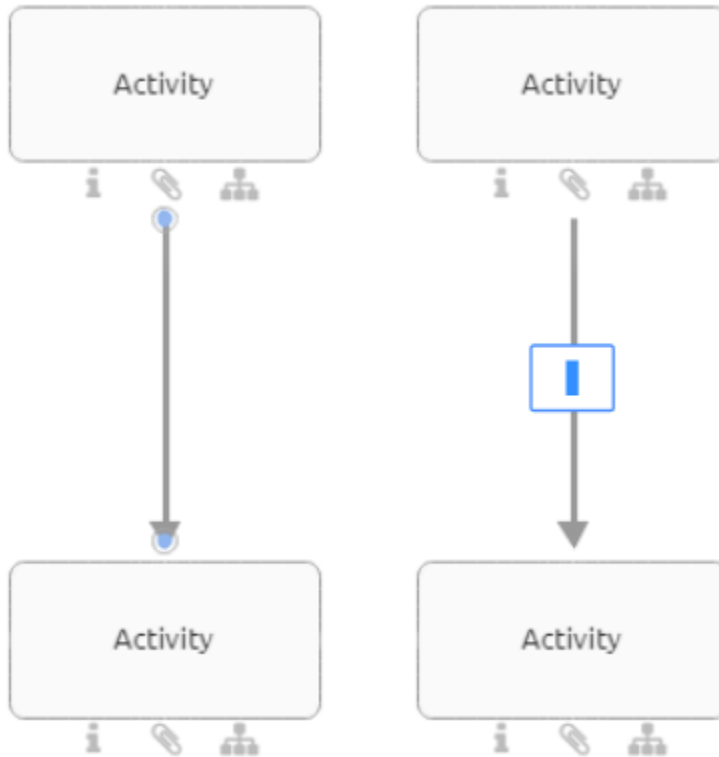
7.3.8 How do I insert an object into a path?

You can insert an object into an existing path using Drag & Drop. The connection between the corresponding objects has to be defined in the method.

Drag a new object from the symbol palette or a free object from the editor to the desired edge. This edge must be of the type sequence flow. When it appears blue and dashed, you can drop the object.
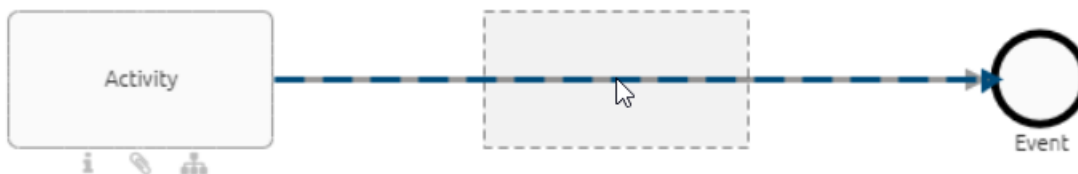
The edge is exchanged by two new edges where the new object is an intermediate node in between the two former objects. All attributes and the optional label of the old edge are copied to the newly created edge where the placed node is the target node.

If you remove the new object, the edge returns to its previous state and connects the initial two objects. In case the object types do not allow a connection, the edge does not change its layout as described above. Dropping the new object will place it on top of the edge without any connection.

7.4 Copy, paste and more functions

7.4.1 How do I copy and paste symbols?

Select one or more symbols that you want to copy within a diagram or between diagrams. Then click the *Copy*-button in the menu bar (alternatively CTRL+C).
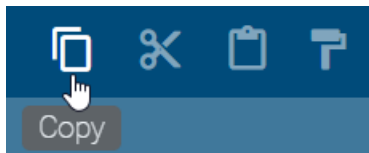
Click on the *Paste*-button in the menu bar (alternatively CTRL+V).
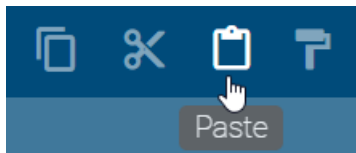
Optionally you can right-click on an object or in the editor to open the context menu and select Copy or Paste.

You can paste objects into another diagram of different type (e.g. EPC to BPMN) if the object is available in the target diagram type. When you copy several objects, each object is checked for this requirement and pasted when applicable. If you want to paste an object which is not allowed in target diagram it will not be pasted. Furthermore, Connections will only be pasted between two pasted objects, i.e. if an object could not be pasted its connections to other objects will also not be pasted. If an object is allowed in the target diagram but the symbol of the object is not, the object will be pasted with the standard symbol. If an element could not be pasted, you will be informed about the reason for that.

Note: Copying catalog items and symbols that are not part of the catalog differs. Regardless of the object type, copies of catalog items are always reused. This means that an expression copy is created and the object remains the same. Changes to this copy will also cause changes to the original if the catalog item has not yet been accepted. Objects that are not in the catalog are doubled, a *definition copy* is created. Changes to the copy are thus independent of the original.

There are also differences in copying connections. A copied connection is newly created if one of the connected and also copied objects is a definition copy; this is the case if one of the objects is not a catalog item. A connection is reused if the connected objects were occurrence copies; this is the case if they are both catalog items.

Note: Please note that when copying elements, relationship attributes are not automatically taken over. This means that if you copy an activity, for example, the associated role is not automatically copied as well. Make sure that you transfer relationship attributes separately if this is necessary.

7.4.2 How can I cut symbols from a diagram?

Click on a symbol that you want to cut. Now use the *Cut*-button in the menu bar to select the desired symbol (alternatively *CTRL+X*).
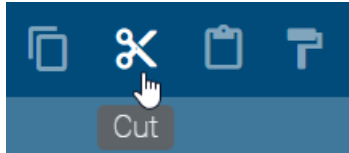
Optionally you can right-click on an object to open the context menu and select Cut.

7.4.3 How can I delete symbols from a diagram?

Right-click on the symbol you want to delete to open the context menu and select *Delete*.

Optionally, you can delete selected symbols via the *"Del"* button on your keyboard.

If the object is connected with other objects via exactly one incoming and one outgoing edge of type *Sequence Flow*, a new edge of the same type is created. This connects the neighboring objects with each other in the same direction. The attributes of the previously incoming edge are adopted for the new connection.

Deleting symbols in the diagram does not automatically delete associated catalog items in the catalog. This creates unused catalog items, which can be *reorganized*.

Note: You can also use the *multi-selection* of symbols to delete several symbols at the same time. The new edge is also created here for the neighboring symbols, but without the transfer of attributes.

7.4.4 How can I undo or redo modeling steps?

To undo individual modeling steps, select the *Undo*-button in the menu bar or alternatively *CTRL+Z*.
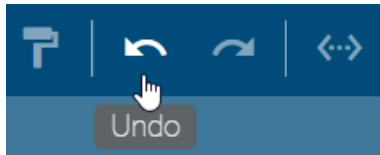
Use the *Redo*-button to restore steps. Alternatively, press *CTRL+Y*.
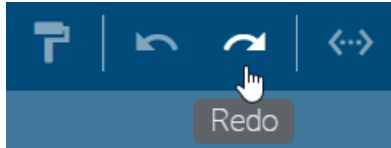
The *Redo*-button and *Undo*-button can be used until the diagram has been changed.

7.4.5 How do I add images to a diagram?

You have the option to add images which have the file formats jpg, jpeg, bmp, png and gif (without animation) to a diagram. To do so, the execution of the following steps is necessary:

Check out the diagram into which you want to insert an image. Now you can navigate to the memory location of the image (on your computer) and drag it into the editor.

Tip: The functions *Edit shape*, *Format* and *Change size* can be used for editing an image. For example, you can crop your picture or set a frame.

Note: Copying images between different browser tabs is not supported.

Note: Files stored in interlace mode, such as available for PNG files, are not fully supported. This includes the print

preview. In this case, saving the affected file without interlacing and inserting it into the modeling is recommended.

7.4.6 How can I add an image to an activity?

You can add an image to an activity (or any other object). This can be helpful, if you want to create navigation objects and want to highlight them.

To do that, you need to do the following:

Check out the diagram in which you want to add the image. Copy the image which you want to add. Select the activity (or other object) that the image should have as background. Paste the image (*Ctrl+V*).
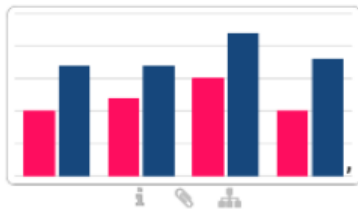
Create financial analysis Create market analysis Write invoice

7.5 Formatting

The different formatting options affect not only free-stream symbols but also symbols, such as activities and connections.

7.5.1 How do I change the format of symbol and diagram?

Navigate to the format settings in the *symbol palette* by selecting the third entry in the symbols menu.
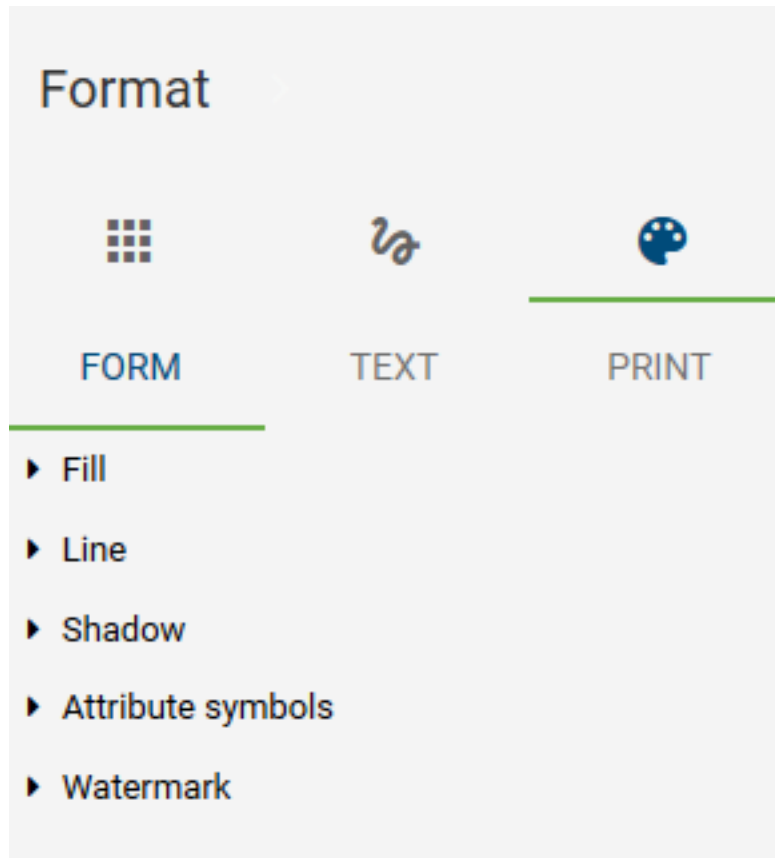
Select an existing symbol (or several symbols at a time) in the editor. You can now choose between *Form*, *Text* and *Print*.
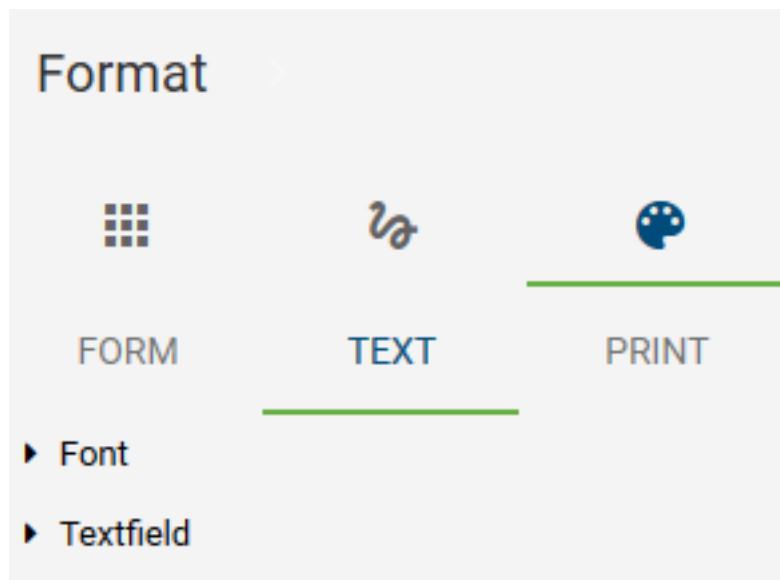
If you select the *Form* menu item, you can format fill, line, shadow, attribute symbols and watermarks for the selected symbol.

7.5.2 What options do I have to format objects?

Available settings for the form of symbols:

- *Fill:* You can choose between the following options for the filling of a symbol: None, Solid or Gradient. You can also adjust the color and transparency of the filling.

- *Line:* For the line of a symbol, you can select whether there is no line or a solid line. Furthermore, the transparency and the color can also be set. In addition, you can set the style of a line (for example: dotted line, etc.) and the line width. With open symbols, such as *connection* or the freeform symbol *line*, you can change the edge shape as well as the arrow type. To adapt these characteristics the following options are available: *Line End*, *Line Join*, *Start Arrow Type* and *End Arrow Type*.

- *Shadow:* You can choose different shadow types for a symbol. The color can also be set here.

- *Attribute symbols:* You can enable or disable the display of attribute symbols for an object. *Attribute symbols* are the icons that appear below an object, for example when a description has been maintained.

- *Watermark:* You can enable or disable the display of watermarks and create them for symbols. In this case, there is a wide range of adjustment options, such as the adaptation of the size and color of the watermark.

- *Background:* You can use an image as a background for an object.

7.5.3 What are the options to format text?

Available settings for the text in symbols:

- *Font:* The font, size, color and style of texts can be changed.

- *Text field:* Defines the behavior of the text field, e.g.: do not resize form. Furthermore, you can define the position of the text field. Your options are: at the left, right, upper and lower text margins.

7.5.4 How can I save print settings in the diagram?

Use the symbol palette to navigate to *Format* and select the menu item *Print*. The editor then changes to the print preview (including sheets and page margin). There you can make some print settings for your diagram.
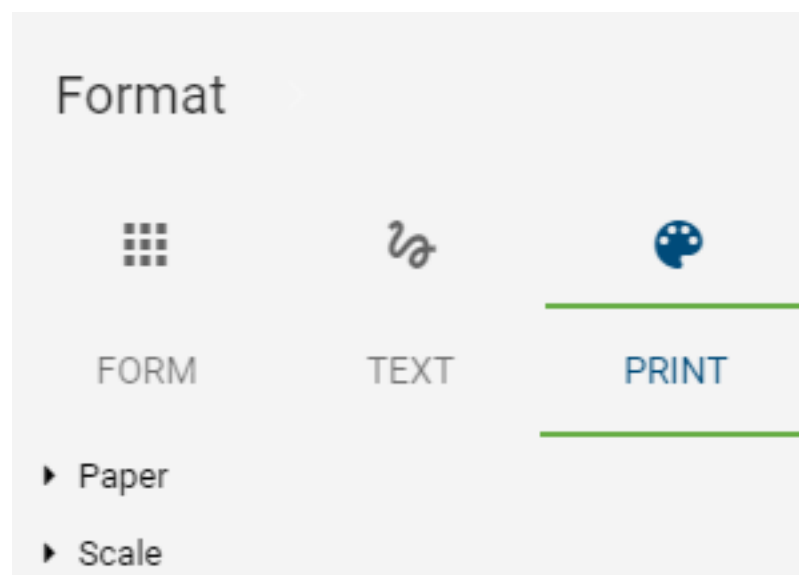
- *Paper:* Different format (e.g. DIN A4) and orientation settings (landscape/portrait) can be selected here.

- *Scale:* Page limits and the factor of scale can be set here.

When saving and checking in, these settings are taken over for the diagram, just like other formatting. Thus, users with the rights of an author can set user-independent presets for printing. These are then automatically displayed in the print preview. They can also be individually changed there, but not saved across the board.

7.5.5 How can I transfer a formatting?

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

Select your formatted object by clicking on it once. Then select *Copy format* in the menu bar. Once you click on the button, you can transfer the format to another object. If you double-click, you can edit several objects.
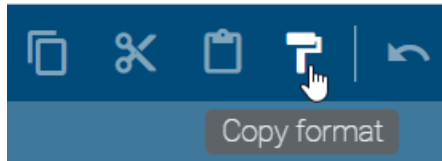
Click on the object to which you want to transfer the formatting. With a click somewhere in the empty editor or pressing ESC you can cancel/exit the *Copy format* mode.

7.5.6 How do I change the shape of symbols?

You can change the shape of existing symbols.

Select a symbol in the editor that you want to modify and select *Editing* by right-clicking in the context menu. It is now possible to edit individual points of the symbol, which allows you to change the shape of the predefined icons.
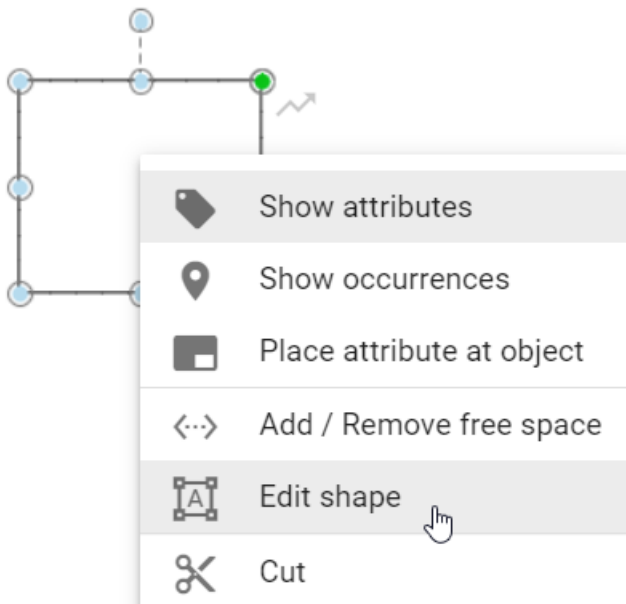
Change the symbol by moving an editing point to a different position while holding down the mouse key. You can repeat this for further processing points. The editing mode is active until you click somewhere in the editor. The same processing also applies to *connections*.
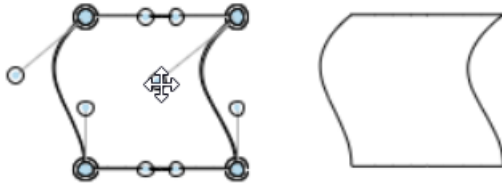
7.6 Support for visual adjustments

7.6.1 How do I rotate symbols?

You can change the orientation of symbols in the editor. That means it is possible to rotate symbols to any position you like. Analogous to the *position and size*, it is also possible to change the orientation of symbol names independently of the orientation of their symbols.

Click on a symbol in the editor. If you only want to change the orientation of the name, click on the symbol twice. A circle appears above the symbol. Select the circle above the symbol by mouse click and drag it to the left or right to change the orientation of the symbol. This allows you to rotate the symbol for example by 90 degrees.
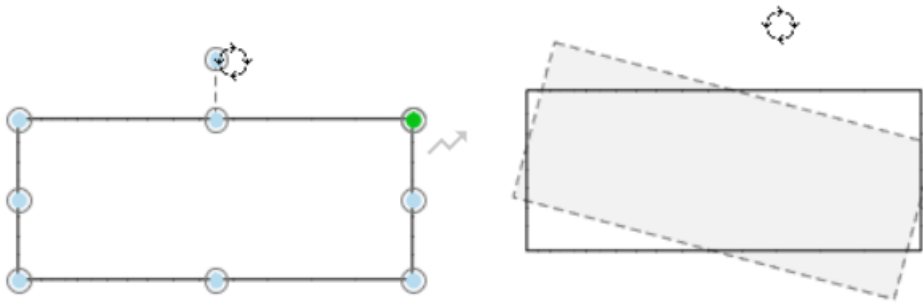
7.6.2 How do I change the order of symbols?

You can define the order of overlapping objects in the editor. This applies to all objects you can use in the editor, including free forms and connections.

Select the object. Then navigate to the *Order*-button in the menu bar.
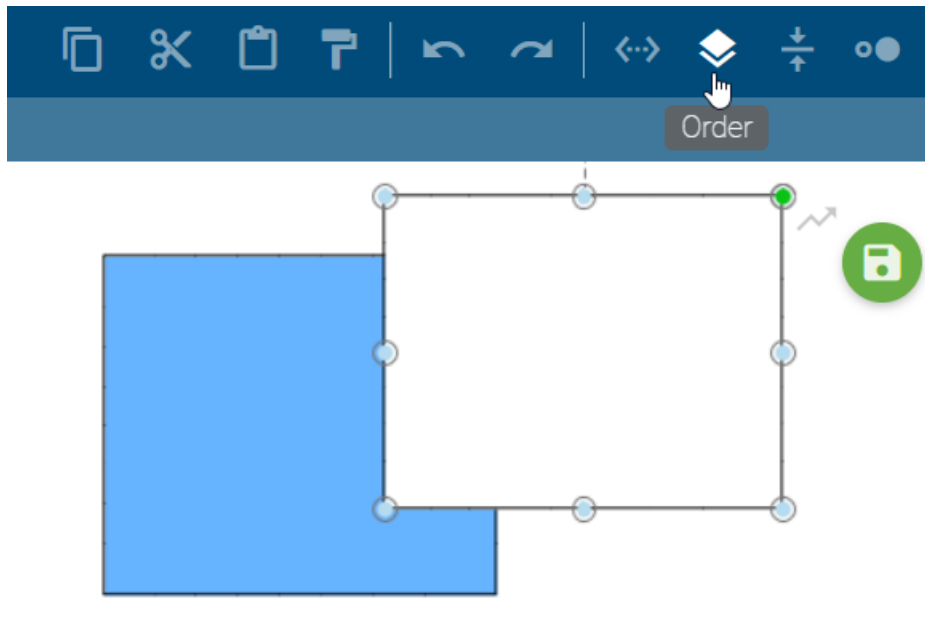
Four options are available:

- *Foreground:* The selected object becomes the top level of the overlapping objects.
- *Background:* The selected object becomes the lowest level of the overlapping objects.
- *Move up:* The selected object is set one level higher.
- *Move down:* The selected object is placed one level lower.

Once one of the options is selected, the arrangement of the symbol changes accordingly.
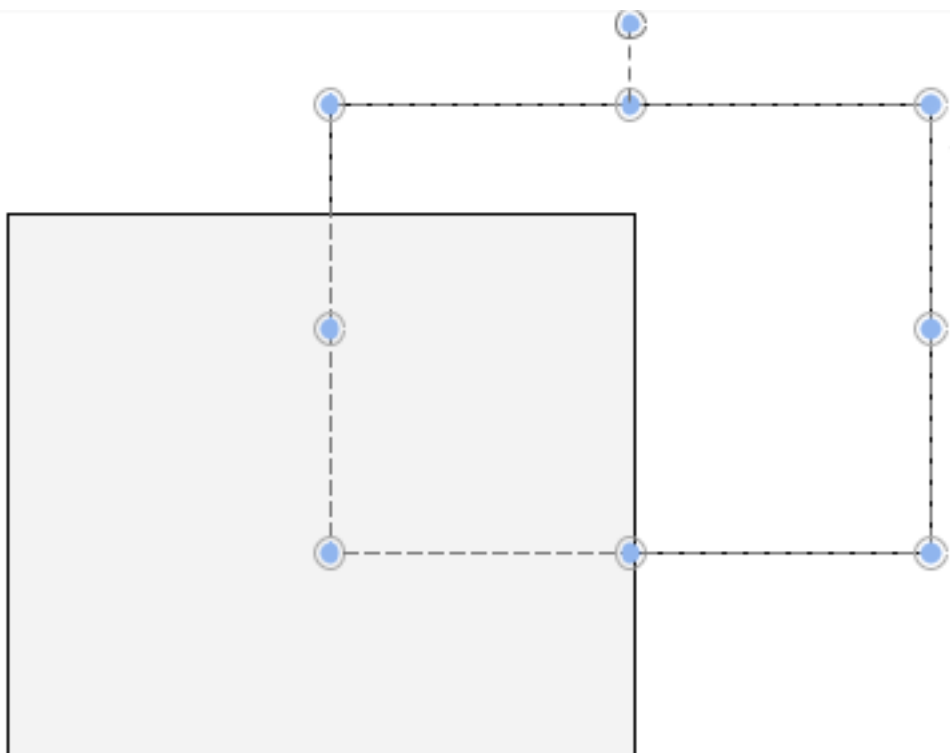
Note: Recently created objects always lie within the topmost plane of arrangement. This layer can still be changed later. Pools always lie within the lowermost plane of arrangement due to their technical meaning.

7.6.3 How do I use the alignment tool?

To simplify the positioning of symbols, you can use the alignment tool, both for existing symbols as well as for the creation of new symbols in the editor.

Open an existing diagram that contains symbols and drag a symbol from the symbols view into the editor. Afterwards, align the symbol with other symbols by placing it beneath another one. You will see that alignment lines are displayed. They can appear at the outer edges of symbols as well as through the center of a symbol, depending on the position to other symbols.
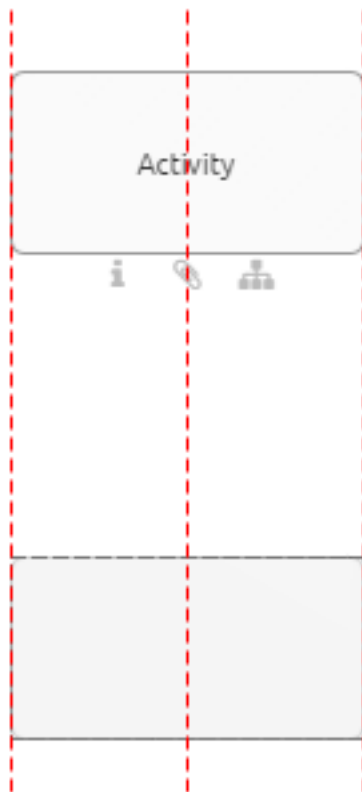
You can turn off the alignment tool by pressing the *Alt GR* key while positioning the symbol.

Warning: In the Google Chrome browser you can turn off the alignment tool with *Alt* and *Alt GR*. When using Internet Explorer, keep in mind that the *Alt* key opens the menu bar of the browser. So please only press *Alt GR* for turning off.

7.6.4 How do I align symbols to each other?

You can use an *Alignment* function to align symbols to each other.

To do so open a checked out diagram that contains elements that you want to align to each other. Select several elements at the same time, either by dragging the mouse with pressed key over the area in which these elements are located, or by using the Shift key and clicking on the symbols. To finish, select *Align* from the menu bar and select an entry (for example, *Top align*). The elements are aligned to each other according to the first selected entry.
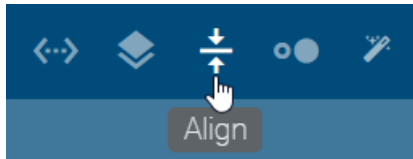
7.6.5 How do I match the size of symbols to each other?

Open a checked-out chart that contains items whose size you want to match. Then, select several elements at the same time, either by dragging with pressed mouse key over an area in which these elements are located or by using the Shift key and clicking on the corresponding symbols.

Select *Resize* from the menu bar and select an entry (for example, *Fit to largest Shape*). The size of the elements is adjusted accordingly.
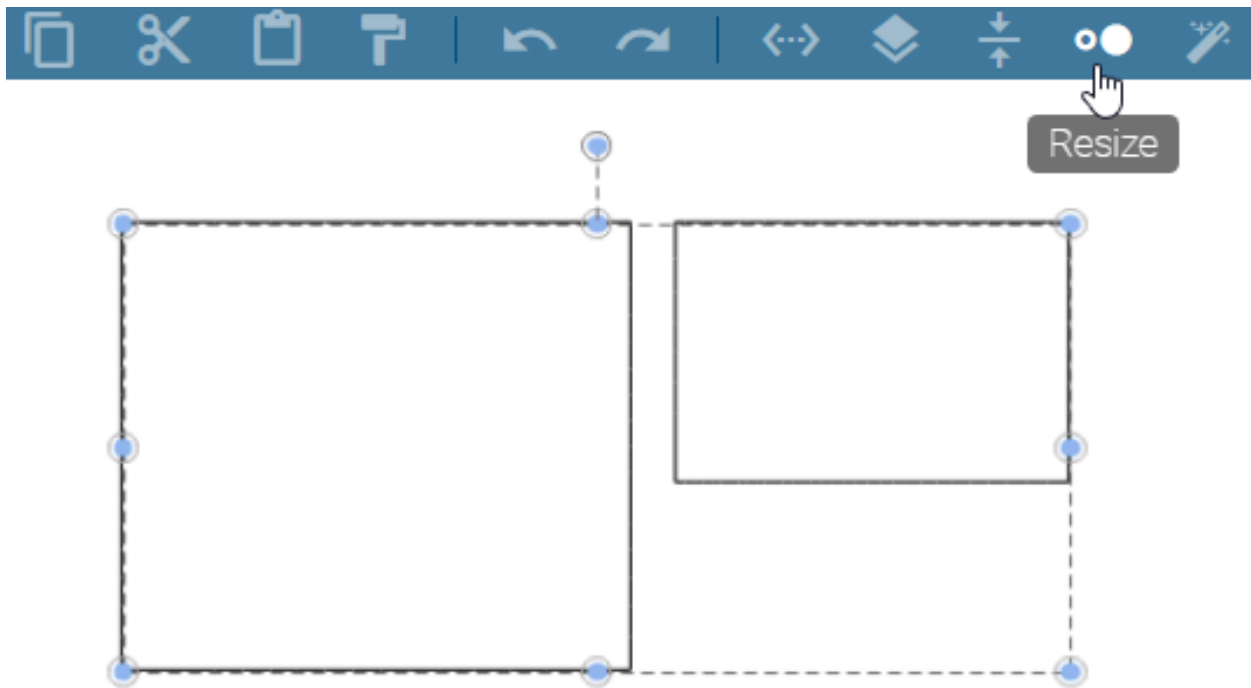
7.6.6 How do I add or remove space?

With the function *Add/ Remove free space*, you have the option to insert or remove space between symbols.
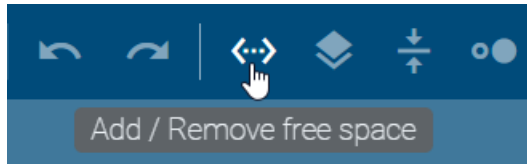
In your checked-out diagram, you can access the function by a click on the option *Add/ Remove free space* in the menu bar. Alternatively, open the context menu by right-clicking in the editor and select the entry *Add/ Remove free space* there.
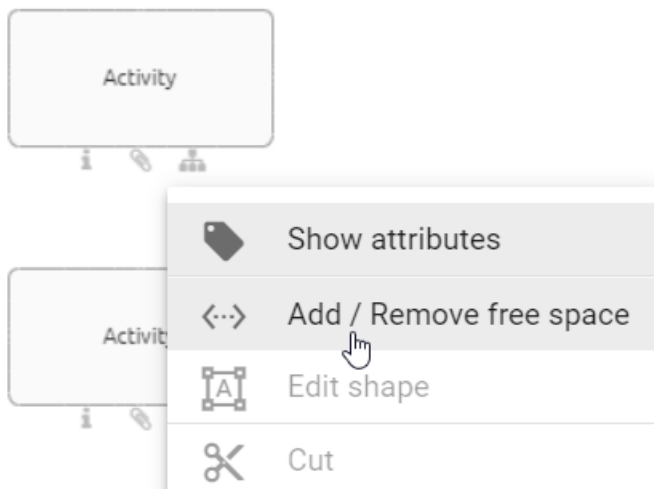
Two blue dashed lines appear, one running horizontally and the other vertically through the diagram.

Click on a point in the diagram to set the start point where you want to start removing or adding free space.
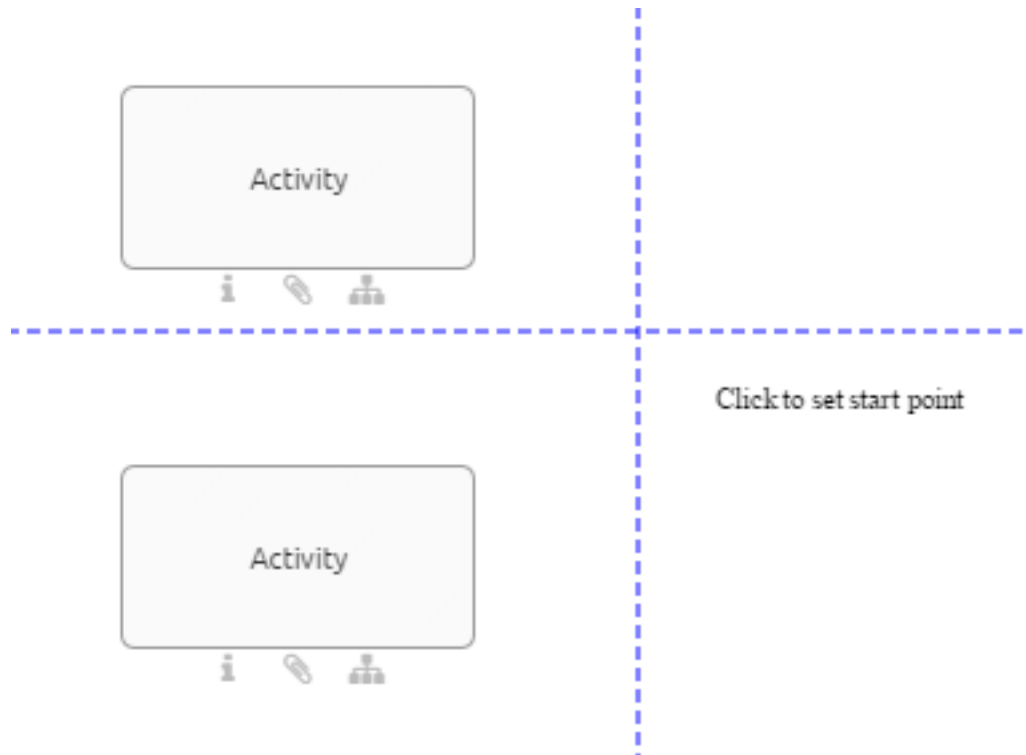
Add space

Click on a point in the diagram that is located on the right side or underneath the start point to add free space.

Remove space

Click on a point in the diagram that is located on the left side or above the start point to remove free space.
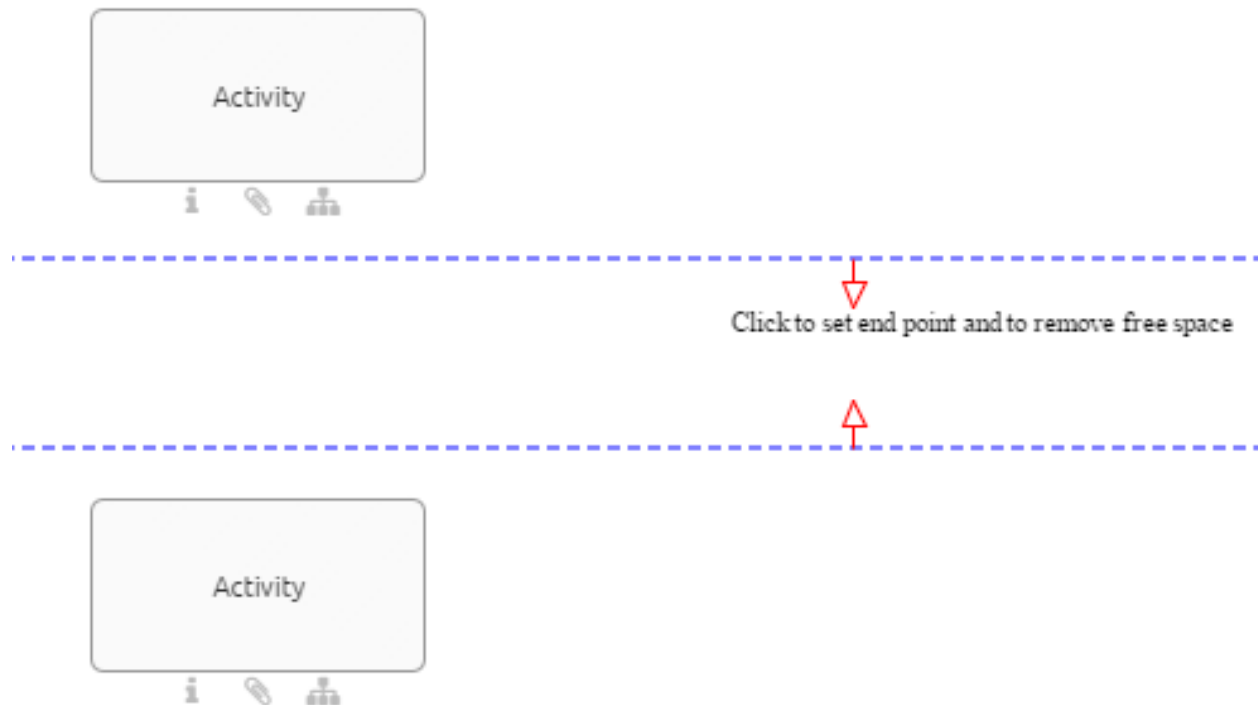
7.6.7 How do I use the layout assistant?

The layout assistant helps you to layout the process flow. This means that the sequence flow and activities are in the foreground. By default these are the diagram types BPMN, EPC and VCD. In edit mode of these diagrams you can layout the selection of a container object, multi-selections as well as the entire modeling. After layouting, the diagram is positioned at the 0/0 corner. In order to layout the whole modeling, you should not select anything in the diagram or select a symbol, which is not a container symbol. Your selection persists after layouting.

Navigate to the menu bar and click *Layout*. This will automatically layout the objects involved in the process. In the meantime, the editor is overlaid by the corresponding message. It is distinguished between satellites and sequence flow.

Satellites: The various satellites associated with an activity, such as roles and documents, are divided into quadrants according to their modeled position. Within this quadrant, the satellite is automatically positioned uniformly depending on the modeling. Furthermore, the edge ports are reassigned here. The arrangement of the edges in EPC diagrams takes place on the right and left side of activities. In BPMN diagrams, the ports are created at the top and bottom of activities.

Sequence flow: Mainly underlying activities are assigned to a column. In the same way, adjacent activities are assigned to rows. Within these rows and columns, the activities are arranged in a straight line using the layout assistant. An activity including satellites is considered as one related object. This affects the height and width of columns and rows. Sequence and message edges between activities are reassigned if necessary.

Note when layouting containers in the diagram:

- If you want to layout the whole diagram with a container in it, the size of the containers is adjusted in addition to the changes described. The containers thus keep a configured distance from the internal elements. When resizing, however, the header side of pools is excluded, so that no configured distance is kept there.

- If a container, such as a horizontal or vertical pool or lane, is selected, the layout assistant takes the symbols within this container into account. The layout of the elements in any container always follows the same rules, while the container size remains unchanged.

This chapter describes the default settings. The layout may behave differently, if the settings to a diagram types are adjusted in administration area of BIC Process Design.

Note: The layout assistant does not support the simultaneous use of horizontal and vertical pools within a diagram.

7.6.8 How can new symbols be layouted automatically?

The layout assistant is permanently activated by pressing *CTRL* -key and simultaneously clicking on *Layout*. The associated icon remains highlighted in the menu bar. When creating new symbols with one click via the mini symbol palette, the symbols are directly routed and placed in the corresponding position.

With *CTRL* and left mouse button, the permanent setting can be deselected again. A single click on *Layout* still corresponds to the *Layout described above*.

Note: The "Undo" and "Redo" modeling features exclude these layout assistant changes.

7.7 Details

This section explains various display settings of diagrams and symbols used in diagrams. These options are each part of the *Details* bar which you can open for a diagram *while modeling*. Click on the *details* button in the top bar of a checked-out diagram and the details bar opens on the right side.
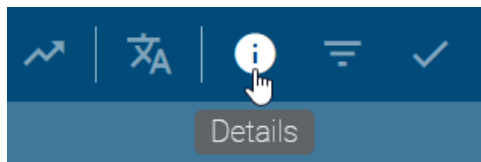
Depending on the administration settings in BIC Process Design the bar can contain the *attributes*, *occurrences* and *the profile*. For more information on the *Details* bar, see the following questions and answers.

7.7.1 How can I view the occurrences of symbols in checked out diagrams?

If you want to display the occurrences of a symbol while modeling, proceed as follows.

Right-click the desired symbol. A context menu opens. Select *Show occurrences*. This opens a bar on the right-hand side, listing all uses of this object.
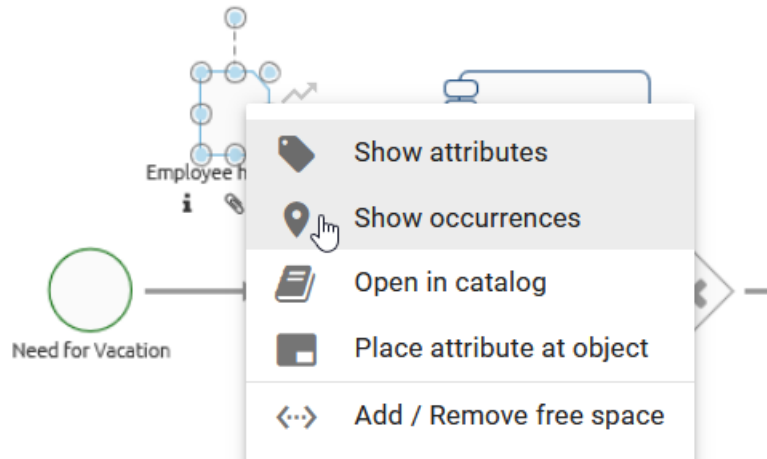
Optionally you can also navigate from the *attribute bar* to the *occurrences* of an object. Select the desired object and click the *Details* in the menu bar. The attribute bar opens and by clicking on the button *Occurrences* represented by a pin, the same list of uses is displayed here.
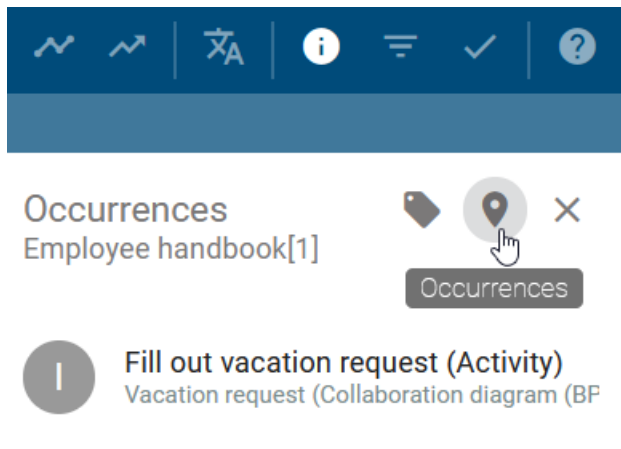
Tip: You can also check a *symbol's occurrences while the diagram is checked in*.

7.7.2 How can I display the profile while modeling?

To view the profile while modeling, follow these steps:
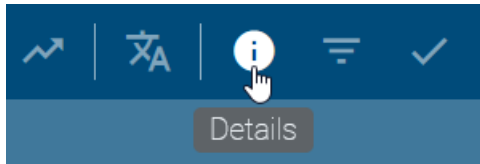
Select the *Details* button in the menu bar to open the right side bar. Then, you can switch to the profile of your diagram via the equivalent button on top.
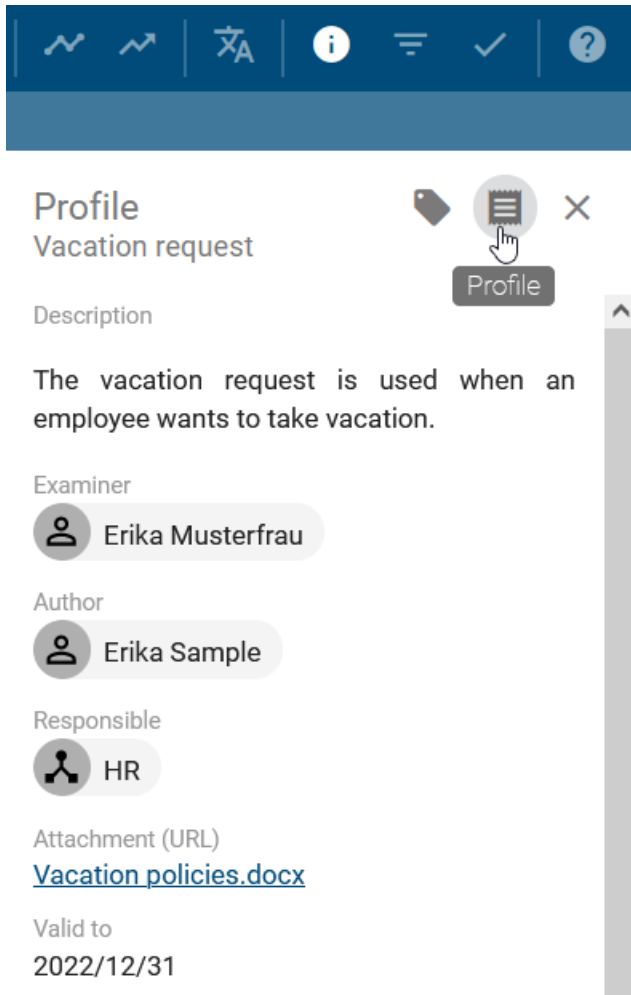
To display the profile of an object, select it in the editor before or after navigating to the profile in the side bar.
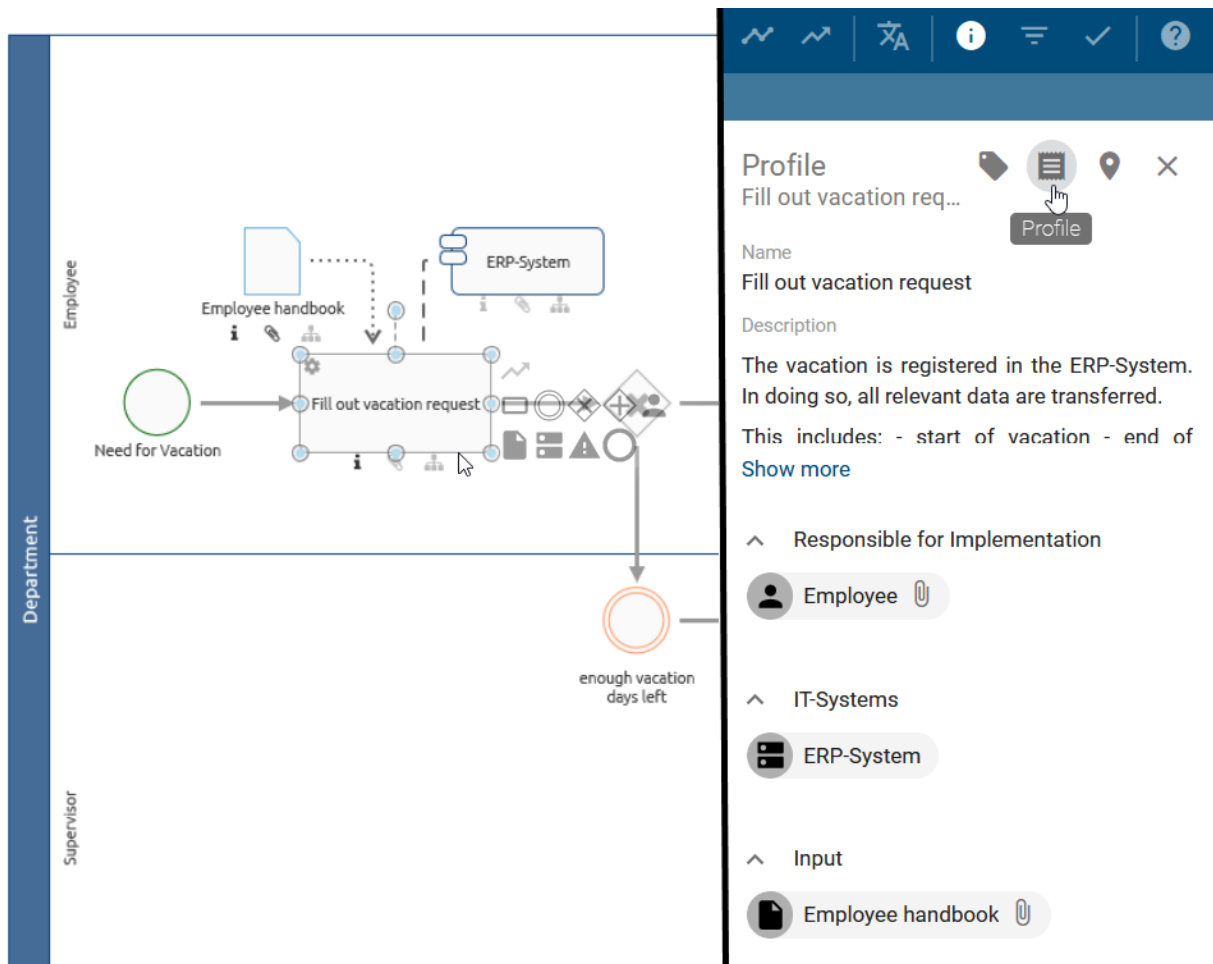
The valid standard configurations for the profile entries are described in the chapter about the *profile in diagram view*.

Click on the *Close*-button to exit the profile view.

Note: Please note that the button *Profile* in the details bar can only be selected if this was specified in administration. Furthermore, the content of the profile may vary depending on the configuration, object type and diagram type.

7.7.3 How can I access attachments of entries in the profile?

If a profile lists objects that have maintained a file or URL in the *attribute "Attachment (URL)"*, they can be accessed directly.

The sorted order of maintained files and/or URLs is alphabetical. If an object is not maintained in your active content language, it will be moved back in the list and labeled as *[no Content]*. If a diagram lists an object with restricted access or if an object differs from a specific stage, it will appear at the end of the list.

Navigate to the *profile* of a diagram or object. If the chip of an entry contains a paperclip, an attachment is maintained. Clicking on the paperclip opens the attachment directly or instead a selection menu if several attachments are available.

7.8 Attributes

7.8.1 How do I display attributes in diagrams?

In the checked-out diagram, you can view diagram or symbol attributes in the sidebar on the right. Note the administration settings in BIC Process Design for the attribute bar in the different stages.

Click on a symbol or diagram and click the *Details* button in the menu bar.
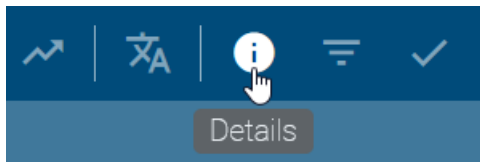
The attribute bar appears on the right-hand side, displaying the diagram type above and the attributes of the currently selected diagram below it.

If you have selected a symbol before or after clicking the *Details* button, the right side bar shows the attributes of the corresponding object. Objects that are "catalog suggestions" or an approved "catalog item", have this additional information in the attribute bar next to the object type.

Attributes

Document Catalog item

Name

Employee handbook

Identifier

Description

B *I* U S̶ ▦, ☰ ☰ 🔗 I̶ₓ

The employee handbook defines all issues that are important for the employees, e.g. the vacation planning or the procedure of a feedback meeting.

Keywords

Decomposition

Attachment (URL)
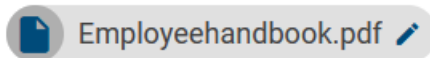
📄 Employeehandbook.pdf ✏

Optionally, you can right-click on a symbol and select the entry *Show attributes* of the appearing context menu to display the attributes of the corresponding object. If you right-click on a free space, you can open the attributes of the diagram.

Activity

🏷 Show attributes

📍 Show occurrences

▭ Create allocation diagram
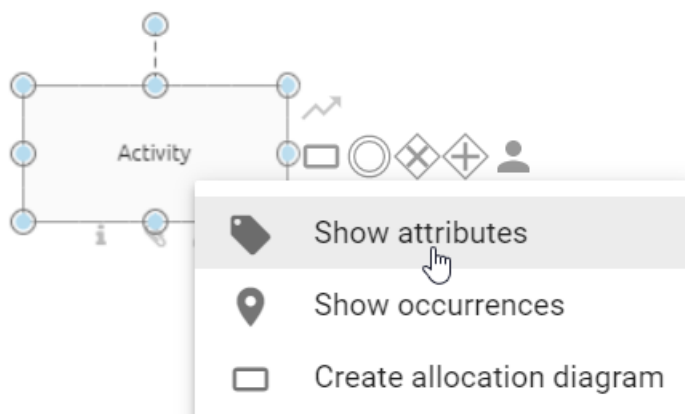
In the attribute bar, all attributes of the diagram or of the selected object are displayed. You can edit the attributes or set a new value if an attribute has not been maintained yet. But you should note the behavior when you *change a*

catalog object. By default, further attribute groups, such as *Governance*, are hidden in the attribute bar. By clicking on the respective heading, you can display those attributes.
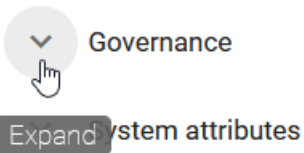
Furthermore, you can *display the occurrences* of a symbol in the opened attribute bar.

7.8.2 How do I create a link to another diagram?

You can place links to other diagrams to create subprocesses of diagrams. These subprocesses allow you to map diagram hierarchies.

Create an activity in a diagram and open the attributes of this activity. Then, in the attributes, click the *Subprocess* attribute. Afterwards insert the name of the diagram you want to save. You will receive a suggestion list of diagrams containing the entered term in the name.

Select the diagram from the suggestion list. The subprocess is saved and is made visible in the diagram by the attribute symbol showing up below the activity.

Note: Variants and *allocation models* can be linked in the same way. Only existing diagrams can be linked as they are added via the suggestion list.

Tip: If you also maintain the process type of the activity as *Call activity*, a subcase in BIC Process Execution will be started for the subprocess.

7.8.3 How can I connect users to diagrams and objects?

The attributes of diagrams and objects can be used to connect to users and user groups. This is possible using the *governance attributes* author, reviewer, responsible, scope, and restricted access for various functions.

Navigate to the appropriate attribute in the attribute bar in the catalog or diagram. Then enter a term and you will get a suggestion list of all users or user groups that contain this term in their name. You can select a suggested user or user group by clicking on it. The corresponding person or organizational unit from the catalog will then be entered in the respecting attribute. Finally, save your changes.

Tip: You can also search for the user's e-mail address. If a user is selected from the list and is not linked to a *catalog* object of the type "person", a new catalog item will be generated with the name and the e-mail of the given user. If more than one person exists with the e-mail address you are looking for, the catalog item found first will be taken by selection of the user.

7.8.4 How can I maintain governance attributes?

You can maintain governance attributes for diagrams and some catalog items. To do this, check out the affected diagram or navigate to the corresponding catalog item and open the attributes. In the *Governance* attribute group, you can use a suggestion list to select users and user groups. The corresponding catalog object person or organizational unit will be set for the attribute, when the user or user group has been selected from the suggestion list. When you save the catalog item or additionally check in the diagram, your changes are taken over. The different governance attributes and their functions are presented below.

Author: Users of the role *Author* only have the permission to edit diagrams if they are entered as author in the diagram attributes. This is possible for both users and user groups. In addition, you can enter authors in governance attributes of catalog items. Then not only creating and editing suggested catalog items is allowed, but registered authors can also edit accepted master data. An author of a published diagram or catalog item is (by default) *informed via e-mail* about a resubmission.
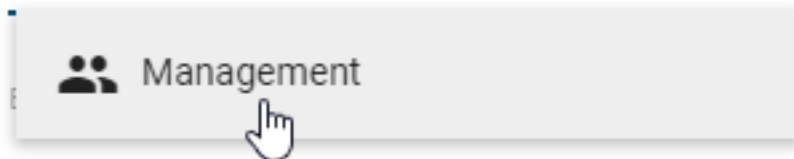
Examiner: Users who are registered in the attribute *Examiner* execute the release step of a publication and will be notified of the pending release step. The examiner role can be assigned to individual users as well as user groups per diagram and per catalog item. Per entry, that means per person and per organizational unit, one approval is required in the examine step to initiate the next workflow step. The first three examiners of a published diagram or catalog item are (by default) *informed via e-mail* about a resubmission.

Examiner
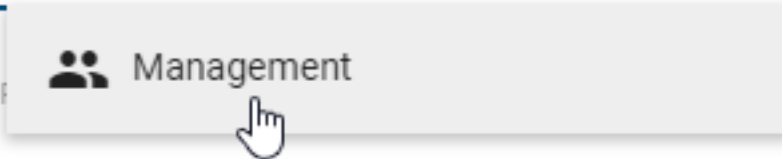
Responsible: A maximum of one user or user group can be entered in the *Responsible* attribute. This entry is required if a catalog item is to be published individually or the diagram is to be published. The responsible user or user group is finally notified at the release step of the publication and can confirm it. Moreover, they receive a notification and a *resubmission task* before the validity period of a diagram or catalog object is reached. The attribute *responsible (resubmission)* can be used instead. In this case, the responsible will receive the *information mail* about the scheduled resubmission.

Responsible (resubmission): The *Responsible (resubmission)* attribute is available for diagrams and catalog items. Either an individual user or a user group can be entered here. The responsible persons then receive the notification and a *resubmission task* before the validity period of a diagram or catalog item is reached. If this attribute is empty, the *Responsible* receives the corresponding task and notification.

Tip: You can also search for the user's e-mail address. If a user or user group is selected from the list and is not linked to a catalog object of the type "Person" or "Organizational unit", a new catalog item will be generated. This will have the name and e-mail of the corresponding user or the name of the user group as name and identifier.

Special retention period (in years): This attribute enables you to define an individual retention period for the archive entries of the concerning diagram or catalog item. The retention period determines for how long an entry is saved in the archive. A general setting can be made in the administration. In case the period of archive entries in *publication* stage should differ for your diagram or catalog item, you can set the desired value here. Maintaining an integer greater than zero leads to an archiving of new entries for the corresponding number of years whereas negative values will be

ignored (i.e. the time set in the administration is applied). If no archive entries should be created for this object (in publication stage), simply enter the number zero.

Hint: Please note that the attribute *Special retention period* is deactivated by default. If it should appear in the governance attributes, it can be activated in the method. However, the special retention period is only applied to a diagram or catalog item if the general archiving has been activated for the corresponding type in the administration.

7.8.5 How do I attach files to objects?

Modelers have the option to upload their own files (up to max. 64 MB) and link them to an object in a diagram. The file can optionally depend on the users' language settings.

Navigate to the attributes of the object to which you want to attach a file. In the *Attachment (URL)* attribute, you can select a file from your folders by clicking on *Upload file*. BIC Process Design supports the following file formats:

- .ods, .xls, .xlsb, .xlsx, .xltm

- .pdf

- .potm, .potx, .pps, .ppsm, .ppsx, .ppt, .pptx

- .doc, .docm, .docx, .dot, .potm, .dotx, .odt

After you selected, a dialog window opens where you can rename your file. Via the checkbox *Upload for all languages* you have to decide if the attachment is intended for all languages (select checkbox) or only for your current content language (unselect checkbox).

Click on *Upload file* to confirm your input and to attach the file to the object as a chip with the name of your input.

In case you uploaded an attachment only for your current language, you can *change your content language* and add an attachment for other languages as explained before. A clear administration of language dependent attachments is also recommended *in translation mode*.

The uploaded file can be downloaded by other users by clicking on the attribute entry whereas the linked file is depending on the users' content language. Another option for downloading these files is by *providing a link* for other users. Further options for downloading these files are also provided in the *Profile* and in the Matrix view, for example for inputs and outputs. Note that documents are *stamped in the process of publication*.

Optionally you can also insert your file into the attribute field *Attachment (URL)* of an object by using the drag & drop function and name it.

If you want to remove the attachment, click in the input field of the attribute, use the arrow keys to navigate to the chip (until it is highlighted) and press the backspace key on your keyboard to delete it.

Tip: URLs like links to documents on network drives can also be added as attachments.

Note: "/" characters cannot be included in the file name and are automatically removed when uploading. Moreover, the same URL cannot be added twice.

7.8.6 How can I maintain language dependent attachments?

If you *upload a file*, you have the choice to link this file for your current content language or for all content languages which are selected in the administration. The translation mode offers a clear overview of the attribute *Attachment* compared in all content languages.

You can enter the translation mode by clicking the option *Diagram translation* in the menu bar.

By a click on *Upload file* in the column of an arbitrary language, you can select and open a file as usual.

Via the checkbox *Upload for all languages* you can decide whether you want to link the file for all or only the selected language.

Please enter a name for the file

Attachment01.txt

✓ Upload for all languages

CANCEL   UPLOAD FILE

The function *Edit* enables you to change or rename the attachment also in translation mode.

English (English)

Name (EN)

My diagram

Description (EN)

Keywords (EN)

Attachment (URL) (EN)

Attachment02.txt ✏
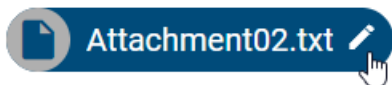
Edit   ⬆

Note: If you import a diagram containing an attachment that is not linked to languages, the attachment is maintained in every content language. Therefore no data will be lost. In case you would like to link the attachment to only one content language, you can adapt this attribute afterwards, for example *using the translation mode*.

7.8.7 How can I rename attachments (URLs)?

If the attribute *"Attachment (URL)"* is maintained, you can rename the corresponding attached file or URL language-independently. Navigate to the attachment, represented by a chip, in the attributes of the desired object. At the right edge of the chip you can select the option *Edit*, represented by a pen symbol.

This will open the dialog *Edit title*. In the field *Attachment (URL)* the URL, or the BIC Process Design-internal file path, is displayed but cannot be edited. In the *Title* input field, you can rename the attachment. Click on *Save* to take over the new title and display it in the chip.

If you do not want to save your changes, click *Cancel*.

7.8.8 Which functions are available for the attribute description?

Each symbol and diagram has a description attribute. When you edit the description attribute for an object, some object types show a description icon by default.

Click on the description attribute of a symbol (e.g. an activity). Various formatting options are available for the description attribute. These are:

- Bold
- Italic
- Underline
- Strikethrough

- Table

- Numbered list

- Bulleted list

- Add links

- Remove format

- Add AI-generated description

Description

The **text of the description field** can be formatted.
It is also possible to include a link here.

Column 1	Column 2
The rows and columns change dynamically according to the context.	You can format this text aswell.

Set the formatting according to your requirements and finish the editing by clicking in the diagram.

Add a link:

You have the possibility to link documents or URLs within the description field. To create a link, click on the link symbol.

Description

B *I* U S ⊞▾ ⅟☰ ☰ 🔗 Tₓ

A dialog opens where you can enter the link and optionally a title, i.e. a text which is displayed.

You can also mark a piece of text in the description field and click on the link symbol to fill the title automatically and attach the link to the existing text. In the dialog, you have two further options. First, you can choose whether the link is opened in a new tab (activate checkbox) or in the current tab when it is selected. If you select the second option, the default protocol `http://` is used for your URL. Deselect the checkbox in case you use another protocol, like `mailto://`. Both options are initially activated. When the configuration is implemented according to your wishes, select the button *Insert Link*. Your configuration will be saved and the dialog closes. To discard the data instead, close the dialog via the cross button in the upper right corner.

The title of the link is displayed in blue color afterwards. If you select it once, a pop-up will show the link and two buttons. Selecting the right one removes the link (the displayed text remains). The left button can be used to re-open the configuration dialog for further editing.

Table:

In order to insert a table, click the table icon to open a selection field. You can define the size of the table by hovering over the grid and confirming the desired columns x rows numbers by a click. The table is pasted into the description field. If you mark the table, you can move it to a desired place using drag & drop. To adapt the formatting of text inside the table, simply use the functions mentioned above. If you place the cursor in a cell, further functions are displayed to insert new rows and columns. You can also delete the current row/column. The bin icon enables you to remove the whole table. The table is removed instantly after selecting this function and there is no further confirmation necessary. Therefore, be sure about the deletion before selecting the function!

Note: Please note that if you use a description attribute that contains an HTML table and place it on the modeling

canvas, the table borders will not be visible. In addition, when copying a table from PowerPoint, it may appear twice, once without formatting and once with formatting.

The maintained description attribute is indicated by an **i** under the symbol. Descriptions of your process steps and other symbols are displayed in a tooltip as soon as you move your mouse over the highlighted information icon of the object.

If you view descriptions of checked-in diagrams that contain more than 3 lines, they are displayed collapsed by default. You can see the entire description by clicking on *Show more* and minimize it by choosing *Show less*.
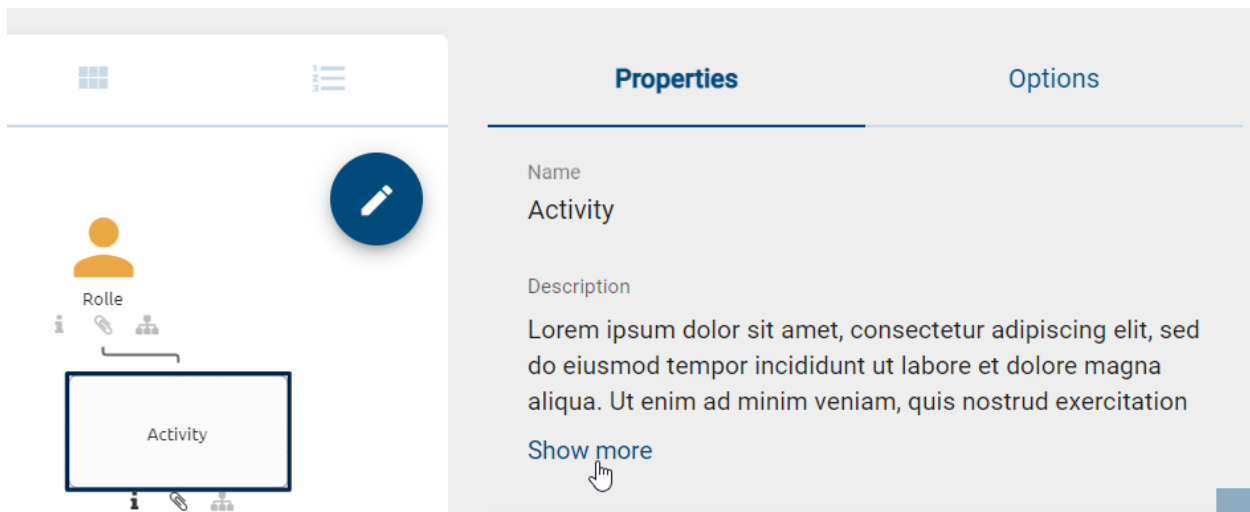
Note: For some object types the icon for maintained description attributes is not visible by default. It is possible to change this in the formatting options for a selected symbol.

Hint: The table formatting is not fully supported in exports. If you use a table in a description attribute, the content is still copied to the document as a table and appears in the defined formatting. But the table is displayed without a frame and border lines of the rows and columns.

7.8.9 How can I generate a description from AI?

Starting from version 7.13, the feature to generate an AI-generated description is available. For this, you need to be in the local workspace and check out the respective diagram.

To use this feature, the diagram or entity in question must have a name and not contain a description. Subsequently, the button for generating an AI-generated description will be activated.

After clicking the button, you will receive a complete description of the diagram or entity within seconds, which you can adjust as needed at any time. Subsequently, the button deactivates and can be used again if the description is empty.

Hint: This function is performed by *Arty*, our AI Modeler. It is part of the AI Modeler package, which requires a separate license.

7.8.10 What is a mandatory attribute and how can I detect it?

In the attribute tab, an asterisk marks a mandatory attribute. This applies both to the attribute tab in the diagram view and to the object details in the catalog. Entering such an attribute is mandatory to publish the diagram resp. catalog object. If these are not maintained, you will get a corresponding message in the application when initiating the release workflow. If you create or edit an entity, you do not have to maintain the mandatory attributes yet. Attributes can be defined as mandatory in the method.

For example, the attribute "Responsible" always is a mandatory attribute.

Note: The following exceptions will be applied to mandatory attributes that are multi-valued or language localized when the release workflow is initiated. The workflow engine checks if at least one value has been maintained for all mandatory multi-value attributes. There is no further check about the amount of values. The check for language localized attributes is successful if a value has been maintained for at least the default language of the tenant. If this attribute value has not been set, the initiator of the release workflow receives a notification about the missing translation in the diagram resp. catalog object.

7.8.11 What are occurrence attributes?

If you have multiple copies of an object, typically, the value of an attribute (for example, the name of the object) is the same for each of these copies. In contrast, the values of occurrence attributes can be set independently for each copy. If an object is copied, initially each attribute value is identical to the original value. These can, however, be subsequently modified without the other copies / the original being altered.

BIC Process Design uses a small symbol to indicate whether it is an occurrence attribute (see figure below).

- Occurrence attributes are defined in the method and cannot be defined in the application itself.

- If the occurrence attribute has to be of identical type in all variants of the object, then it must be maintained individually for each object.

- The contents and the identifiers of the occurrence attributes are not included in the catalog.

7.8.12 How can I set the access restriction for objects?

You can use the *Restricted access* attribute to limit an object for specific users. To do this, you must edit the attributes of the object *in the diagram* or *in the catalog*. This has an effect if the object exists in the catalog. Only members of the selected user group, registered users and *governance participants* can see the object in the catalog or reuse it via the suggestion list. The restrictions apply regardless of the user role, so administrators can also be excluded. If the object attribute *Restricted access* is empty, there is no access restriction.

> **Warning:** Reuses of the catalog items with access restriction are still visible in diagrams. This applies to the entire entry with all attributes, like attachments. Moreover, this data is for example also part of a diagram version in the archive.

7.8.13 What are system attributes?

System attributes give the user information about the creator, the person who last edited the diagram and the associated timestamps of the diagram. These attributes are generated by the system and users can only read them.

You can view the systems attributes while modeling a diagram as follows. Open the *Details* by clicking on the button in the menu bar. If you scroll down the tab, you can see the associated information by clicking on the heading *System attributes*.

∧   System attributes

Created by

Import

Created date

1/18/21 4:16:01 PM

Last modified by

Max Mustermann

Last modified date

2/15/21 10:00:28 AM

Here you can find help to view the system attributes outside the edit mode.

Note: As a user with at least *Reviewer* rights, you will find the *number of diagram visits* in the system attributes when viewing the diagram in *publication*.

Note: When the diagram is published by the workflow engine, the system attribute "Last Modified By" of the diagram is set to "Workflow" in all stages.

7.9 BPMN Collaboration

This chapter explains the modeling of a BPMN collaboration diagram.

7.9.1 How do I work with pools and lanes?

In contrast to other objects, lanes are not dragged from the symbol palette into the editor, but can be generated via a pool. This prevents lanes from being loosely modeled (i.e., outside of pools), which is not allowed according to the BPMN standard of OMG.

Create a pool:

Open your BPMN diagram and check it out. Afterwards, use drag & drop or stamp mode to model a pool from the symbol palette.
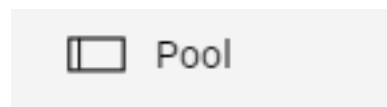
A selection menu for the pool opens. In this case, you may decide whether the pool will represent a *Role* or an *Application*. Please note that this decision **cannot be changed afterwards**.
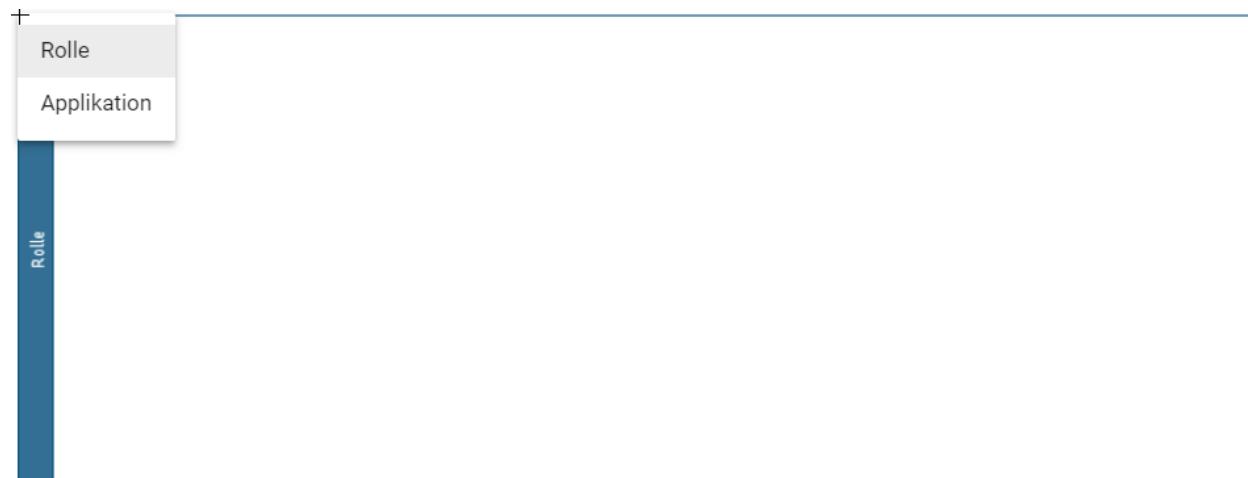
Create a lane:

Select the pool located in the editor (a further subdivision of lanes can be made accordingly). There are some icons at the top right-hand side of the object.

If you click on the two horizontal strokes, two lanes are generated in the object.

Select a lane with a left-click. If you click on the arrow pointing upwards or downwards on a horizontal line, you can insert additional lanes above or below.

To change the position of the selected lane, click on the up or down arrow. The lane is moved up or down.

Note: A pool which is containing lanes can be selected by clicking on the blue header.

7.9.2 How do I change watermarks of pools and lanes?

Watermarks are visible by default in the background of pools and lanes. These watermarks are repeatedly shown from a certain width of the symbol and automatically display the name of the pool or lane in the selected content language. You can adjust the watermark yourself as follows.

Navigate to the format settings via the *symbol palette* by selecting the third entry in the symbols menu.
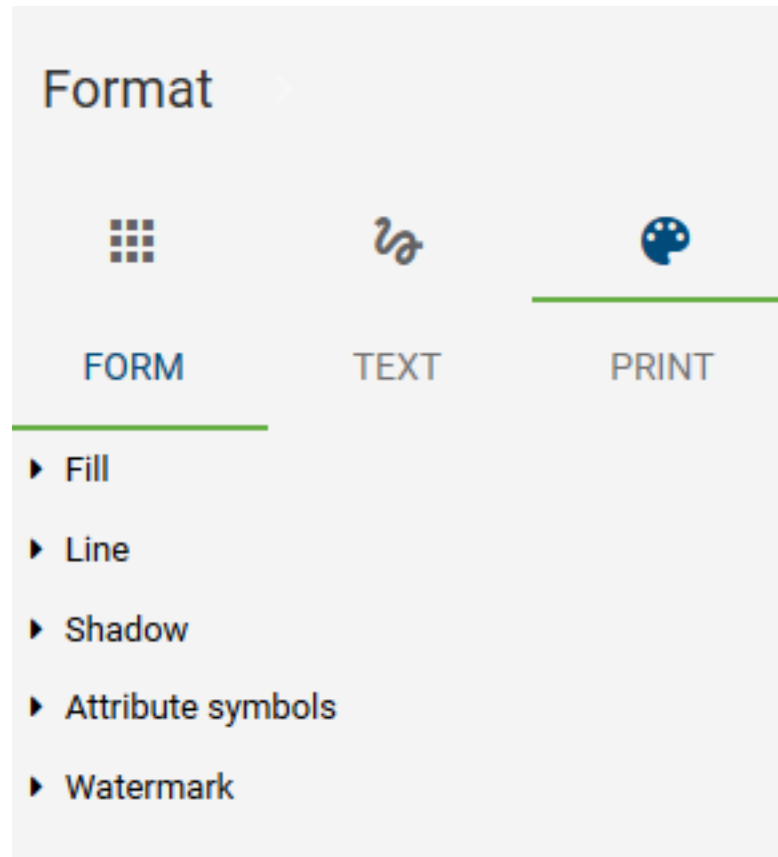
Select the pool or lane including the watermark you want to edit. Click the menu button *Form* and open the entry *Watermark*. There you can remove the watermark by deselecting the checkbox *Visible* or you can rename the watermark and adjust it to your needs. Customization options include font size and color, as well as the location of the watermark within the pool or lane.

Format

FORM   TEXT   PRINT

▶ Fill

▶ Line

▶ Shadow

▶ Attribute symbols
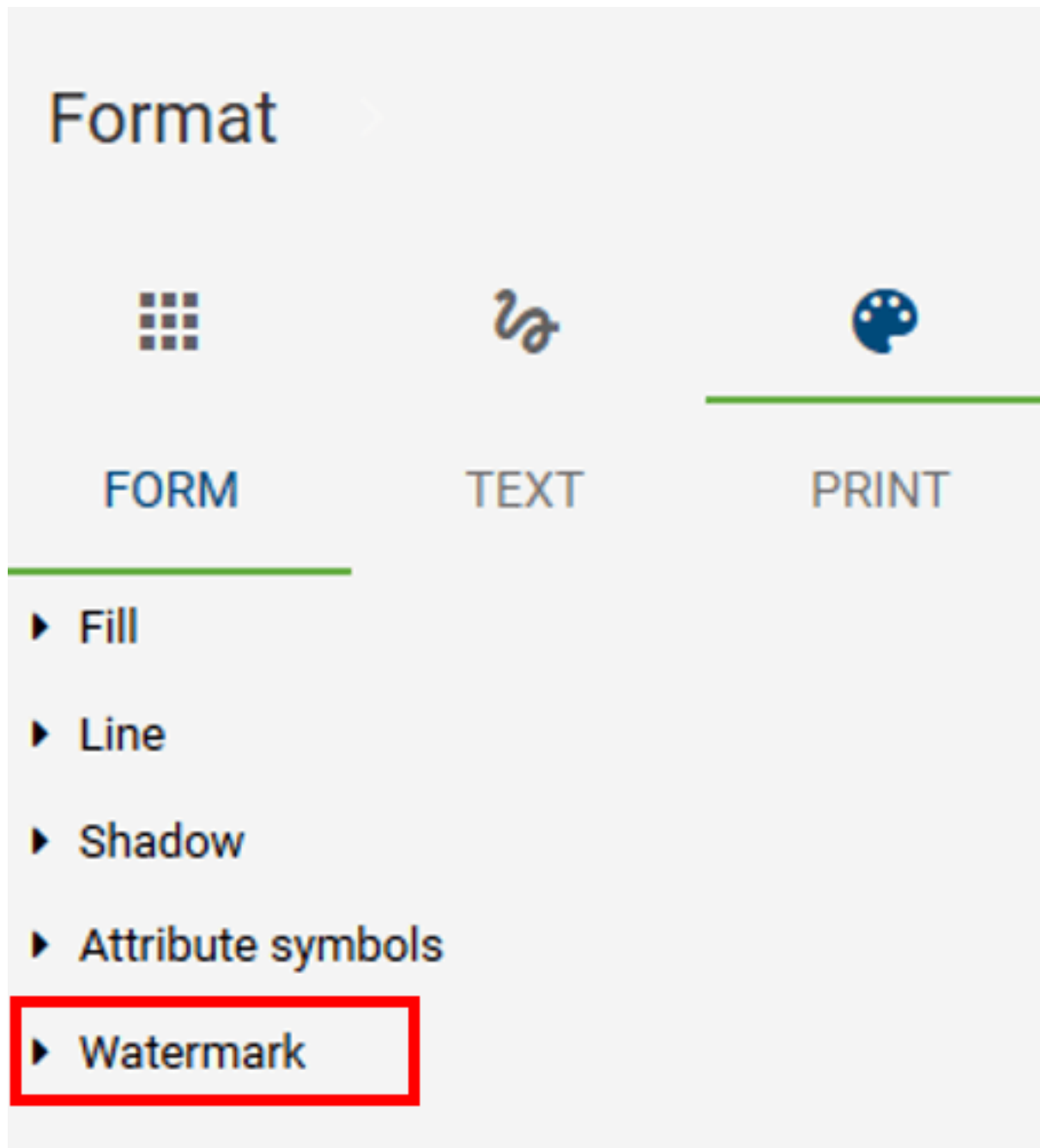
▶ Watermark

Note: If you rename the watermark itself in the symbol palette in the *Text* field, it will no longer initially display the name of the object. To have the name of the object automatically adopted again, you only have to remove your input in the symbol palette under *Text* or leave the input field empty.

7.9.3 How can I model inside and between pools?

As soon as you want to connect two pools, the connection type *Message Flow* is selected automatically. This applies also for connections between activities and connections between activities and events, which lie in different pools.

If those objects are connected within a pool the connection type *Sequence* is automatically selected.

In addition, connections can be modeled using the *mini symbol palette*. When creating a new object from the mini symbol palette of an existing object that is in the pool, the following is considered: If the new object is placed outside the pool and not in another pool, the pool is automatically enlarged. Thus, the pool contains the new object, which is connected to the other object via the type *Sequence*. If the new object is stored within another pool, no connection is initially created. This can subsequently be modeled again as a *Message Flow* via the *connection symbol*.

Please note that the connection type does not change by moving an object from another pool into the pool of the connected entity. This may cause *validation errors*.

7.9.4 What kind of task types exist in a BPMN diagram?

You have the possibility to change the activity type of an activity in your BPMN diagram. This provides two advantages. Firstly, the selected activity type will be displayed with an icon, which makes your diagram more readable. Secondly, BIC Process Execution allows you to provide templates for the specific types that can reduce the workload of your users.

If you want to change the task type of an activity you need to select the corresponding activity first. After that go to its *attributes*.
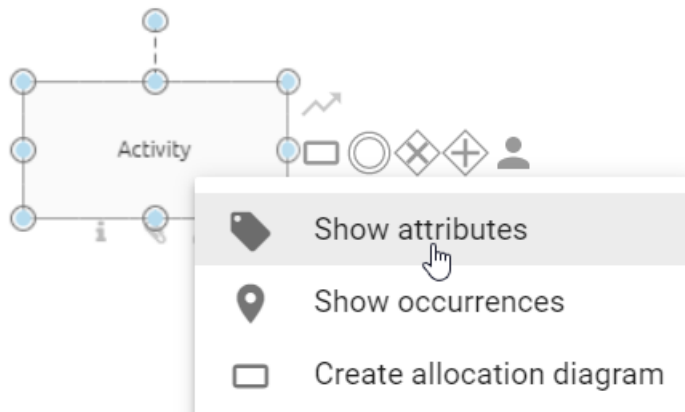
In the group *Typing* you can change the attribute *Task type*. To do that change the type as desired using a selection menu. It opens by a click on the marked arrow. The changes are also noticeable at the object itself through different icons that show up.

You can choose from the following options. But be aware that some template editors only work in combination with BIC Process Execution. Therefore your process must be marked as executable as well.

- **None**: This is the default type for an activity. It does not allow the creation of any additional templates.

- **Send**: This task type defines that an user has to send a message. BIC Process Execution allows the creation of an e-mail template and the automatic sending of emails. It is symbolized by a filled envelope.

- **Receive**: This task type expects that your user will receive a message. It is symbolized by an envelope.

- **User**: A user task is a task which will be executed by one of your users (if necessary with software support). BIC Process Execution allows the possibility to define own user forms, where a user can input or calculate values and get output values.

- **Manual**: The task type manual is characterized by the fact that it must be performed manually by a user. Therefore, it has no form of integration with BIC Process Execution. It is symbolized by a hand.

- **Business Rule**: A business rule allows you to define certain rules and conditions to calculate an output value or to set a variable to a certain value. *This chapter* gives you more details about how to use the DMN editor. This type is symbolized by a table.

- **Service**: You can use a service task to use REST Calls in your process. This means you can integrate other software components or web services with BIC Process Execution. The symbol of this type is a gear.

- **Script**: With the help of a script task you can include your own scripts so this process step can run automatically. It is symbolized by a computer chip.

Tip: Further information about the usage of the different task types can be found in the user documentation of BIC Process Execution.

Note: In addition to the *Task type*, you also have the option of further typing your activities using the attribute selection fields *Process type* and *Multiple Instance Type*. With the *Process type* for example you can define a call activity. Through the function of *Multiple Instances Type*, you can, for example, mark activities as parallel multiple instances.

7.9.5 How can I model a dynamic due date for my activities?

You can model your activities with a dynamic due date. This attribute defines when the corresponding task should be completed (with respect to the case start).

To do that, go into the *details* of the activity and there go into the attribute group *automation*. Here you can find the attribute *Process time in days*. You can use the due date in BIC Process Execution.

∧   Automation

Process time in days

_____

Here you can enter how many days after the start of the task, it is due. BIC Process Execution calculates the correct due date automatically.

_____

Note: You can only input full days. If you do not give any input in the field, the activity will have no due date.

_____

7.9.6 How do I change the event type in a BPMN diagram?

Select the event whose event type you want to change by a right click. Display the attributes.

🏷️   Show attributes

📍   Show occurrences

🗔   Place attribute at object
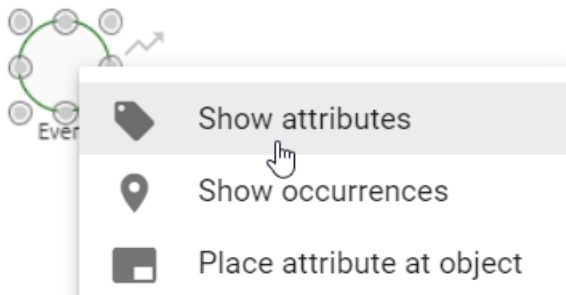
In the *Event type* attribute field, you can change the type as desired using a selection menu. To do this, click on the marked arrow. The changes are also noticeable at the object itself through different icons that show up. There are different event types available for the start, intermediate and end event, according to the OMG standard.

∧   Typing

Event type 📍

Event type   ▾

7.9.7 How do I attach an Intermediate Event to an Activity?

In BPMN diagrams you have the possibility to attach an intermediate event to an activity:

First, you need an activity. Then, drag & drop the intermediate event that you want to attach over the edge of the activity. The appearing orange edge means that you can attach the event to the activity. One half of the intermediate event is always placed inside the activity.
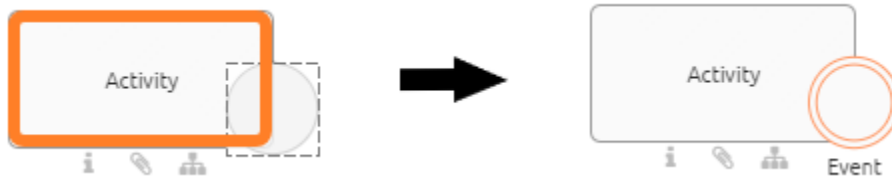
If you want to remove the intermediate event from the activity, simply drag & drop it back into the editor.

Note: When you move or change the size of the activity, the intermediate events remains attached to it.

7.10 DMN Editor

The DMN Editor gives you the option to add business rules to your diagram. Based on these rules, business processes can determine what action should be taken in different decision making situations.

Note: Decision tables can be created for objects of the type decision or for activities.

7.10.1 Where do I find the DMN Editor?

In the relevant diagram, navigate to the decision or activity for which you want to set rules. The object must have the *task type Business Rule*. You can find the *Task type* in the attribute group *Typing* within the *attributes* of the corresponding object.

To run the DMN editor open the context menu of the corresponding object with a right click on its symbol. Select the entry "Open DMN editor".
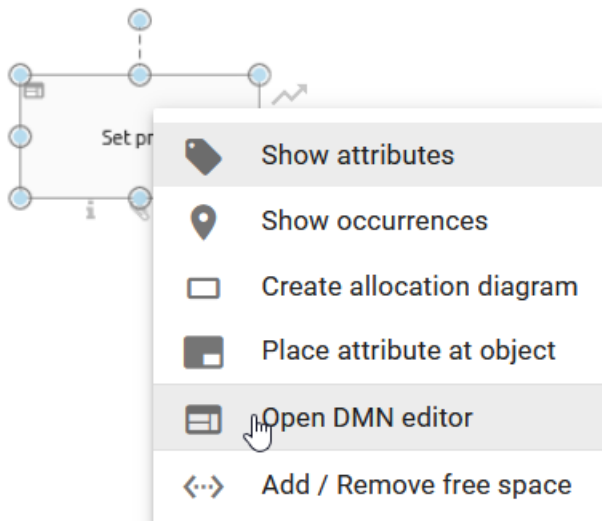
Alternatively, you can open the editor by selecting the activity and choosing *Editor* in the *Details* menu. There you will find the button *Open Editor*. Select it and the DMN editor will be opened.

The DMN editor opens in the form of a table. Here you can set and edit rules, input and output values. Alternatively, you can *import* whole decision tables. To get back to your diagram choose the option *Save* in the top right corner if you want to save your changes. If you do not want to save your changes select *Cancel*.

7.10.2 How is the DMN editor structured?

The available functions of the DMN editor are arranged within a table. The table can be divided into the following sections:

1. *Hit Policy*: Here you can see the selected *hit policy*.

2. *Input/Output*: The column *Input* includes all possible input values, which should be considered by the user. Analogously, the *Output* column returns the respective output values of the defined rules.

3. *Rules*: In this section you will find all *decision rules* based on which the respective decisions are later evaluated.

Figure: The DMN editor can be divided in the sections hit policy (1), input/output (2) and rules (3).

7.10.3 How can I change the selected hit policy?

With the help of the hit policy you can determine how your decision rules will be executed. You can change the policy with the following steps:

Navigate to the respecting business rule and *open the DMN editor*. Then, click on the field which displays *the actual hit policy*.

A list opens, that contains all available policies. Here you can select the desired hit policy.
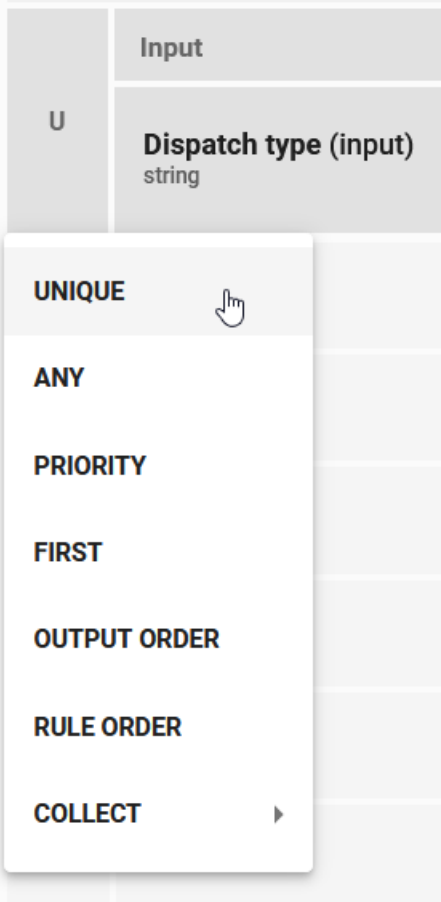
7.10.4 Which hit policies exist and how can I use them?

With the DMN-Editor you can create rules that may overlap. Below you can see an example of that. Hit policies are used to determine which output shall be returned.

A distinction is made between hit policies that return only one value and those who can return multiple values.

If you want only one output out of your decision table, you can use the following hit policies.

- *UNIQUE*: The rules are not allowed to overlap. Only a single rule can be matched and return its output.

- *ANY*: Rules may overlap, but if they do they have the same output. Any match can be returned. If the outputs are not the same there will be an error while using the decision table.

- *PRIORITY*: This hit policy is currently not supported.

- *FIRST*: Rules may overlap. If they do, the first rule who matches returns its output. That means that the order of the rules in the DMN-Editor is important.

If you want to get more than one output, you can use the following hit policies.
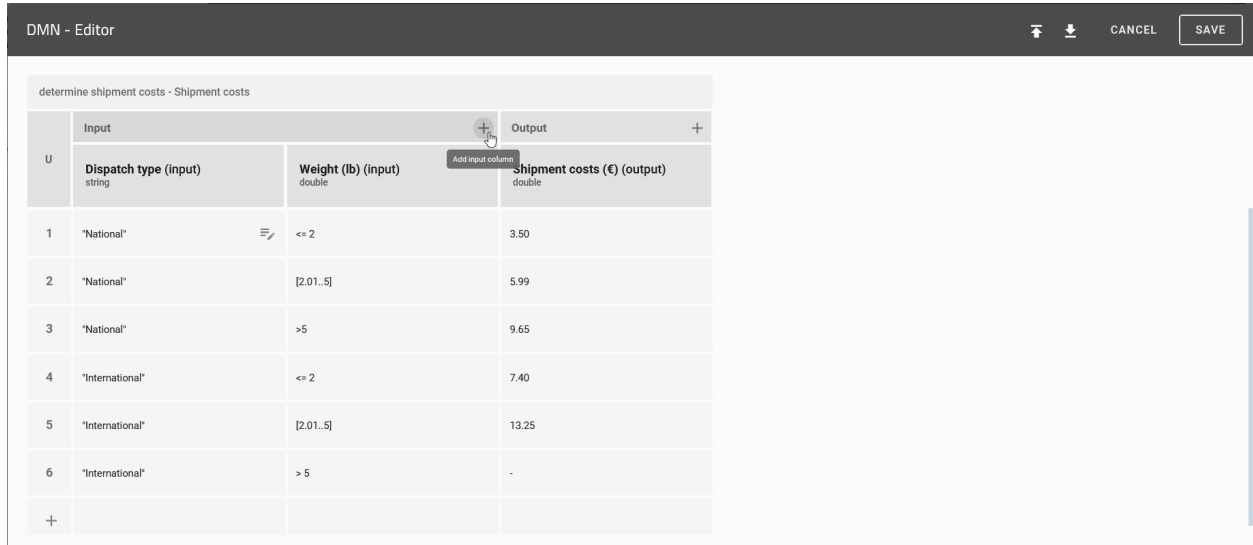
- *OUTPUT ORDER*: This hit policy is currently not supported.

- *RULE ORDER*: All outputs of matched rules will be returned, in order of the rules in the DMN-Editor. That means that the order in the DMN-Editor is important.

- *COLLECT*: All outputs of matched rules will be returned in an arbitrary order. Optionally, you can add an operator to manipulate your result:

- *no aggregation*: All values will be returned.

- *sum*: The sum of all numeric outputs will be returned.

- *min*: The smallest value of all numeric outputs will be returned.

- *max*: The biggest value of all numeric outputs will be returned.

- *count*: The number of rules matched will be returned.

7.10.5 How do I add input and output values to my decision table?

If you want to use additional input or output values for your decision rules you can add them to your decision table by executing the following steps:

Open the DMN editor of the respecting activity.

Click on the plus button next to *Input* or *Output*, within the *section "Input/Output"* to add a new input or output value to your table. The new input/output value then appears in the corresponding column.

7.10.6 How can I edit the input values?

Within the decision table, the properties of your input values can be edited comprehensively for all decision rules. To change these properties *open the DMN editor* of the desired object and then click on the input value in the *"Input/Output" section*. A dialog box opens in which you can adjust the selected input value.

You can edit the following properties:

- *Label*: Here you can specify the name under which the respective input value is displayed in the *attributes of the object*. If you do not specify a label, it gets automatically generated (e.g. Input1).

- *Input variable*: As soon as you evaluate input values they are stored in variables. These should have a unique identification for further processing by the DMN engine. The identification is defined within the property *Input variable*. Be aware that for the value of the *Input variable* only a combination of the following characters is allowed: lower- and uppercase letters, underscores and numbers. Numbers are only allowed as subsequent characters. If no value has been set it is automatically generated by the DMN editor. This generated value is based on the given value set in the property *Input label*. You also can use pre defined process variables here.

- *Expression*: This property allows you to define expressions for each input value. As a result, the input values of the decision rules can be additionally specified and changed.

- *Data type*: With the drop-down menu you can specify the data type for the respective input value. You can choose from the following data types: *string*, *boolean*, *integer*, *long*, *double* and *date*.

- *Predefined values*: You have the following options for input values of type String: Enter strings in the *Define new value* field and add them to the list of predefined values using the *plus icon*. Existing list entries can be deleted via the corresponding *trashcan icon*. Finally, this list serves as a suggestion list for possible input values for the *evaluation of the decision*. The predefined values can therefore reflect the cells entered in the *section*

"Rules" for the respective input. Be aware that this list is only a suggestion list. Users can still enter different input.

Edit input

Label
Dispatch type

Input variable
dispatch_type

Expression

Data type
String   ▾

Predefined values

Define new value   +

National

International

CLOSE

After you have completed your changes, you can save them by clicking the *CLOSE* button.

Note: You can use the variables defined here in other activities, e.g. as a process variables in BIC Process Execution.

7.10.7 How can I edit the output values?

Within the decision table, the properties of your output values can be edited comprehensively for all decision rules. To change these properties *open the DMN editor* of the desired object and then click on the output value in the *"Input/Output" section*. A dialog box opens in which you can adjust the selected output value.

You can edit the following properties:

  • *Label*: Here you can specify the name under which the respective output value is displayed in the *attributes of the object* after the evaluation of the input values.

- *Output variable*: As soon as you evaluate the decision rules, the output values are stored in variables. These should have a unique identification for further processing by the DMN engine.

- *Data type*: With the drop-down menu you can specify the data type for the respective output value. You have the option to choose between the following data types: *String*, *Boolean*, *Integer*, *Long*, *Double* und *Date*.

After you have completed your changes, you can save them by clicking on the *SAVE* button. Click on the button *CANCEL* to discard your changes.

Note: Possible functions of the property *Output Values* are currently not supported.

7.10.8 How do I delete input and output values from my decision table?

To remove an input or output value, execute the following steps:

Open the DMN editor of the respective activity. Choose the Option *Delete column* in the column you want to delete. This option is displayed with a *trashcan-icon*.

Note: Note that there must always be at least one input or output value for each decision table. If, for example, there is only one input value, it cannot be removed from the table.

7.10.9 How do I administrate my decision rules?

Within *the section "Rules"* of the DMN editor you will find all decision rules for this decision. Every row represents a rule. It is defined by the specified input and output values. You can change these values with a click on the cell, that contains the value you want to change.

You can use the following functions to administrate the the decision rules:

Add row

Through a click on the plus symbol under the last row you can add a new rule to your table.
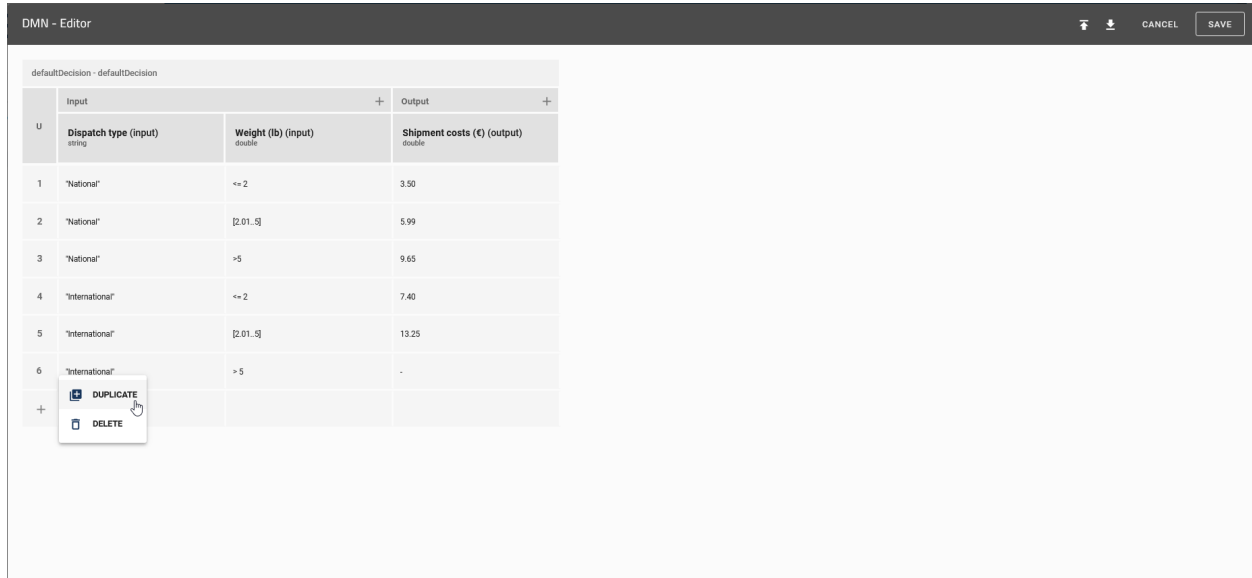
Duplicate row

For easier handling, you can also duplicate entire rows. To do so, click on the number of the rule you want to duplicate, then select the option *Duplicate* from the context menu.

After that, a new rule will be created under the selected row. The new rule has the same values as the selected one.

Delete row

To delete a rule, click on the number of the respecting row and select the option *Delete* in the context menu. The line then disappears from the table.

Note: The semantics of the defined values are based on the DMN standard FEEL ("Friendly Enough Expression Language").

7.10.10 Where can I use the decision tables?

To use a decision table, navigate to the details of the respecting object and click on the *Decision* button.
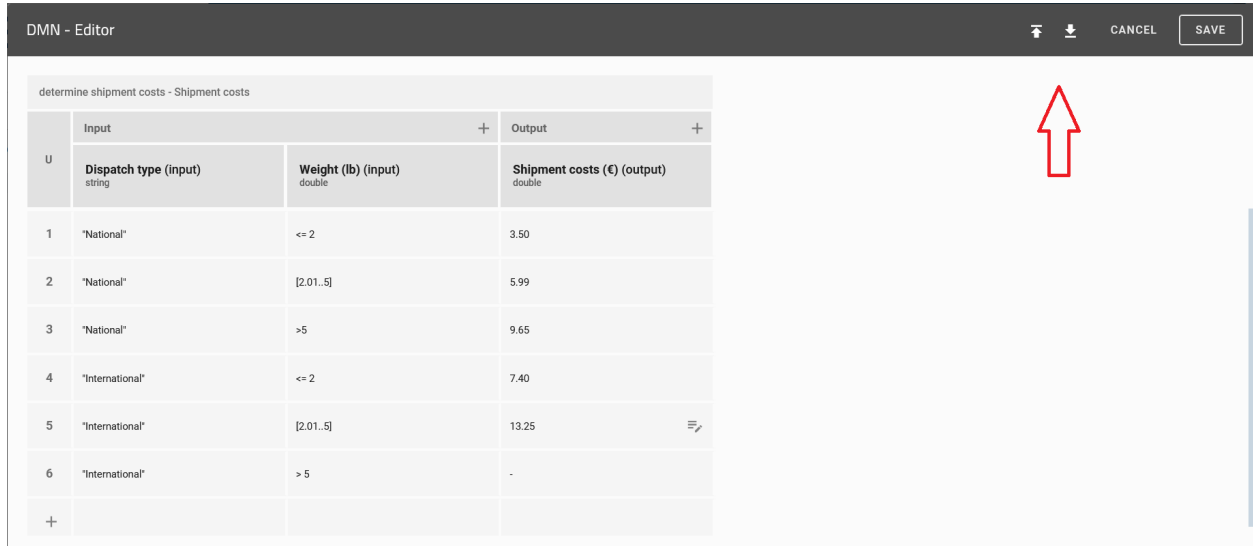
Here you can specify the specific input values. If *predefined values* have been maintained previously, a suggestion list appears when clicking on the respective input field. Click on *Evaluate* to start the evaluation. The results will be displayed below the input values.

Note: When entering the values within a text field, pay attention to the capitalization!

7.10.11 How can I import/export decision tables?

Using the DMN editor, you can import existing DMN tables or export DMN tables from BIC Process Design. Both options are explained below. *Open the DMN editor* of the activity

Choose the option *Import* or *Export*.

Import

If you select the *Import* option, a dialog box opens in which you can select the desired file. By clicking on *Open* the file will be imported afterwards.

Note: Note that the file, which should be imported, must be a .dmn file.

Export

Select the option *Export*. Your table will be exported as a .dmn file ans automatically downloaded.

7.11 Validation

7.11.1 How can I validate my modeling?

You can determine whether your modeling is valid for the settings selected by the administrator. To do this, open the *Validation* tab from the menu bar.
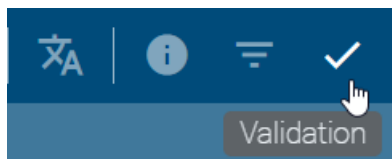
You can see a list of *unapproved* or *not published* catalog items regarding this diagram or *entities for which check-in is prohibited* in the right sidebar. If *OCL rule violations* or *invalid sequence flows* are existing in the diagram, the corresponding list is displayed here, too. In addition, catalog items will be displayed if their *Valid to* date is reached. In the diagram, when clicking on a list entry, the associated symbols are highlighted in color. Furthermore, you can

collapse the lists by clicking on the list header, which also shows the number of entries. At the top right you can *Close* the validation bar.

7.11.2 How do I handle not allowed catalog suggestions?

As long as some inadmissibility is displayed in the validation list *Not allowed catalog suggestions*, you will be not able to check in the diagram. The affected symbols that are additionally marked red in the validation should therefore be linked to an existing catalog items via the *suggestion list*. If no suitable catalog item exists, you can remove the symbol from the diagram. On the other hand, users can create a suitable new catalog item with the rights of an editor. As soon as no more inadmissibility exists after saving, check-in is possible.
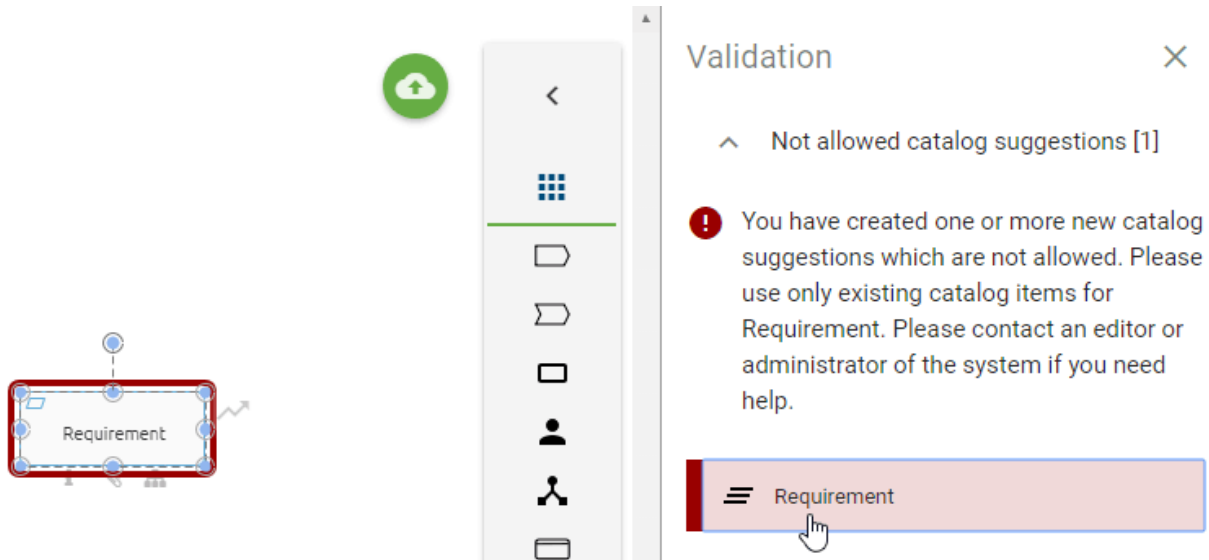
Note: Users who have the appropriate permissions can still *create objects* in the catalog for reuse in diagrams.

7.11.3 How do I deal with unapproved catalog suggestions?

In the validation you can see the list *Used catalog suggestions*. Entities in the opened diagram are listed here if they are not yet accepted in the catalog. This applies to newly created, existing symbols or symbols that are linked to catalog items via attributes. When the validation bar is open, modeled entities are listed in yellow and marked in the editor by clicking on the entry. Entities, that are accepted in the catalog but are linked to unaccepted entities in the attributes, are also marked. It is indicated by the addition *Object attribute* in the list entry. If this behavior also occurs in the diagram attributes, the listed entity is labeled with *Diagram attribute*.
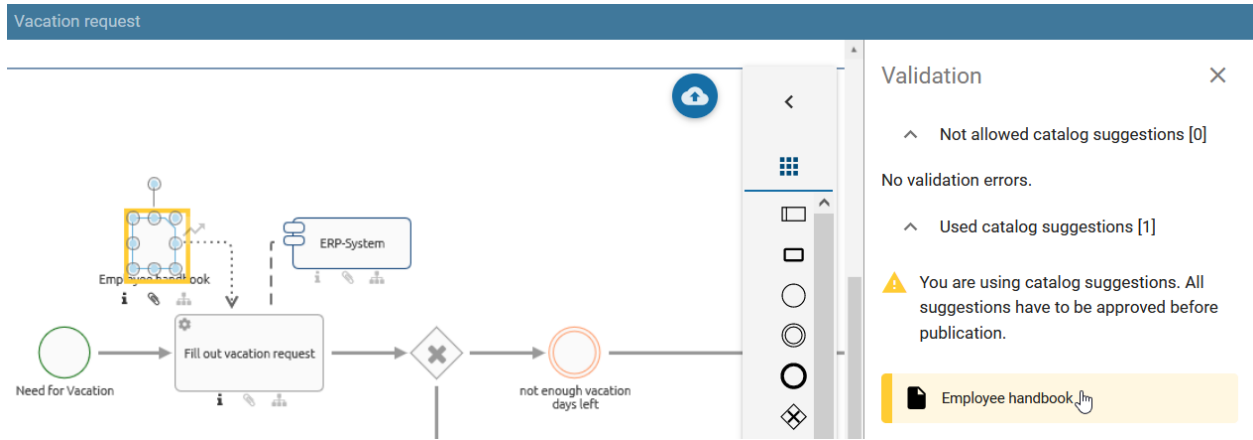
Check-in is not restricted by this feature. However, before publishing the diagram, the catalog suggestions listed here should be *approved in the catalog*.

7.11.4 How do I deal with unpublished catalog suggestions?

In the validation, you can see the list of *Not published catalog items*. Entities of the selected diagram are listed here if they have their own responsible person (lifecycle) but have not been published yet.

This applies to newly created, existing symbols or symbols that are linked to catalog items via attributes. When the validation bar is open, modeled entities are listed in yellow.

The diagram can only be published in BIC Process Design once all contained catalog items with their own life cycle have already been published or their publication has been initiated. Users with author rights can publish the *catalog*

items in the catalog. If the catalog items are in the preview stage but not confirmed by the person responsible, the diagram will be published containing a draft version of that catalog item. After confirmation the draft version is automatically replaced by the final version.

7.11.5 How are OCL rule violations displayed?

The OCL (Object Constraint Language) is supported on the method side and is also used for validating the model. This allows you to set various modeling restrictions that help users to design valid diagrams. Rules defined with OCL for modeling are checked during modeling and/ or afterwards (during check-in). Rule violations are displayed in the validation mode and can be defined in the method with appropriate notes for the modeler. Both connected and unconnected modeling objects can be validated. By clicking on the list entry in the validation, the corresponding object is marked in the diagram.

This is for example used in BPMN Collaboration diagrams to prevent invalid message flows. In this case, a message flow was modeled between two objects that are placed in the same pool. This is not permitted here by the method and is displayed as follows in the validation.
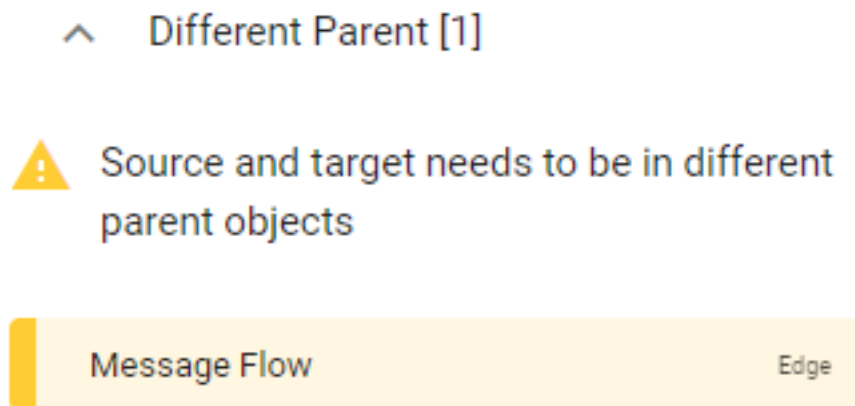
Moreover, OCL rules concerning diagram attributes, so called *semantic checks*, can be defined in the method. Depending on the setting, the check is done when the diagram is modeled or when it is checked-in. For example, semantic checks can be useful to ensure that modellers always maintain a specific diagram attribute or set a meaningful validity period. If you model a diagram and a semantic check fails for a diagram attribute, you will be informed about it in the validation hub. The hint is - depending on the concerning method setting - either a *warning* (yellow), an *error* (red) or a *blocker*. If a modeled diagram violates a blocker, the check-in is not possible. You need to correct the modeling to be able to transfer the diagram from your local storage to the public workspace via the check-in.

Hint: Please be aware that users who utilize customized OCL rules do not receive the diagram attribute checks automatically. They need to integrate these manually into their customized method.

In the method of the following example, a rule has been defined which states that the attribute scope (AT_SCOPE) of a BPMN diagram has to be maintained. In case of a violation, a customized message will be shown. A violation of this rule is estimated as an error. Thus, the following error hint is displayed to the modeller of the diagram "Onboarding" because the scope attribute is empty.

A diagram needs a scope to see where
it belongs!

Onboarding
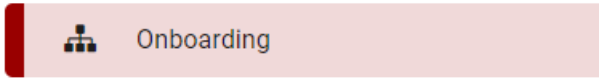
OCL rules can be adjusted in customizing.

7.11.6 How is an invalid sequence flow displayed?

In the validation of BPMN diagrams, objects with invalid sequence flows are listed under the heading *Sequence flow*, if these exist in your modeling. In the following cases you will receive a corresponding note in the validation bar:

- Intermediate events have no incoming and/or outgoing sequence flow
- Activities have no incoming and/or outgoing sequence flow
- Start events have no or more outgoing sequences
- End events have no or several incoming sequences
- Gateways have several incoming and outgoing sequence flows simultaneously
- Gateways have exactly one incoming and one outgoing sequence flow

As an example, the message for an end event without an incoming sequence is displayed here.

Sequence flow [1]

End events should have exactly one
incoming sequence flow

Event

7.12 Allocation diagrams

Allocation diagrams allow you to add subgraphs to the main graph of your diagram. By using these allocation diagrams you can model subdiagrams in a manner, so that your main diagram is not overloaded with details.

Note: Allocation diagrams can only be created for activities because the resources used in this activity are represented in this diagram type. A diagram can contain multiple allocation diagrams, depending on the number of existing activities.

7.12.1 How can I create a new allocation diagram?

Open the context menu of the corresponding activity by right-clicking on the symbol. Select the option *Create allocation diagram*.
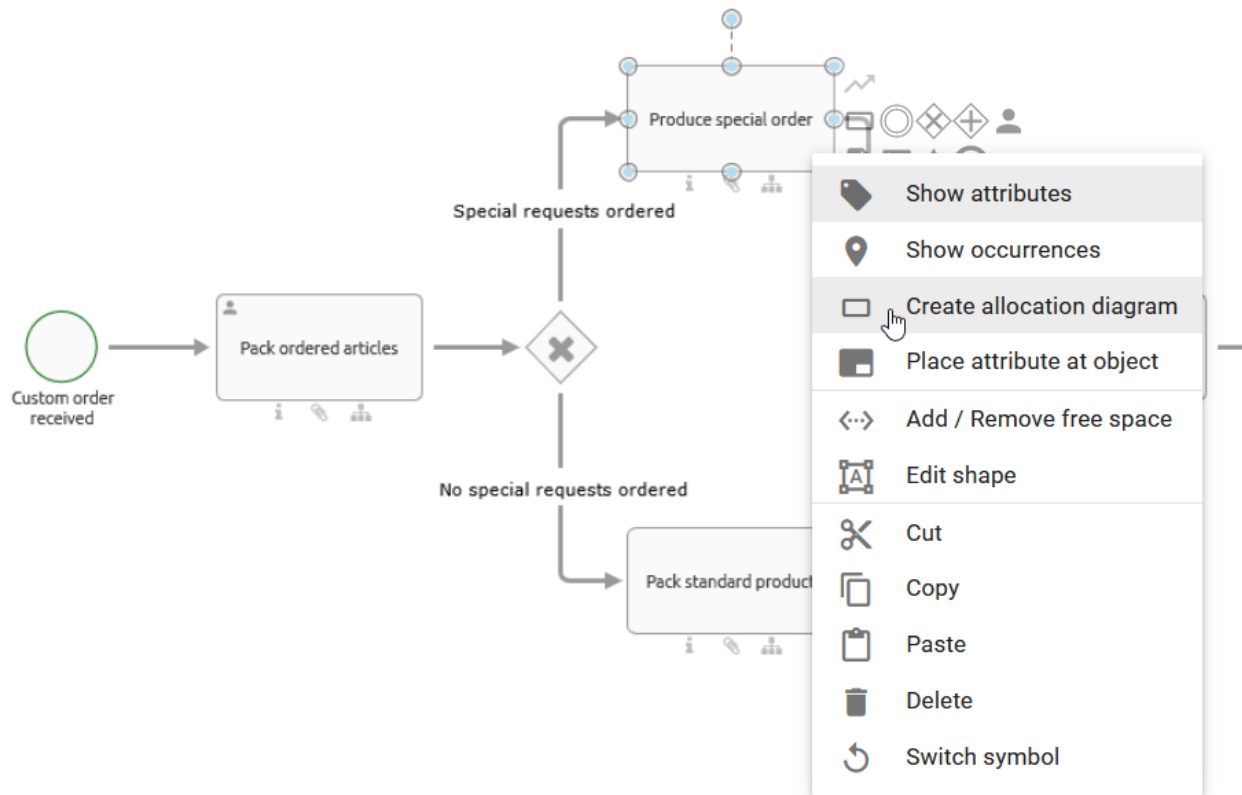
You will get to the editor of the allocation diagram where you will find the symbol of the respecting activity. Within this editor you can now model as usual.

If you want to return to your main diagram click on the *Close* button on the upper right corner of your editor. When changes have been made you must save first before you can use the *Close* function. You will then see the main diagram at the same position with the same zoom settings as before and the corresponding activity is selected.

Note: Only one allocation diagram can be created per activity, as this ensures a clear assignment.

7.12.2 How can I edit an allocation diagram?

To open an allocation diagram for editing you have two possibilities:

1. Check-out the diagram in which the associated allocation diagram is located. Open the context menu of the corresponding activity by right-clicking on the symbol. Select the option *Open allocation diagram*.
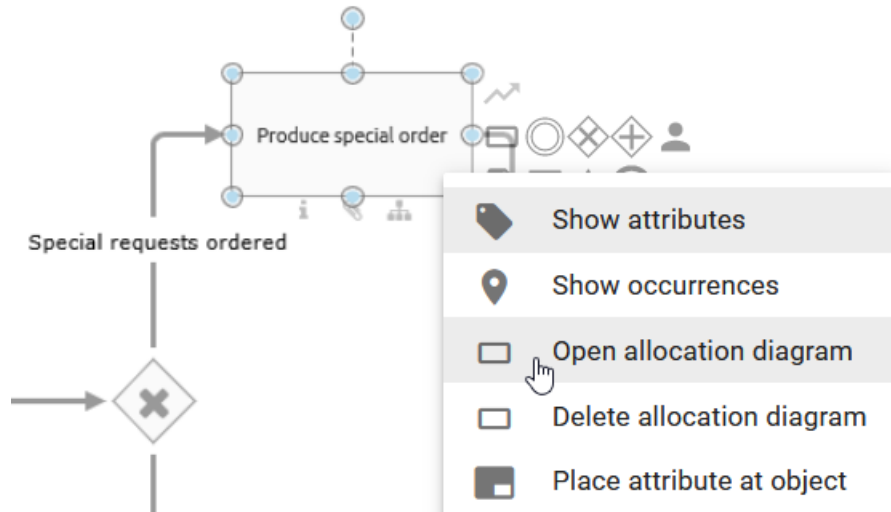
2. If the diagram in which the associated allocation diagram is located is checked-out, the explorer shows all associated allocation diagrams subordinated to the respecting diagram.
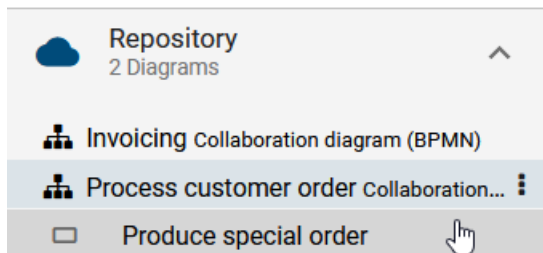
To apply the changes, click on the *Save* button on the upper right corner of your editor after editing your allocation diagram.

Note: Symbols created in the allocation diagram are only displayed there. Changes you make to the activity for which the allocation diagram was created are visible in the main graph and also in the corresponding allocation diagram. It does not matter if the changes have been made in the main diagram or the allocation diagram itself, or if there is a catalog item for this activity. Note that it is not possible to edit an activity with an allocation diagram using the suggestion list.

7.12.3 How can an allocation diagram be deleted?

To delete an allocation diagram execute the following steps:

Navigate to the diagram in which the the associated allocation diagram is located. Then, open the context menu of the corresponding activity by right-clicking on the symbol. Select the option *Delete allocation diagram*.
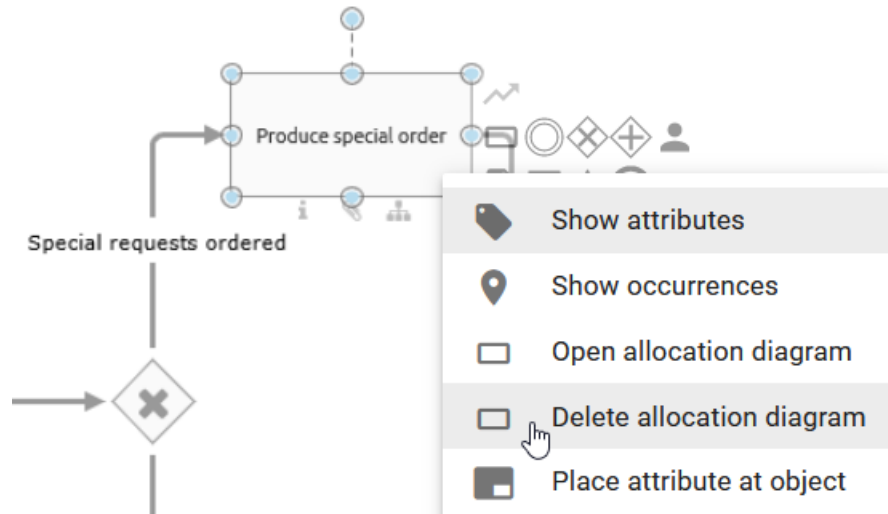
The allocation diagram has been removed and is no longer displayed in the explorer under the corresponding diagram.

7.12.4 What are external function allocation diagrams (FAD) and how can I use them?

External function allocation diagrams are analogous to *allocation diagrams* diagrams, which you can allocate to activities in order to describe a subordinated part of your diagram more precisely. Unlike the allocation diagrams, external FADs are not created via the context menu of an activity. An external FAD is an already existing diagram which is assigned to an activity in another diagram using the *Allocation model* attribute.

Analogous to the subprocess, simply *link a diagram* to an activity within its attribute *Allocation model* in order to assign the diagram to the activity as an external FAD.

The external FAD continues to exist as an independent diagram, which can also be seen from the arrangement in the repository.
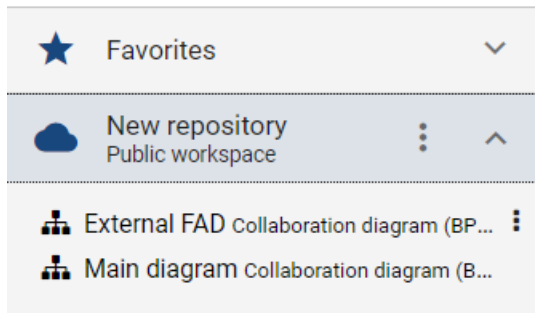
However, analogous to the allocation diagram, all relevant objects of the external FAD are also listed in the reports of the diagram that contains the relevant activity with the assigned FAD. In addition, by simply clicking on the external FAD in the activity's attributes, you are automatically directed to the relevant diagram.

Note: Only one FAD can be created per activity, as this ensures a clear assignment.

7.13 Multilingualism

7.13.1 How can I model multilingually?

You can model diagrams in BIC Process Design in several content languages being supported by the *alternative language*. Translations of the content can be maintained within the diagram view or the diagram translation mode. In general, translations of existing objects that have already been *accepted in the catalog* should not be edited in the diagram view. If you maintain those changes directly in the diagram, new catalog items are created. The alternative way is to use the *Diagram translation mode*. Alternatively, you can use the Catalog translation mode of the old user interface.

Tip: For a clear view, which gives you a conclusion about which values have been maintained for which language, use the concerning translation mode. The chapters explaining these tools are linked above.

For direct changes within the diagram view *select the content language* you want to maintain the translation for. As alternative language, set the one for which the attributes have already been maintained.

Open your diagram in the designer. Now you can edit the corresponding *attributes*.

While editing, you can only see values of attributes that have been maintained for the selected content language. Therefore you can directly see if an attribute has not been translated yet.

If you set a value for a language and the viewer sets this language as his alternative language, he will see this value in case the concerning attribute has not been maintained in his content language. This is marked by the abbreviation of the alternative language in brackets after the value.

Note: If you change an attribute which has only been maintained in the alternative language, this change only applies to the content language. If you only use one language, the content language equals the alternative language. Note, that some attributes are independent of the content and alternative language such as the e-mail address.

7.13.2 How do I translate a diagram?

When modeling diagrams, modelers can directly maintain the corresponding translation for the content languages selected in the administration. The navigation to the catalog is not necessary.

Check out the diagram, save it if necessary and click on *Diagram translation* in the menu bar. All elements of the diagram that have at least one maintained text attribute are listed here. In addition to the diagram itself, all modeled symbols can therefore be included. Several versions of the same catalog item are therefore listed several times. The diagram is always the first list entry. Below, the objects are grouped alphabetically according to their object types. The objects of each group are also sorted in alphabetical order depending on their object names in the current content language. If the name attribute is not maintained, you see the object type instead.
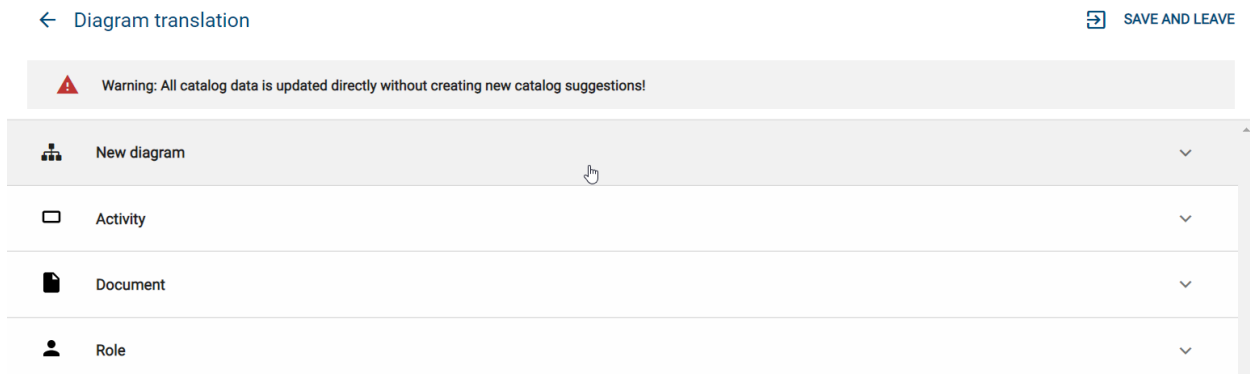
Click on a list entry to expand it and see all text attributes of this entry in the available content languages. The attribute type names are displayed in the UI language. You can now maintain your translations in the text fields.
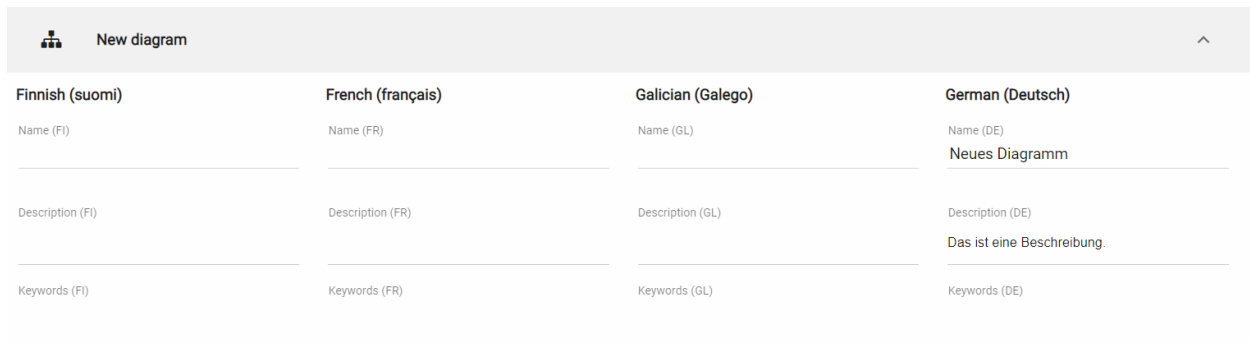
Click on *Save and leave* to save your changes and return to the diagram view. Note the warning message on top of the list. As administrator and editor, your changes will be saved for all catalog items without creating new items, even if they are already accepted in the catalog. If you are an Author, your list will be filtered, so that the accepted catalog data used in the diagram is not listed and cannot be changed here.

SAVE AND LEAVE

If you do want to take over your changes, click on *Diagram translation* or go *Back to process view* and select *Discard changes* in the dialog.

The diagram has been changed!

Do you want to save your changes?

CANCEL   DISCARD CHANGES   SAVE

Note: While translating a diagram, accessing the modeling options or opening the sidebar via the menu bar is not possible.

7.14 Navigation

7.14.1 How do I hide the sidebar in the designer?

In the menu bar, click the *Hide sidebar* button, to hide the sidebar on the left side of the designer.

To show the sidebar, click the same button again. It is now called *Show sidebar*.

7.14.2 How can I zoom in the designer?

You can apply the zoom to the for modeling opened diagram or to the entire website. This depends on where you place your mouse while zooming. The selection can be made by placing the mouse outside (area 1) or inside (area 2) the editor.
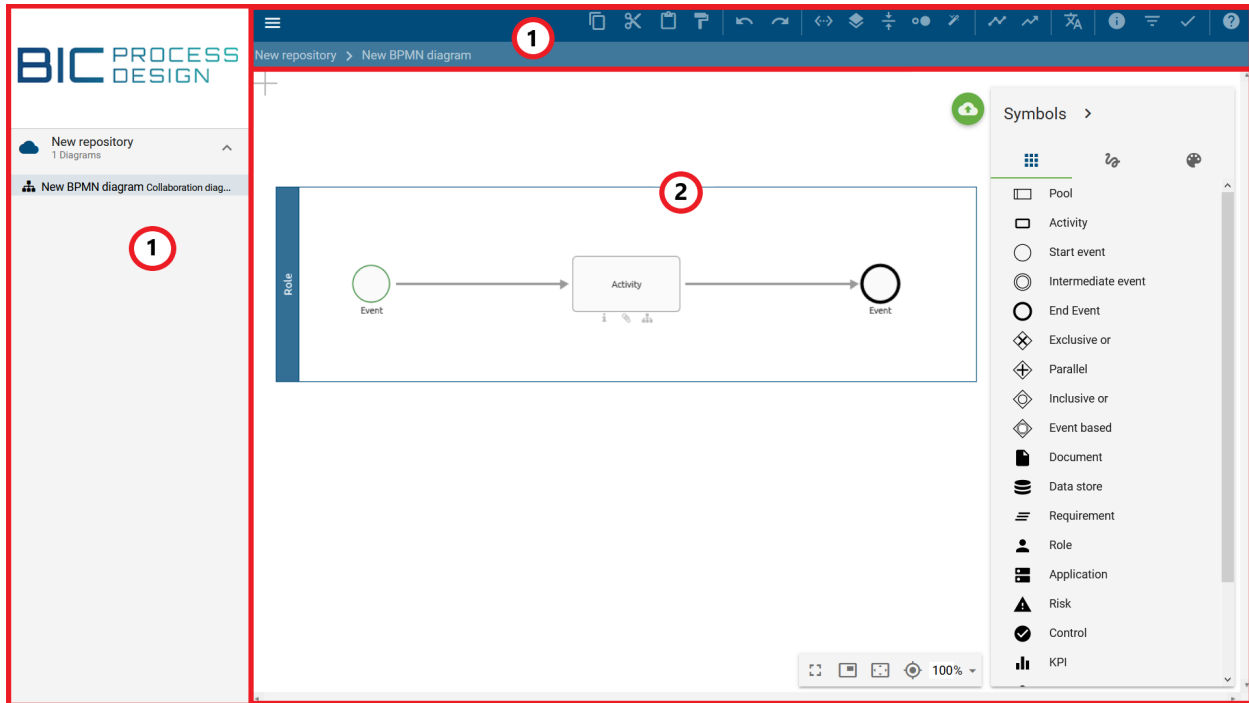
Now hold down the *Ctrl* key and scroll with the mouse wheel. Optionally, you can zoom the whole website by holding down the *Ctrl* key and pressing + to zoom in or - to zoom out.

7.14.3 How can I navigate the diagram while modeling?

In a checked-out diagram in edit mode, you can navigate by holding down the right mouse button or by scrolling and using the scrollbar.

Furthermore, there is a navigation bar at the right bottom of the editor, which offers the following possibilities:
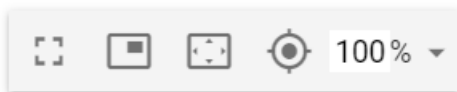
Full screen: If you click the first button *Enter fullscreen*, both the application and the browser switch to full screen mode. The application hides the first menu bar. With a further click on the button you can *exit fullscreen* mode for the application and the browser and return to the original view. Note that the *ESC* key only exits the browser's full screen mode. This overlays the *ESC* effect for other functions of the application, such as deactivating stamp mode. In addition, the application itself remains in full screen mode, if you exit full screen mode with *ESC*. That means the first menu bar remains hidden. It is therefore recommended to use the buttons provided for deselecting full screen mode and other functions.

Navigator: Click on the second entry to *Show navigator*. It gives you an overview of the diagram and thus allows you to navigate easily by moving the transparent rectangle with the mouse. The size of the rectangle can be changed by dragging and dropping the edges, which corresponds to zooming in the diagram. Click again on the button to *hide the navigator*.
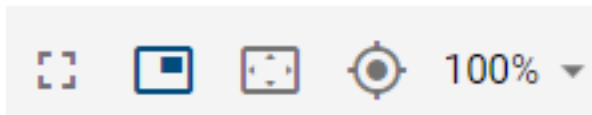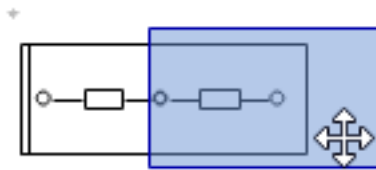
Adjust content to window size: By clicking on the third button, the diagram will be zoomed and scrolled, so that you can see the whole diagram in the editor.

Scroll selection into view: A click on the fourth button scrolls the diagram to 0/0 position.

Zoom level: The fifth function allows you to set different zoom levels in percent. Preset levels appear when you click on the arrow. You can then select one of the zoom levels from the list. Furthermore, it is possible to set your own zoom level between 10% and 800%. To do this, click on the displayed number, enter a new percentage and confirm with the Enter key or click on the diagram.

7.14.4 How do I open a subprocess?

While modeling, you can jump directly from a diagram into a refined diagram which is maintained in the *subprocess attribute*.

If you have opened a diagram containing an activity with a subprocess diagram in the designer, you can click the highlighted diagram icon below the object. Alternatively, navigate to the attributes of the object and click on the diagram in *Subprocess*.
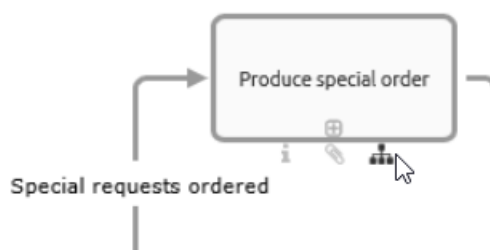
If you have also checked out the subprocess diagram, this diagram will be displayed in the designer. In case you have not checked out the diagram, the click opens the diagram in the public workspace of BIC Process Design. This happens in a new browser tab or if the application is running in another tab, you will be navigated to the diagram there.

In case there is more than one subprocess diagram available (i.e. one or more diagrams are maintained in the *Variants* attribute), an alphabetically sorted list of all subprocess diagrams is shown after selecting the diagram symbol. You can choose the diagram which you like to view.
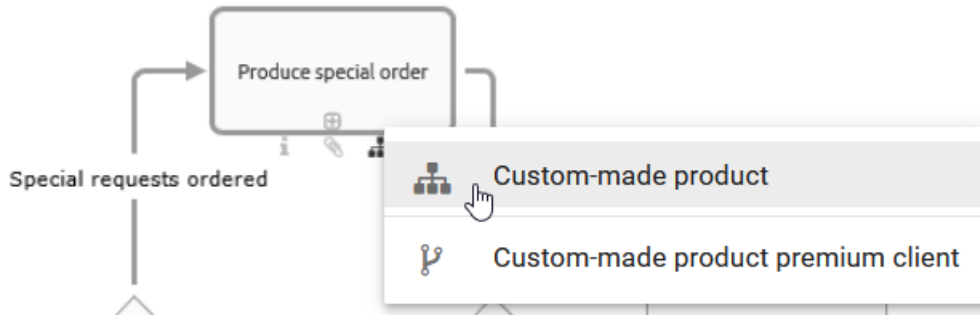
Note: Subprocesses also display diagrams to which you have no access. If you navigate into these diagrams, you will get a *corresponding message* and can not see the content of the diagram.

7.14.5 How do I open a subprocess when multiple ones are maintained?

BIC Process Design offers the possibility to maintain *multiple variants within the attributes*. You can open them in the same way as *you can open one subprocess*. However, a simple click on the diagram icon under the object will give you an alphabetically sorted list of all the subprocesses. This gives you the opportunity to see at a glance which navigation options are available to you. The top entry reflects the *subprocess* field, followed by the variants. Select the required subprocess to follow the link as described above.

Note: If you have no access to a subprocess, the corresponding list entry is greyed out and you will not be able to select it.

7.15 Useful hints

In this section, you find some concluding tips that facilitate the modeling in BIC Process Design.

7.15.1 Which is the best position for the diagram?

Align your diagrams at the 0/0 position to ensure that they will be displayed optimally after checking-in.

7.15.2 How can I navigate the diagram more easily?

In addition to horizontal and vertical scrolling, you can move the diagram in the editor while pressing the right mouse button. In addition, the *navigator in the editor* is available.

7.15.3 How can I make a multi selection?

Select several elements at the same time, either by dragging with pressed mouse key over the area in which these elements are located or by holding the CTRL key and clicking on the corresponding symbols. Also note the possible *shortcuts*.

7.15.4 How can I deselect objects in a diagram?

If you have selected too many elements at the same time, you can remove individual objects from the selection by deselecting them. To do this, hold down the Shift key and click on the wrongly selected object.

7.15.5 How can I see the description of an object?

If you have maintained a *description* of an object, the corresponding attribute symbol "i" is highlighted on the object. Hold the mouse over this symbol. A tooltip with the description appears as a preview. Alternatively, you can also see the description of the object by clicking on the attribute symbol or by opening the attributes tab.

7.15.6 How can I deposit websites in the attachments?

In the attribute-tab, you can deposit websites in the *attachments* by typing in the URL and confirming with the "Return"-key.

7.15.7 How can I see the description of an object?

If you have maintained a *description* of an object, the corresponding attribute symbol "i" is highlighted on the object. Hold the mouse over this symbol. A tooltip with the description appears as a preview. Alternatively, you can also see the description of the object by clicking on the attribute symbol or by opening the attributes tab.

7.15.8 Should I always use the same browser for modeling?

After checking-out, your diagrams will be saved locally in the local storage of your browser. Therefore, you should always use the same browser.

7.15.9 What should I look for after modeling?

Please, save your diagrams regularly and check them in, to avoid data loss and to make them available for other users. A diagram is locked for other users, if you do not check it in. Note the information *at the beginning of this chapter*.

SIMULATION

BIC Process Design offers you the possibility to simulate your processes. This functionality can be used for all processes modeled in a BPMN diagram.

Process costs, cycle time and further KPIs for your process can be calculated in a simulation. The results can help you to estimate the effect of process changes without having to use actual resources of your organization. This helps you to determine the optimum of your process to reduce costs and support the efficient use of resources.

Create a *scenario* with hypothetical parameters defining how your process could be performed. A simulation executes the scenario according to your specification and provides results to analyze bottlenecks, cycle times and the costs of your processes. You can create different scenarios to analyze the maximum potential of your process and make it more cost and resource efficient.

Note: The process simulation is not available on mobile devices.

Hint: This functionality is an additional package in the new user interface of BIC Process Design. If you are interested, please contact our sales team.

8.1 How can I start a simulation of my process?

In order to simulate a process in BIC Process Design, you may create a concrete *scenario*. In a scenario, the number of process instances and the duration of the simulation can be defined. When all process steps (i.e. activities) and resources of the process are specified with hypothetical values, the simulation can be started.

To create a scenario, navigate to the diagram view of your BPMN diagram and select the option *Simulation*.
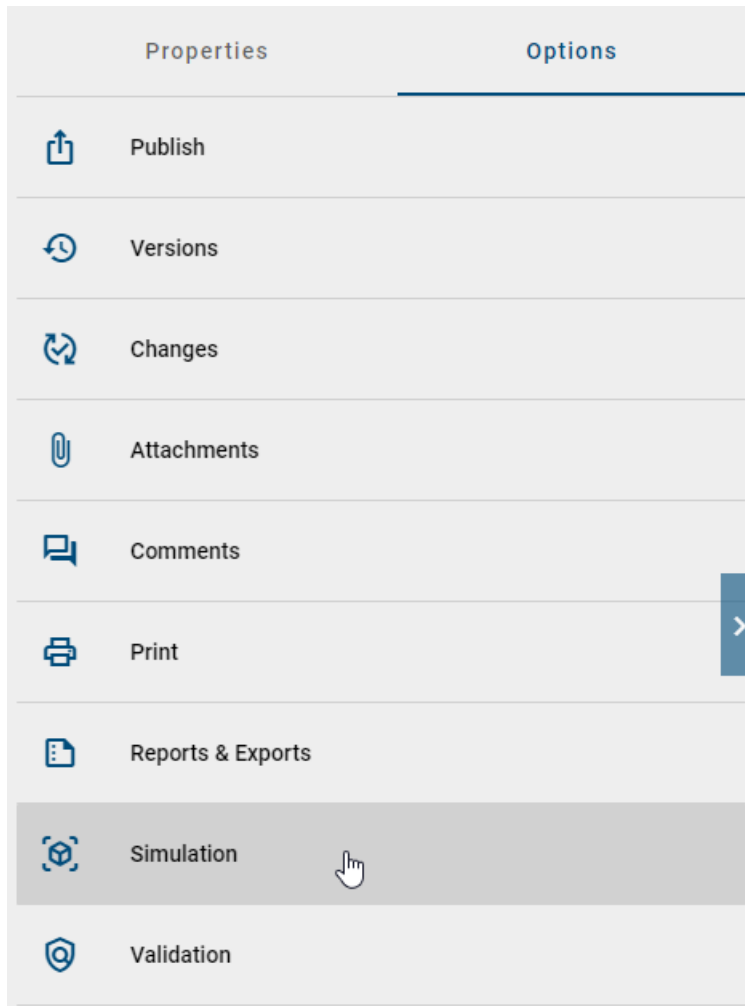
The form for the scenario specification opens in the side bar. All fields can be edited after clicking them. At first, you can enter the name of your scenario. The following list describes the purpose of each field:

- **Distribution**: Depending on the selected distribution you will get different parameters. *Here* you can find details of the different distributions.

- **Time unit**: What is the time unit for the input fields.

- **Number of process instances**: How many process instances will be started in the simulation? A maximal number of 1000 instances is possible.

- **Scenario start date and time**: When does the simulation start?

- **Currency**: Which currency is used to calculate the total cost?

Analyse current execution	

Scenario specification

Arrival rate*
Exponential ▾

Mean*
120

Time unit*
Minutes ▾

Number of process instances*
50 ›

Scenario start date and time**
1/2/2022 🗓
MM/DD/YYYY

Currency*
EUR ▾

When creating a scenario, it is required to rate the financial and temporal expense of the single process steps (i.e. the tasks for participants of the process). Select an activity in the diagram to open the corresponding form in the side bar. You may set the following parameters there:

1. **Duration**:

   - **Distribution**: Depending on the selected distribution you will get different parameters. *Here* you can find details of the different distributions.

   - **Time unit**: What is the time unit for the input fields.

2. **Fixed costs and threshold**:

   - **Fixed costs**: What are the costs for this process step?
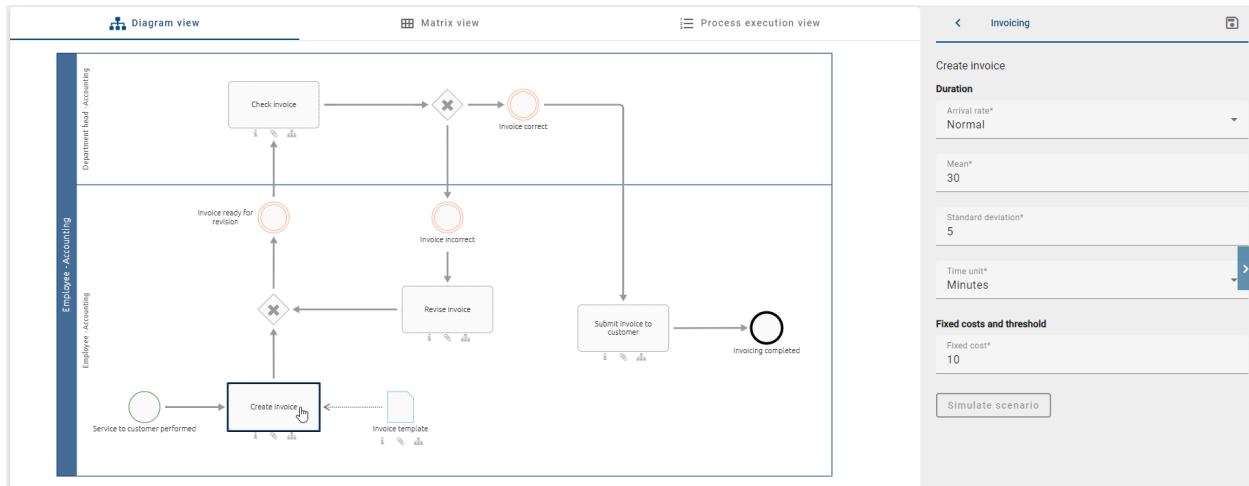
Define these parameters for each process step. You can switch to the scenario specification form by a click on an empty space.

If there are gateways modeled in the diagram, you have to set probabilities of the outgoing paths. This is required for XOR and OR gateways that have more than one outgoing path. You cannot set probabilities for a parallel gateway, all outgoing paths will always be executed. The side bar will show the corresponding form when you select a gateway in the diagram. The form is a list of the directly following process steps with a field *Probability* for each. Enter the probability that the process step is chosen at the gateway in percentage between 0 and 100. The following logic applies to the different gateway types:

- **Exclusive or** (XOR): The sum of the probabilities of all following paths has to be 100%. In each process instance that is simulated, exactly one path is executed.

- **Inclusive or** (OR): The probability of each outgoing path can be between 0% and 100%. During the simulation of a process instance at least one path is executed and the total number is depending on your settings.
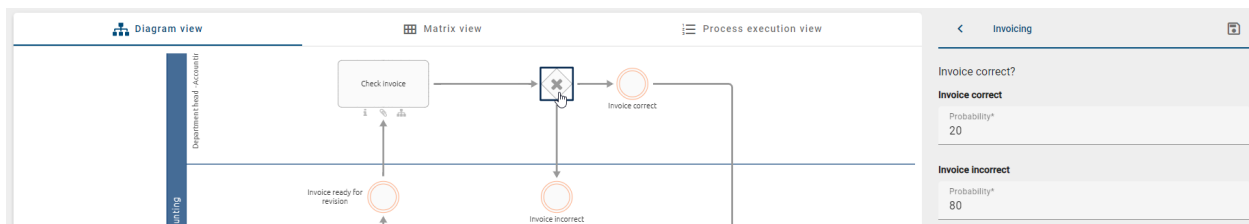
After all parameters are set, save the parameters and initiate the simulation by selecting the button *Simulate Scenario*.

8.2 How can I save my entered simulation parameter?

As a simulation user, you have the option of saving your entered simulation parameters in order to continue working on them later.

To start the simulation, click on *Simulate scenario*. Enter a name for the scenario in the corresponding input field and click on *Create scenario*. If you have made changes to the parameters, you can save them by clicking on *Save parameters*.

If no changes have been made, the corresponding button to save a parameter is disabled. Additionally, you will be notified with a hint about this.

Before you can start the simulation, you must enter and save the required parameters for the scenario. Appropriate input fields are provided for this purpose. If you want to return to the overview of saved scenarios, use the *Back to saved scenarios* button.

To exit the simulation and return to the diagram view, select *Back to options list*. You also have the option to open a single saved scenario. To do this, click on the tooltip *Open Scenario*. This will take you to the corresponding scenario with all the saved parameters.

Warning: As soon as changes are made to the diagram, a new scenario must also be created.

Hint: Please note that if you have made changes to the scenario parameters and want to exit the simulation without saving, you will receive a hint. You can choose whether you want to save the parameters or not. The dialogue offers you the options *Cancel* and *Save*.

8.3 How can I specify my resources in a simulation?

In a scenario, resources are very important. Mostly, a resource represents a concrete role in your company. In a BPMN diagram, it is modeled as a separate lane.

8.3.1 How can I change the details of my resource?

When you want to change the details of a resource in your process, you can click on the BPMN lane of the resource you want to change. On the right-hand side a window appears where you can change the details of your resource. You can see the name of your resource on the top.
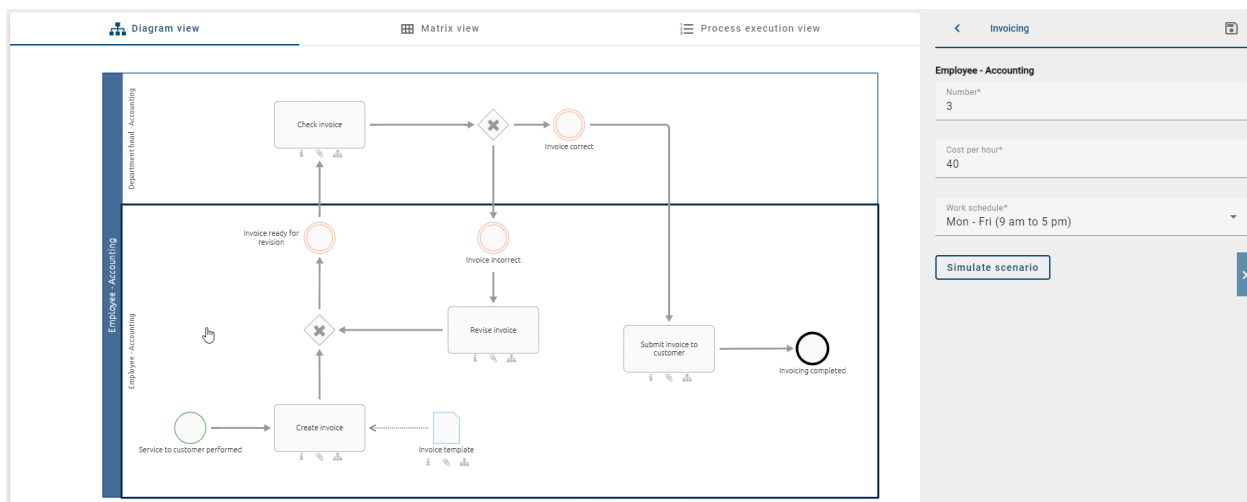
Number: Here you can enter how many resources of this type are available. You can only enter integers. Mostly this number represents how many employees you got for a certain role.

Cost per hour: Here you can enter what the resource is costing you per hour. This can be the hourly wage of your employee.

Work schedule: Here you can select when the resource is available. By default you got two different options: *Mon-Fri (9 am to 5 pm)* and *24/7*. *Mon-Fri (9 am to 5 pm)* means that your resource is available from Monday to Friday from 9:00 am to 5:00 pm. *24/7* means that your resource is always available.

Note: Be aware that a resource can only work on **one activity at the same time**. That means it is not possible for a resource to work simultaneously on two different activities. Vice versa, an activity can also only be worked on by **one**

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resource at a time.

8.4 Which distribution types can I choose and what do they look like?

In the real world it is usually not common that an instance of a process always lasts the same time. Therefore you have the option to choose from different distribution types which will make your simulation more realistic. It is helpful to collect real process data to determine the best approximation for your distribution.

In the following chapter you will find an explanation of the different distribution types and their needed parameters. Also you will find a graph which shows the distribution. On the x-axis you can see the time, and on the y-axis the probability that a task will take this time.

Fixed:

With the constant distribution you assume that your task takes a constant time. This distribution needs only one parameter *To*. Every task in the simulation will then need exactly this time. Therefore the probability is 100% for this exact time.
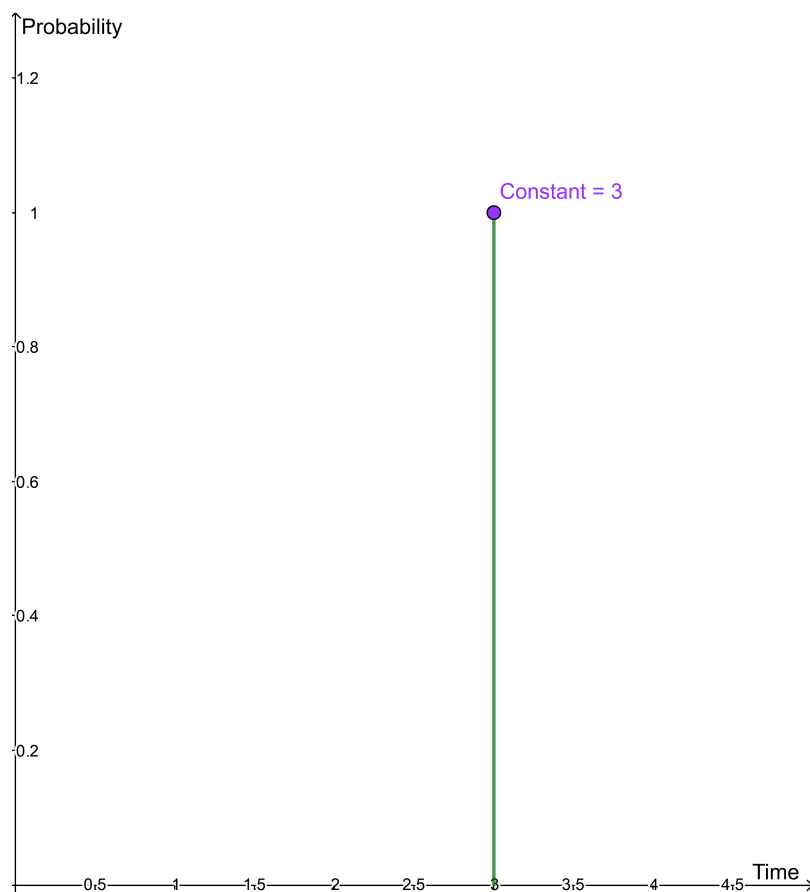
Normal:

With the help of this distribution function, deviations from the norm or the expected value can be modeled very well. The normal distribution requires the input parameters *Mean* and *Standard deviation*. The *Mean* represents the time with the highest probability. The *Standard deviation* describes the deviation from the *Mean*. If this value is bigger than 1, the deviation will be bigger. If the value is less than 1 the deviation will be smaller.
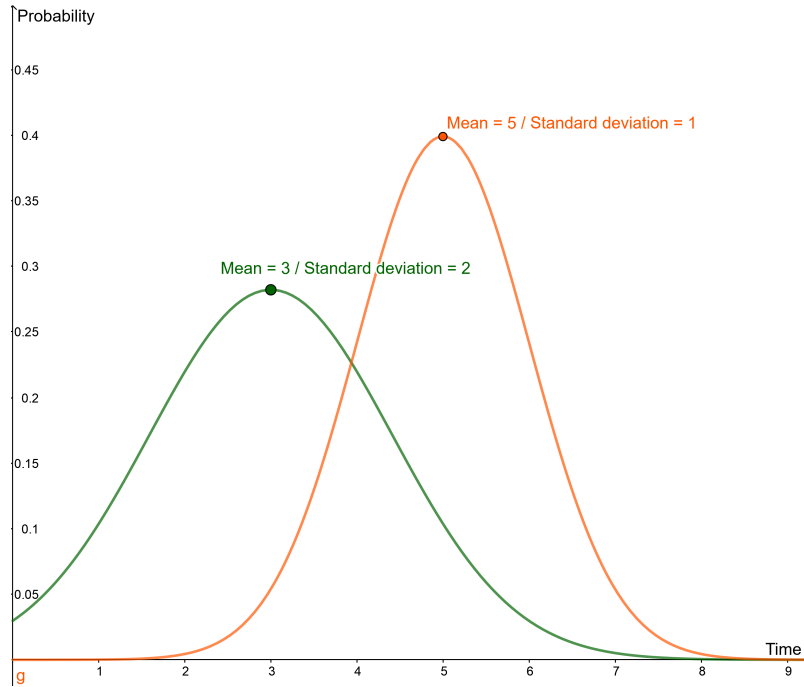
Exponential:

This distribution function allows a realistic approximation for different time intervals. The distribution only needs the parameter *Mean*.
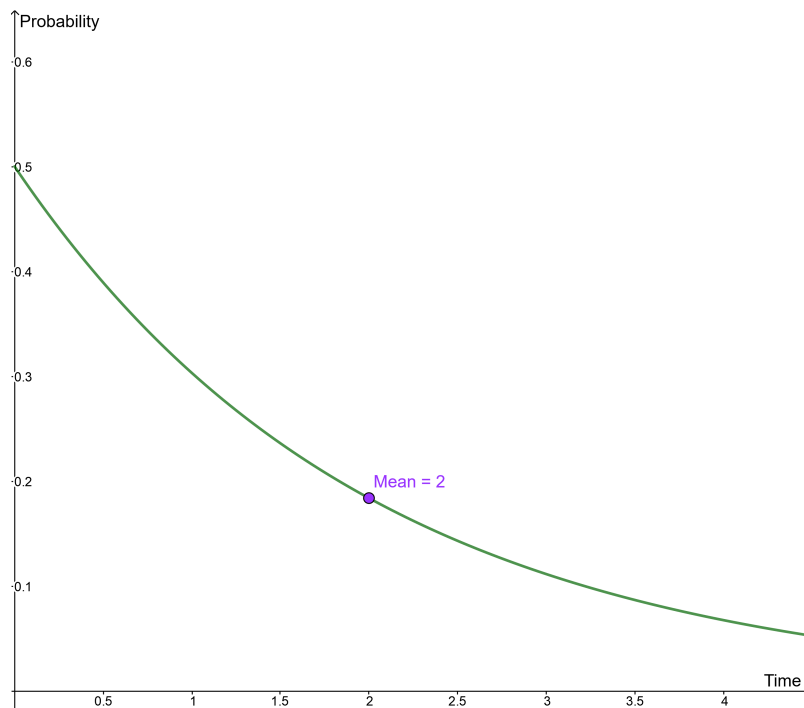
Uniform:

A uniform distribution that for every time between the given parameters the probability is the same. You need the parameters *Between* and *And* that indicate the time interval you want to use.
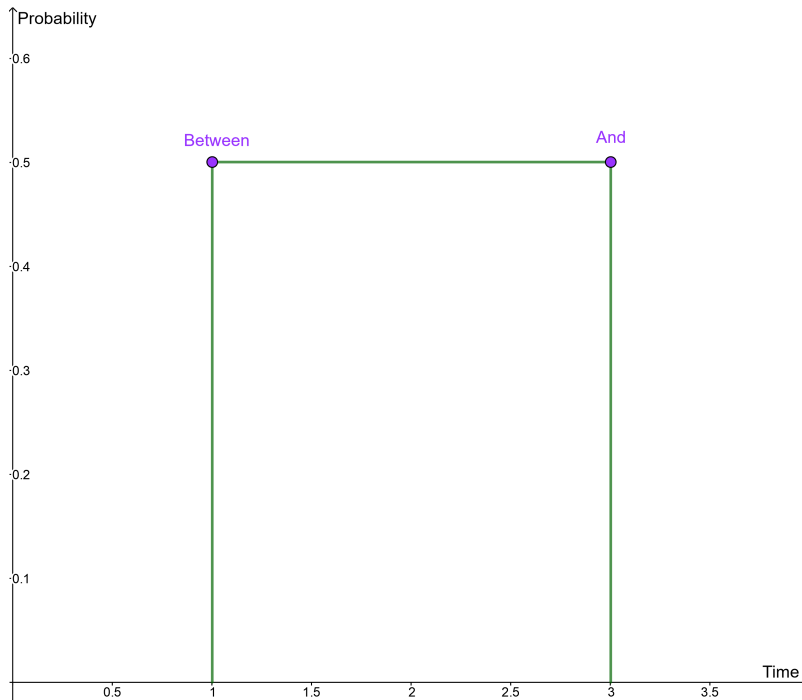
Triangular:

With the help of the triangular function it is modeled in a simplified way, after which time an event occurs at the earliest and at which time at the latest. Therefore you need a *Minimum (a)*, a *Maximum (b)* time and a *Mode (c)*.
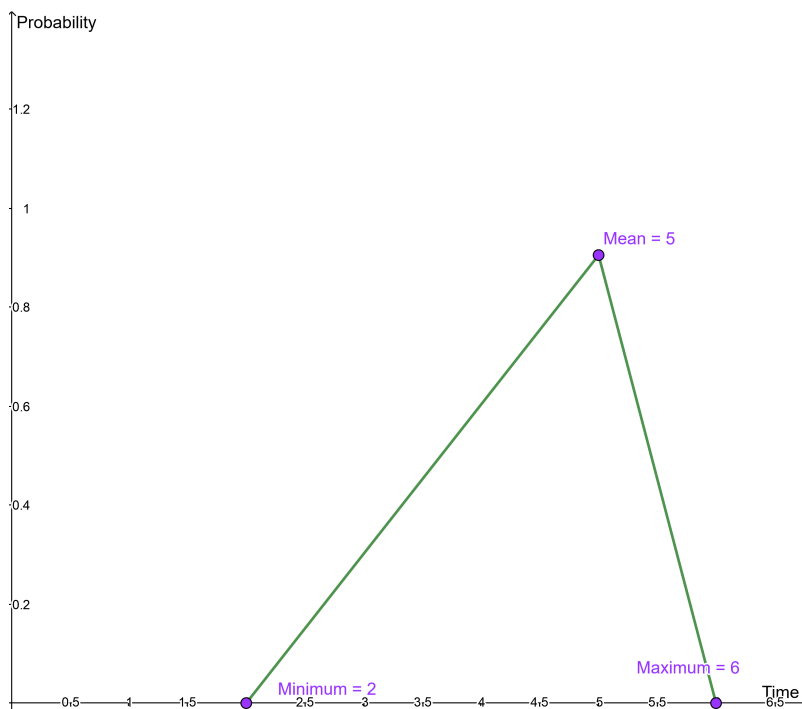
Log Normal:

The log normal distribution is relatively similar to the exponential distribution. Which of the two makes more sense in the particular case depends on the expected or measured data. The log normal distribution needs also two parameters *Mean* and *Variance*.
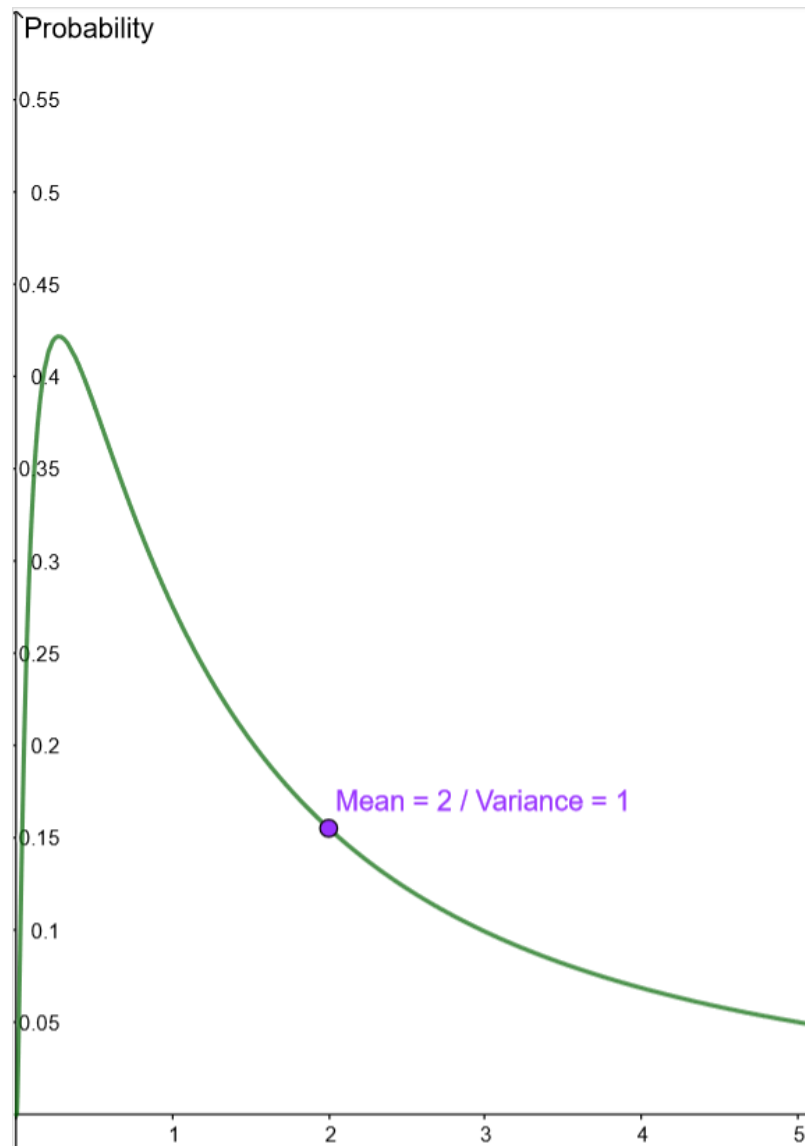
Gamma:

This distribution function enables a realistic simulation of a queue, a lifetime of a product or a repair time. For this, the input parameters *Mean* and *Variance* are required.
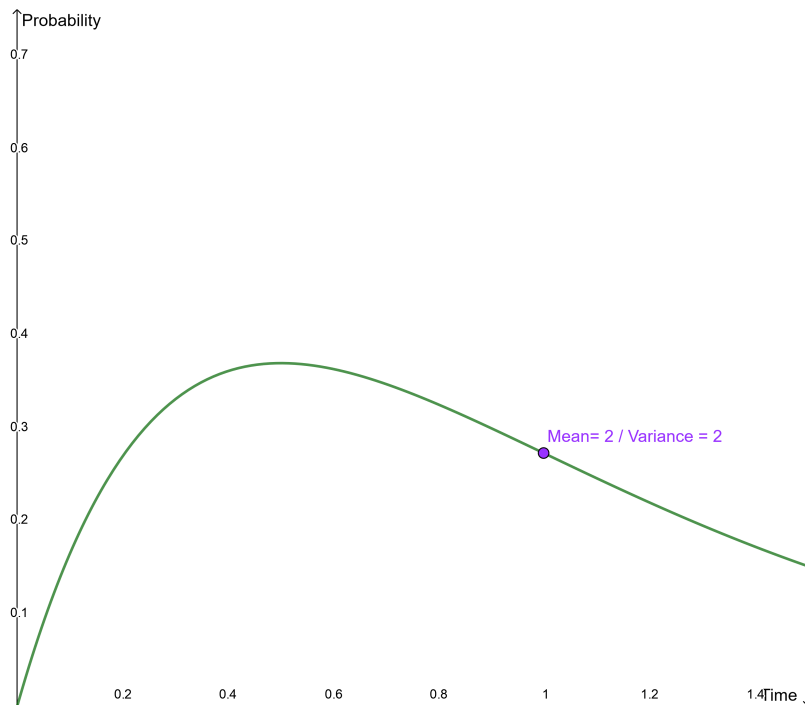
8.5 Which results do I get from the simulation of a scenario?

If you have requested a *simulation for a scenario*, you will get a numerical evaluation in the side bar and a *heatmap* in your diagram. More information about the heatmap can be found in the linked section. The results in the side bar include the following two parts:

General information

The KPIs of the scenario will be provided here. The total costs, the number of completed process instances and the elapsed time for the whole scenario will be displayed so you can estimate the duration and cost of the process.

Scenario statistics

These statistics break down the costs of the process instances. There is a maximal, minimal and average value for the time and cost needed to execute the process in the scenario once. The *Process waiting times* show the time that a process instance is on hold in the scenario. The waiting time includes all time spans that are measured when a process step cannot be executed yet.

A click on the button *Back to options* redirects you to the options of the diagram view.

> **Warning:** If you leave the page or the scenario, the simulation results is not saved. The specification of the scenario is *only* saved if you go back to the options list. If you like to see the results of this scenario, you have calculate them again.

8.6 What information is contained in the heatmap?

If you requested the simulation of a scenario, the diagram will be colored as a *heatmap* showing the *Waiting times* of each process step.
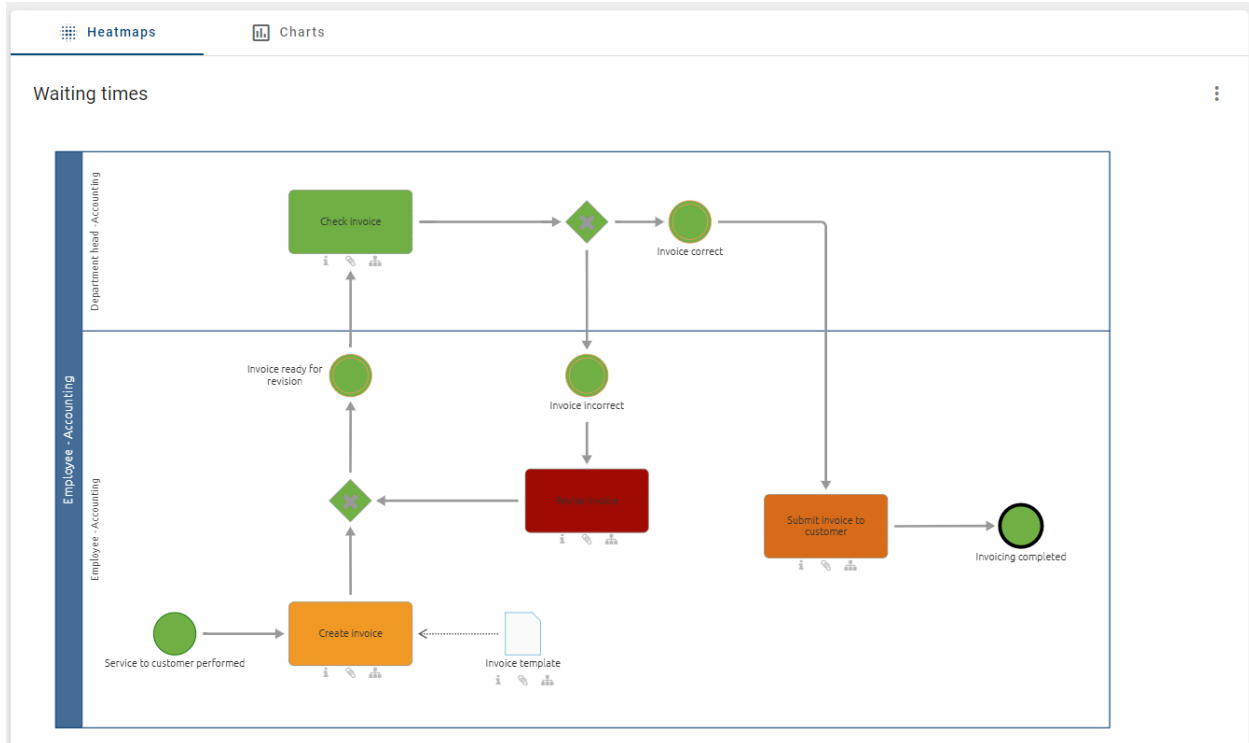
You can choose to view the heatmap for other KPIs in the context menu which is accessible via the three dots in the upper right corner. All views support you to analyze your process concerning the need for optimization.
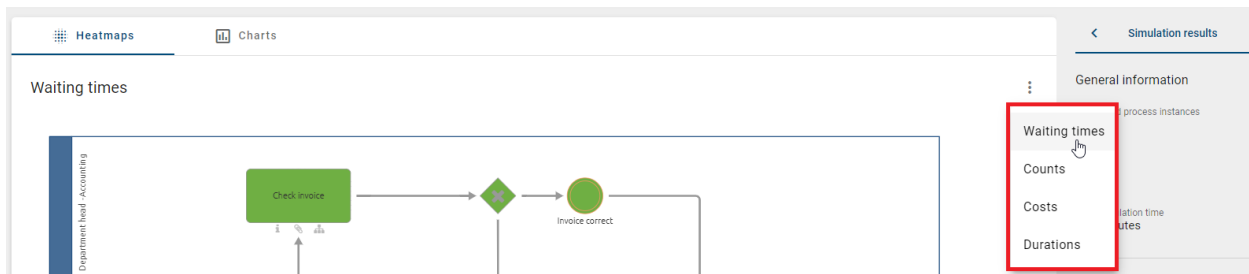
- *Waiting times* The waiting time is the average time it takes for each process step (i.e. activity/task) to be started. It occurs when an activity has to wait for a free resource. Therefore, the heatmap displays where there is a delay in your process.

- *Duration*: The heatmap shows the average duration of each process step during the simulation.

- *Costs*: You can examine the costs that each process step caused on average during the simulation.

- *Counts*: The values indicate how often a process step has been executed when the demanded number of instances was simulated. If the process flow is dynamic (i.e. includes gateways), this map provides information about the frequency that the different paths have been executed.

The following color scale shows the spectrum of the heatmap. The green color corresponds to relatively low values and the red color corresponds to the highest values.

If you hover over an element of the diagram, a pop-up appears which shows the KPI of this elements depending on the currently chosen heatmap. For the waiting time as well as the duration and cost, the average, minimal and maximal value measured for the process step are displayed. Moreover, in the heatmap based on *counts*, the value directly indicates how often a process step has been executed during the simulation of all instances.

8.7 What information is contained in the charts?

In addition to the *Waiting times* in the *Heatmap* view, you have the option of displaying the *Resource utilization in %* in a bar chart. To do this, move to the *Charts* tab.

A vertical bar chart will appear with the resource names and the utilization rate in percentage, with an interval from 0 to 100 %. To get the exact percentage of utilization of a resource, you can hover over the corresponding bar.
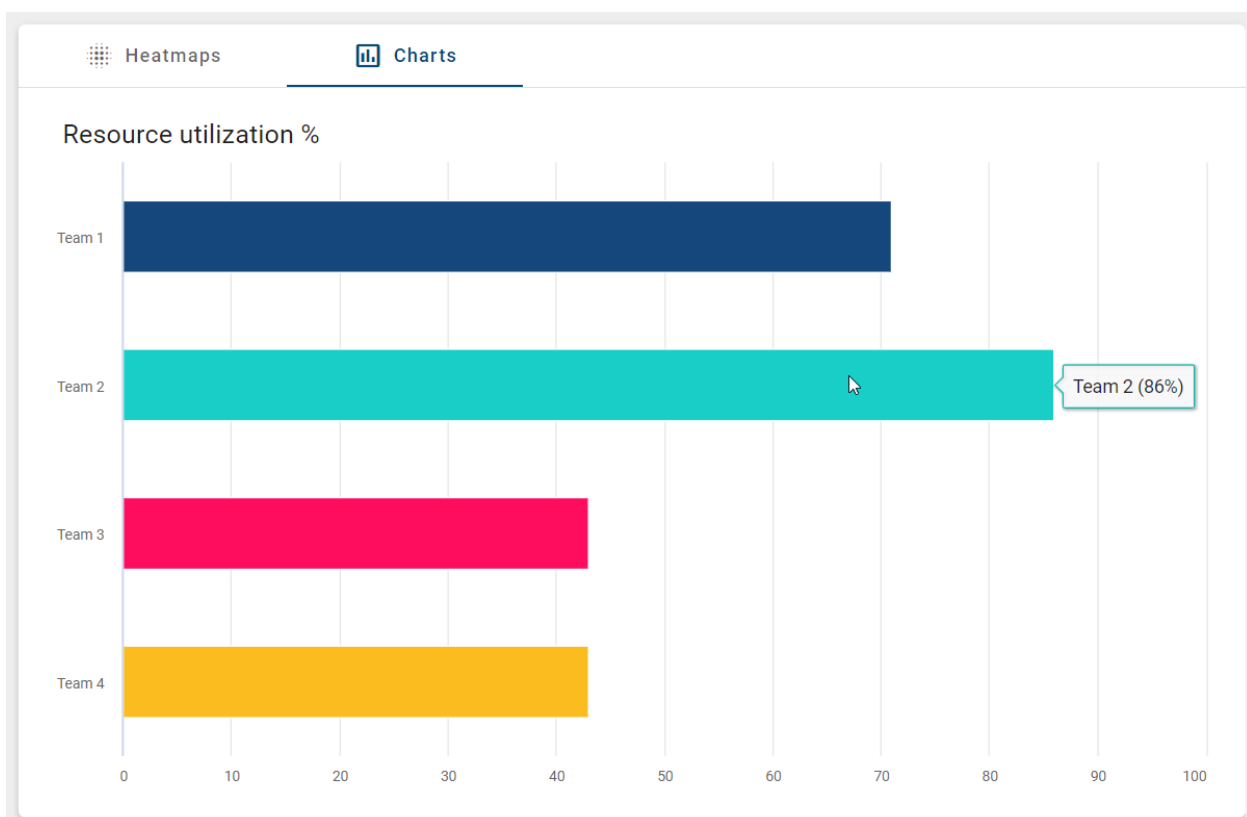
8.8 How can I download simulation results?

The simulation results can be downloaded as a CSV file via the *Download results (CSV)* button. Select the *Download* icon next to **Simulation results** after the simulation has been run.
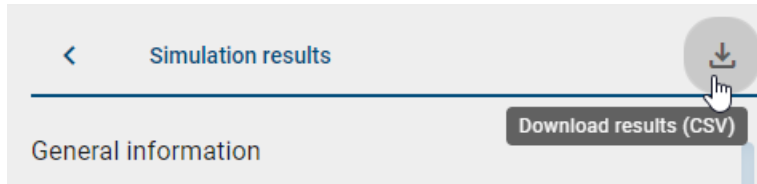
The downloaded CSV file is named with the timestamp of the simulation run.

Note: The *download* option for the CSV file is not available for small screen sizes (e.g., in the mobile view)

CATALOG

9.1 What is the catalog?

The catalog contains all master data from your diagrams that may be reused; such as roles and IT-Systems. The processing and quality assurance of catalog items is available for users with administrator or editor rights to support a central administration of master data.

In modeling, suggested catalog items appear as usual in red and italics in the modelers' suggestion list, but can be changed in the diagram. As soon as the administrator or the editor has accepted catalog items, they appear in black text (not italics) in the suggestion list and cannot be changed by modelers anymore. This reduces the risk of objects being accidentally changed in individual diagrams, which are reused elsewhere and thereby result in unintended side effects.

You can find the *Catalog* in the menu and open it with one click.
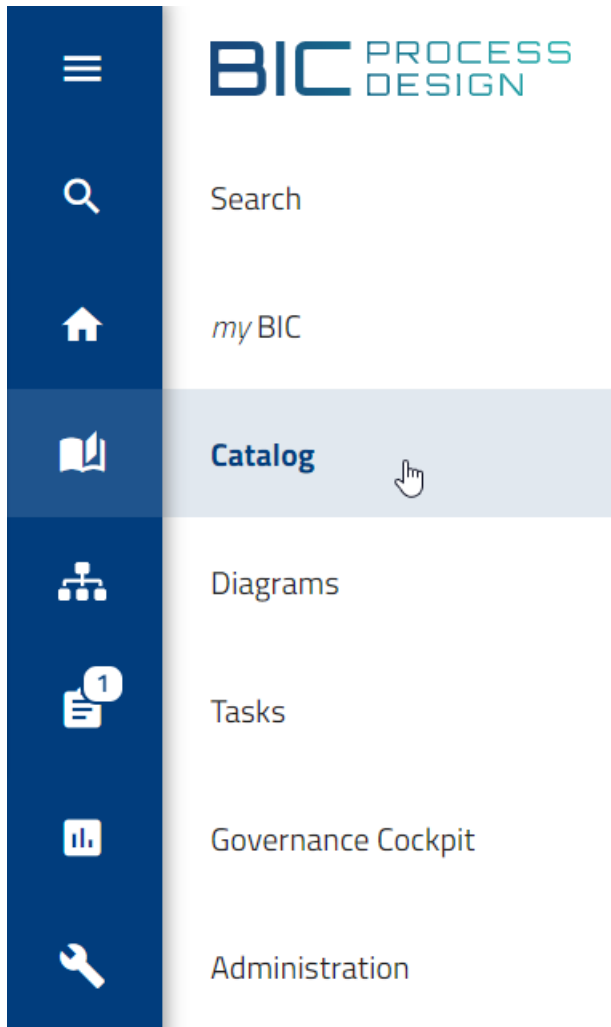
The catalog opens and a list of all catalog items, that *you can access*, is displayed. This includes the symbol of the type and the name of each catalog item here. In addition, the associated attributes and occurrences can be displayed. You can see the number of currently listed catalog items in the header next to the "Catalog". If a catalog entry includes a description, it is displayed either below the name in the list or within the catalog entry.

In the public workspace, accepted catalog items as well as suggested catalog items are displayed in the catalog. You can recognize a suggestion by an orange dot at the icon of the item.
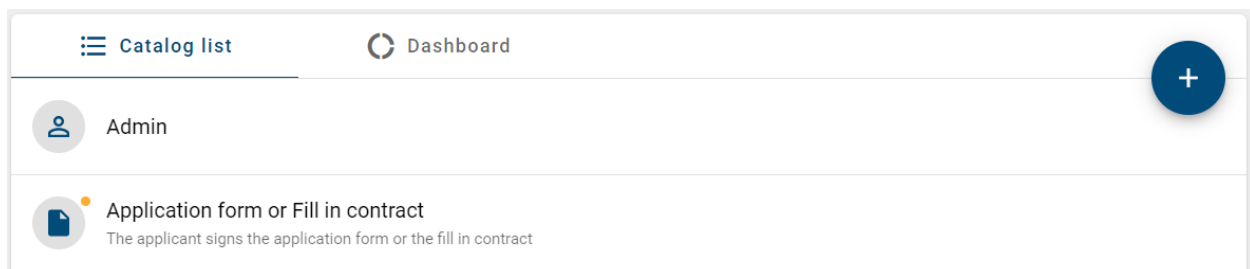
In addition to the list of catalog items you can also use the *dashboard* to represent some of the data in your catalog graphically.

9.2 Create and edit catalog items

9.2.1 How do I create new catalog items?

Within the new user interface you can generate new catalog items in two different ways, which are described below.

Note: Note that you create catalog *suggestions* here. To start the publication of a diagram containing instances of catalog items, these catalog items have to be *accepted*.

Create items directly in the catalog:

This functionality can be used by administrators or editors. Navigate to the catalog in public workspace and click the plus symbol *New catalog item* at the bottom of the screen.
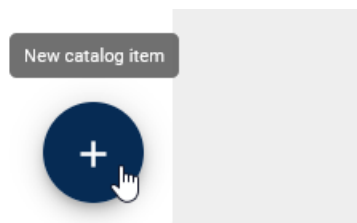
A dialog appears where you can insert a name and a type for the new catalog item. Furthermore, you got a checkbox, which redirects you to the details page of the newly created catalog item. If you have deselected the checkbox you will be redirected to the catalog list and get notified about the successful creation. Afterwards you can create a new catalog item, if wanted.

If you activated a filter before creating a new catalog item, the filtered type is selected in the drop-down list. For example, when you view all *data store* items in the catalog and realize that one data store of your organization is not listed, you can directly add the missing object via the *New catalog item* button. As soon as you confirm the type by selecting the *save changes* button, you will be directed to the details of the new catalog item in edit mode. You can set the attributes of the new catalog item (e.g. name, identifier or description) there. The name of the new catalog item is

initially maintained as the type name. *Save* the new catalog item afterwards using the equivalent button to close the edit mode.

Note: After you created a new catalog item the catalog list is not sorted alphabetically anymore. To go back to the alphabetical sorting you need to reload the list first (e.g. by pressing F5).

Adding items by modeling:

New catalog items can be generated when creating new symbols in the *diagram modeling process*. The activation of the object type as catalog suggestion in the *administration area* is required to use this function.

Create a new symbol in a diagram, which can be used in the catalog. (These are reusable symbols, such as roles, risks, etc. Symbols that are not displayed in the catalog by default are symbols which are normally unique, like for example activities and events.) You then have to check in your diagram to make the items available in the catalog. As soon as you have checked in your diagram, a new catalog item for each of the symbols is available. Furthermore, they are available in the suggestion list when creating new symbols of the same type in the editor.

Note: In the old user interface, you also have the possibility to suggest existing symbols as catalog items.

9.2.2 How do I create new catalog items using AI?

As an administrator and editor, you have the option of generating catalog items using AI. To do this, navigate to the *Options* panel of the catalog and click on *AI-powered Editor*.
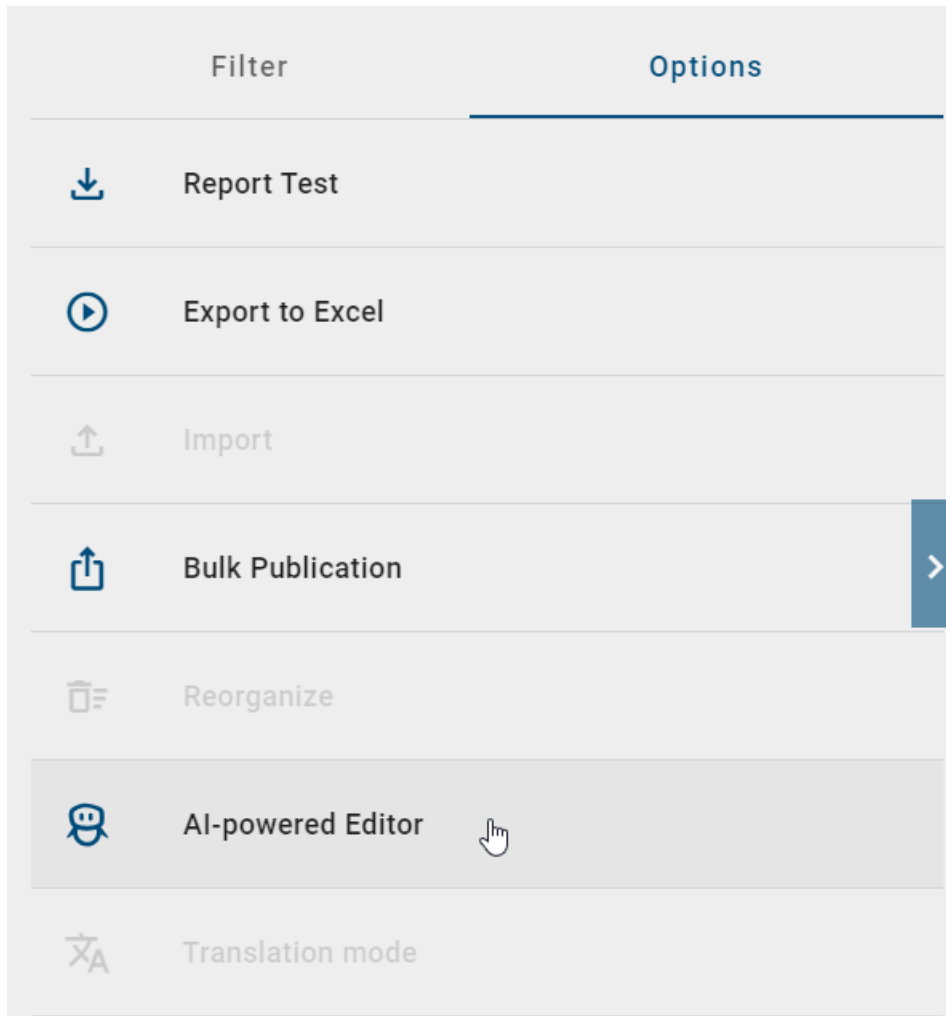
This will open a dialog window where you will need to follow three steps. First, you must inform our AI-powered editor, *Arty*, of the desired type of AI-generated catalog items. Additionally, you can specify the industry and the quantity of catalog suggestions. Click on *Next* to proceed to the next step.

AI-powered Editor

1 Define	**2** Select	**3** Create

Let Arty know your requirements for the generation of the catalog items

Choose a type*
Activity   ▾

Specify your industry
Job application

15/255

How many catalog items do you want Arty to generate?

●━━━━━━━━━━━━━━ Moderate

Cancel   **Next**

In the next step, *Arty* generates a range of catalog suggestions. Here, you can select which items meet your requirements. To select all AI-generated suggestions, please click on the top entry *Catalog items selected*. If you are dissatisfied with the suggestions, you can click the *Previous* button to adjust your input accordingly.

Once you have selected at least one suggestion, you can click on *Next* to proceed to the final step.

AI-powered Editor

✏️ Define ────────────── ② Select ────────────── ③ Create

➖ 4 catalog items selected

☐ Job posting

☑ Resume screening

☑ Interview scheduling

☐ Candidate assessment

☑ Background check

☐ Reference check

☐ Offer negotiation

☑ Onboarding process

☐ Training and development

☐ Performance evaluation

☐ Employee benefits

Cancel   Previous   Next

In the final step, you will see an overview of all catalog items generated by *Arty*. If no errors were identified, you will see a green checkmark next to the suggestions. To view the suggestions in the catalog list, please click the *Close* button.

AI-powered Editor

✓ Define —————————— ✓ Select —————————— ③ Create

✓ Background check

✓ Interview scheduling

✓ Onboarding process

✓ Resume screening

Close

The catalog items generated by *Arty* are now displayed at the top of the catalog list. Once you reload the page, the items will appear in alphabetical order. You can find information on how to edit catalog items *here*.

Note: Please be aware that the AI-generated catalog items are generated only in the current content language.

Note: The *AI-powered Editor* option is not available in the mobile view.

Hint: This function is performed by *Arty*, our AI Editor. It is part of the AI catalog editor package, which requires a separate license.

9.2.3 How do I edit attributes of catalog items?

Navigate to the catalog in public workspace and search for a catalog item that you like to change. Select the item to open the details.
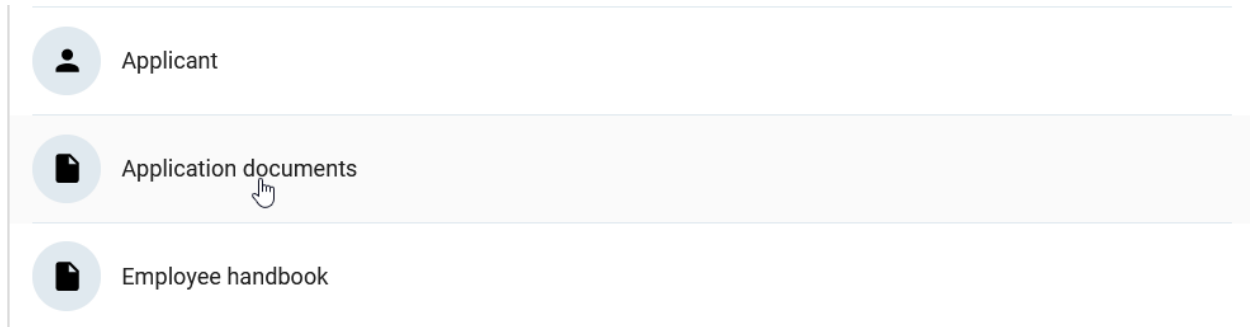
Click the *Edit* button to enter the edit mode.
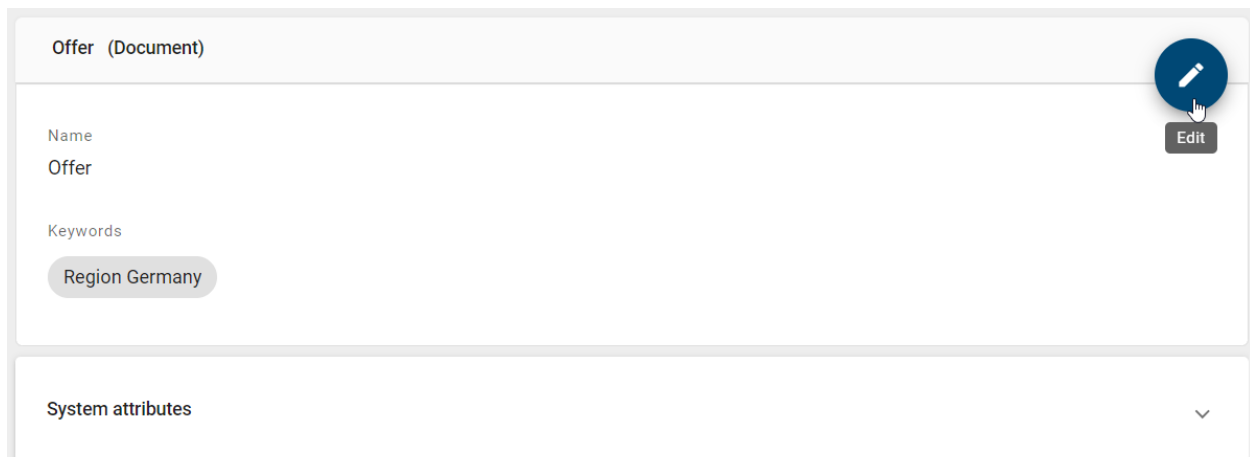
If you are editing a catalog item that is only a suggestion, a small banner at the top informs you about that.

Edit the attributes according to your wishes by changing, inserting or deleting values. Read-only and system attributes cannot be edited. You can add links and files in the attribute field *Attachment (URL)*, which are sorted alphabetically. The attachments can be provided language dependent. An explanation for the functionality can be found in the chapter about the *attribute "attachment"*. Moreover, note the different *functionality to edit the attribute "Description"*.

Organizational units, documents and norms can be created while editing the attributes of certain entities in the catalog. To do this, the attribute field must be selected. Suggestions of existing catalog items are shown after the the first letter is entered.

In addition, a new entity can be created and assigned directly. This is done by entering the desired name in the selected field and clicking "create" for the required entity type.
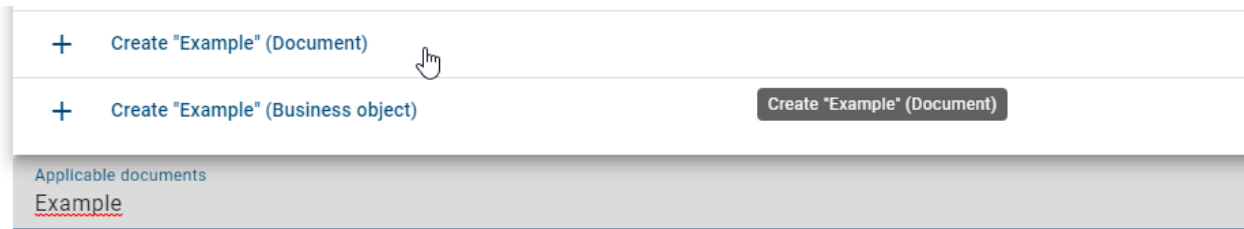
A notification will inform you that chosen entity has been created and added to the publishing workflow for catalog items.
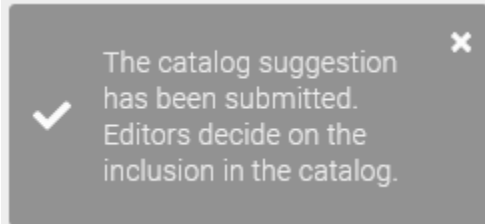
Confirm your changes by selecting *Save*. You will be redirected to the original view of the catalog item. You can undo your changes via the button *Exit edit mode*.
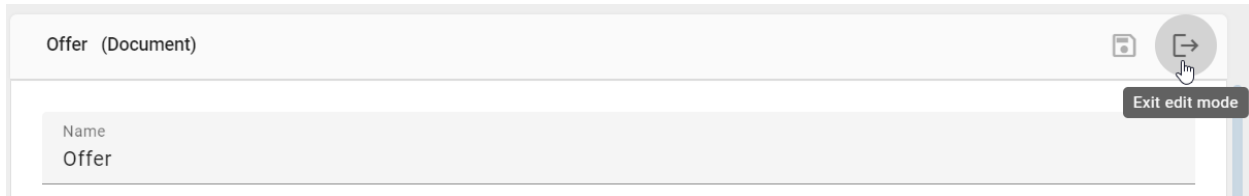
If you are leaving the edit mode and there are unsaved changes, you will get a hint. You will have the possibility to save your changes or leave without saving. Alternatively, you can cancel leaving the edit mode by clicking outside of the pop-up window.

Note: In the edit mode you can only see values of properties that have been maintained for the selected *content language*. Outside of the edit mode you will also see values that have been maintained in the alternative language but not in the content language. This behaviour enables you to be sure that when being in edit mode you will always set up values for the currently selected content language.

Hint: In the edit mode, all options except for **Delete** are deactivated. For example, no catalog suggestion can be approved or rejected during editing.

Tip: If a diagram or object has been added to the details of a catalog entry, you can navigate to the corresponding

diagram or object by clicking on the chip.

9.2.4 What happens if I change symbol attributes in a diagram that are in the catalog?

If you change symbol attributes in an existing diagram when they have already been accepted in the catalog, a new catalog item is created for this symbol. This serves to prevent unwanted or accidental changes in the attributes of the same symbol. The creation of new items allows you to manage changes centrally in the catalog, for example, to decide whether the changes should also apply to other symbols.

Create a new symbol (for example, a role) and select a catalog item from the suggestion list. The symbol has the same properties as the selected catalog item. If you change the attributes of this symbol, for example, by renaming it, the following happens.
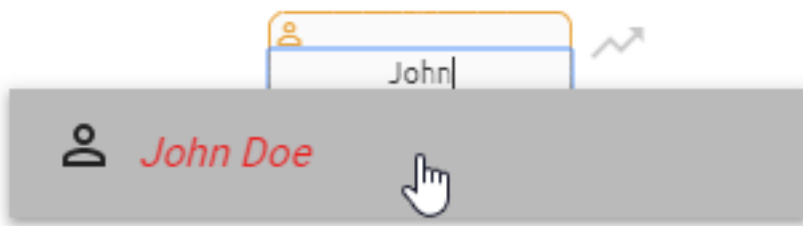
Accepted (black) catalog item

A new catalog item containing the changed attributes is created by checking-in the diagram. Other symbols in the same diagram that previously referred to the same catalog item are also changed and then refer to the new creation mentioned before. However, the symbols of the catalog item that are used in other diagrams do not change and the reference remains. If you want to replace the selected catalog item with the newly created item for these symbols as well, you have to do it via the *Delete* option.

Proposed (red, italic) catalog item

Check in the diagram and the changes will be accepted for the existing catalog item without creating a new one. These changes also affect all other diagrams in which the proposed catalog item is used.

Note: Be aware that the *suggestion list of the server* will be updated after you check in your diagram. In other words, if a suggested catalog item is renamed, this item will still have the old name in the suggestion list of the server until you have checked in the diagram once.

9.3 Quality assurance in the catalog

9.3.1 How do I change the state of an accepted catalog item?

As administrator or editor you have the possibility to set accepted catalog items back to the status *catalog suggestion*.

To do that, open the details of the catalog item and open the options menu.
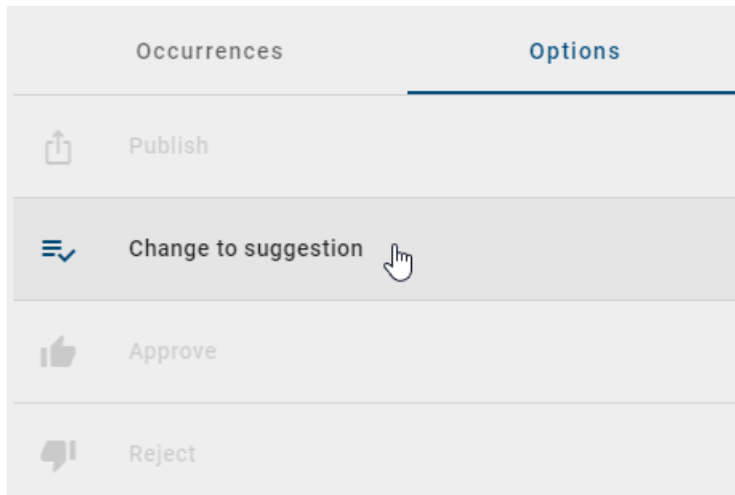
Choose the Option *Change to suggestion* to set the catalog item to the status of a catalog proposal.

9.3.2 How can I accept a catalog suggestion?

The user roles *Administrator* and *Editor* are authorized to manage catalog items and can therefore accept suggestions to include them into the catalog.

Navigate to an existing catalog item in the catalog list that has not yet been accepted. You can recognize such a *catalog suggestion* by an orange dot at the icon of the item.

You can directly accept the suggestion in the list. Open the context menu (three dots) of the item and select the option *Accept*.
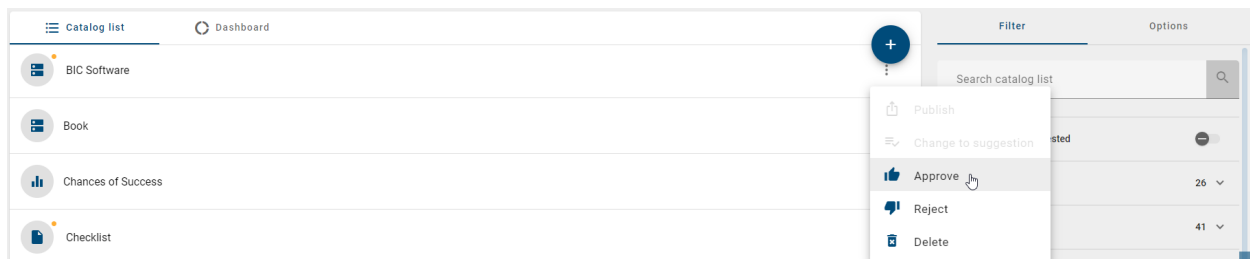
Alternatively, you can find the same option in the detail view of the catalog suggestion. Click the item, then switch to the *Options* tab in the right sidebar and select *Accept*.
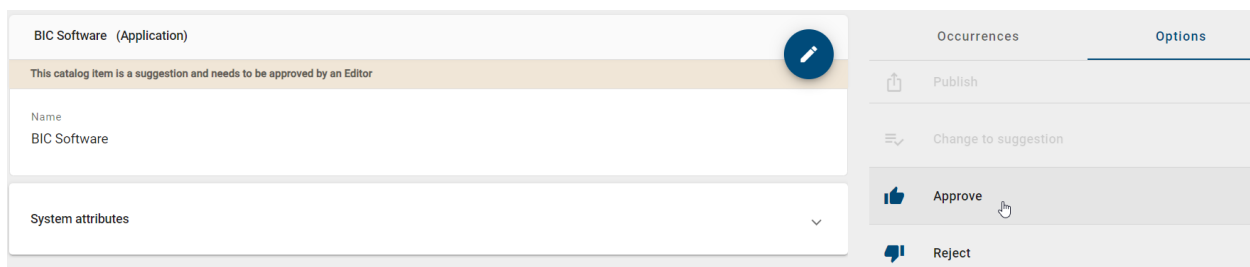
As soon as you accepted the suggestion, it will be added to the catalog and thus will be part of the master data of your repository.

If an object of the approved catalog item is changed in a diagram, the item in the catalog is not changed but a new catalog item is created instead. Changes for reuse of the accepted item can thus only be made via the catalog itself.

Tip: You can *filter suggested catalog items* in the catalog.

9.3.3 How can I reject a catalog suggestion?

Items that have been rejected in the catalog are removed and no longer available for reuse in any diagrams (via the suggestion list). As an *Administrator* or *Editor* you can reject proposed items from the catalog as follows.

Navigate to an existing catalog item in the catalog list that has not yet been accepted. You can recognize such a *catalog suggestion* by an orange dot at the icon of the item.

You can directly reject the suggestion in the list. Open the context menu (three dots) of the item and select the option *Reject*.
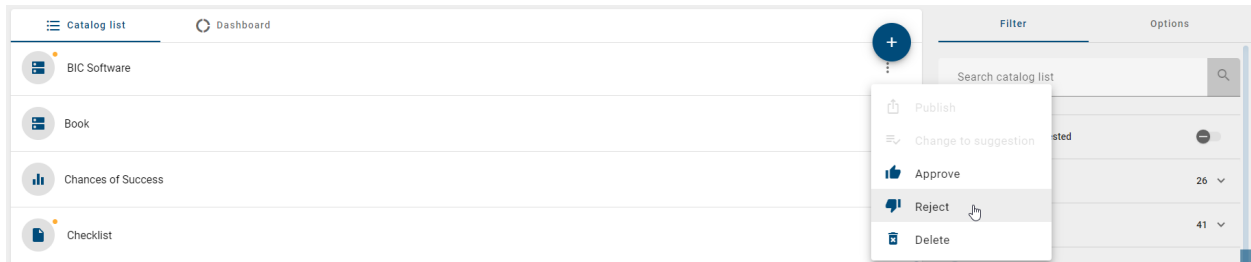
Alternatively, you can find the same option in the detail view of the catalog suggestion. Click the item, then switch to the *Options* tab in the right sidebar and select *Reject*.
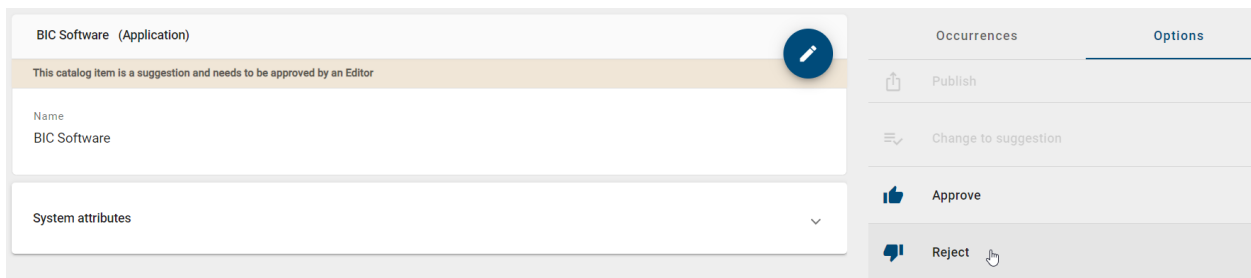
As soon as you reject the catalog suggestion, it will be removed from the catalog. Until the page is updated, the item will be displayed strikedthrough. This action cannot be undone.

9.4 Search and filter catalog items

9.4.1 How do I search for catalog items in the catalog?

If you want to search for specific catalog items, you have to click on *Search catalog list* in the *filter* tab. To start the search, press *enter* or click on the magnifier icon.
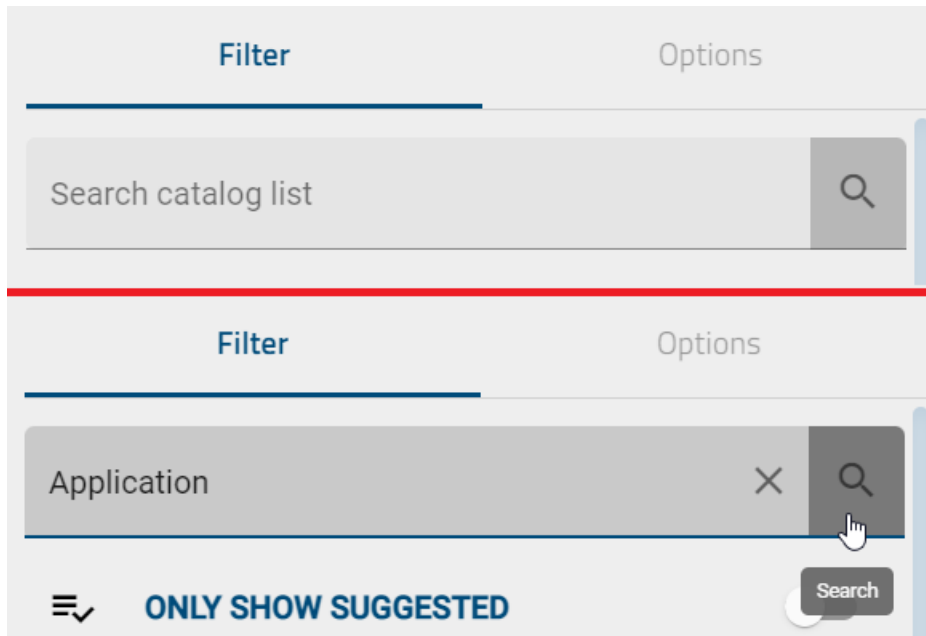
You will then see all the search results that contain the specific term.

If there are no matching catalog items for your search term, the main area will show a corresponding hint as well as the button *Toggle language & search again*. You can select this button to set the alternative language as your content language and restart the search in this new content language.

If you want to display your entire catalog list again, click *Clear search* next to the magnifier glass icon to reset your list.
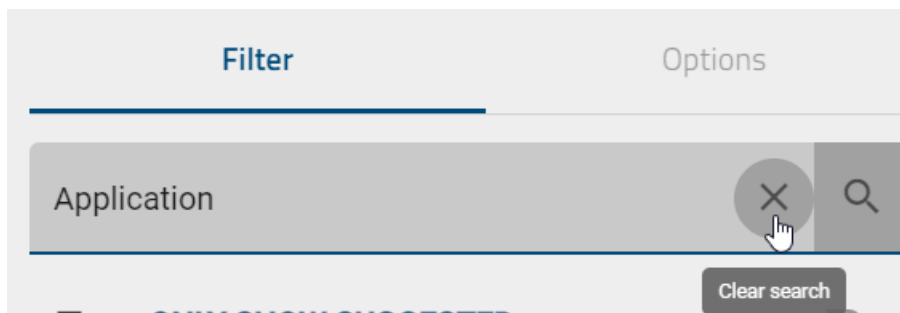
Hint: *Here* you can find an overview of the different options you have for search terms.

Note: The search results are sorted by relevance. Therefore, it is not possible to sort them by name.

9.4.2 How can I filter catalog items?

Navigate to the *Catalog*.
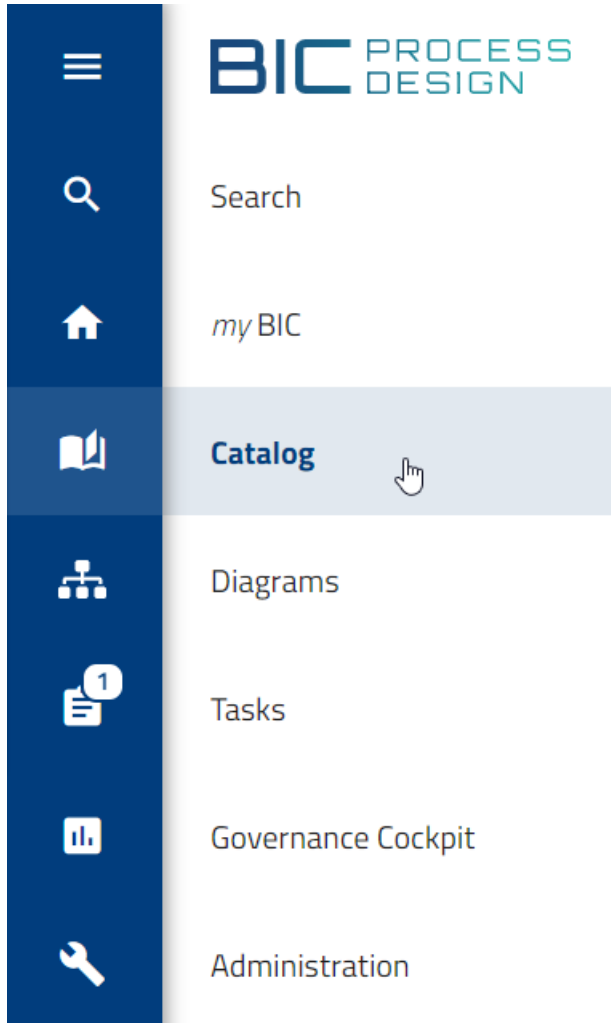
There, in the right sidebar you can choose between the register cards *Filter* or *Options*. In case you are using a mobile device you can find the filters via the three dotted menu in the upper right corner. If the register card *Filter* has been selected, filters for all available object types in the catalog are listed. If you click on the desired filter, it will be expanded and automatically applied to the catalog. Additionally, the selected filter will be visually enhanced by a checkmark on the corresponding item.
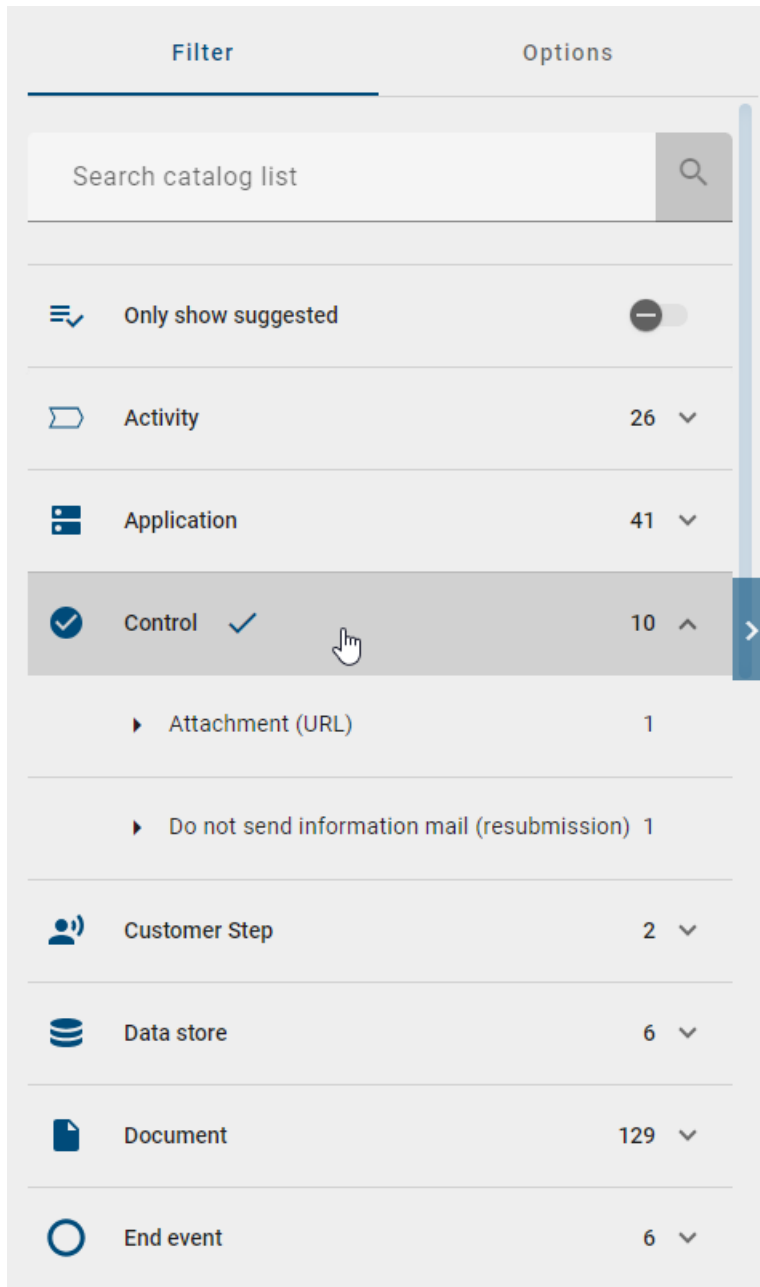
The catalog only displays items of the selected type, as you can see in the header of the catalog. After expanding the filter, individual facets are displayed for the selected entity type. A facet corresponds to an attribute type of the object type and is listed here as soon as it has been maintained on an object and *activated in the administration area*. The order is alphabetical. Attribute types that include checkboxes or assignments to persons are not taken into account here. The facets can also be expanded. The attribute values of the object type appear and are always listed dependently of a search term. Each attribute value has a checkbox and can be selected and deselected to limit the search to that value.
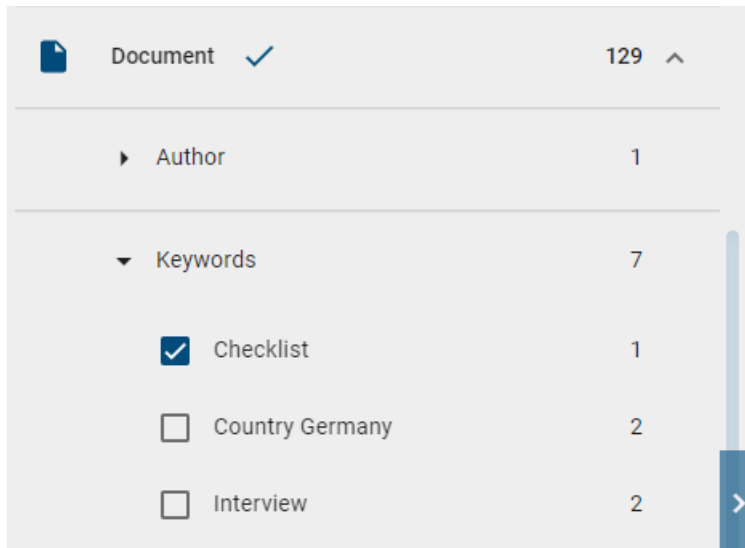
You can now select more facets, search within the filter, or remove the filter. By collapsing the filter or facet, all filter and facet settings are reset. Note, that you cannot select two filters at the same time.

As an administrator, editor or author you also have the possibility to filter only catalog suggestions. To do that, use the toggle button on the top of the right sidebar. Depending on the stage you are currently in, the button will be labeled differently and you will get different results. If you are in the public workspace, you will get *only suggested* catalog items. If you are in the preview stage, you will only see catalog items that *need approval*. It is possible to combine this filter with other filters.
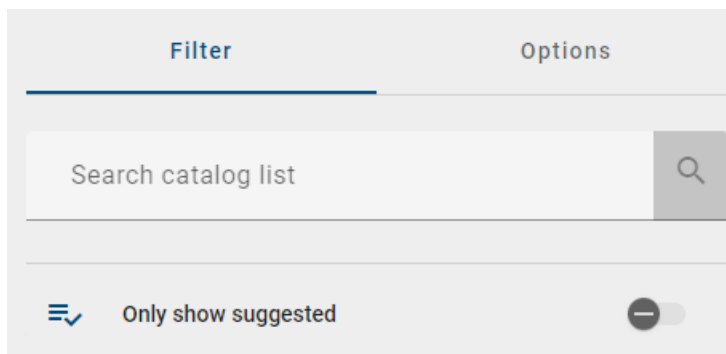
Filters, which have no corresponding catalog items can be hidden within the administration area. To do so use the option to automatically generate catalog items, when checking in. In case this option is deactivated the affected filter will be hidden. This filter will then only be displayed if catalog items for this object type already exist or in case a new catalog item has been manually created in the catalog.

9.4.3 How can I filter catalog items by their current state?

With the *Governance Lifecycle* filter, you can filter catalog items according to their currently active workflow, their publication or their revision. This gives you a better overview of the status of the catalog items.

If you want to apply this filter, you must be in the *Public workspace*. In the *Filter* tab, you can open the *Governance Lifecycle* filter.

Publication

If you open the *Published* subfilter and at least one catalog item has been published, you can filter for the corresponding catalog item by clicking on *Depublished*, *Not published* or *Published*.

▼ Publication	3
☐ Depublished	1
☐ Not published	1
☐ Published	2

Revision

If the *Revision* subfilter is expanded and at least one catalog item has a revision status, you can select a specific revision status as a filter. You can filter catalog items according to the following revision statuses: *Modified*, *Unmodified* and *Unknown*. Changes to a catalog item cannot be displayed until it has been republished. Until then, it has the revision status *Unknown*.

▼ Revision	3
☐ Modified	1
☐ Unknown	2
☐ Unmodified	1

Workflow

If you have expanded the *Governance Lifecycle* filter, you also have the option of opening the *Workflow* subfilter. Here you can then filter whether a workflow is active for the catalog item. A distinction is made between *Depublication*, *Publication* and *Resubmission*.

▼ Workflow	2
☐ Depublication	1
☐ Publication	1

You will then see a filtered list and a number of all catalog items that are in the corresponding area.

Hint: The *Governance Lifecycle* filter is available from version 7.14.0. To display all published catalog items in the filter, you must check the catalog items out and back in at least once.

Note: All filtered results are sorted alphabetically by browser language.

Hint: The *Governance Lifecycle* filter is also available to filter *diagrams* by their *Workflow*, their *Publication* or their *Revision*.

9.5 Translate catalog items

As *Administrator* or *Editor* you have the possibility to translate all catalog items. This is only possible if you have previously *filtered* the catalog list. As an *Author* you can only translate the filtered catalog items you are assigned to. To translate the catalog items, go to the option area and click *Translation Mode*.
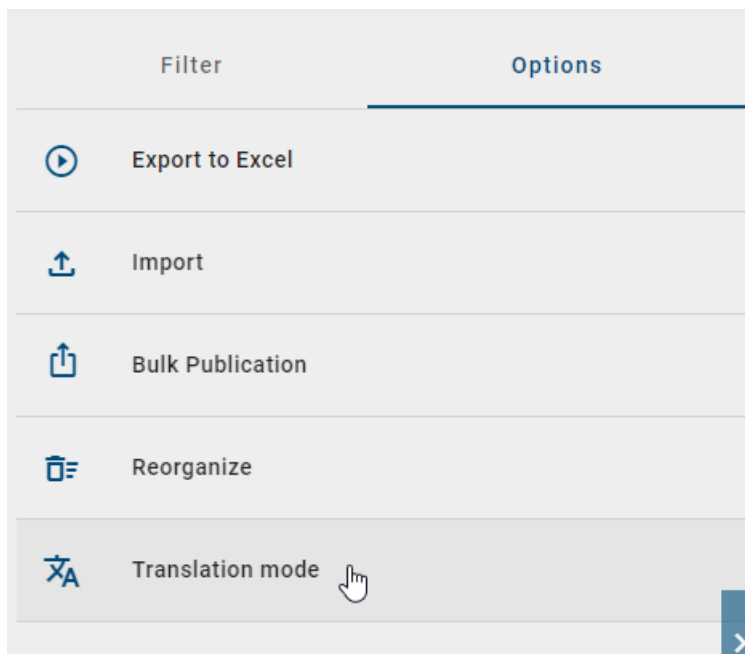
Hint: The option *Translation Mode* will only be shown if you are in the *Public Workspace* stage.

After selecting the *Translation Mode* option, the catalog items will be displayed in your *content language*. To now insert an *alternative language*, click on the catalog item in which you want to add a translation.

A list of filtered catalog entries appears to translate the language-dependent attributes. After clicking on a catalog entry, several text input fields appear where you can enter the name, description, and keywords in another language. The language codes (two-letter codes following **ISO 639-1**) indicate which text field the translation should be entered into. You can use the horizontal scroll bar to view all supported languages by BIC Process Design and provide translations.

After entering the translations, you can either *save* or *discard* the changes by clicking on the *Save* icon or the *Discard* icon in the changed catalog item.

Hint: The function *save changes* is only available per entry and not for all entries together. This allows you to save changes or modifications to a single entry, but it is not possible to save all entries at once.

To leave the *Translation Mode*, you can either click on the *Translation Mode* option again or click on your next destination in the application. If you have unsaved changes, a dialog window appears with the according hint. You can decide if you want to discard the changes by clicking on the *Leave* button or go back to your modified catalog item and save the translation(s) by clicking on the *Cancel* button.

Note: The option *Translation Mode* is not available for small screen sizes (e. g. in the mobile view).

9.5.1 How can I automatically receive translation suggestions in the catalog?

If the *DeepL translation service* is enabled, you can generate translation suggestions for attributes *Name, Description,* and *Keywords* in other languages. To do this, only a language-dependent attribute needs to be maintained in the active content language, which serves as the basis for the translation suggestion.

The option for the translation suggestions is automatically disabled if an input field already contains text. Conversely, the option is activated automatically when an input field's existing input is removed.

If you want to request a translation for a language-dependent attribute, select the *Create translation suggestion* option in the respective input field. This will send a request to the DeepL API, which will automatically generate translation suggestions.

9.6 Dashboard

9.6.1 What is the dashboard and what options does it offer to display the data?

You can display all catalog items in a pie chart when using the dashboard. To open the pie chart select the tab *Dashboard* within the headline of the catalog.
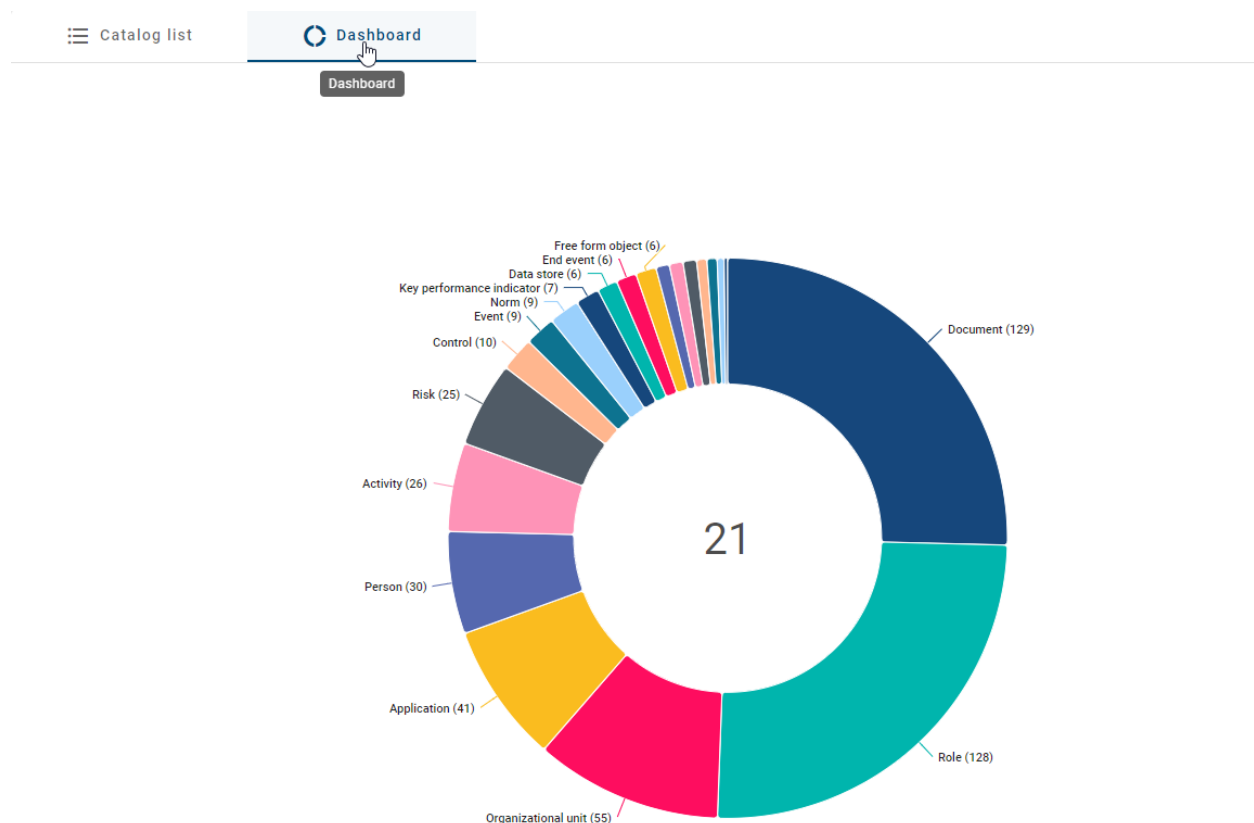
The dashboard opens with a pie chart in which all catalog items are sorted according to the object types. You can highlight individual elements by moving the cursor over an element in the pie chart.

To return to the usual list-based view of the catalog items, select the *List* icon next to the dashboard icon.
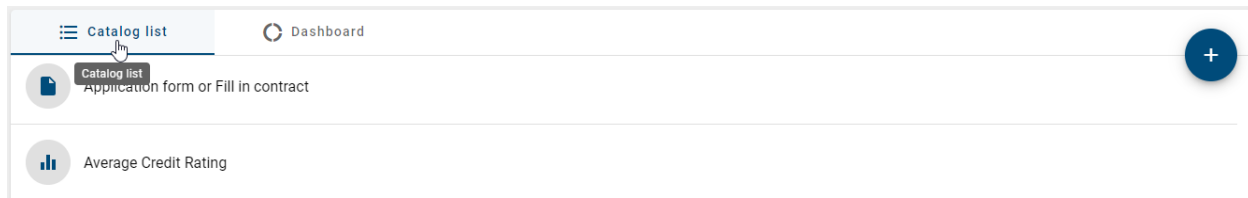
Tip: The number displayed in the center of the donut diagram shows the the number of different entity types within the catalog.

9.6.2 Which data is offered by the dashboard?

In the dashboard you can decide whether you want to display an overview of all catalog items of all object types or all facet values of all catalog items that belong to a specific object type.

If you have not selected a filter in the catalog, all catalog items will be displayed, sorted by their object type. In parentheses after the name of the object type, the number of catalog items that exist for this type are shown.
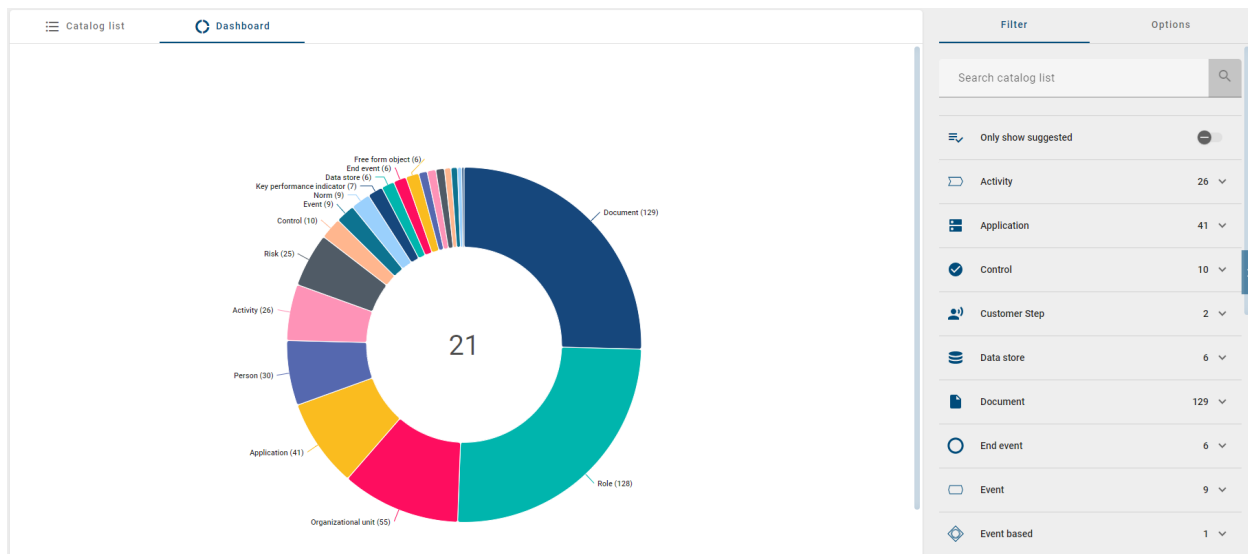
In case you have selected a filter, the facets and their values are displayed for the specific object type. A separate diagram is displayed for each facet. Each of these diagrams shows the different values that exist for the respective facet. Behind each of the values in parentheses you can see the number how often this value was given for the facet.
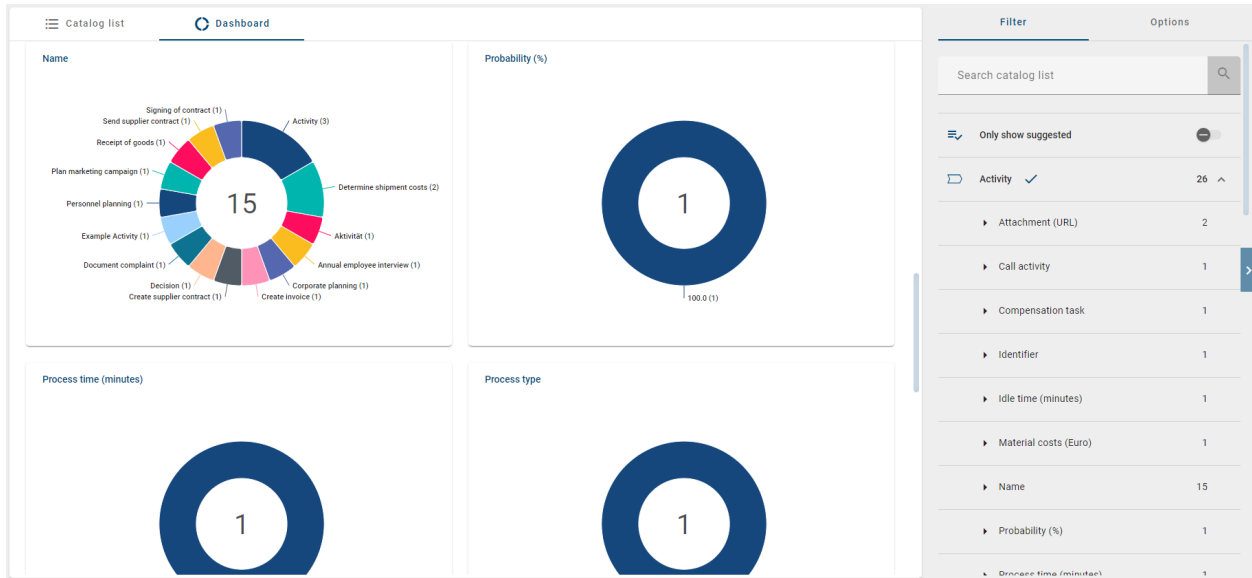
9.7 Occurrences

9.7.1 How can I view the relationship of a catalog item to other catalog items?

You can see in the respective details of a catalog item if this item is related to other catalog items. To do this, open a catalog item and select the *Occurrences* tab in the right sidebar. The appearing facet *Catalog* can be expanded to view its relationship to other catalog items.

If the catalog item is related to other catalog items, you can view its details by clicking on the corresponding item.
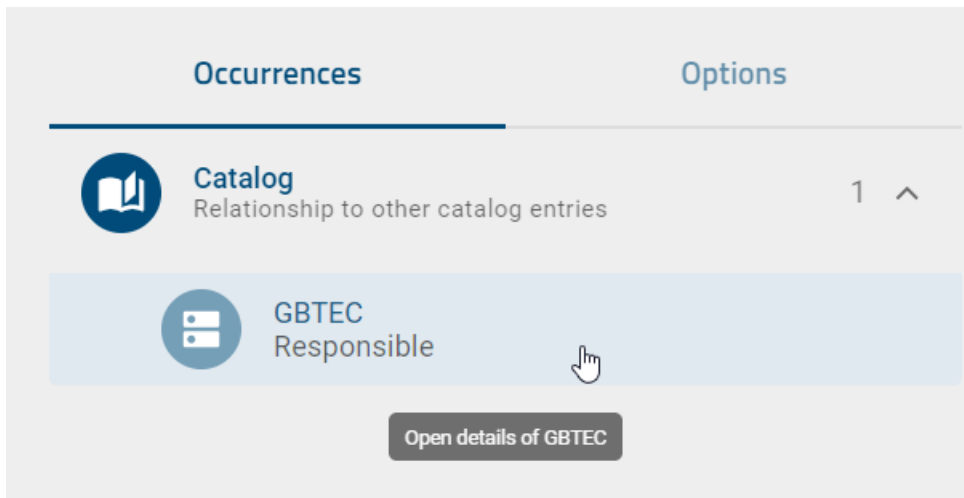
If the catalog item is not related to any other catalog items, you will be notified with the corresponding information.

GBTEC is not used in other catalog items
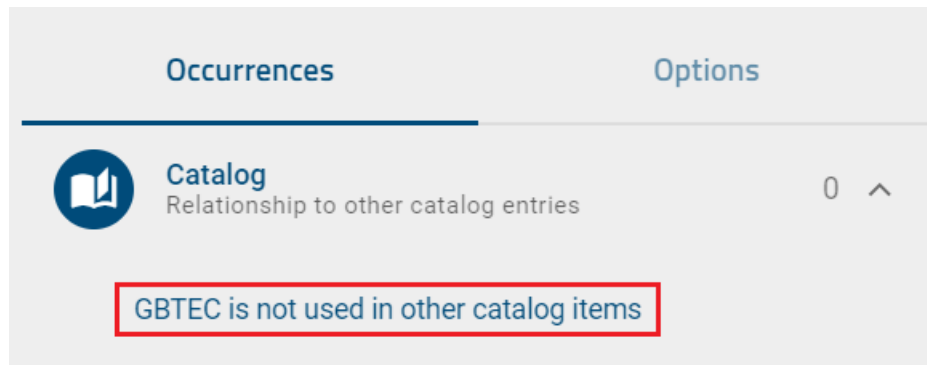
9.7.2 How can I view occurrences of catalog items in diagrams?

In the catalog, you have the option to view the occurrences of catalog items. In doing so, all occurrences will be displayed, in which diagrams they are used and the relations they have to other objects.

Select the *Catalog* item in the menu. There select a catalog item to open the details of that item. Within the right sidebar you can see the register card *Occurrences*. In case it is selected a list of all the occurrences of the item will be displayed.
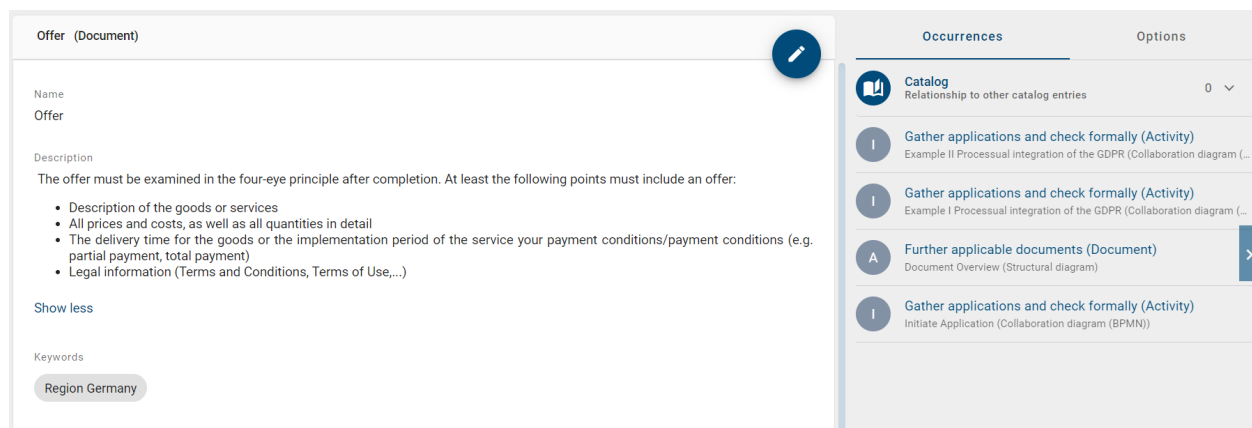
For occurrences with connections to other symbols, the name of the connected symbol and the name of the diagram are displayed. For objects without connections to other objects, only the diagram name is displayed.
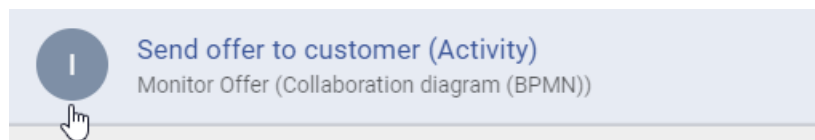
Select an occurrence from the list. The diagram or allocation diagram that contains the occurrence will be opened and the symbol will be pre-selected.

You can also *display the occurrences of an object* in diagrams.

9.7.3 How can I see how a catalog item is used in a diagram?

When you navigate to the catalog list and have selected an item, you have the option *Occurances* under the details. This option allows you to see the relationships between other catalog items and diagrams.

If the corresponding item is used in a diagram, this diagram is listed in the occurrence list. The list is sorted alphabetically, with each item being an expandable field with the number of occurrences. When the diagram field is expanded, all occurrences of the item are listed. These are clearly presented in ordered groups, each with its own designation.

Hint: To navigate to a specific occurrence of an item, you need to click on that item.

9.7.4 How do I reuse catalog items in multiple diagrams?

You can reuse catalog items in multiple diagrams by using the suggestion list. It does not matter whether the items have already been accepted in the catalog or not ("suggested").

Create an object type that already exists in the catalog. Edit the name of the object by double-clicking or pressing F2 and type in at least one letter of the catalog item that you want to reuse. All catalog items, up to a maximum of five, appear in the suggestion list of the server containing the entered term. For example, the search term "manager" will also find "process manager". In addition, the suggestion list is prefiltered by the diagram attribute "Scope":

- **Scope defined**: Only catalog items whose scope is not defined or which have the same scope as the diagram are found in the suggestion list. Scopes are considered to be the same as soon as an organizational unit exists in both scopes.

- **Scope not defined**: Only catalog items whose scope is not defined are found in the suggestion list.
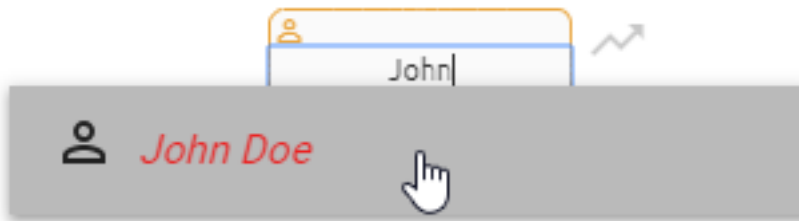
Select the catalog item that you want to reuse from the suggestion list.

Note: The suggestion list for catalog items in the *attributes of an object* behaves in the same way. When reusing, note the *differences by editing* suggested and accepted catalog items.

9.8 Catalog Export and Import

9.8.1 How do I create a Process warehouse export in the catalog?

The Process warehouse export contains all currently displayed catalog items in the form of an Excel table. This means that *filters, facets or search results* can limit the content of the catalog export.

In your menu bar, navigate to the *Catalog*. In the right sidebar click on the register card *Options*. There select the option *Export to excel*. The export will then be created according to the current filtering.
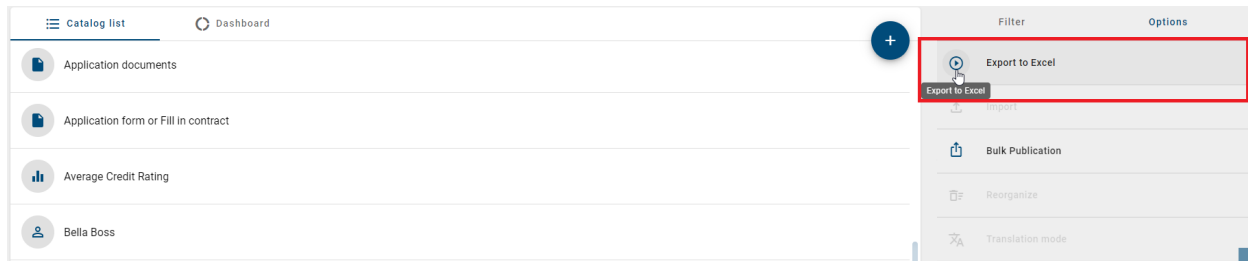
As soon as the report has been generated you get a popup notification which informs you about the successfully created report. There you also get the option to directly download the export. In addition, the function *Download the report* appears on the right side of the *Export to excel* function. Via those two options you can download the report.
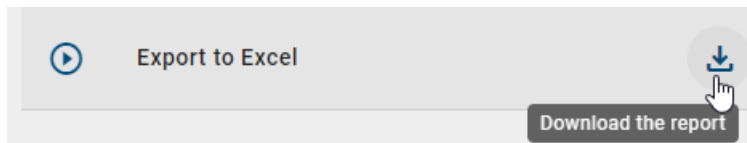
In the export, the first visible row forms the header, that is, the heading of the following rows. In the first column, the unique identifiers of the catalog items are listed under the heading "Entity ID". The following columns relate to the attributes of the catalog item. The names of the attribute types represent the headings, for example the name, identifier, description, attachment, keywords, system attributes and the object type. The following rows specify the filled attribute values associated with the catalog items. Multi-value attributes, like keywords, are listed separated by a semicolon. In general, the attribute types are only part of the export if they have been maintained for at least one catalog item.

Hint: In older versions, all attribute types were exported, regardless of whether they were deactivated or removed within the method. From now on, only visible attribute types are exported.

Note: Attribute values exceeding 32767 characters will be automatically shortened. A notification will be provided at the end of the shortened value indicating it has been reduced.

Note: The *attribute type IDs*, which are defined in the method, are specified in the initially hidden first row. This allows you to *re-import* the exported data and make changes to catalog items. However, note the following restriction.

Note: Each cell of the column "Attachment (URL)" contains a comma-separated list of the links maintained in the corresponding attribute field. Maintained titles are specified at the corresponding URLs via URL encoding. If you edit (or add) the title of a URL in the process warehouse, be sure to use URL encoding in order to update the catalog item successfully.

Note: The date information you find within your exports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

9.8.2 How can I import data into the catalog?

With the rights of the user role "Editor" you can import a (adapted) process warehouse export in csv or xlsx format into the catalog of the public workspace to add or change data. The data is always saved in the current content language.

Navigate to the *Catalog* via the menu bar and select the desired catalog filter. The catalog filter specifies the object type of the subsequently imported catalog items and must be active for the import. If there are no catalog items of the type you want to import in the current catalog list, please add a catalog item of the desired type to obtain the corresponding filter facet. After filtering for the desired type, switch to the options tab in the right sidebar and select the entry *Import*.
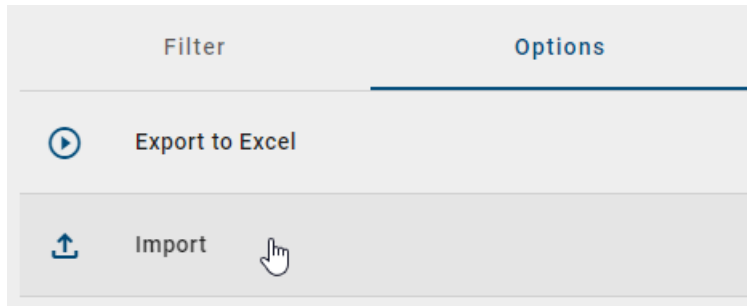
Open the desired csv or xlsx file via the appearing file selection window. The import is carried out according to the current filtering, recognizable by a corresponding message at the bottom right of the screen. If the data has been imported successfully, you receive another message. Refresh the catalog by clicking on this message to display the imported items in the catalog list. Instead, if the import fails, you will receive a corresponding message without the refresh function.
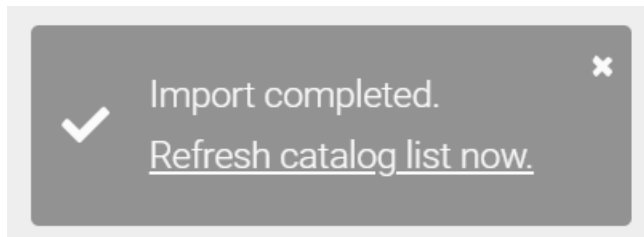
Note: The date information you find within your imports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

Note: Note that the entries of the "Attachment (URL)" column have to be URL-encoded in order to be imported successfully. Thus, if you like to attach URLs with titles to a catalog item, the titles have to be URL-encoded.

Functionality:

The import process is explained using exported (customized) catalog items. The import file is then structured as follows: The initially hidden first row specifies the *attribute type ID* for each column, that is defined for an object type in the application and is taken into account for your import. The first visible row, which is the second row in the screenshot, specifies the header. The filled out rows below correspond to the catalog items. This structure basically applies to an import file. In the following example, three catalog items are created during import in the same order as in the file.

Note: Accordingly, when importing in both csv and xlsx format, the catalog items are read in from the third row onwards.

Attributes listed in the import are adopted for the catalog items if the attribute is defined for the corresponding object type in the method: the attribute type and its data type. If this is not the case, the respective attribute type is ignored by the import. The system attributes are set or adjusted automatically at the start of the import and cannot be adjusted manually.

By default, the first column of the import file contains the ENTITY_ID if it is an export. However, if you modify the import file or create it yourself to update or create catalog items, adopt the structure described above and note the following functionality. If the first column of the **import file contains the ENTITY_ID or an attribute type ID of type Text** (as the header, see example above) and corresponding row entries,

- this column is regarded as identifying. It is used for the case-sensitive comparison with catalog items.

- the row of the file in the import is skipped if no *Universally Unique Identifier* (UUID) is used to define the ENTITY_ID. A UUID is a globally unique identifier of numbers and letters which is defined by time and location stamps. The use of an existing UUID or the generation of a new one is necessary for the import with ID and the update functionalities based on it. You can generate a new UUID using a generator (e.g. using the Online UUID Generator Tool).

- a new catalog item is created as a suggestion if the ID or text attribute does not already exist in the catalog.

- the existing catalog item with the exact same ID or text attribute is updated, that means the attribute types contained in the import are reset for the selected content language. Accordingly, empty or filled cells in the import delete or change the attributes of a catalog item. Attribute types that are not listed in the import remain unaffected in the catalog item. To update via the ID, the corresponding catalog item must be available in the filtered catalog.

  - If this is not the case for the **ENTITY_ID**, that means the same ID already exists for a catalog item of another object type, the affected row is skipped in the import.

  - The adjustment using the **attribute type ID** does not take into account the existing objects of another object type. However, if the selected filter contains several objects with the exact same attribute text, the affected row is skipped in the import.

If several line entries of the identifying attribute have the same name in the import file, the contents of the first corresponding line entry are updated with the subsequent line entries. Note that using the ENTITY_ID only makes sense in the first column. If the **import file contains neither an ENTITY_ID nor a text attribute**, it will not be imported.

Format:

For certain attributes, you must note the format. These include date values that must be entered in the format of the current content language.

Note: When importing as an xlsx file or via Excel, it is recommended to format date values in Excel as "date". Importing as a csv file or as an xlsx file, in which date values are formatted as "text", allows the following formats per data type.

Attribute value for data type	Format
Date	yyyy-MM-dd
Datetime	yyyy-MM-dd HH:mm:ss
Time	HH:mm:ss

Also note that cell representation of numbers in scientific format, that means in exponential notation, is not supported by the import.

Note: The date information you find within your imports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.
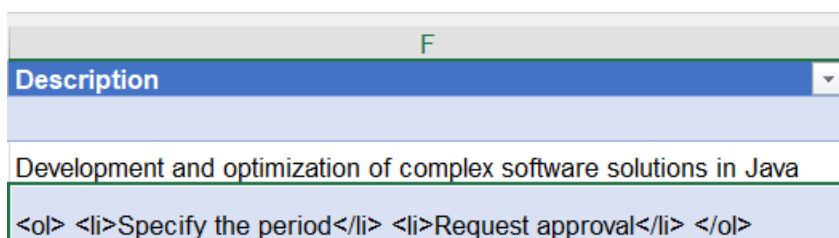
Note: The combination of quotation marks and a semicolon (`";`) in attributes with string values (e.g., the attribute *Name*, AT_NAME) is not supported by the import. Instead please use commas to separate these attributes.
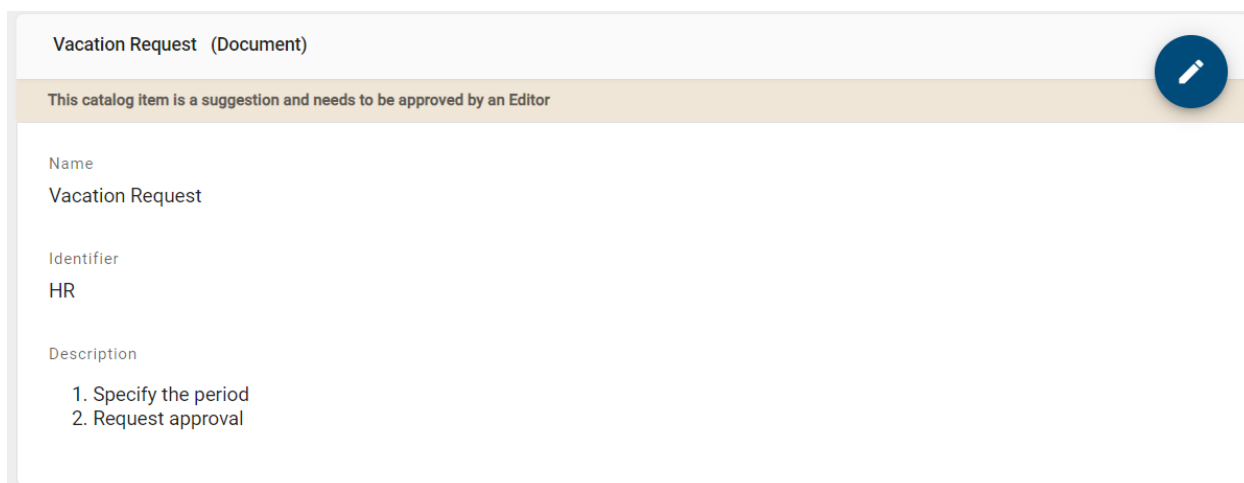
HTML tags which are used in the attribute *Description* will be interpreted during the import. The content of the attribute will then be displayed in the desired format after the file has been imported into the catalog. For example, you can specify the description of a document as shown below.

The content of the attribute is then displayed according to the given HTML format after the import into the catalog. Thus, the description attribute of the document "Vacation request" is maintained as follows:

The possibility to convert HTML tags into the desired format only applies to the import. The *export* cannot process HTML tags and also the formatting is not converted into HTML tags.

Multi-value text attributes, such as keywords, and links are also supported. The individual attribute values must be separated by a semicolon in the import so that they can also be recognized as multiple values. A space before or after the semicolon is not adopted in the attribute value.

For example, the import above creates the two keywords "Checklist" and "Offer" for the "checklist for an offer" document and shows them in alphabetical order.

Note: Since all catalog items are created during the import as object types of the selected filter, the imported file should also contain only this object type. Furthermore, the files (xlsx, csv) should be UTF-8 encoded. When importing an xlsx file, only the first spreadsheet is taken into account.

Hint: Please note that you cannot maintain or update assignments (like an assigned diagram in the subprocess attribute or person/ organizational units in the governance attributes author/examiner/responsible) via the catalog import. If you update existing catalog items via an import, the current assignments in BIC Process Design are not overwritten (and new ones are not added).

9.8.3 How can I export the profile of a catalog item?

Go to the *Catalog* and navigate to the catalog item for which you want to create a profile. With this you will enter the item's details view. There, in the right sidebar, navigate to the register card *Options* and select the option *Create the report* next to the *Profile* entry. The creation will then be started.

As soon as the report has been generated you get a popup notification which informs you about the successfully created report. There you also get the option to directly download the profile. In addition, the function *Download the report* appears on the right side of the *Profile* entry. Via those two options you can download the docx file.
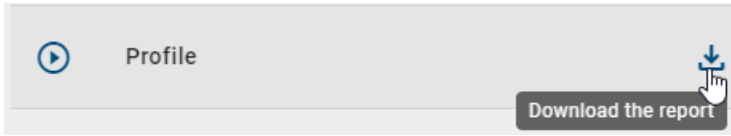
The profile is available in the catalog for the object types defined in the administration area. Administrators and Editors can retrieve it.

Note: In general, the availability for the profile depends on the configuration in the corresponding report descriptor.

It lists all attributes that have an attribute value and the corresponding value in alphabetical order and is created in the current content language of the application. You do not see the values of assignment attributes as titles, but the actual assignment, such as a URL. Furthermore, the profile lists the uses of the catalog item - grouped by diagram - in the form of tables. A table contains the names and types of the objects associated with the catalog item and the connection types.

Hint: The date information you find within your exports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

Note: For now the administration area can only be reached through the old user interface. If the report template does not exist in the selected content language, the English template is used. The maintained attribute values remain in the content language.

9.9 Delete catalog items

9.9.1 How do I delete a catalog item?

Catalog items which are no longer needed can be deleted from the catalog. This is possible for catalog suggestions and accepted catalog items. Deleting a catalog item is irrevocable! Navigate to the desired catalog item in the catalog list and open its context menu. Select the option *Delete* in the menu.
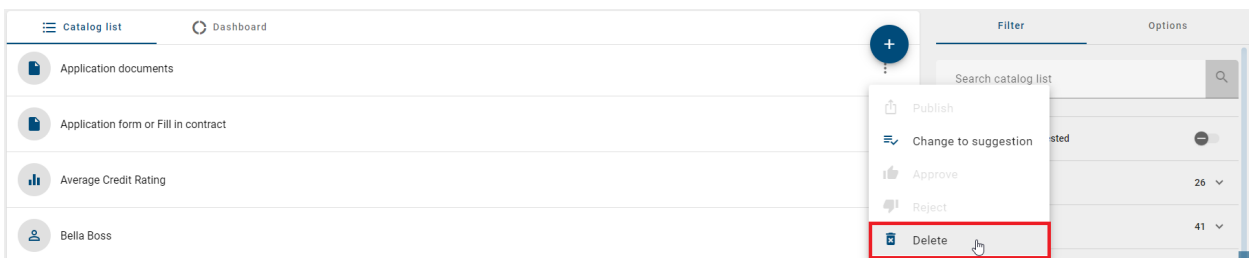
The option *Delete* is also available in the right sidebar if you open the catalog item (i.e. in its detail view).
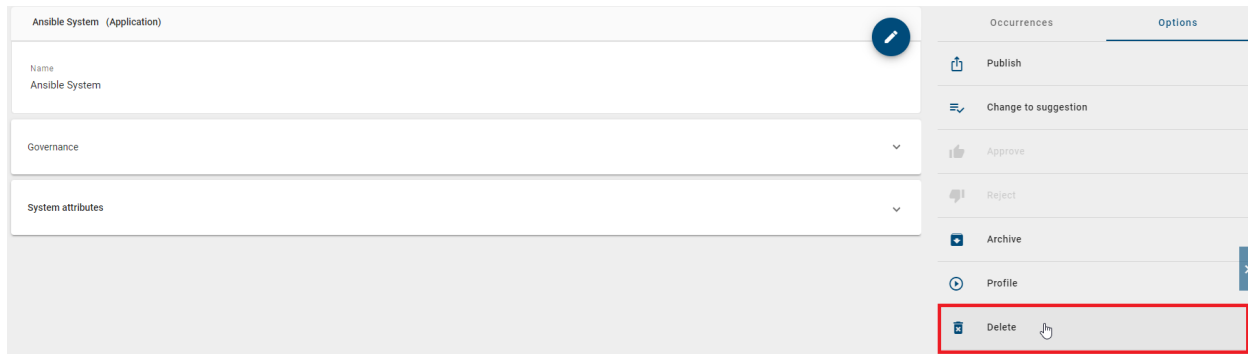
After selecting the option, a dialog window appears to confirm or cancel the deletion. If the catalog item is neither used as an object in a diagram nor assigned to an attribute, the item will be deleted directly.

Catalog item in usage: If the catalog item has at least one *occurrence* in a diagram, an existing catalog item has to be chosen as a replacement. A second dialog appears which includes an input field. Enter and select an existing item of the same type via the selection list. You can confirm the dialog via the *Replace* button as soon as you chose an item as a replacement.

Assigned catalog item: In case the catalog item is at least assigned to one attribute (but not in usage as an object), you can decide to remove or replace the item in a second dialog. For example, this might be *person objects in governance attributes*. Choosing the option *Replace*, you can enter and select an existing item of the same type via the selection list in the input field. This item will replace the deleted catalog item after you confirmed the button *Replace*. Alternatively, you can directly and irrevocably *Remove* the catalog item. The corresponding assignments in the attributes of other

objects or diagrams will be deleted as well. This is executed as soon as you confirm the dialog.

Afterwards, you will return to the catalog list. If an item was deleted in the catalog list, it is crossed and greyed out. When the page is updated, the item disappears from the list.

9.9.2 How can all unused catalog items be deleted?

With the function *Reorganize* all unused catalog items of a special object type can be deleted. This includes all catalog items that are neither modeled nor used in attributes as subprocesses. The user roles administrator and editor are authorized to delete catalog items.

Navigate to the catalog list. You can find the entry *Reorganize* in the options tab in the right sidebar. Reorganizing the catalog is only possible in combination with an active object type filter. Therefore select the *filter facet* of the object type, for which you want to delete unused items. Afterwards click the *Reorganize* option.
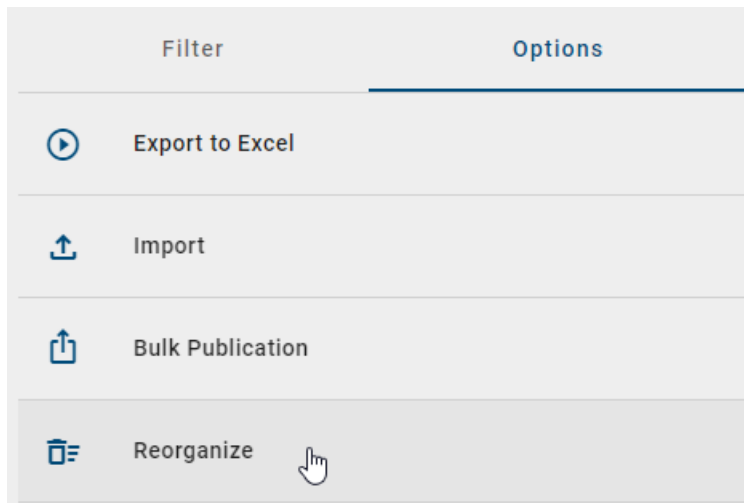
You have to confirm the reorganization in the appearing dialog. If you are sure that you want to delete all unused catalog items of the selected type, enter the name of the selected object type in the input field. Your input must match the type name from the current method in your current *browser language* (i.e. the UI language). Note that the check is case-sensitive. If your input is correct, you can confirm the reorganization of the selected type via the corresponding button.

All unused catalog items will be permanently removed from the catalog. Deleted items will be shown crossed out. When the page is updated, the item disappears from the list.

> **Warning:** Please note that the "Reorganize" function affects all unused catalog items of an object type, regardless of which *facets were selected in addition to the filter*.

> **Note:** The option *Reorganize* is not available for small screen sizes (e. g. in the mobile view).

TASKS

10.1 How do I work with my tasks?

Users who are maintained as "Examiner" or "Responsible" in the governance attributes must approve or reject a *publication* or *depublication*. Moreover, you can be assigned to resubmission tasks. You will receive further information about these tasks *here*. Using the task list, governance participants can edit their tasks directly or access the pending and completed (de-)publication tasks in the diagrams or catalog.

Open the tasks list by clicking on the *Tasks* button within the side bar. The amount of your open tasks is always displayed there as a chip.
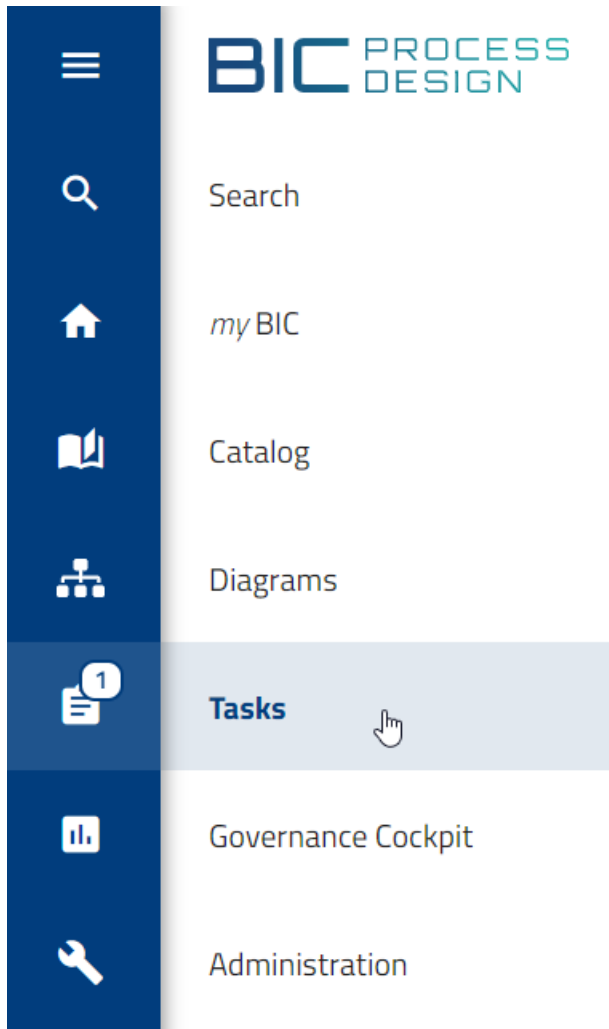
A list of all unfinished tasks appears on your screen.
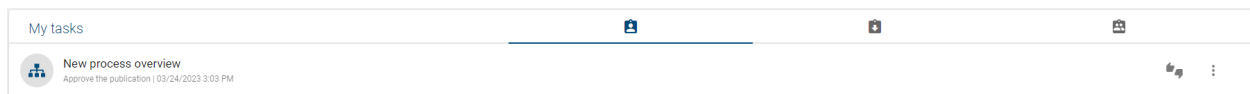
For every task you have several options on the right. Clicking on "*Audit trail*" in the context menu opens a window with further details.
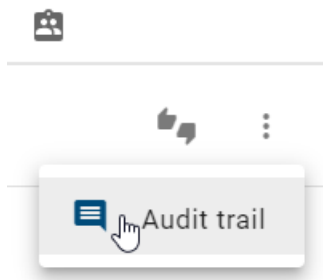
In addition to the diagram or catalog object name, user comments from previous workflow steps are displayed. In the history, the first comment always reflects the publication or depublication reason given at initiation. You can see your actual task above the history. Furthermore, a timestamp of received and completed tasks are also recorded for each task.

Audit trail of New process overview (Publication)

🕐 Start date 03/24/2023

MM **Approve the publication - Pending**
03/24/2023

MM Diagram publication - Initiated   New overview for department xy
03/24/2023 - 03/24/2023   Read more

Close

Click on the *Close* button to leave the audit trail.

Completing tasks directly:

You can directly complete your tasks in the task list without navigating to the corresponding diagram or catalog object. To do so, click on *Approve or reject task*.

New process overview
Approve the publication | 03/24/2023 3:03 PM

Approve or reject task
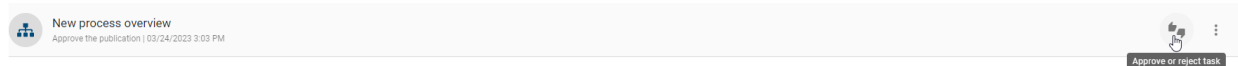
A window then opens in which you can reject or approve the task and also set a comment. By clicking on the appropriate button you *confirm* the process, otherwise you can *abort* it.

Completing tasks in the diagram or in the catalog:

Select one of the unfinished tasks via the diagram name or catalog item to go directly to the corresponding diagram or catalog item.

New process overview
Approve the publication | 23/21 9:20:06 AM
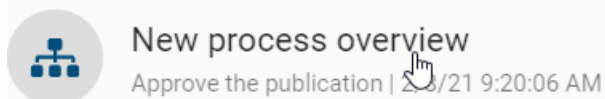
If the task is a publication, the selected diagram or catalog item is presented to you in preview. In case you are working on a resubmission or publication task, the diagram or catalog item will be presented in the published version. In each case, you have the option to approve or reject the (maintenance of) publication or depublication by clicking on the corresponding button *Approve or reject task*. In the appearing window you can make the desired selection and leave a comment optionally. Afterwards, *confirm* the process or *abort* it via the appropriate button.

🔷 **Diagram view**   ▦ Matrix view   ≣ Process execution view

Approve or reject task
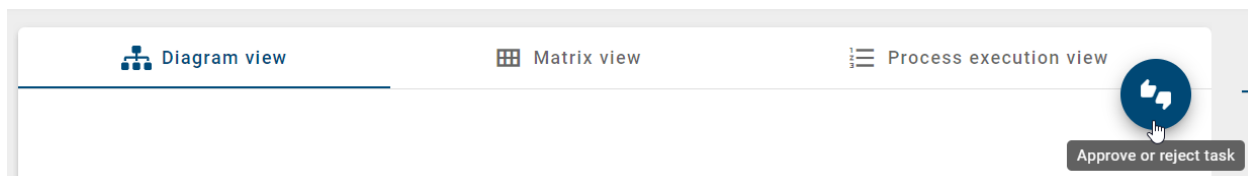
After you have completed a task, it is no longer appearing in your task list.

Note: Optionally, an additional user authentication can be requested when processing tasks. Then the user has to

confirm his identity again if, for example, a quality assurance task is being processed as part of the process release. As you cannot activate the additional authentication yourself, please contact us.

10.2 How am I informed about my new tasks?

If you receive a new task while you are logged in to BIC Process Design, a push notification will appear at the right bottom of the screen. If this affects a diagram or catalog item, you can follow your task notification with one click directly into the corresponding diagram or catalog item. If the notification concerns an object, you will be forwarded to the task in your task list by one click.

If you are assigned to one or more new tasks, an e-mail with a summary list of those will be sent to you on the next day.

Furthermore, you will receive a reminder e-mail every seven days by default informing you of pending tasks. This can be changed by the administrator.

10.3 How do I work with my deputy tasks?

You can set a deputy for *your tasks*, who can then take over your tasks.

Working on deputy tasks: Navigate to *your tasks*. Then you can find your *deputy tasks* in the middle tab of the top bar.
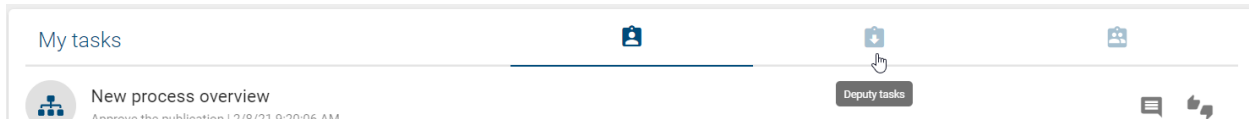
All tasks for which you are set as deputy will be displayed here. If a deputy task has already been claimed by a user, its initials are shown as a chip at the task entry. This can happen if your user group has been set as deputy of an absent user. You can hover over the chip to view the full name of the user. If no user claimed a task yet, you can select the option *Claim task* at the entry to do so.
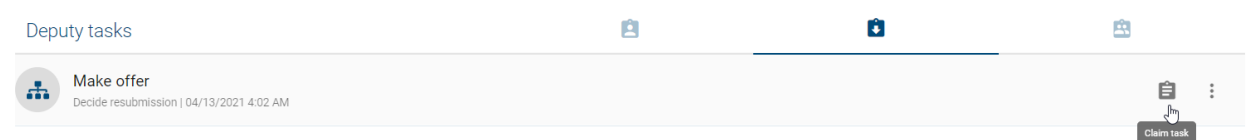
Then, the task shows your initials and is also part of your personal task list where you can *work on it*.

Set deputy: You can set a *deputy in your profile*. Please find an explanation at the linked section.

10.4 How do I work with my group tasks?

In addition to users, user groups can get an examination task if they are entered in the attributes of a diagram or catalog item as reviewer or responsible. In this case, every user who was a member of the group when the workflow was started can see the corresponding workflow task in his *Group Tasks*.

Open the group task list in your explorer by opening *your tasks* via the side bar and switching to the tab *Group Tasks*.
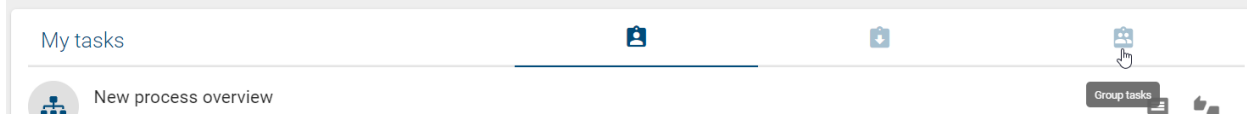
Here you will see all your pending group tasks. Group members can claim the tasks and work on them. If a group task has already been claimed by a user, its initials are shown as a chip at the task entry. You can hover over the chip to view the full name of the user. If no user claimed the group task yet, you can select the option *Claim task* to do so.
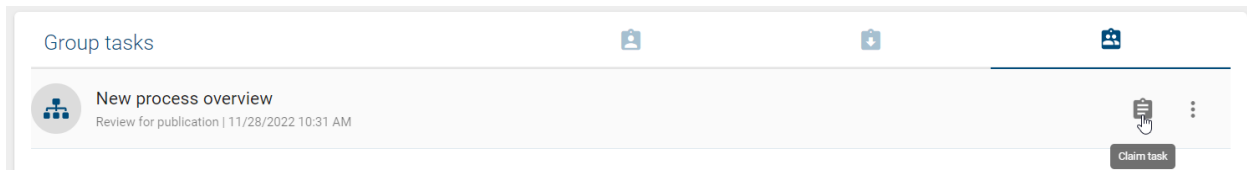
Then you can find the group task in your personal task list where you can *work on it*. Moreover, your initials will be shown at the entry in the group task list. Thus, the other group members can notice that you take over the task.
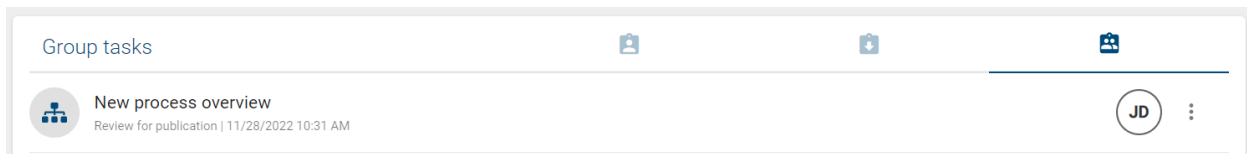
If you claimed a group task, you can undo this by selecting the option *Revoke task* in the context menu of the concerning task in the group task list. Afterwards, all users of the corresponding group can claim the task again.
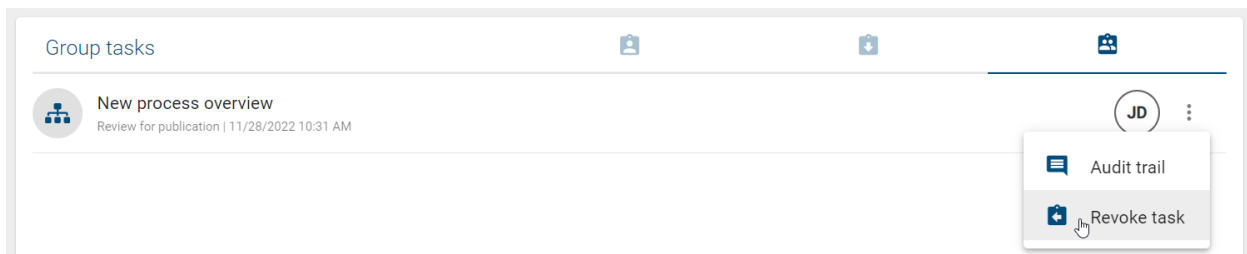
After a group task has been completed, it will no longer be displayed in the task list of any group members.

Note: If a group has only one member, the workflow tasks are not displayed in the *Group Tasks* but in the *Tasks* of the corresponding user.

10.5 How do I work with resubmission tasks?

If the *validity of a diagram*, or *catalog item is limited* the *responsible user or user group* for resubmission receives an examine task. The affected users can see it in the task list. To work on the task, click on *Approve or reject task*.
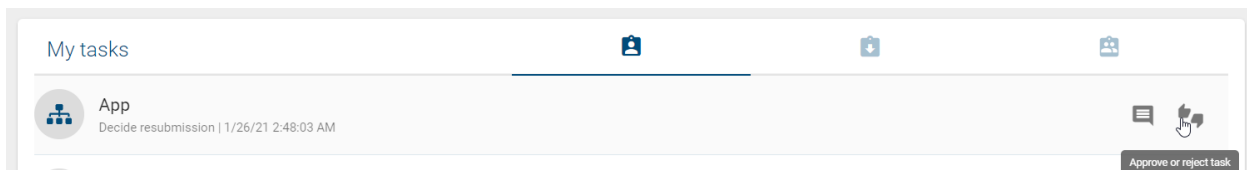
The following options are available:

Depublication: Select this option to remove the diagram or catalog item from the publication and preview stages. The depublication of a catalog item is not executed if the item is present in another diagram in publication stage. Unlike default depublication, no additional confirmation from the responsible user (group) is required, as only they can work on the resubmission. Depublication is then started as soon as the "Valid to" date of the diagram is reached.

Extend validity: By choosing this option, you can extend the validity of the diagram. The original expiration date, or "Valid to" date, is set to one year in the future, and it will be updated in the publication as soon as you confirm the extension. Additionally, archive entries will be created.

End task and inform Governance participants: By choosing this option, you can end the resubmission task and inform Governance participants via Email about your decision.

App - Decide resubmission

Comment

Comment

0 / 1024

○ Depublish

○ Extend validity

○ End task and inform Governance participants

Abort   Confirm

For the option *End task and inform Governance participants* a comment has to be set. For the other options, it is optionally. Then click *Confirm* to end the examination.

Afterwards, for the options *Depublication* and *End task and inform Governance participants*, an email will be sent to all recipients that are maintained in the governance attributes of the diagram/catalog object. This email contains the option that has been selected, as well as the (optional) comment and the responsible person.

Alternatively, you can click on the diagram or the catalog object item. There, the *Approve or reject task* button also appears. If the validity period if the diagram or catalog item (resp. catalog items contained in the diagram) is expired, you will get a hint (for each case).

< 　 ⛁ DIAGRAM VIEW 　 ⊞ MATRIX VIEW 　 ☰ PROCESS E >

▶

The validity period of this diagram has been exceeded.

This diagram contains catalog items whose validity period has been exceeded.
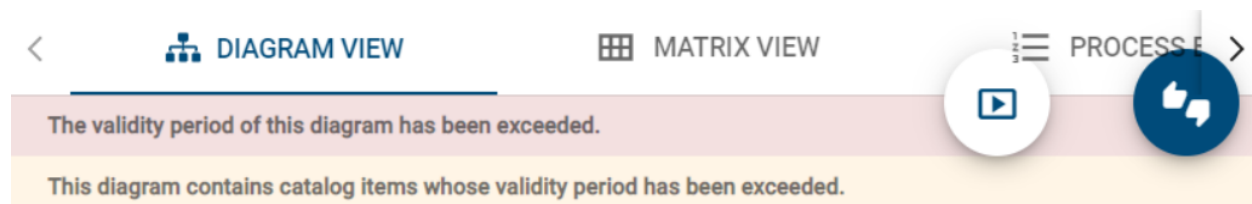
If a revision is necessary, contact the appropriate author and extend the diagram or catalog item to give the author time for the revision. Of course, you can also depublish the object in the event of a revision, but this could create a process gap until the revision is published.

If the resubmission task is not processed, there is no automatic depublication. A diagram or catalog item can still be published or depublished while a resubmission workflow is active. In this case, the active resubmission process including the resulting outstanding and now obsolete tasks will be terminated. The behavior is further explained *here*.

For a general detailed description of tasks, see *the corresponding section*.

Note: If you are an administrator, you can also see all resubmission workflows within the *list of all workflows* in your *governance cockpit*.

10.6 What happens if I initiate a publication while a resubmission workflow is active?

When a resubmission workflow for a published object (diagram or catalog item) is active, the object can still be published. In this case, the active resubmission process including the resulting outstanding and now obsolete tasks will be terminated. Users will see the new version in publication stage as soon as the publication workflow is finished.

Note that the validity is not maintained automatically. This means: If the attribute "Valid to" of the object has not been updated manually before publishing the new version, another resubmission workflow will be started for the object. The responsible receives a new resubmission task and the *corresponding notifications* will be sent. An extension of the validity for one year can be triggered by the responsible when working on the task.

Therefore, when a resubmission workflow is active for a diagram or catalog object and you update it manually by publishing a new version, consider the validation date to avoid the direct start of a resubmission workflow for the new version.

GOVERNANCE

Created, edited, and checked-in diagrams are available in the public workspace. These diagrams are only visible for users with access to this workspace, such as modelers and administrators. A model must be visible in the publication, so that other users, like Readers, are able to see them. This means they have to be published, which starts in the public workspace. The currently displayed version of the diagram is copied to the stages preview and publication using a release workflow. The different *versions of a diagram* are thus formed.

In general, you have two different releases for publishing diagrams: *editorial release* and publication via a *multi-level publication workflow*. By using the editorial release, a diagram is directly published without requiring an explicit approval. The publication via the multi-level release workflow requires confirmation by a responsible person. Optionally, a review by one or more examiners can be required in addition to the responsible, before a diagram becomes visible in the "Publication" stage.

11.1 Diagrams

11.1.1 How can I publish a diagram?

The publication via the multi-level release workflow requires confirmation by a responsible person. Optionally, a review by one or more examiners can be required in addition to the responsible, before a diagram becomes visible in the "Publication" stage.

While modeling, users and user groups can be entered in the *attribute "Examiner"*, using their catalog object person or organizational unit. Per entry, that means per person and per organizational unit, only one approval is required in the examine step.

The attribute *Responsible* can only be set uniquely. Therefore, only a single person or organizational unit is eligible. This attribute is a *mandatory attribute* and has to be maintained for the publication.
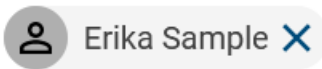
Initiation

To start the publication workflow, open the context menu of the desired diagram in the diagram list and click the entry *Publish diagram*.
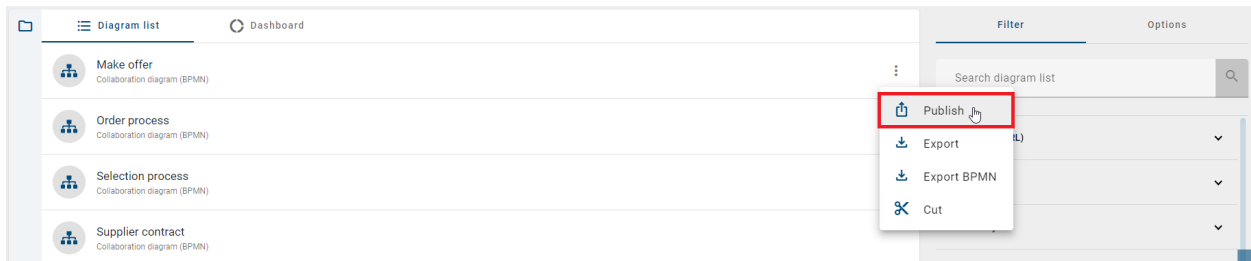
Alternatively (if you have opened a diagram), find the equivalent entry in the *Options* in the right side bar.

A dialog will open and request to provide a reason for the publication. Type in a reason and click *Publish*. For *various reasons*, it is possible that a workflow cannot be started. You will be notified by an error message in this case.

The publication always affects the version of the diagram at the time of the workflow start. Changes made to the diagram after initiation are not taken into account. This can lead to differences between the diagram in the public workspace and its version in the preview.

Examine step

The optional examine step is reached if at least one examiner has been set. After the release workflow has been triggered, examiners receive a notification by e-mail and in the application about the pending *examine task*, that can be done in the versions tab.

The examiner can reject or approve the diagram.

- If an examiner rejects the diagram, he must comment his rejection and the diagram will not be published. The initiator receives an e-mail and *Task* about the *Rework* on this diagram instead. Then the publication can be aborted here, or the diagram can be edited and published again by clicking on the entry *Publish* in the versions tab.

- If the examiners approve the diagram, the responsible user or user group is informed by e-mail and requested to check the diagram. To approve the examine step, all registered persons must approve the diagram. Furthermore, only one member of a registered organizational unit or user group must confirm the release.
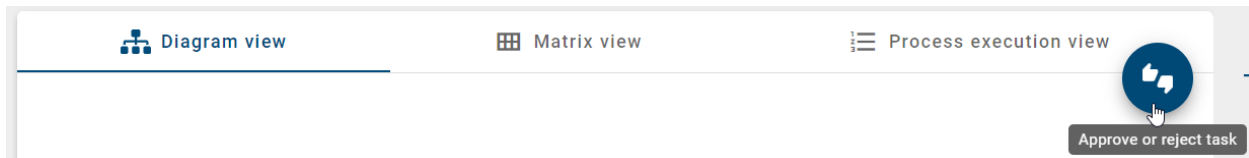
Release step

The responsible user or user group also receives a *task*. The diagram can be approved or rejected. If a user group is entered, the processing of one group member is sufficient.

- If a responsible rejects the release of the diagram, he needs to write a suitable comment. Afterwards the initiator and examiner are informed by task and e-mail that the workflow is terminated.

- If a responsible approves the diagram, for example the author and initiator are informed, the diagram is published (publication), and the publication workflow is terminated.

The symbols and catalog items contained in the diagram and in attributes are also published with the diagram. Catalog items with an own life cycle are an exception. These are not updated by the diagram publication, but exclusively via the *object publication independent* of this.

Note: The responsible and the examiner have to be assigned at least to the user role "Reviewer", since they require access to the corresponding areas. Also note, that a new workflow can only be started if no publication is already running for the affected diagram.

Note: When the diagram is published by the workflow engine, the system attribute "Last Modified By" of the diagram is set to "Workflow" in all stages.

11.1.2 How can I directly publish a diagram?

In the case of the editorial release, a diagram is published directly without requiring an explicit approval by a responsible person or examiner. This workflow can be started by users with the role *Editor* or *Administrator*.

In order to be able to use the editorial release, the governance attribute *Responsible* has to be maintained. To set a responsible user or user group, you have to ensure that a person or organizational unit was created in the catalog and filled in the attribute. Please note that the names of the persons must be entered individually in all languages used when manually created.
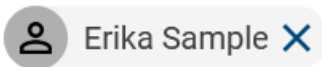
To start the editorial release, open the context menu of the desired diagram in the diagram list and click the entry *Publish diagram*.
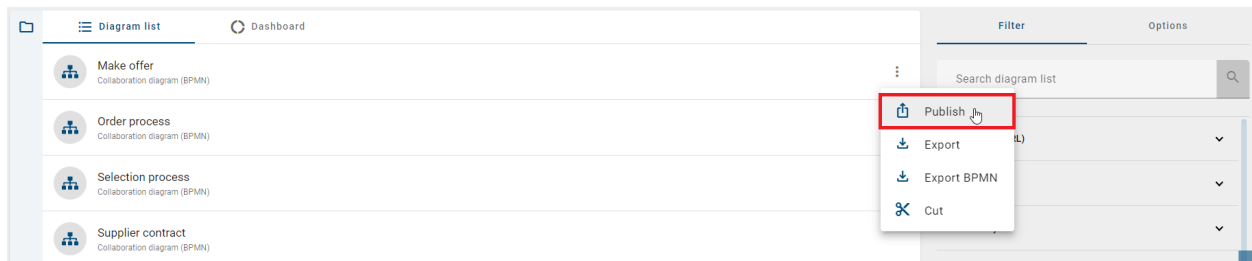
Alternatively (if you have opened a diagram), find the equivalent entry in the *Options* in the right side bar.

A dialog will open and request to provide a reason for the publication. Type in a reason and select the checkbox *editorial release*. Then confirm via *Publish*. For *various reasons*, it is possible that a workflow cannot be started. You will be notified by an error message in this case.

The diagram is now available in preview and in publication stage, without the need for acceptance by the responsible person. The responsible person and *other participants* receive *an optional e-mail* informing them that the diagram has been published.

Note: Editorial release can be deactivated so that each publication must pass through the defined approval and release

steps. If the checkbox is selected during publishing, the application will inform you that editorial publishing is not possible. To ensure governance, editorial release cannot be disabled by administrators. Please contact our Customer Support for further information.

Note: When the diagram is published by the workflow engine, the system attribute "Last Modified By" of the diagram is set to "Workflow" in all stages.

11.1.3 How do I see which diagrams have already been published?

In order to view all published diagrams, navigate to the *stage Publication*. To do so, click the button in the header which shows the name of your current stage.
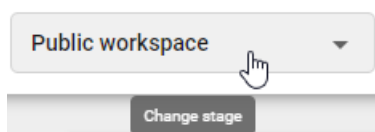
A list of available stages appears where you are directed to the stage *Publication* by a click. The name of the newly selected stage appears right next to the name of the repository. When you navigate to the *diagrams* now, you will see all diagrams and categories that have already been published.
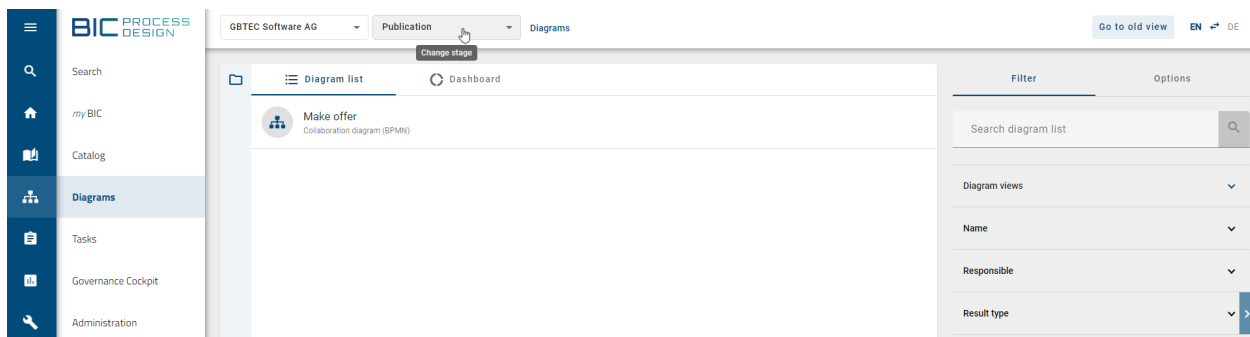
Note: The same procedure applies to *diagram versions* in *Preview (in Release)*.

Alternatively, you can click the *Governance Lifecycle* attribute in the *Public Workspace* stage to filter by published diagrams and see all diagrams that have already been published.
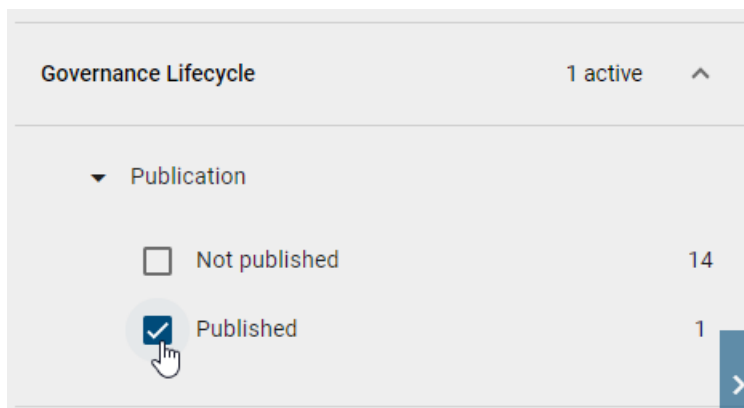
Note: If the *Published* facet is not displayed, no diagrams are currently published.

Hint: The attribute *Governance Lifecycle* is available from version 7.14.0. To view all published diagrams in this attribute, you must check the diagrams out and back in at least once.

11.1.4 How do I see if a diagram has been published?

Navigate to a diagram whose published version you want to check. Afterwards open the *options* and click the entry *Versions*.
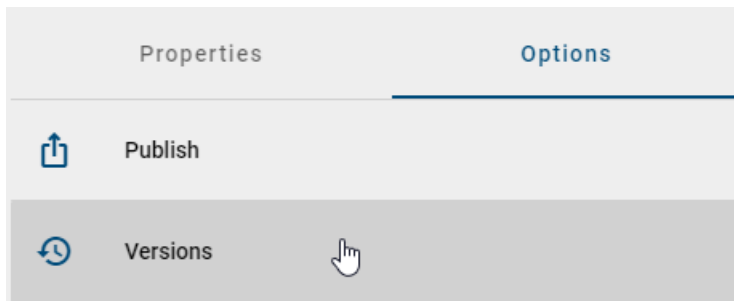
If the diagram has already been published, you can select the entry *Publication*. Afterwards you see the published version of the diagram. The entry will be greyed out if the diagram has not been published yet. For the diagram of the example, the release has not even been started which is evident by the greyed out *Preview* entry:
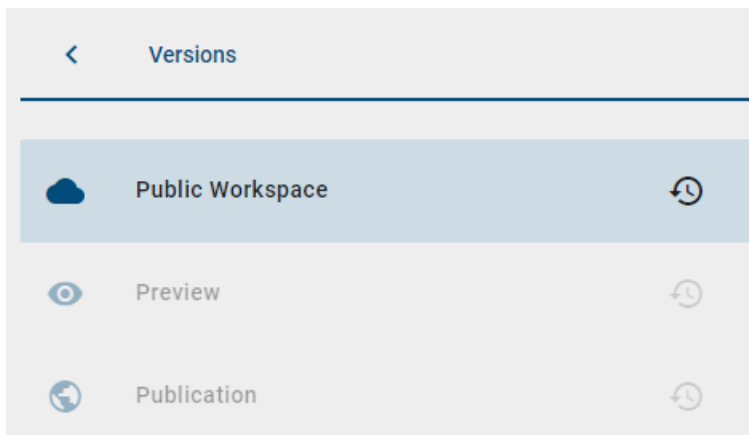
Note: The chapter *"Versions and History"* gives more information about the versions of a diagram.

11.1.5 How can I remove a diagram from the publication?

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. This workflow can be started by users with the role *Author*, *Editor* or *Administrator*. Your stage also needs to be in *Publication*.

Initiation

To start the publication workflow, open the context menu of the desired diagram in the diagram list and click the entry *Depublish*.
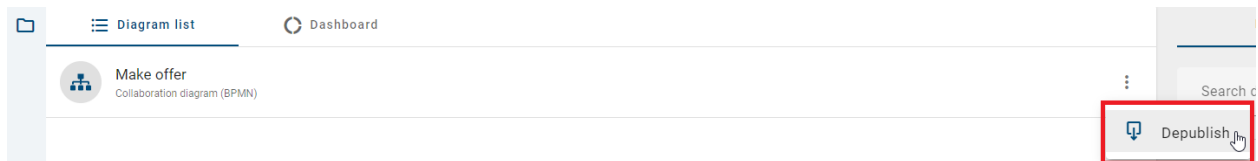
Alternatively (if you have opened a diagram), you can find the equivalent entry in the *Options* in the right sidebar.
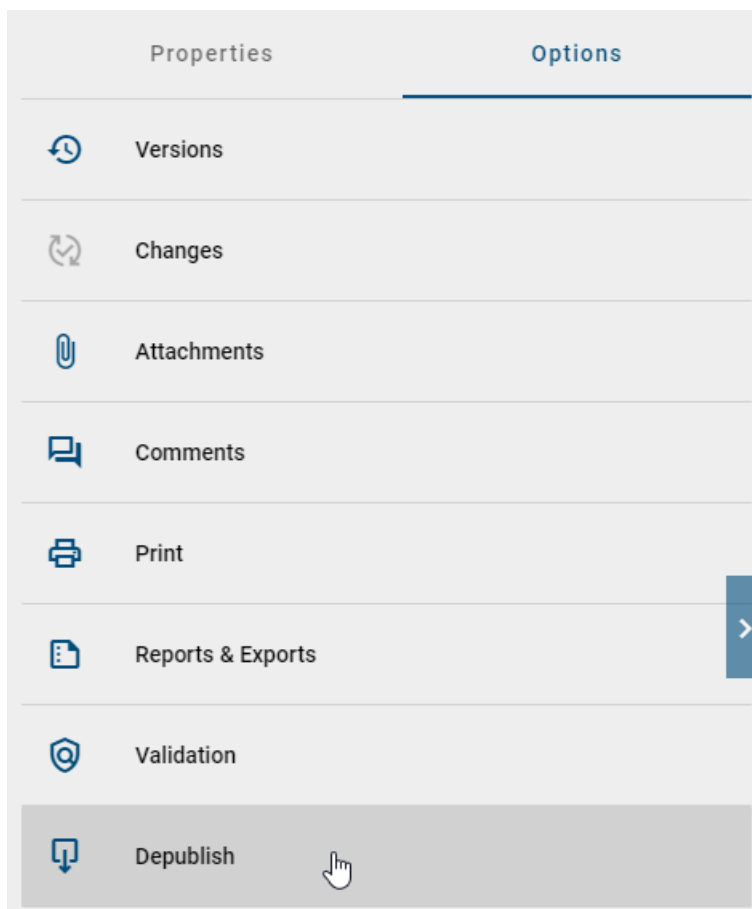
A dialog will open and request to provide a reason for the publication. Type in a reason and click *Depublish*. For *various reasons*, it is possible that a workflow cannot be started. You will be notified by an error message in this case.

Release step

The user or user group maintained as responsible receives a *task* or a *group task* in the system and is informed by e-mail. The responsible can arrange the final depublication.

If you are responsible for a diagram and received such a task, navigate to your *tasks* and select the button *Approve or*

reject task.
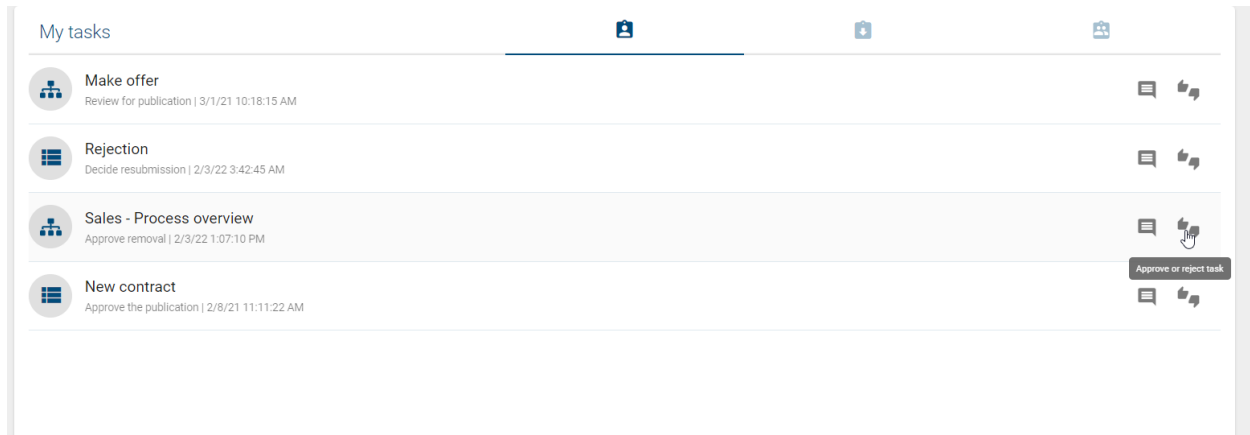
In the upcoming dialog window, you can make your decision.

- If a responsible rejects the depublication of the diagram, he needs to write a suitable comment. Afterwards the initiator is informed by a task and an e-mail that the workflow is terminated.

- If a responsible approves the depublication, e.g. the initiator is informed by e-mail, the diagram is removed from publication, and the workflow is finished.

Catalog items without an own responsible person and which are only used in this diagram, are removed from catalog by depublication of the diagram. Entities with an own life cycle can be depublished using a *special workflow*.

11.1.6 How can I directly depublish a diagram?

With this editorial change, a diagram that has already been published is directly removed from the publication without explicit approval by a responsible person. This workflow can be started by users with the role *Editor* or *Administrator*.

Follow the steps of *initiation* from the *previous chapter*. Enter a reason for the depublication and activate the **checkbox** of the editorial change in the dialog window with a mouse click.

Some participants are optionally notified of this depublication by *an e-mail.*

11.1.7 How can I analyse the click rates of processes?

In the *diagrams section*, you can monitor the click rates of your published processes. As a *user with reviewer rights or higher*, you can find a *filter facet Diagram views* in the diagrams list.
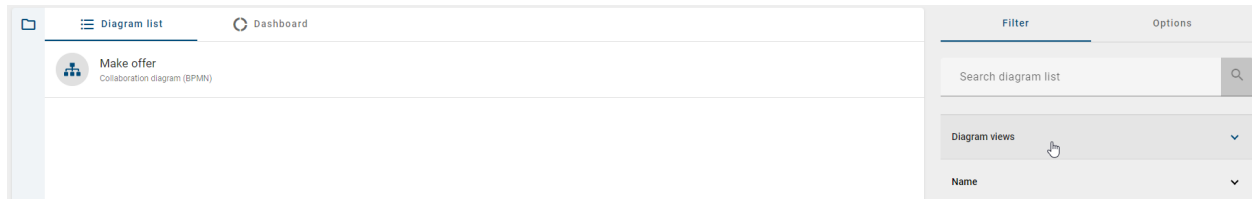
Open the facet by a click. Then you can enter a minimum and/or maximum value of click rates. After entering at least one value, you can click the *Apply* button. Then, the list shows all diagrams which have been viewed as frequently as specified.
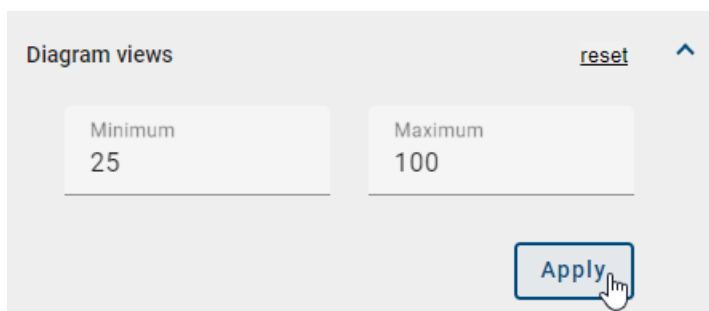
As soon as you entered a value as minimum or maximum, a *reset* button appears which you can use to remove the input and the filter again.
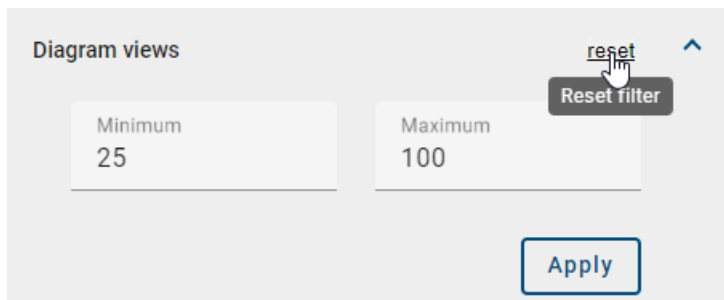
If you open a diagram in *publication* stage, you can find the number of views in the system attributes group. These attributes are shown in the *details* which is the first tab of the right sidebar. Note that this information is not available for *Readers*.

System attributes ⌃

Created by
Workflow

Created date
01/18/2023 1:15 PM

Last modified by
Workflow

Last modified date
02/27/2023 2:06 PM
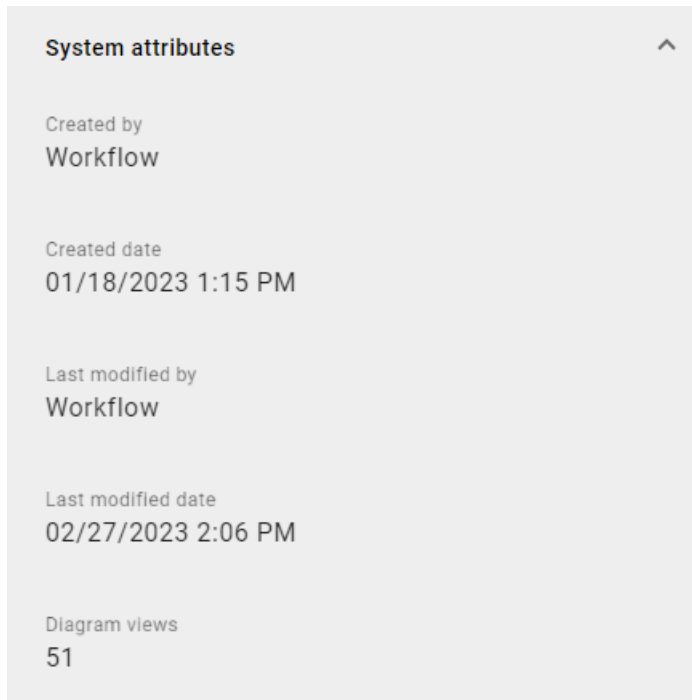
Diagram views
51

Note: Please note that the diagram click rates are registered continuously, but the attribute *Diagram views* is updated only once a day (at midnight of your server time zone). Therefore, you filter for the click rates given by the last update which is at most 24 hours ago.

11.2 Catalog items

11.2.1 With which requirements can I publish a catalog item?

Administrators, editors and authors have the option to publish a catalog item independently of a diagram. This is useful for items changed in the public workspace, so that individual changes are also available in the publication. There are a few points to bear in mind.

You can only publish *accepted catalog items* of the public workspace. Furthermore, the catalog items must have governance attributes that are assigned to a responsible person or organizational unit and optionally one or more examiners.

Only if these criteria are fulfilled, it is finally possible to *Publish* a catalog item the catalog of the public workspace.

Also note the *general reasons* for failed publishing workflows.

11.2.2 How can I publish a catalog item?

If an object is published via the multilevel release workflow, at least one review is necessary. This is always done by the responsible person. Optionally,a review by one or more examiners can be required. Only after successful verification the changed object becomes visible in the "Publication" stage. The requirements for publishing a catalog item are explained in more detail in this *section*.

Initiation

In the catalog, navigate to the item you want to publish. Select the item and open the register card *Options* in the right sidebar. Activate the function *Publish* of the catalog item to start the publication process.
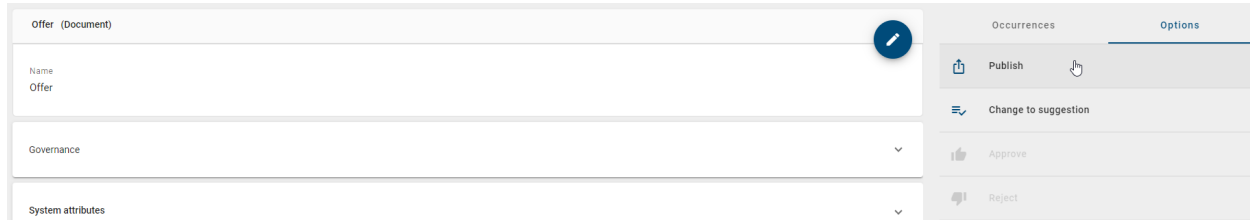
Alternatively, you can start the publication via the context menu of the catalog item by selecting the option *Publish*. Note, that the *Responsible* attribute needs to be set to start the publication.
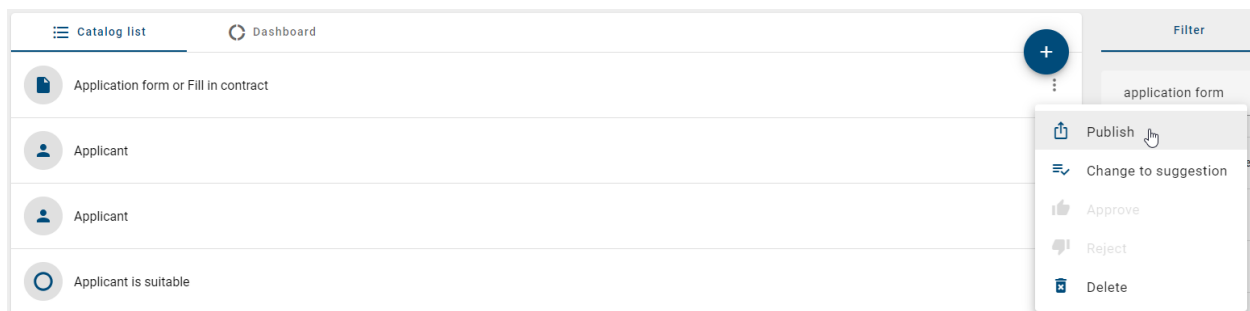
Then enter a reason for publication and click *Publish*.

The registered examiners and the responsible are then informed about the initiation and they can carry out their examine and release steps. The time of the workflow start determines the version of the catalog item to be published. Changes

made to the object after initiation are not taken into account. This can lead to differences between the catalog item in the public workspace and its version in the *preview*.

If you receive an error message for initiating the workflow at this point, you will find the *possible reasons for this here*.

Hint: If the catalog item is not assigned to an entity type and therefore does not contain a *Responsible* attribute, the *Publish* option is not visible.

Examine and release step

The optional examine step is achieved if at least one examiner is set. After the release workflow has been triggered, the responsible examiners receive a notification by e-mail and in the application about the outstanding review task.

Responsible persons or organizational units are informed by e-mail of the pending release step after workflow initiation or after the accepted examine step.

By clicking on the notification, users can navigate to *their tasks* and can see the task here or in their *group tasks*. The new task is displayed there and can be edited.
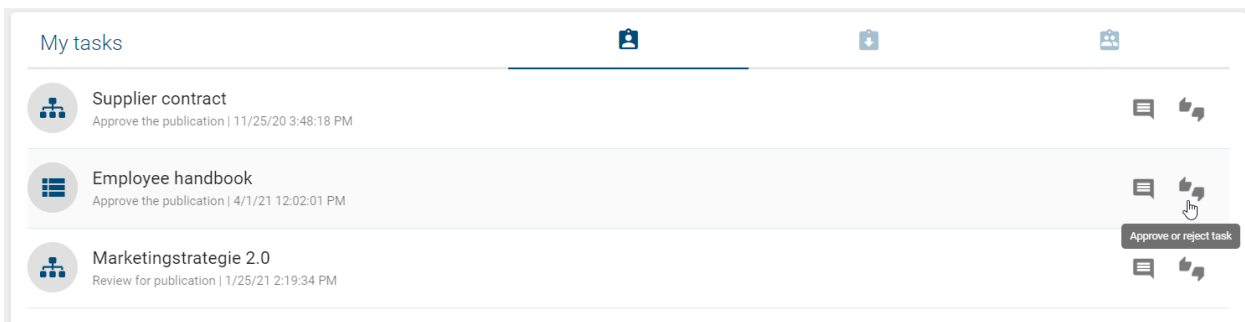
- If the publication is rejected, the respective person must set an appropriate comment and the catalog item will not be published. The initiator is informed by e-mail and the workflow is terminated.

- After approval in the examine step, the responsible is requested to perform a release check by e-mail and task. All persons registered as examiners must approve the publication. Furthermore, only the release of one member of a registered organizational unit or user group is necessary.

- If the responsible person or a member of the organizational unit responsible approves the publication, for example the author and initiator will be informed by e-mail, the catalog item will be published (publication) and the release workflow will be completed.

Note: Only after publication of the catalog item, the changes are applied to all diagrams in preview and publication in which this object is modeled. Catalog items, that have an own responsible, are not updated using diagram publication.

Tip: If you want to publish several catalog items, you can use the *bulk publication* to initiate the releases all at once.

Note: Please note the hints when publishing catalog items with *word file attachments*.

11.2.3 How can I directly publish a catalog item?

In editorial release, a catalog item is published directly, without explicit release confirmation by a responsible person or examiner. This workflow can be started by users of the role *Editor* or *Administrator*. Some prerequisites for publishing a catalog item are explained in this *section*.

In the catalog, navigate to the item you want to publish. Select the item and open the register card *Options* in the right sidebar. Activate the function *Publish* of the catalog item to start the publication process.

Enter a reason for publication in the provided text field and activate the checkbox "This is an editorial change. There will be no further approval requested." below the input field. Confirm by clicking *Publish*.

You will then receive a notification about the workflow start in the application. The catalog item is now available in the preview and in the publication stage without the approval of examiners or the responsible. The initiator and other *workflow participants* receive the information by e-mail that the catalog item has been published.

If you receive an error message for initiating the workflow instead, you will find the *possible reasons for this here*.

Note: Editorial release can be deactivated so that each publication must pass through the defined approval and release steps. If the checkbox is selected during publication, the application will inform you that editorial publication is not possible. To ensure governance, editorial release cannot be disabled by administrators. Please contact our Customer Support for further information.

Note: Please note the hints when publishing catalog items with *word file attachments*.

11.2.4 How can I start a publication for multiple catalog items at once?

If you would like to publish multiple catalog items, you can use the bulk publication to speed up the process. The bulk publication starts a release workflow for each of your selected catalog items, so that you do not need to *initiate the release at each single item*.

Navigate to the catalog, open the options tab in the right side bar and click the bulk publication option. Note that the bulk publication is performed in the catalog list. If you view the dashboard when selecting the option, the application will switch to the list automatically.
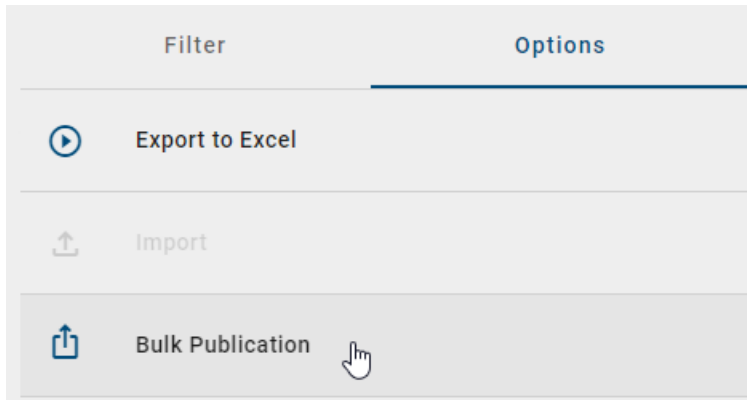
The catalog list will be filtered for all accepted items where the attribute *Responsible* is maintained. Thus, the list shows the items that fulfill the *prerequisites for publication*. Moreover, each list entry comes up with a checkbox. Now you can select the catalog items you want to publish. In the header, you can find the number of selected items.

If you marked at least on catalog item, you can click the arrow button to start the multilevel (or editorial) release for your selection.
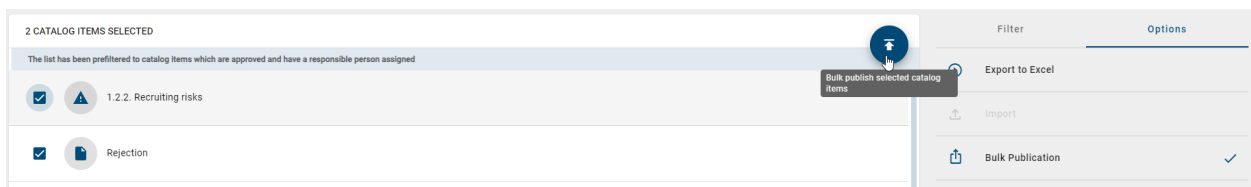
As soon as you click the button, a dialog window appears. Firstly, you can enter a comment in the comment field. Secondly, you need to confirm the bulk publication by typing "Yes" in the field at the bottom and clicking *publish selection* afterwards.

In order to perform an *editorial release* for all selected catalog items, you can activate the checkbox *This is an editorial change*. Then, no further approval is requested from responsible or examiners and the catalog items are directly transferred to the publication stage where they are visible for all users (as far as there is no access restriction on the respective catalog items).

After confirmation, the dialog window is closed automatically. If you initiated a multilevel release, a release workflow for each catalog item is started where the assigned examiners and responsible decide on the publication.

You can switch to the original catalog view by selecting the option *bulk publication* again. To prevent unwanted canceling of the bulk publication, you will be asked to confirm this step in a dialog window. Click the *leave* button there.

Note: Please note that the bulk publication is only available in the desktop version.

Note: Editorial release can be deactivated so that each publication must pass through the defined approval and release steps. If the checkbox is selected during publication, the application will inform you that editorial publication is not possible. To ensure governance, editorial release cannot be disabled by administrators. Please contact our Customer Support for further information.

Note: Please note the hints when publishing catalog items with *word file attachments*.

11.2.5 How can I remove a catalog item from the publication?

If you want to remove a catalog item from the publication, you can use the "Depublication" function. The integrated workflow engine ensures a confirmation step. Users of the roles *Editor* or *Administrator* can start this workflow.

Initiation

Open the catalog in the "Publication" stage and navigate to the catalog item you want to depublish. Click on the context menu of the item and select *Depublish*.
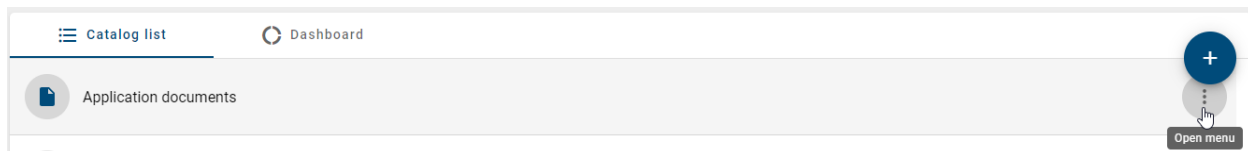
Alternatively (if you have opened a catalog item), you can find the equivalent item in the *Options* in the right sidebar.

A dialog window opens. Enter a reason for the depublication there and click *Depublish*.

Hint: If a catalog item has no responsible assigned, a depublication cannot take place.

Release step

The user maintained as "Responsible" receives a *notification in the system* as well as by e-mail. With a click on the notification, users will be navigated to *his tasks* and can initiate the final depublication.

- If the person responsible rejects the depublication, a corresponding comment must be set. The initiator is informed by e-mail and the workflow is canceled.

- If the responsible person approves the depublication, the initiator will be informed by e-mail, the catalog item will be removed from the publication and the workflow will be finished.

Note: If the published catalog item is used in a published diagram, the depublication of the item is not possible.

11.2.6 How can I directly depublish a catalog item?

With this editorial change, a catalog item that has already been published is directly removed from the publication without explicit approval by a responsible person. This workflow can be started by users of the role *Editor* or *Administrator*.

Open the catalog in the "Publication" stage and navigate to the catalog item you want to depublish. Click on the context menu of the item and select *Depublish*.
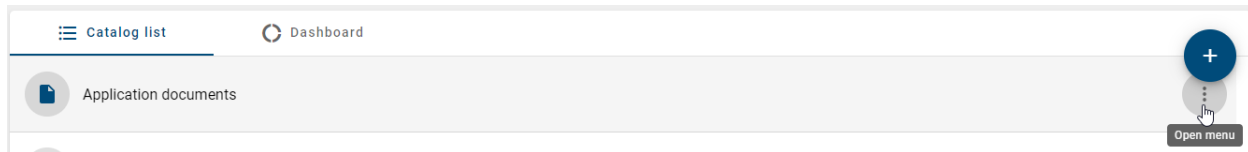
A dialog window opens. Enter a reason for the depublication there and activate the checkbox "This is an editorial change. There will be no further approval requested." below the input field. Confirm with a click on *Depublish*.

Then the catalog item is removed from the publication.

Note: If the published entity is used in a published diagram, depublication is not possible and the workflow will be canceled.

Note: Editorial change can be deactivated so that each depublication must pass through the defined release step. If the checkbox is selected during depublication, the application will inform you that editorial change is not possible. To ensure governance, editorial release cannot be disabled by administrators. Please contact our Customer Support for further information.

11.2.7 What do I have to consider when publishing items with word file attachments?

If you publish a catalog item with a word file attachment, unwanted changed might occur due to language-specific configuration in the table of contents. To prevent this, you should *not* format the TOC (Table of contents) field function using the \t switch. The configuration of the table of contents can be checked (and changed) as follows.

Select the table of contents and then press Alt + F9 to view the definition of the TOC field function. In the definition, you should use \o and \u. You can find more information on the switches and syntax in the TOC field function in this section of the Microsoft documentation.

If you *convert the word file to a pdf file during publication*, only certain fonts are supported. The usage of not supported fonts can lead to formatting losses and a change in the total number of pages in your .pdf file. Here you will find a detailed list of the fonts, which are supported by the report engine. Moreover, note the possibility to *embed the used fonts in your document*.

11.2.8 How do I ensure that attachments in the publication are provided as pdf files?

For catalog items with an own responsible person, you can specify that files attached in the *"Attachment (URL)"* attribute are only available in pdf format in the publication, even though they were added in a different format in the public workspace.

To do this, *edit* the catalog item and activate the checkbox of the attribute *Publish as PDF* in the governance attributes.

✓ Publish as PDF

All attached files that are not in .pdf format in public workspace will be converted to .pdf files during the next object publication of this catalog item. In preview and publication, these replace the original file format, which remains for the respective attachment in the public workspace. The files keep their names in all stages. For example, you get this .docx attachment in the attributes of the catalog item in the public workspace,

Attachment (URL)

🔗   Document.docx

while the corresponding .pdf file can be found in preview and publication stage:

Attachment (URL)

🔗   Document.pdf

In the section about the attribute *"Attachment (URL)"*, you can find a list of the file formats that are supported by the upload and pdf generation engine. If errors occur during the generation of the pdf file, the *publish workflow* will fail. This can be caused by invalid documents or protected documents.

Note: Be aware that only certain fonts are supported in the process of converting your file to a .pdf file. The usage of not supported fonts can lead to formatting losses and a change in the total number of pages in your .pdf file. Therefore note the possibility to *embed the used fonts in your document*.

Hint: Please note that documents with *extended rights* are not stamped during publication. Thus, the .pdf file in preview and publication stage does not include the details which are usually *transferred from the governance attributes*.

Note: The pdf conversion engine prints all worksheets from left to right. Each worksheet is printed from top to bottom and then from left to right. The generated pdf roughly corresponds to the defined print area of the Excel file, but page breaks can be slightly offset from the print preview. In principle, the paper format, margins and orientation

are taken into account when generating the pdf. However, please note that with larger documents there is an increasing misalignment and the preview does not correspond to the final pdf.

Note: Please note that although it is possible to mirror text along the x or y axis in Excel, the Aspose framework does not support keeping the mirrored text when converting to PDF.

11.2.9 How can I ensure that all characters are preserved in the pdf conversion?

Only certain fonts are supported in the process of converting your file to a .pdf file. The usage of not supported fonts can lead to formatting losses and a change in the total number of pages in your .pdf file. In the documentation of the old user interface you will find a detailed list of the fonts, which are supported by the report engine. Note that symbols of not supported fonts are usually used automatically for enumerations. We recommend to adapt the following option in Microsoft Word in order to prevent formatting losses.

It is possible to embed the used Microsoft fonts in your Word file. If the fonts are embedded in the document, the corresponding characters and symbols are correctly shown in the pdf file that is generated in the process of publication in BIC Process Design.

You can embed the fonts in the Word Options in the menu item *Save*. In the section "Preserve fidelity when sharing this document", select the checkbox "Embed fonts in the file" and deselect the two below. Then choose the option "All New Documents" in the drop-down menu.
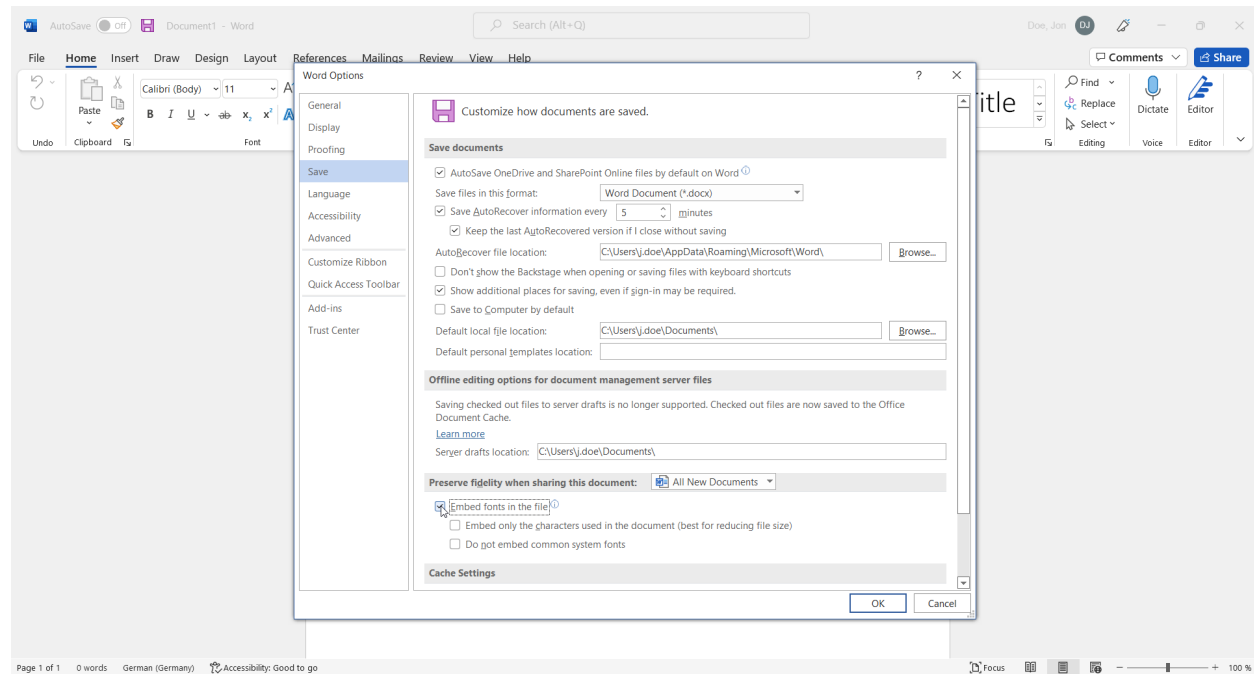
"Used with permission from Microsoft."

All documents saved afterwards can be converted to pdf during publication in BIC Process Design whereas the original characters are used.

11.2.10 How can I transfer attributes to documents during publication?

In the process of publication, *attached files* can be stamped with some attributes of the associated catalog item if some requirements are fulfilled. The file has to be attached to a catalog item of the type *document* that also has its own responsible in order to be *published independently*. The ability to stamp documents is enabled by default and can be disabled at the system level. Document stamping can be applied to all prepared files in .pdf, .doc, .docx, .xls, .xlsx, .ppt and .pptx format. The following attributes are transferred to your file by default:

- Author (AT_AUTHOR)

- Examiner (first three) (AT_EXAMINER, AT_EXAMINER_2, AT_EXAMINER_3)

- Responsible (AT_RESPONSIBLE)

- Responsible (Resubmission) (AT_RESUBMISSION_RESPONSIBLE)

- Valid from (AT_VALID_FROM)

- Valid to (AT_VALID_TO)

- Release (AT_RELEASE)

- Scope (AT_SCOPE)

- Restricted access (AT_ACCESS_RESTRICTION)

- Identifier (AT_IDENTIFIER)

- State (AT_STATE)

- Publish as PDF (AT_PUBLISH_AS_PDF) (see the note)

Other attributes of the catalog item can be stamped if the file is prepared in such a way that desired attribute types are included to the file details manually (unless they have already been added to the file by a publication). For more information on how to view and create file details, please refer to the corresponding applications in which you open your document. A guide to viewing and creating custom details for Microsoft Office products can be found here. The name of the detail must be exactly the same as the *attribute type ID* (e.g. "AT_RESPONSIBLE" for the *Responsible*) whereas the value can be set to an arbitrary default.

To stamp language-dependent attributes (i.e. attributes that have a local value depending on the content language), you need to add a locale suffix to the attribute type ID. For example, to get the English name of the corresponding catalog item you need to specify it as AT_NAME_EN. If you include a language localized attribute without a suffix, an error notification, that informs you about this, is maintained as the value of this property.

If the details are configured and the corresponding attributes are maintained for the catalog item, the attribute values will be transferred to the details of the file within the publication of the catalog item. The (default) values of the details are reset with the attribute value from the application. Then the details of the file version in preview and publication include the configured attributes. If an attribute is a multi-value assignment, such as the examiner, it is transferred as a comma-separated list. Details defined by attributes with the data type *enumeration* are filled with their numerical value. If such an enumeration attribute is also language-dependent, you need to specify a suffix at the detail as explained above.

The details associated with the *state* attribute ("AT_STATE") is set with a numerical value according to the selected state. You can add a suffix (e.g. "AT_STATE_EN") in order to write out the string in the corresponding language (e.g. "On Hold" instead of "1") as the state property.

- 0 - None

- 1 - On Hold

- 2 - In Progress

- 3 - Needs Review

- 4 - Approved

Document (Document)

Name
Document

Identifier
012345

Attachment (URL)

🔗   Anlage.docx

Governance

Examiner

👤   John Doe

Responsible

👤   John Doe

Valid from
04/22/2020 12:00 AM

State
Approved

For example, the governance attributes mentioned above are transferred to a docx file in Microsoft Word as follows.
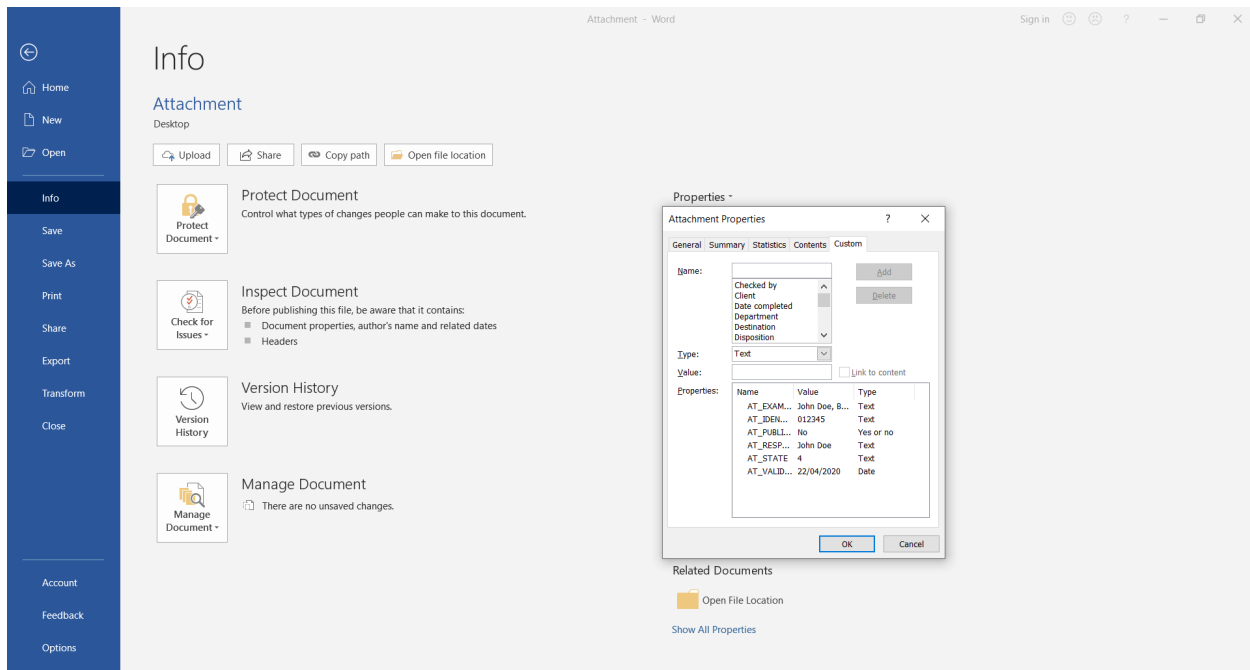
"Used with permission from Microsoft."

It is possible, for example, to use the field function in the header or footer of a Microsoft Word document to access the detail values dynamically. You can select the name of a detail in the "DocProperty" field as a placeholder. At this point also note the reference to the Support of Microsoft Word. In order to use the attributes of the catalog item with the field function, they need to be defined in the file details. With the next publication, the attribute values are finally transferred to the details of the attached file. Thus also the values of the used placeholders will change.

Hint: If you want to use the values of the document details in your document, use the path *Insert → Quick Parts → Field → DocProperty* in Word to access the values. In Excel and PowerPoint, this function is not supported by Microsoft Office. However, you have the option to do this using the Visual Basic-Editor. For more information, please consult the official Microsoft Support homepage.

If errors occur while adding the details, the publication workflow will fail. This can be caused by invalid documents or protected documents.

Hint: Please note that your document is not stamped if its *extended rights* are activated.

Hint: Please note that if a PDF/A document is stamped, the long-term archiving functionality will be lost.

Note: Formatted text attribute values are not supported for stamping. If you stamp an attribute with formatted text, the text will be added to the details without formatting.

Tip: If a date that has been stamped (for example the attribute "Valid to", AT_VALID_TO) is printed in your word document using the field function, the date format can be specified by the author. Otherwise, the date format is taken from the language/locale of the server which is in most cases English. Therefore the date is printed with the delimiter slash as `MM/dd/yyyy`. In order to set the format, navigate to the definition of the field function - for example via

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the quick part *Field* within the "Insert" tab. Select the field name *DocProperty* and mark the desired attribute. Then select the button *Field Codes*. Now you can add the format in the input line right after the attribute. Enter a space and the desired format via `\@ "<YOUR-FORMAT>"`. You can use the placeholders d (for day), M (for month) and y (for year). All possibilities to edit the date format are shown in this Microsoft Support page. For example, you can display the "Valid to" date with written month (e.g. "30 September 22") using the definition `AT_VALID_TO \@ dd MMMM yy`.

11.3 Notifications

In BIC Process Design there exists a notification system with which users can be informed about changes that have been made during governance processes. A distinction is made between different cases, depending on which step of the governance process has just been carried out, whether this was successful and the role of the respective user in this process. In the following a few questions were listed with the help of which the different scenarios can be understood better.

Note: In general, every triggered email addresses up multiple users (up to 150 recipients per email). All users which have the same language set within their user settings will receive the same email. These notifications are send via Bcc emails.

11.3.1 Why does the publication or depublication fail?

As the initiator you should have at least the rights of the user role *Author*. More detailed explanations can be found in the following chapters.

In addition to the rejection or termination of the workflow by examiners or the responsible, the following situations can also prevent publication or depublication. Depending on the reason, you will also be informed about this in the application or by e-mail.

General causes for not publishing or depublishing

- no *responsible* entered in the attributes of the diagram or object

- the e-mail address of the responsible person is missing or does not match the address of the respective user in BIC Process Design

- a publication or depublication workflow is already running for the affected diagram or object

- predated publication for which the "Valid from" date has not been reached yet

- one or more *mandatory attributes* of the diagram resp. object are missing

- A *language localized* mandatory attribute has not been maintained in the default language of the tenant. You will receive a notification about the concerning attribute.

Causes for not publishing or depublishing a diagram

- the affected diagram is checked out

- *validation errors in the diagram*, such as *unaccepted catalog items* or *missing mandatory attributes*

- the diagram contains a *catalog item that is not published yet* and which has an own life cycle (means with its own responsible person). Catalog items with an own life cycle that are in the preview stage but not confirmed yet are an exception. Publishing is possible, but the catalog item is substituted by a draft version until the person responsible confirms it.

Causes for not publishing catalog item

- the *pdf generation of the attachment* of the catalog item fails

- adding *metadata details to attachments* of a catalog item fails

11.3.2 When will I be informed about a (de-) publication?

Users who have diagrams or catalog items within their scope will be informed by e-mail when the diagram or catalog item is directly or indirectly published or depublished. In addition users, which have saved a diagram as a favorite diagram in Publication, will also be informed about the respecting changes.

In addition, workflow-related users will be notified by e-mail and depending on the release workflow by a task. Users, who have *saved a diagram as favorite* in Preview, will be informed for workflow changes in this stage.

11.3.3 Who will be notified at a publication and depublication?

Below is shown who is notified by the system in which workflow step via e-mail.

Publication

Notification	Initiator	Examiner	Responsible	Author	Scope*
Examine task	no e-mail	e-mail	no e-mail	no e-mail	no e-mail
Release task	no e-mail	no e-mail	e-mail	no e-mail	no e-mail
Rejection of examine task	e-mail	no e-mail	no e-mail	no e-mail	no e-mail
Rejection of release task	e-mail	e-mail	no e-mail	no e-mail	no e-mail
Publication	e-mail	e-mail	e-mail	e-mail	e-mail
Workflow error	e-mail	no e-mail	no e-mail	no e-mail	no e-mail
Abort workflow	e-mail	e-mail***	e-mail***	no e-mail	no e-mail

Depublication

Notification	Initiator	Examiner	Responsible	Author	Scope*
Depublication task****	no e-mail	no e-mail	e-mail	no e-mail	no e-mail
Rejection of depublication task	e-mail	no e-mail	no e-mail	no e-mail	no e-mail
Depublication**	e-mail	e-mail	e-mail	e-mail	e-mail
Workflow error	e-mail	no e-mail	no e-mail	no e-mail	no e-mail
Abort workflow	e-mail	no e-mail	e-mail***	no e-mail	no e-mail

E-mails informing about a (de)publication or workflow error are sent as soon as the system can initiate the last workflow step through a user interaction or a system error. E-mails about release or examine tasks are not sent individually for each task assignment but gathered in a daily e-mail.

Users can navigate to BIC Process Design using a link in the e-mail. If the user has not been registered before, this must be done first. Then a second click on the link leads to the desired address.

An editorial change made notifies the same recipients as the *multi-level release* or *depublication* workflow.

*) All organizational units that are entered in the diagram- or catalog item attribute Scope receive a notification at the corresponding steps. In this process, organizational units are assigned to user groups of BIC Process Design.

**) The e-mail is also sent to the second examiner, third examiner and the responsible for resubmission.

***) The user is informed if he or she has a pending or already completed workflow task.

****) Depublication tasks may also be called release tasks since they demand the approval of the responsible to depublish the concerning entity.

Note: Users who have saved the *diagram as a favorite in Publication* or Preview stage will be notified of changes to diagrams in the respective stage. This includes, for example, the publication and depublication.

11.3.4 How can I decide whether the scope is notified of changes by e-mail?

If you have logged in as an authorized user (editor, administrator) in the new user interface and opened the start dialogue for a workflow to depublish or publish a catalog entity or a diagram, a dialog box opens showing you options for sending scope notifications. You have the option of specifying whether this change is an editorial change that does not require additional review or approval. If you select this option, you will have the opportunity to notify the affected scope of this change by email.

Hint: Please note that without selecting the option *This is an editorial change without additional review or approval*, the option to inform the scope of the change will not be displayed to you.

Publish this diagram "BPMN"

Please give a reason for publishing this diagram!

> Enter a comment*
> Example comment

15 / 1024

☑ This is an editorial change without additional review or approval.

▢ Inform scope of this change by e-mail.

Cancel   **Publish**

If the option *Inform scope about this change by e-mail* has not been selected for a publication or depublication, you will receive an email stating that the scope will not be informed about the change.

If the option *Inform scope about this change by e-mail* has been selected for a publication or depublication, the scope will be informed about the change immediately.

If the editorial change option is removed, the selection to send the notification is also automatically canceled. This will remove the option to send a notification of the change to the scope.

Note: Even if no scope has been specified for a chart or catalog entity, you will still receive a corresponding e-mail

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notification. This e-mail will still inform you whether the scope is notified of a change or not.

11.3.5 Who will be notified about a resubmission?

If a resubmission is initiated for a published diagram or catalog object, the responsible or (if the corresponding attribute is maintained) *responsible for a resubmission* receives a *resubmission task* and a notification.

In addition, an e-mail is sent to inform about the resubmission. This information mail is addressed to authors, the examiner (as well as the second and third examiner if they are maintained in the method) and the responsible if the latter is not the owner of the resubmission task. The dispatch of the information mail can be blocked for each diagram or catalog object by selecting the checkbox "Do not send information mail (resubmission)" in the governance attributes.
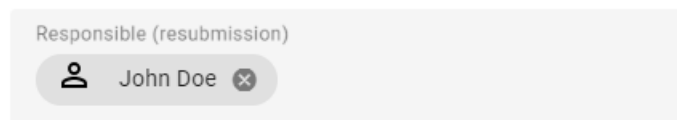
Note: The e-mail about a scheduled resubmission is sent independently of the task summary notification to the responsible or responsible (resubmission) user.

REPORTS AND EXPORTS

In the detail view of a diagram you will find the option *Reports & Exports* with the following options (further information is linked in each case). Note that only administrators and editors can create exports of diagrams in the public workspace.

- *Excel Export*

- *Export a diagram*

- Create reports: *default reports* and customized reports

Moreover the *Excel exports of categories* and the *imports of archives and BPMN diagrams* are described in this chapter.

Additionally, you have the option to export the graphic of a diagram in various file formats. Further information can be found *here*.

12.1 How can I export the contents of a diagram as an Excel file?

Administrators and editors can create an Excel export containing the content of a diagram. By default, there is also the *Matrix report* for the diagram types VCD, EPC and BPMN. The exports can be configured and (de)activated in the administration of the old user interface.

Export to Excel: The exported Excel file (also called *Process warehouse*) includes the worksheets "Diagram" and "Object". In the worksheet "Diagram" all attributes of the diagram, the diagram ID and the name of the category above are listed. The "Object" sheet contains the object type, the symbol type and all the attributes of the objects that are contained in the affected diagram. This also includes the Entity ID and the Occurrence ID, which uniquely identify the object and its occurrence in the diagram. In addition, the diagram name and the diagram ID for the respective objects show the affiliation to a diagram. Overall, all attributes in this export are output in the content language selected in the system.

Hint: In older versions, all attribute types were exported, regardless of whether they were deactivated or removed within the method. From now on, only visible attribute types are exported.

Note: Attribute values exceeding 32767 characters will be automatically shortened. A notification will be provided at the end of the shortened value indicating it has been reduced.

Matrix report: The .xlsx file (also called *Process matrix*) is divided into seven sheets. The first five sheets offer you pre-configured evaluations in form of pivot tables related to different entities. They offer evaluations about the "Application usage", "Document usage", "RACI mapping", "Risk occurrence" and "Diagram metrics". The "Data" sheet of the file contains some collected information. This includes some diagram information, all modeled activities and objects directly related to the activities, such as the so-called satellites. Among others, the Entity ID and the

Occurrence ID, which uniquely identify the connected object and its occurrence in the diagram, are also listed here. Unconnected objects and objects that are connected to an activity via two corners, for example, controls of risks, are not taken into account. Furthermore, the report does not contain any information about the process flow. The last sheet "Matrix" includes a pivot table in which you can create various evaluations. For more information about how to handle pivot tables, see e.g. here or on this support website.

In order to create an Excel export, open your diagram in the diagram view of the public workspace. Switch to the *Options* in the right sidebar and select the entry *Reports & Exports*.
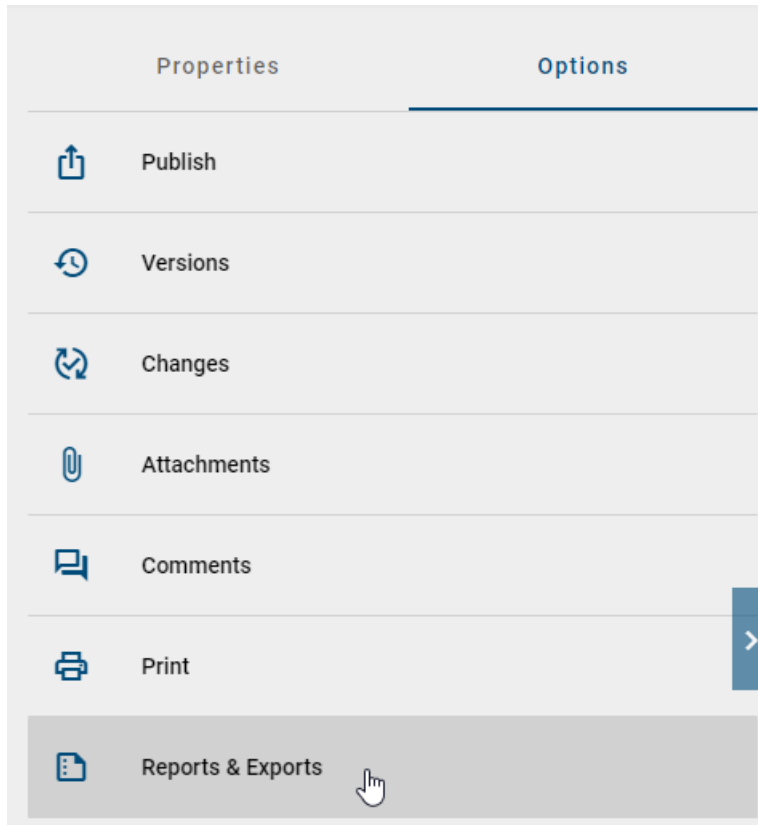
The *Excel exports* are shown as first group of exports.
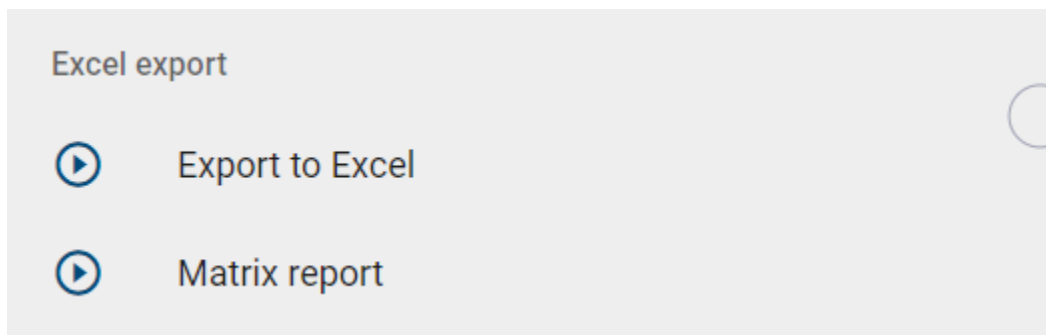
Click the *Start* button at the desired export to create the file. You will receive a corresponding message. As soon as this is completed, you can download the export in a second message by clicking on the corresponding link.

Once the export has been created, you will also find a download button on the entry in the *Reports & Exports* section, where you can download the zip folder.
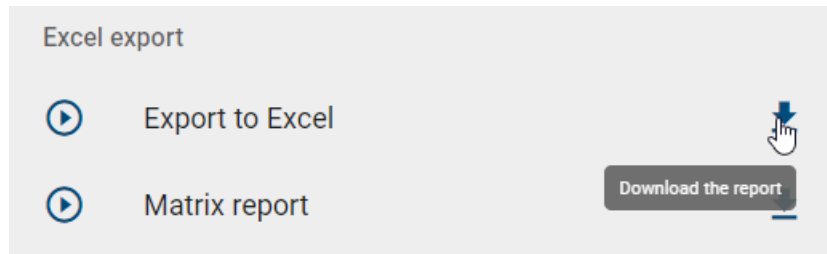
The *Download* button is no longer displayed if the diagram was changed after the export has been created. In this case, you can create a new export for the current state of the diagram and then download it again.

Tip: As part of the DSGVO action plan, you can filter the process warehouse for documents and activities to which "data protection" has been maintained. Another application possibility is filtering for "risk", which allows you to see the risk matrix.

Note: You can create *Excel exports of categories* in order to export the data of multiple diagrams in one file. Excel exports of *archived versions* can be created as well.

12.2 How can I export a diagram?

Administrators and editors can export diagrams from the *public workspace, from the preview and from the* publication in order to save data or move it via a subsequent import. You can access the function both in the detailed view of the desired diagram and via its context menu in the diagram list.

If you have opened the diagram view of your diagram in the public workspace, switch to the *Options* in the right sidebar and select the entry *Reports & Exports*.
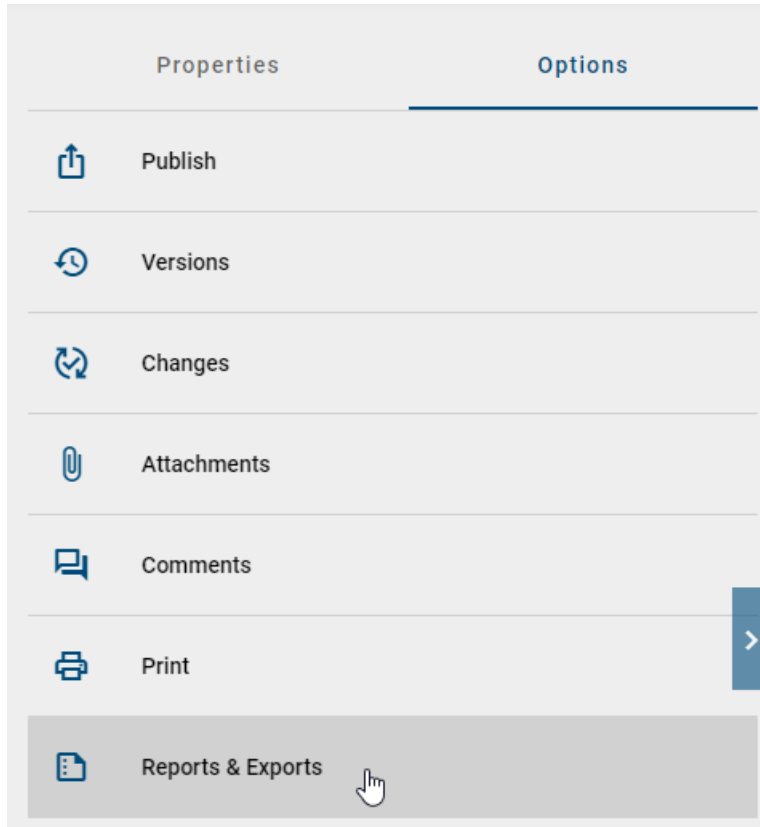
Click the *Create the report* button at the entry *Export diagram archive* in the *Diagram exports* group, to create the export of the current state. Alternatively you can also *export a BPMN file*.
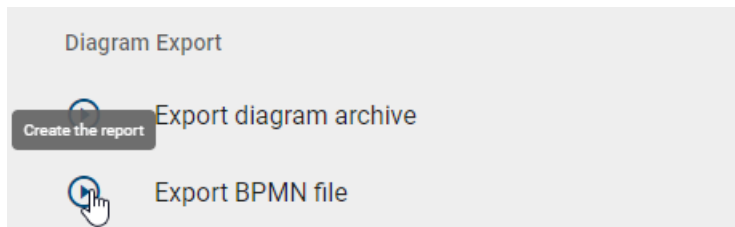
Alternatively, you can navigate to your diagram in the diagrams list and open its context menu (three dots menu). Then select *Export* or *Export BPMN* in the menu to generate the export.
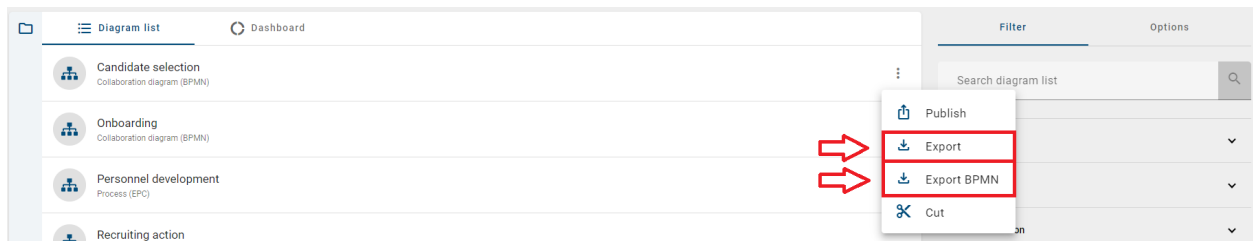
In both cases, the export is created as a zip folder and you will receive a corresponding message. As soon as this is completed, you can download the export in a second message by clicking on the corresponding link.

Once the export has been created, you will also find a download button on the entry in the *Reports & Exports* section, where you can download the zip folder.
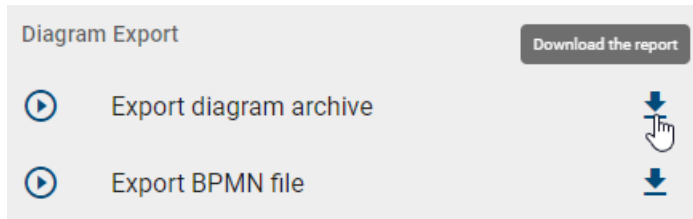
Hint: The *Download* button is no longer displayed if the diagram was changed after the export has been created. In this case, you can create a new export for the current state of the diagram and then download it again.

Note: Please note that if the latest version is outdated and a new version is synchronized with the release, the download for the export will be removed from the export option.

Warning: BIC offers the flexibility to extend the modeling notation beyond BPMN standards, allowing you to incorporate concepts such as customer journey mapping to enhance your process representation. However, it is important to note that the BPMN export functionality might not be supported when these extensions or custom extensions are utilized.

12.3 How can I import an archive or diagram?

You have the opportunity to import an exported archive or BPMN diagram into your current repository. Go to the *Options* panel and select *Import*.
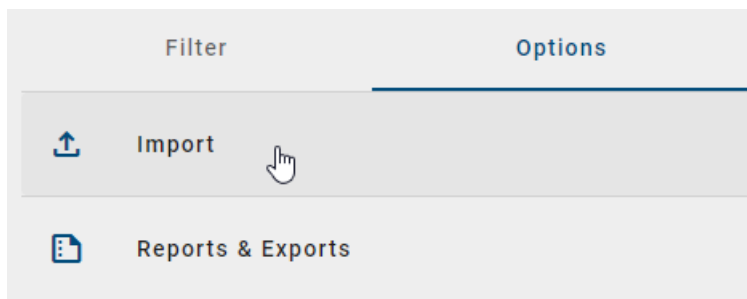
You can select whether you want to import an archive or a BPMN diagram.
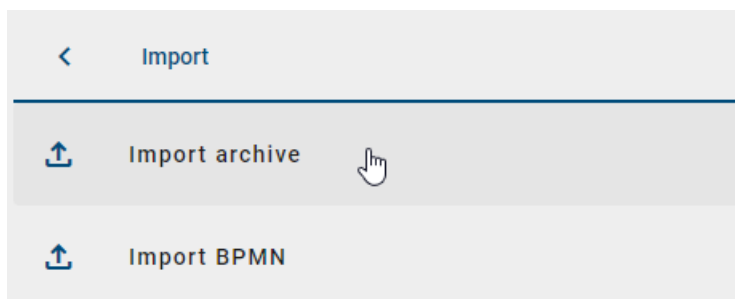
In the appearing file selection window, you can select the desired import. The import will then be executed, which can be recognized by a corresponding message on the bottom of the right side of the screen. If the import was successful, you will receive another message.
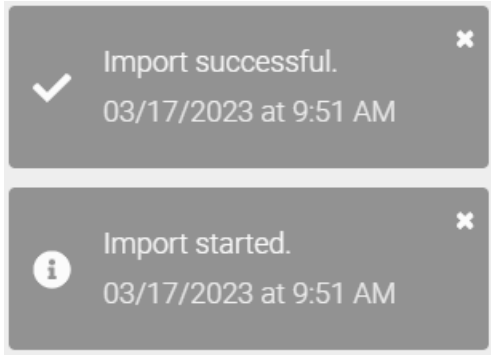
Hint: Currently only *Administrator* can use the *Import* function.

Note: The date information you find within your imports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

If your imported archive already exists in your repository, the following aspects will be handled:

- Already existing diagrams with the same diagram ID of the imported archive will be archived and the imported diagram will become the active version.

- Already existing diagrams with the same diagram ID of the imported archive in a *category* are removed and imported into the selected category.

- Already existing categories with the same category ID of the imported archive remain.

- Already existing entities with the same entity ID of the imported archive are updated.

Note: Diagrams with the same diagram ID can only exist once in the repository.

12.4 Which reports can I download?

In the *Reports & Exports* section in the detail view of a diagram, you will find the standard BIC Process Design reports and the customized reports. Custom reports can be created in administration and further configured with templates. The following standard reports are available to you:

Manual: The manual report (.docx-document) can be executed on individual diagrams (BPMN and EPC) by default. The cover sheet contains the name of the diagram as well as some release dates. Furthermore, there is a process overview, a process graphic, an overview of the responsibilities in the process, a tabular representation of the process steps and a description of used resources. As standard the process overview contains responsible and consulted roles, inputs, outputs, IT systems as well as risks and KPIs. The tabular representation of the process steps includes a list of all existing activities and associated symbols such as inputs, outputs, systems, risks and KPIs.

Manual report with assignments: By default, this export can be executed on process overviews (VCD) and processes (EPC and BPMN), which contain subprocesses. It includes a comprehensive process description including all diagrams, which are shown behind the respective process and furthermore behind the stored diagrams.

Hint: The date information you find within your exports (e.g., "Valid from", "Valid to", "Created date", and similar)

undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

Note: In this export, all attribute types which use dates as values, will also have the data type *date* in the corresponding cell within the xlsx file. With this you can then process these values, e.g. to calculate time spans. This applies for all process warehouse exports, regardless of whether they are carried out for *repositories, categories, diagrams* or the catalog. The displayed date format in excel (e.g. 12/05/2019 or 12:05.2019) depends on the display language, which has been set within the Windows language settings.

Note: **Subprocesses** on start or end activities with the node symbol type *NST_INTERFACE* are explicitly excluded from the manual report with assignments.

Process costs/simulation: A comprehensive explanation of this export can be found in the *separate chapter*.

See *"Creating reports"* to know how to perform these exports.

Note: As an administrator, you can *change the basic settings of individual reports*, such as their availability. You can also customize the reports by using a report template.

12.4.1 Which reports sort activities based on the process flow?

Similar to the *matrix diagram view* activities are listed in certain reports according to the process flow of the diagram. This means that activities which are placed at the beginning of the process flow, will also be listed first in the corresponding report.

This sorting algorithm is available for all reports in .docx format. This effects by default the *Manual* and the *Manual report with assignments*. The affected diagram types are accordingly the collaboration diagram (BPMN), the process (EPC) and the process overview (VCD).

Note: When gateways or operators have been modeled in a process flow, then the activities probability will determine the order of those activities.

12.5 How can I create and download a report?

If you create a report, it is always based on the current diagram version, so pay attention to which area you are in and, if necessary, *change it* via the corresponding menu.

Navigate to the desired diagram in the diagram list and open it. Switch to the *options* panel in the right sidebar and select *Reports & Exports*.
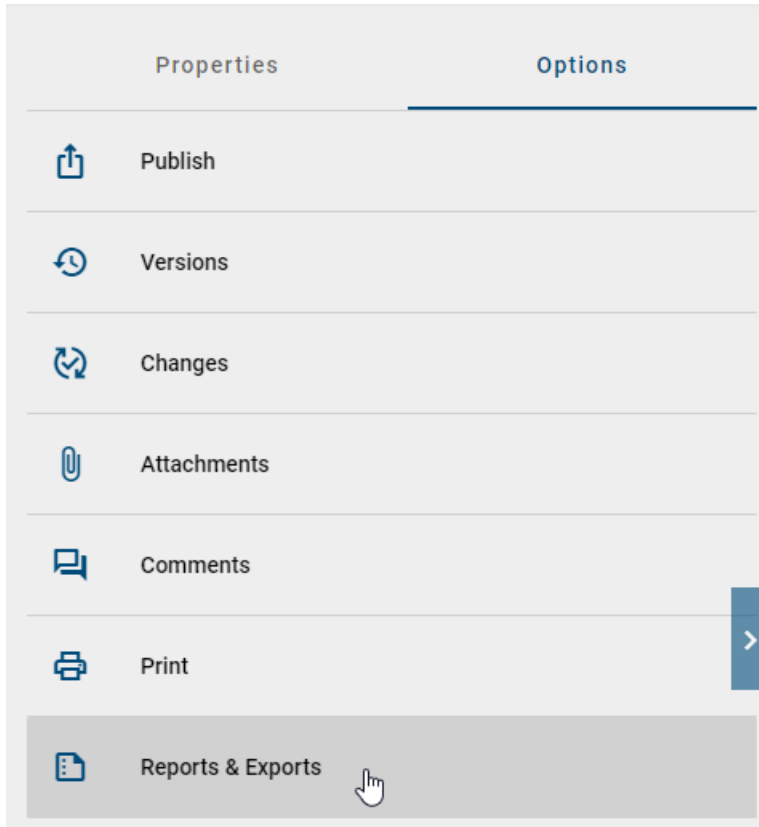
In the group **Reports**, all *available reports* are listed. Create the desired report by clicking on the respective *Start* button.
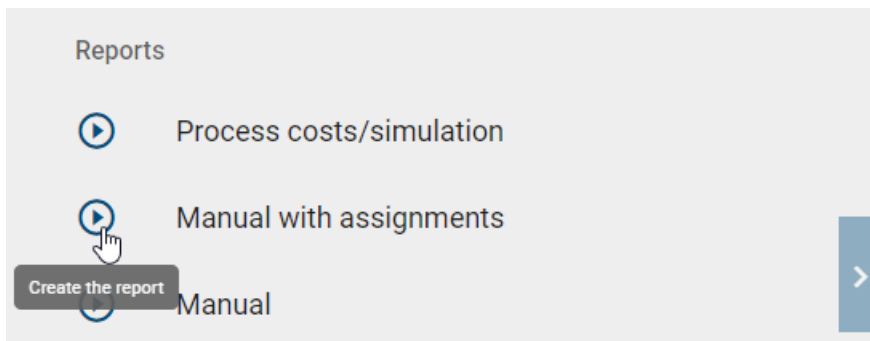
Once the report has been generated, you will receive a message at the bottom of the screen allowing you to start the report download with one click. Alternatively, you can also download the report using the *Download* button that appears to the right of the entry once the report has been created.
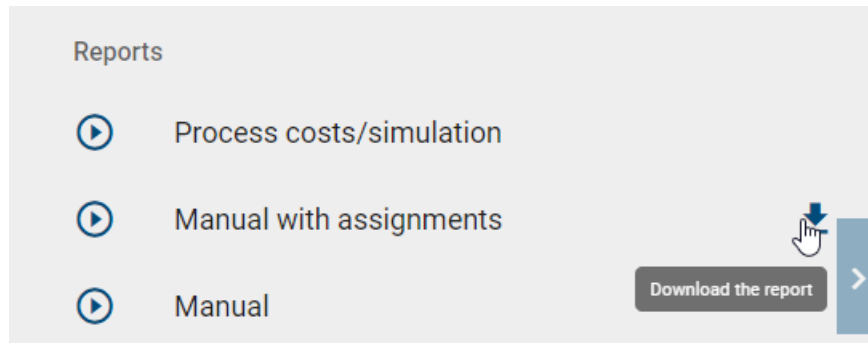
Note: The report language is always based on your current *content language*.

Note: You can also create reports of *opened archived versions*.

12.6 Process costs/simulation

The Process cost/Simulation (.xlsx file) can be executed on individual diagrams (BPMN and EPC). Downloading the report is described *here* in detail.

This report offers a detailed listing and calculation of different costs, times and capacity requirements on three worksheets. In principle, some *attribute input* are required in the affected diagrams of BIC Process Design for meaningful evaluation. These inputs affect not only the name of the resources and activities but also the attributes in the analysis attribute group. They are included in the report and are explained below in the respective subsections under the point of view "taken from the system". The imported values can be adjusted manually in the report itself. Furthermore, multiple occurrences of resource objects in a diagram are recognized as one object in the report. Occurrences of activities and activities or resources with the same name are output individually in the report. Note that different objects should generally have different names, otherwise some calculations may be corrupted. In the following, the individual worksheets are explained in more detail in order to clarify the analysis procedure.

12.6.1 Table sheet "Activities"

This spreadsheet contains four different blocks. In the following, the functions and calculations are illustrated by the individual terms within the blocks.

Process costs: This block is essential for the further, automatically executed calculations of all times and costs. Except for the field *Currency*, the required fields are not filled in automatically when the report is created. Instead, they must be entered manually in the Excel file.

Process costs	
Date	01.01.2022
Period of calculation	Week
Instances per period	30
Currency	€

- *Date:* In the corresponding cell, you can enter any date, for example, the current date.

- *Period of calculation:* The entry of the calculation period is required in the corresponding cell. This could be "week" or "month", for example. The period should be taken into account by entering values in BIC Process

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Design. Take care of consistency, so as not to distort some calculations. For example, the capacity of a resource (see *worksheet "Resources"*) depends on the selected period!

- *Instances per period:* Depending on the calculation period, the number of runs of this process must be entered here, e.g. 5. Further calculations are only performed automatically using this number.

- *Currency:* The cell associated with the currency displays the currency symbol for Euro ("€") by default and is displayed accordingly on all worksheets. It is possible to change the currency to Dollar ("$") by clicking on the cell and opening the dropdown list. The change will be automatically applied to all worksheets.

Activities of the process: This block offers a compact overview of the activities of the process, their frequencies and some total costs. These total costs are partly the result of subsequent calculations.

Activities of the process					Total MC	Total RC	Total costs
Activities	Frequency	Probability	MC				
[n] [Text]	[n]	[%]	[€]		[€]	[€]	[€]
1 Create invoice	30	100%	14,26 €		427,80 €	675,00 €	1.102,80 €
2 Check invoice	30	100%	- €		- €	450,00 €	450,00 €
3 Revise invoice	7	25%	1,25 €		8,75 €	157,50 €	166,25 €
4 Submit invoice to customer	30	100%	1,90 €		57,00 €	112,50 €	169,50 €
			Sum		493,55 €	1.395,00 €	1.888,55 €

taken from the system:

- *Activities:* Number assigned when reading the process and name of the activity

- *Probability:* Probability with which this activity is performed in the process (in %)

- *Material costs (MC):* Cost of an activity (in €)

For example, the values for the activity "Create invoice" have previously been entered in the attributes in the system as follows:
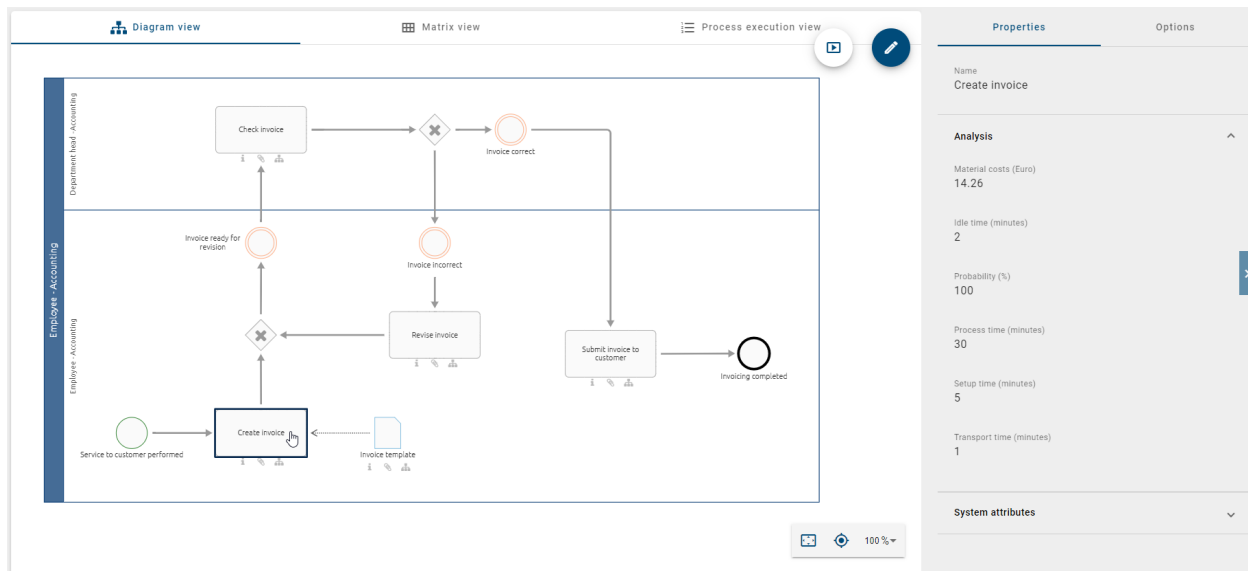
Calculations in the report depending on the instances per period:

- *Frequency:* Probability multiplied by the number of runs; it indicates how often an activity is executed per period

- *Total material costs (Total MC):* Material costs multiplied by the frequency; corresponds to the material costs of an activity per period (in €)

- *Total resource costs (Total RC):* Sum of all costs of the resources involved in this activity per period (in €), calculated using the "Resources" block

- *Total costs:* Sum of total resource costs and total material costs per activity per period (in €)

- *Sum:* These three numbers each represent the sum of the Total MC, Total RC and Total Costs of all activities. They therefore correspond to the respective total costs of the period (in €).

Times: In this block some basic and total times are listed.

Times				Total time
PT	IT	TT	ST	
[min]	[min]	[min]	[min]	[min]
30	2	1	5	1140
15	10	0	10	1050
30	0	0	15	315
5	15	5	5	900
			Sum	3405

taken from the system:

- *Process time (PT):* Processing time of an activity (in minutes)

- *Idle time (IT):* Idle time of an activity (in minutes)

- *Transport time (TT):* Transport time of an activity (in minutes)

- *Setup time (ST):* Setup time of an activity (in minutes)

For example, the values for "Activity 1" have previously been entered in the attributes in the system as follows:

Calculations in the report depending on the instances per period:

- *Total time:* Sum of all times PT, IT, TT and ST multiplied by the frequency per activity (in minutes)

- *Sum:* Sum of the total times of all activities per period (in minutes)

Resources: This block is subdivided into further resource blocks, which are lined up and each four columns long. For each resource, the name and the values listed below, such as associated costs and times, are displayed here. The involvement of a resource in an activity is indicated by the existing numbers within a block in the respective row. Accordingly, the fields remain empty if a resource does not execute an activity. The calculation for "Total RC" finally takes place across resources and thus stands in the last column of the block. The resources listed correspond to the ones in worksheet "Resources". The worksheets are linked and influence each other.

P	Q	R	S	T	U	V	W	X

Resources								
Employee - Accounting				Department head - Accounting				Total RC
PT	RC per instance	RC	Total PT	PT	RC per instance	RC	Total PT	
[min]	[€]	[€]	[min]	[min]	[€]	[€]	[min]	[€]
30	22,5	675	900					675
				15	15	450	450	450
30	22,5	157,5	210					157,5
5	3,75	112,5	150					112,5
Sum		945,00 €	1260	Sum		450,00 €	450	

taken from the system:

- *Process time (PT):* Time taken by a resource to process an activity (in minutes). This corresponds to the PT of the activity if no separate entry per resource is possible in BIC Process Design. You can change the number yourself in the report.

Calculations in the report depending on the instances per period:

- *Resource costs per instance (RC per instance):* Cost rate of the resource (see "Resources" sheet) multiplied by the PT that the resource requires to process an activity (in €). It indicates how much a resource would cost if the activity is run once.

- *Resource costs (RC):* RC per instance multiplied by the frequency (in €). These are the costs per period that the resource causes by performing the activity.

- *Total process time (Total PC):* Frequency multiplied by the PT that the resource needs to process an activity (in minutes). It specifies how much time the resource needs to complete the activity per period.

- *Sum:* respective sum of RC, or PT. It indicates the total costs or total time the resource requires per activity per period (in € or minutes).

- *Total resource costs (Total RC):* Sum of all RC per activity. It specifies the amount of costs of an activity per period, caused by the resources involved (in €).

Note: Input values transferred from the system, such as names, probabilities, costs, times and capacities, can be subsequently adjusted in the report as required. The changes are useful for analysis root-attributes "Capacity" and "Cost rate" of the "Role" object, for example, if these values are activity-specific. In contrast to *occurrence attributes*,

root attributes are adopted for each occurrence of an object. *Confirmed objects* should therefore only be changed in the catalog or in the file itself.

12.6.2 Table sheet "Resources"

This section contains the resource requirement calculation, which shows the capacities and costs of individual resources separately.

Capacity requirements calculation: In this block, some values of resources are listed separately. These values correspond to the entries in the system, are calculated separately in the worksheet "Activities" or in this worksheet.

Capacity requirements calculation						
Resources		Capacity	Cost rate	Total RC	Total time	Capacity requirements
[n]	[Text]	[h]	[€/min]	[€]	[min]	[n]
1	Employee - Accounting	39	0,75	945	1260 ✔	0,54
2	Department head - Accou	40	1	450	450	0,19

taken from the system:

- *Resources:* Number assigned when the process is read and name of the resources
- *Capacity:* Capacity of the resource (in hours)
- *Cost rate:* Cost rate of the resource (in € per minute)

For example, the values for the role "Employee - Accounting" were previously entered in the attributes in the system as follows:

Analysis

Capacity (in hours)
39

Cost rate (in € per minute)
0.75

Calculations in the report depending on the instances per period:

- *Total resource costs (Total RC):* Sum of the cost of this resource in the selected period (in €); it corresponds to "Sum" from *worksheet "Activities"*, block "Resources"
- *Total time:* Sum of resource processing times over participating activities in the selected period (in minutes); it corresponds to "Sum" from *worksheet "Activities"*, block "Resources"
- *Capacity requirements:* Ratio of the total time required by the resource to perform the activities of this process to its available capacity. The value of the capacity requirements therefore indicates the extent to which a resource uses its available time or whether more time is needed. A distinction is made as follows.
  - Value greater than 1 (red X): The time required for the tasks exceeds the capacity of this resource for the selected process. There is a capacity requirement.
  - Value between 0.5 and 1 (green check mark): The capacity is equal to or half the processing time required for the activities. The resource has sufficient capacity.

– Value less than 0.5 (yellow exclamation point): The capacity is more than twice as large as the processing time required for the activities. The resource still has a lot of capacity.

12.6.3 Table sheet "Diagram"

Here you can see a picture of the evaluated diagram.
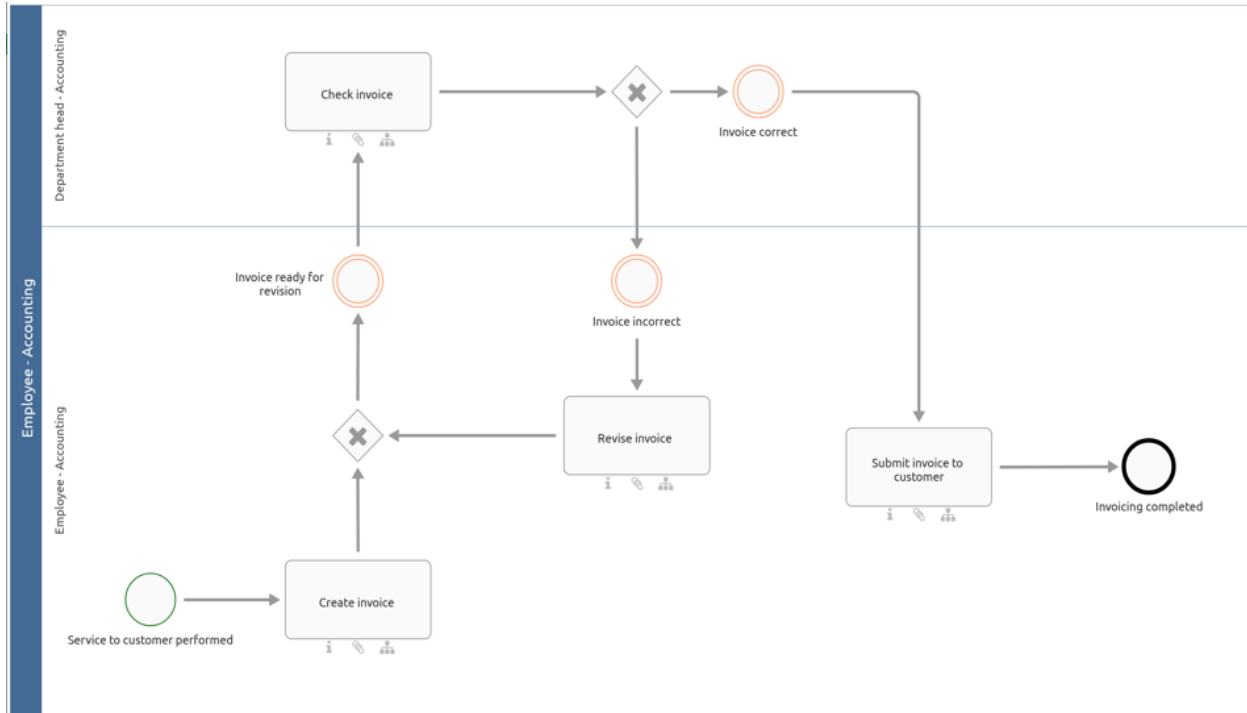
12.7 How can I export all diagrams of a category (as an Excel file)?

If an export should not only contain the data of a single diagram, you can use the export options for categories (or repositories). You can choose (in the default setting from the administration area) between the *Matrix report* and the simple Excel export. The exports can be configured and (de)activated in the administration of the old user interface. The following content is exported as an .xlsx file:

Export to Excel: If this export (also called *Process warehouse*) is created for a category, the system will take all the diagrams of the category into account. The exported Excel file includes the worksheets "Diagram" and "Object". In the worksheet "Diagram" are listed all attributes of the involved diagrams, the diagram IDs and the name of the category above. The "Object" sheet contains the object types, the symbol types and all the attributes of the objects that are contained in the affected diagram. This also includes the Entity ID and the Occurrence ID, which uniquely identify the object and its occurrence in the diagram. In addition, the diagram name and the diagram ID for the respective objects show the affiliation to a diagram. Overall, all attributes in this export are output in the content language selected in the system.

Hint: In older versions, all attribute types were exported, regardless of whether they were deactivated or removed within the method. From now on, only visible attribute types are exported.

Note: Attribute values exceeding 32767 characters will be automatically shortened. A notification will be provided at the end of the shortened value indicating it has been reduced.

Matrix report: The created file (also called *Process matrix*) is divided into seven sheets. The first five sheets offer you pre-configured evaluations in form of pivot tables related to different entities. They offer evaluations about the "Application usage", "Document usage", "RACI mapping", "Risk occurrence" and "Diagram metrics". The "Data" sheet of the file contains some collected information. This includes some diagram information, all modeled activities and objects directly related to the activities, such as the so-called satellites. Among others, the Entity ID and the Occurrence ID, which uniquely identify the connected object and its occurrence in the diagram, are also listed here. Unconnected objects and objects that are connected to an activity via two corners, for example, controls of risks, are not taken into account. Furthermore, the report does not contain any information about the process flow. The last sheet "Matrix" includes a pivot table in which you can create various evaluations. For more information about how to handle pivot tables, see e.g. here or on this support website.

To create one of the exports, navigate to the desired category in the *Diagrams* area, open the *Options* in the right sidebar and click on *Reports & Exports*.
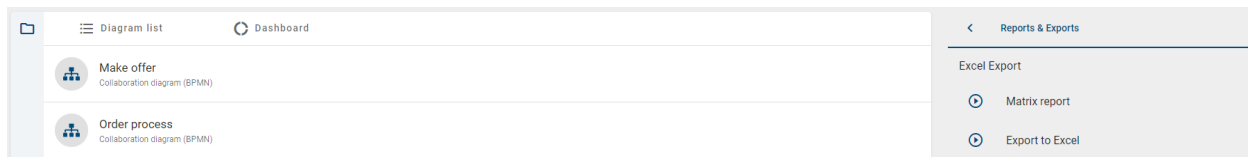
If you click on the *Start* button of the desired export, it will be generated and you will receive a corresponding message. As soon as this is completed, you can download the Excel file in a second message by clicking on the corresponding link.

Once the export has been created, you will also find a download button on the associated entry where you can download the export.
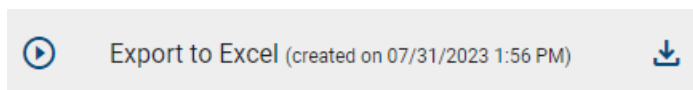
The *Download* button is no longer displayed if changes were made to a diagram after the export was created. In this case, you can create a new export for the current status of the category and then download it again.

Best Practice

With the process matrix you can quickly identify which satellites are connected to which activities. For example, if an application expires, you have an overview of the affected diagrams, the activities concerned and the other parties involved. For this purpose e.g., just activate the checkmarks for the PivotTable fields one at a time. You can then use Excel to filter the corresponding columns (for example, *Object Type*). You can also answer additional questions using the column fields and value fields of the pivot table.

Hint: The date information you find within your exports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

Note: You can also create *Excel exports of single diagrams*.

VERSIONS AND HISTORY

13.1 Which diagram versions are available?

A diagram can be available in different work states or versions. For example, there may be one version per public workspace, preview and publication, which differ from each other. The membership of a particular user role determines which versions a user can see. You can get the information about which versions a certain user role can see, from this chapter of the BIC Process Design user documentation. Please note that in this chapter you will also find information on functions that relate to the handling of the old user interface and are not available in the new user interface.
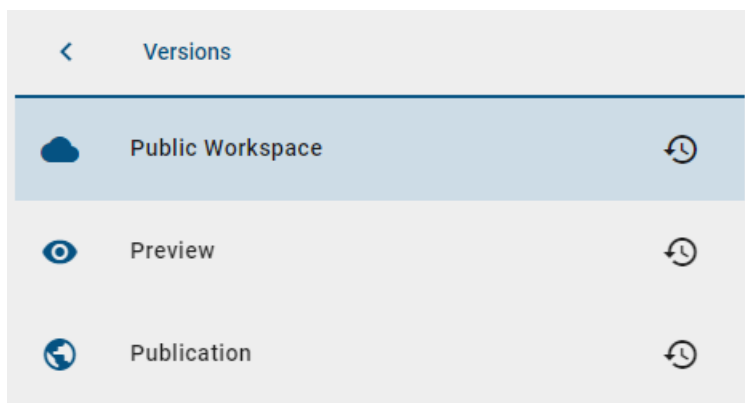
Public Workspace: Diagrams in public workspace are located on the BIC Process Design Server and are visible to users with access to this stage. After the local version of a diagram has been saved and checked in within the modeling area of the old user interface, it becomes visible in the public workspace.

Preview: Diagrams from the public workspace, which are submitted in the release workflow for publication and still have to be approved or rejected by a responsible reviewer within the old user interface, can be found as preview version in the preview stage.

Publication: After the responsible person has released the diagram, this is accepted as the new published version. In the publication, you only see the last released diagram. The released version is the only version that a user with "Reader rights" can see.

Note: It can occur that symbols in the publication or preview are displayed without labels. In such a case the label is not maintained in *the selected content language or the selected alternative language*.

13.2 How do I change the stage?

The following stages exist for the new user interface: *Public Workspace*, *Preview* and *Publication*. Which stages you can see depends on your user role. If you have access to more than one stage, you can change the stage. The currently selected stage is displayed next to the name of the repository. *Here* you can find how to change the stage.

Depending on where you have been during the change of the stage, you will now see all elements that are available for that specific stage. For example, If are at the *Catalog*, you can see all items contained in the diagrams of the selected stage.

Note: It is possible that single stages are not displayed, caused by different user roles. If you only have access to Publication, there is no entry *Change stage* in the menu.

13.3 How can I see the different versions of a diagram?

As part of the versioning of diagrams, you have the option of displaying diagrams in the stages *Public workspace*, *Preview* and *Publication*, regardless of which *stage you have selected for your repository*. With this option you can quickly and easily view the different versions of a diagram in order to be informed of all changes.

To change the displayed version of a diagram, first navigate to *the diagram view* of the corresponding diagram. Under *Options* select the entry *Versions*.
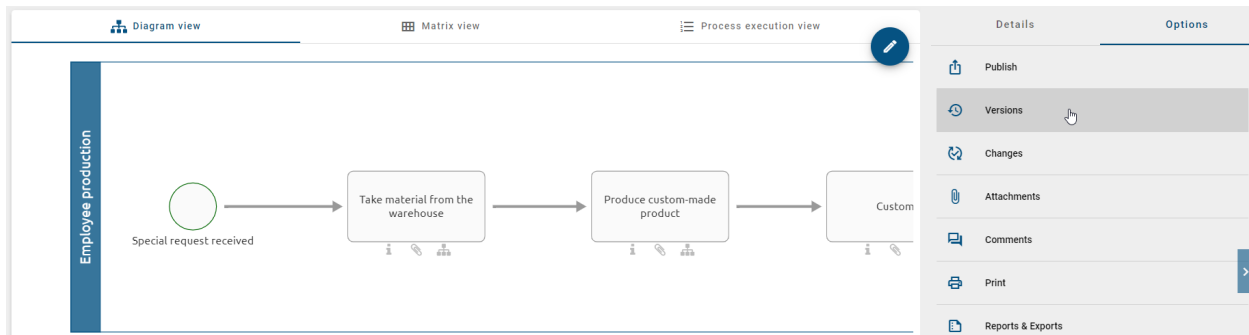
The three different stages between which you can switch are displayed here.
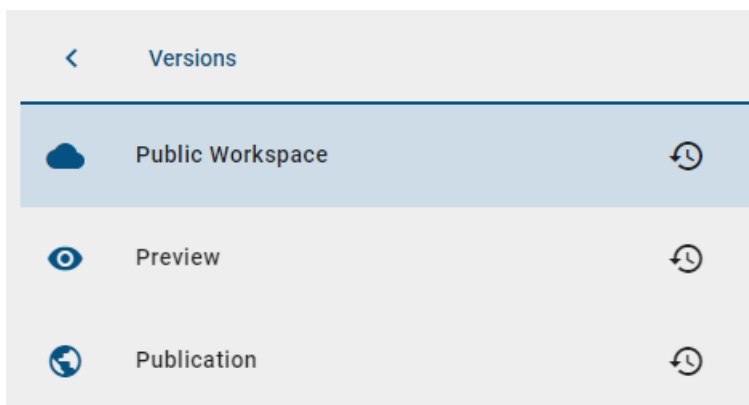
Stages where no current version of the selected diagram exists, are greyed out and can not be selected.
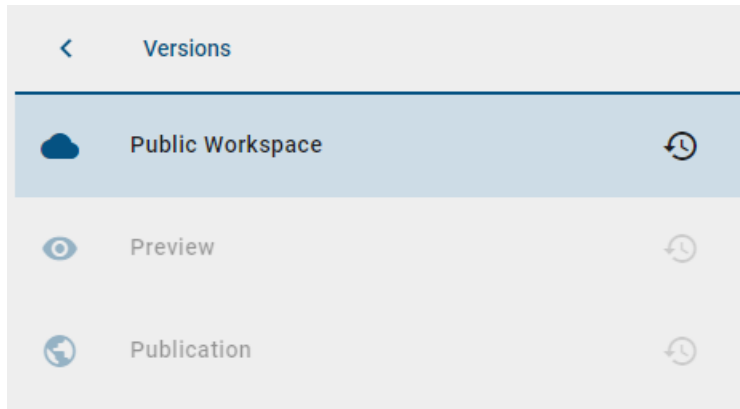
To access older versions of a current diagram you can use the *archive of the corresponding stage*.

Note: *The available stages for a specific diagram depend on the rights of your user role*, analogous to the general stage selection within a repository. E.g. a user with the user role "Reader" can only see the stage "Publication".

Note: If archive access is disabled for the "Reader" user role in *Administration*, Readers will not be able to view versions of a diagram.

13.4 How can I differentiate the stage from the diagram version?

You can display different diagram versions of other stages without *changing the stage*. Changing diagram versions is explained in more detail *here*. As soon as the stage differs from the diagram version, this is noted in the menu bar behind the diagram name.

For example, you are in the public work area. This is displayed below the repository name. At the same time, however, you are looking at a diagram in the *Publication*. The addition "(Publication)" is then displayed behind the diagram name.

13.5 How can I view earlier versions of a diagram?

You have the option of viewing previous versions in the archive. Whether and how long an archive entry exists for *Public workspace*, *Preview* and *Publication* can be set via the *administration*. Thus, for example, after each publication, the previous diagram version is saved in the archive of the publication. This therefore contains the history of all published versions for a diagram. The actual diagram version will be registered in the archive after publication.

Note: In the public workspace, new archive entries are also created when catalog items are changed in the catalog and when importing. All archive entries are created in the languages in which content is maintained on your diagram.

To access the archive of a diagram, first navigate to its *Options*. Then select the entry *Versions* in the sidebar.
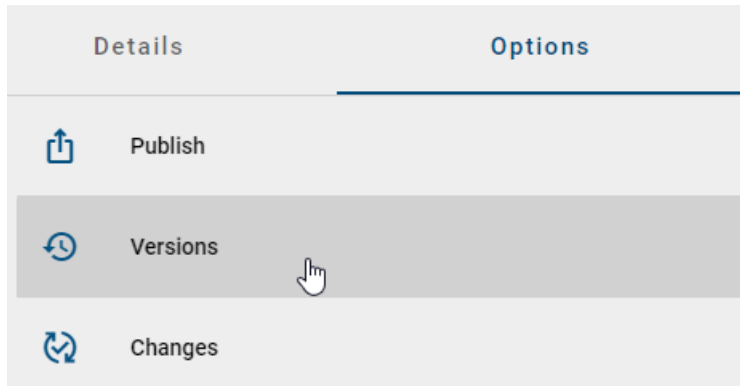
Note: If archive access is disabled for the "Reader" user role in *Administration*, Readers will not be able to view versions of a diagram.

In addition to the archive function, you can view the current version of the selected diagram in the different workspaces. In order to get to the archive of the desired stage (e.g. *Publication*), select the function *Archive* on the right side of the corresponding entry.
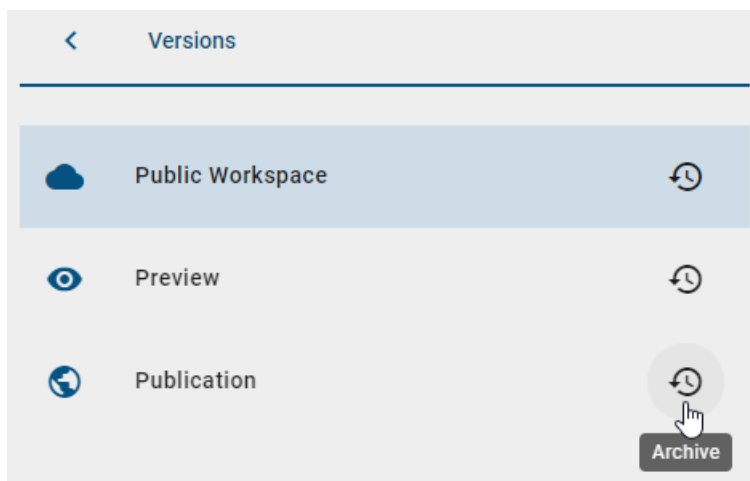
The archive opens and a list of previously archived diagram versions shows up. Each archive entry is named by the time that this version was relevant. In order to view an archived version, click on the desired archive entry. A message that the version is being loaded for you will appear at the bottom right edge of the screen.
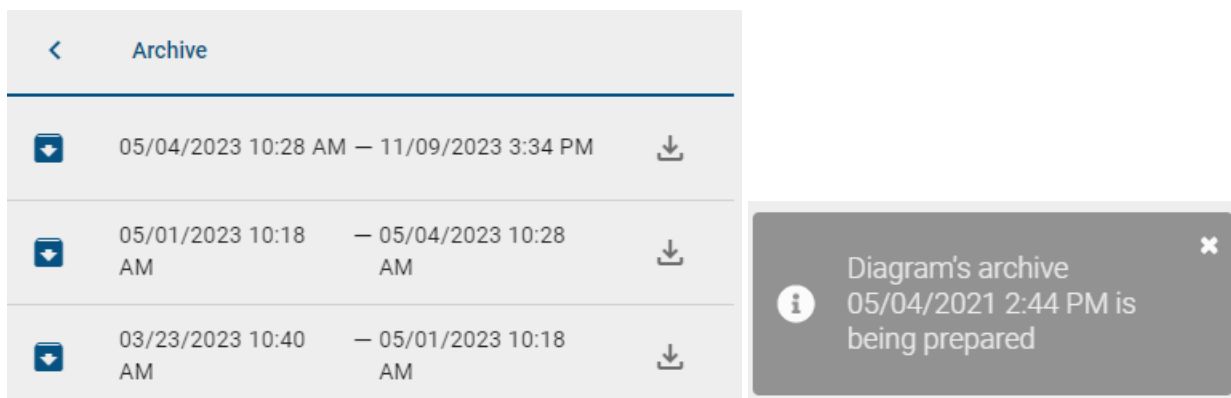
As soon as the archived diagram is loaded, you receive a second message containing a link to open it.
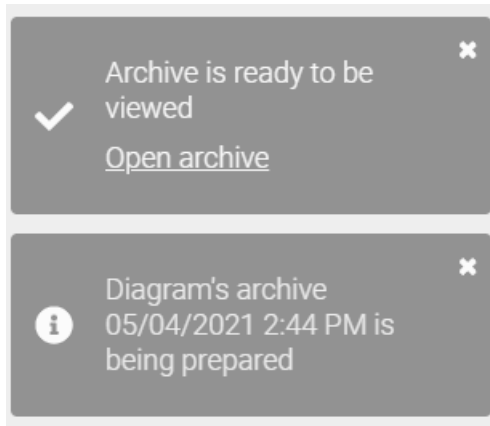
Note: If this archive of the diagram was viewed in the last two weeks, it does not have to be loaded again. You will be redirected to the archive version right after you select this version.
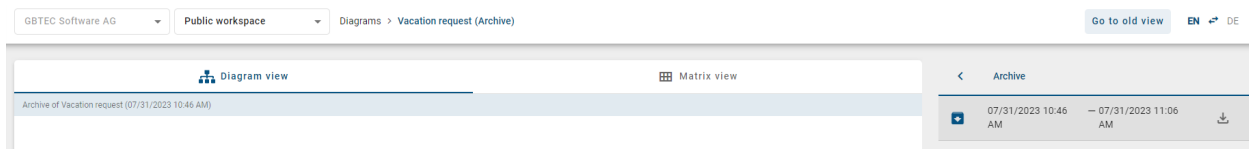
The archived version of you diagram is displayed in diagram view. You get the information that you are seeing an archived version in the top bar as well as in the diagram itself. Note that you can also access the matrix view but not the process execution view. Just like as you were viewing an actual diagram, you can navigate to the *Details* and *Options* of the archived diagram by clicking the *Back*-button twice. The archived diagram supports only the option *Versions* and *Changes* which contains the same archive entries as the actual diagram.

Note: When you view an archived diagram you can look at it but not all options of viewing an actual diagram are supported. Note that you can *download* the archived version and import it in BIC Process Design if this version shall be reused.

Tip: You can use the option *changes* to view all new, changed and removed objects in the opened version of the diagram in comparison to its previous version. You can find more about this in the chapter "*model comparison*".

If you click on the details in the archived diagram, under *System Attributes* you will neither see the name of the creator nor the name of the person who last modified in the diagram. The names are automatically changed to "Import".

System attributes

Created by
Import

Created date
07/31/2023 11:06 AM
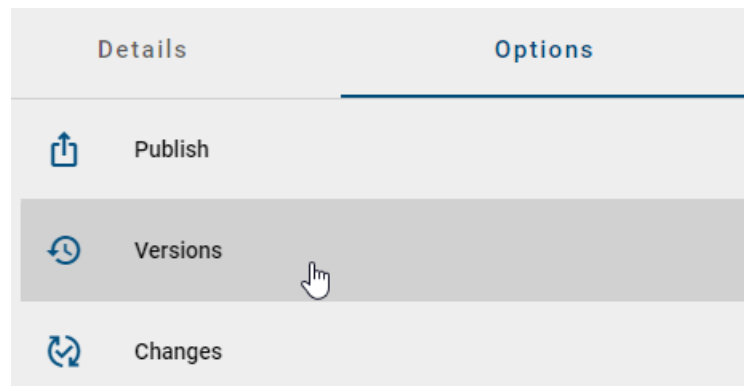
Last modified by
Import

Last modified date
07/31/2023 11:06 AM

13.6 Where can I download earlier versions of a diagram?

You have the option of downloading previous versions in the archive. Whether and how long an archive entry exists for *Public workspace*, *Preview* and *Publication* can be set via the administration in the old user interface. The individual diagram versions can be downloaded as ZIP archive.

To access the archive of a diagram, first navigate to its *Options*. Then select the entry *Versions* in the sidebar.

In order to get to the archive of the desired stage (e.g. *Publication*), select the function *Archive* on the right side of the corresponding entry.
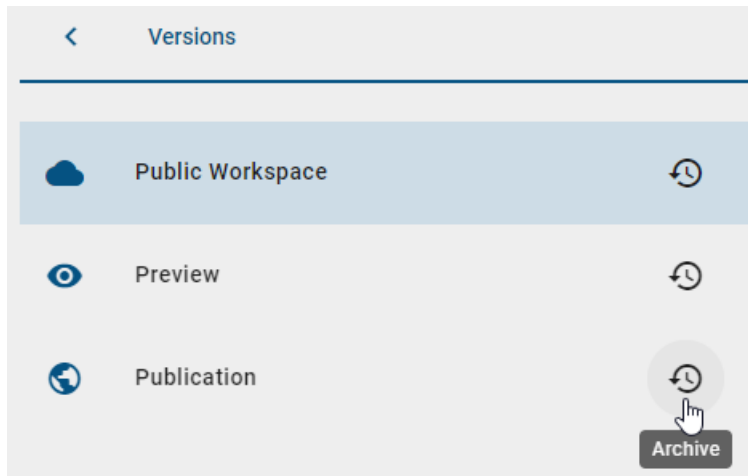
The archive opens and a list of previously published diagram versions shows up. The release date and time are displayed, as well as a button for downloading the archived version.
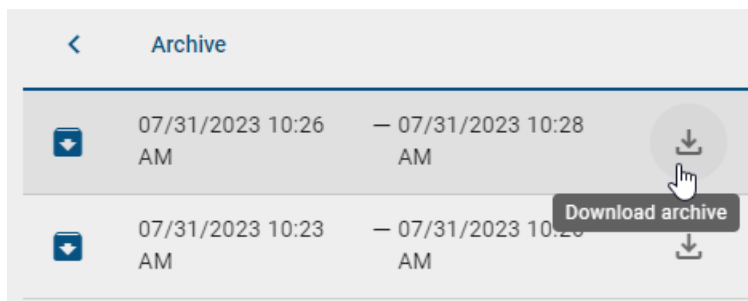
13.7 What is the effect of limiting the validity of a diagram?

Within the *governance attributes* you have the option to maintain responsibilities as well as a validity period for the diagram. The validity is displayed *in the details* of the diagram.
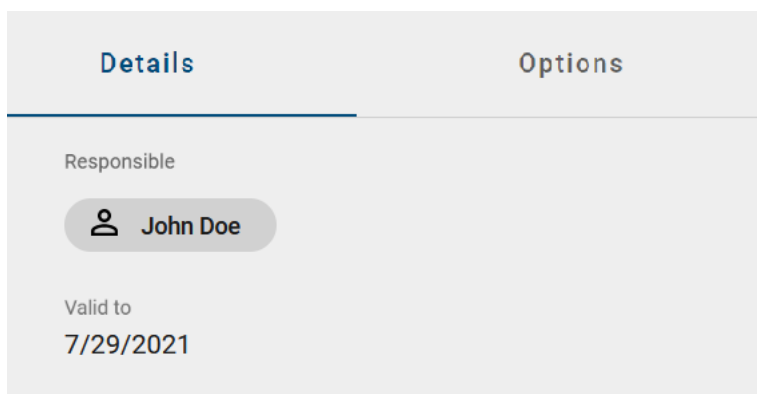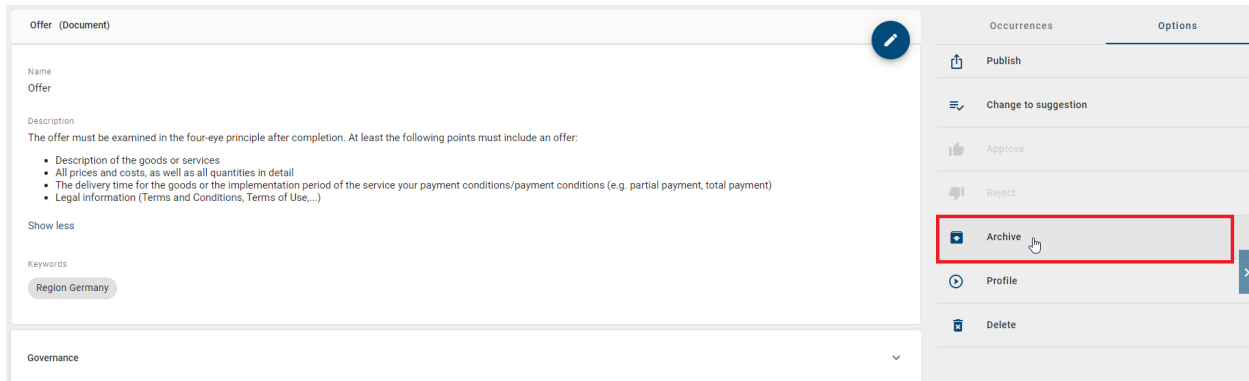
As soon as the diagram is only valid for less than 4 weeks (default setting), the responsible user or user group will be informed by e-mail about the expiration and receives a *resubmission task*. If the end date in the *Valid to* attribute is reached, the diagram will of course continue to exist. Users viewing the diagram in the publication stage get a warning, that the validity period has been exceeded. This is intended to prevent your employees from adopting outdated processes.

Note: The default setting of 4 weeks can be adjusted by the administrator in the BIC Process Design administration.

13.8 Where can I find earlier versions of catalog items?
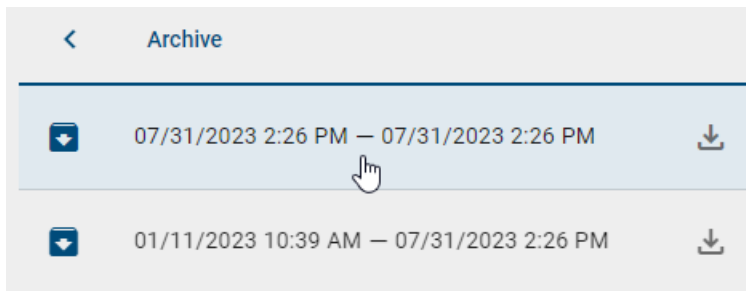
Catalog items, that have an *own responsible* person or user group, have the *Archive* option in all stages. When you select the desired items in the catalog to enter the details, you will find the *Archive* in the right sidebar.

Note: If archive access is disabled for the "Reader" user role in *Administration*, Readers will not be able to view the archives of a catalog entry.

Archive items are created when catalog items are changed. The archive lists all obsolete versions, starting with the latest version. Each archive item is named by the time that this version was relevant. The current version of the catalog object is not listed in the archive.

You can click each item to view the attributes in the main area. The version of the selected archive item is displayed on top.

Additionally, it is possible to download the individual versions of the catalog item as a ZIP file. Select the *Download* button at the desired archive item to do so.
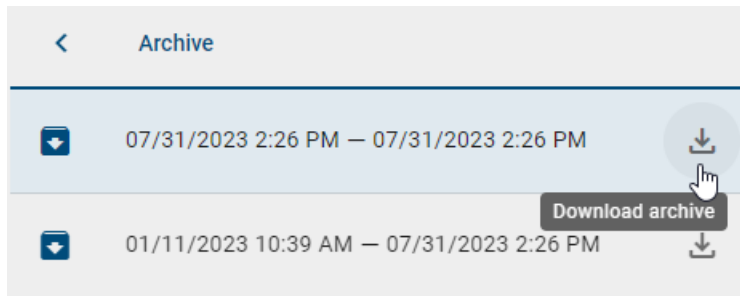
Via the *Back* button you can return to the details view of the current status.

13.9 What is the effect of limiting the validity of a catalog item?

Within the *governance attributes* you have the option to maintain responsibilities as well as a validity period for the catalog item. Users can see the validity in the details.
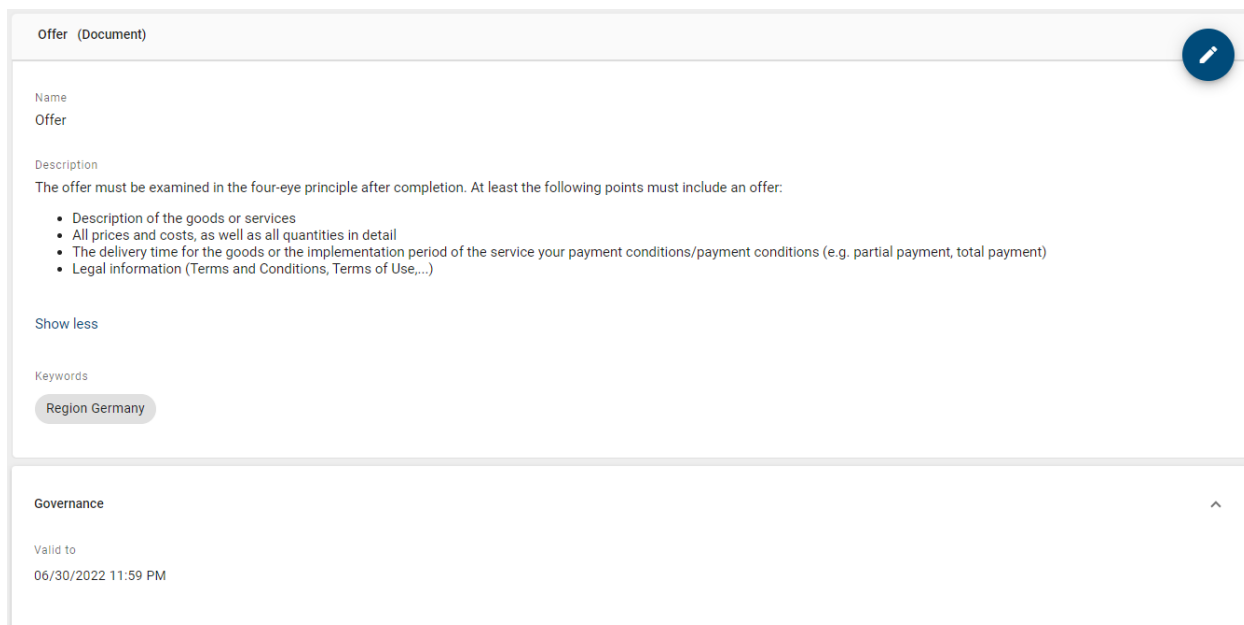
As soon as the catalog item is only valid for less than 4 weeks (default setting), the responsible user or user group will be informed by e-mail about the expiration and receives a *resubmission task*. If the end date in the *Valid to* attribute is reached, the catalog item will of course continue to exist. In publication stage, users who view the item in the catalog or who view a diagram containing the item, will get a warning. The warning points out that the validity period has been exceeded and is intended to prevent your employees from adopting outdated processes. Furthermore, the user will get a note in the *validation hub* if expired catalog items are used.

Note: The default setting of 4 weeks can be adjusted by the administrator in the BIC Process Design administration.

MODEL COMPARISON

The model comparison gives you the opportunity to compare the current version with the *updates* that have been made.

14.1 Where can I find the model comparison?

After clicking on *Changes* in the right sidebar of the diagram view, you will see the option to select a stage and version for comparison with the active version. If you are assigned to the either *Author, Editor* or *Administrator* role, you can select all *stages* for comparison. If you are assigned to the *Reviewer* role, you can **only** view the changes to the **Preview** and **Publication** stages. If you are a *Reader* in the change view of the diagram and would like to view a comprehensive list of all published archives in comparison mode in order to compare all versions with each other, first open the list of archives. All available archives are presented here and you have the option of selecting any archive to enable a comprehensive comparison between the individual versions. As a *Reader* you can **only** view and compare changes in the **Publication** stage.
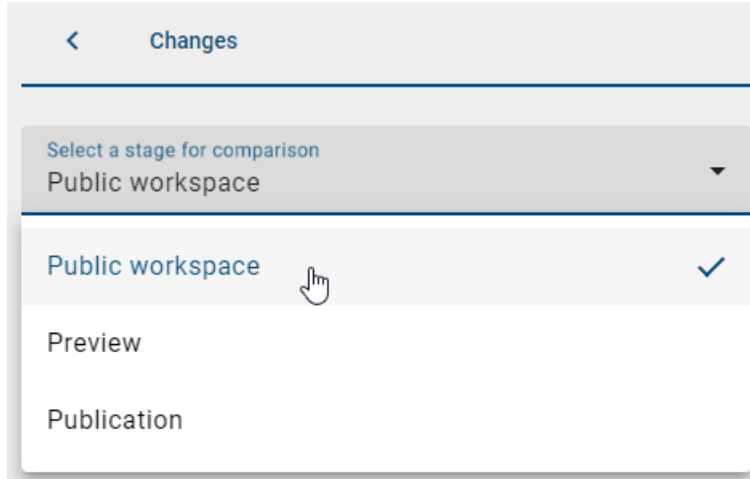
You can also select a *version* from the archive to display the corresponding changes in the respective version.

Note: If archive access is disabled for the "Reader" user role in *Administration*, Readers can only compare the diagram with the direct predecessor archive.

Note: You can only click on the latest version of the stages you are currently **not** in. In your current stage, the "Latest version" selection is not clickable because this is the active version of your stage.
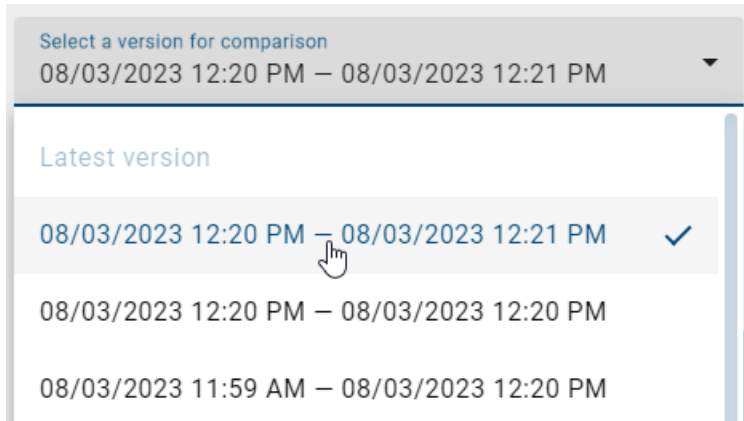
When you have selected the stage and version for comparison, click on the "Show Differences" button. A list of all objects that have been added, removed or changed in diagram compared to the active version is shown.
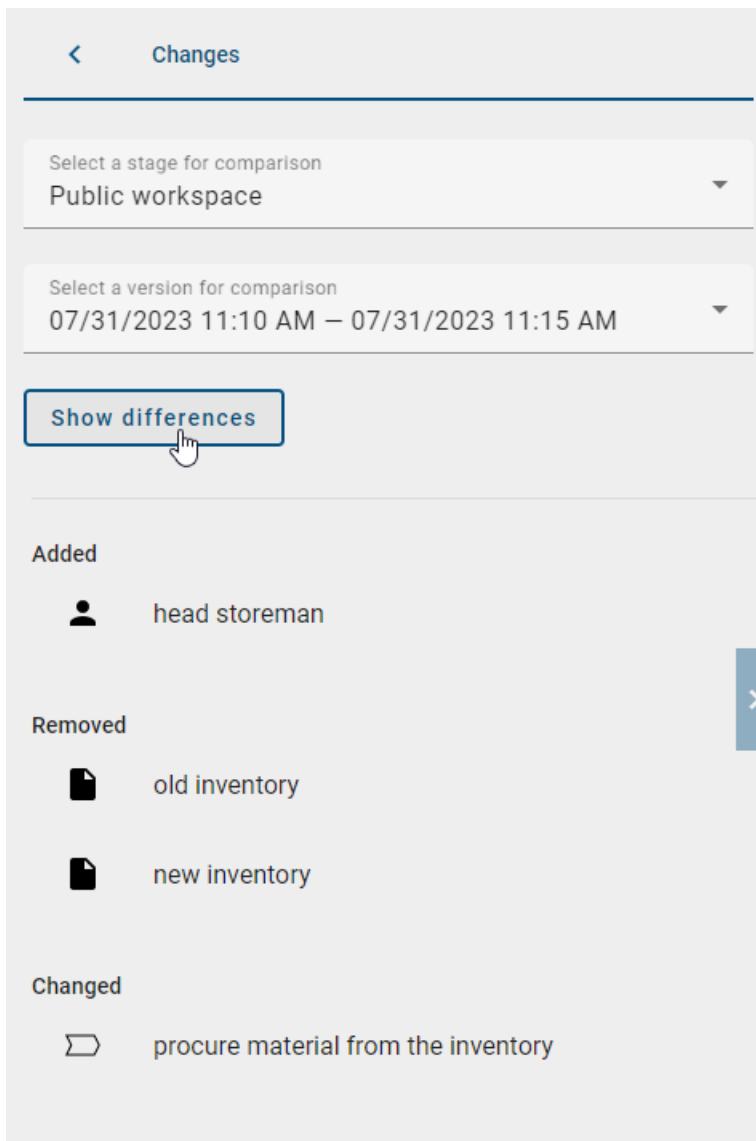
If the name of the object is not maintained in your content language, it will be displayed in your alternative language.

The object appears in the list with the hint "no content", if the name of a changed object has not been maintained in your content and alternative language. You can find more about this topic in the chapter *multilingualism*.

14.2 When and how is a symbol marked?

To see a change in the diagram, you have to click on it in the list.
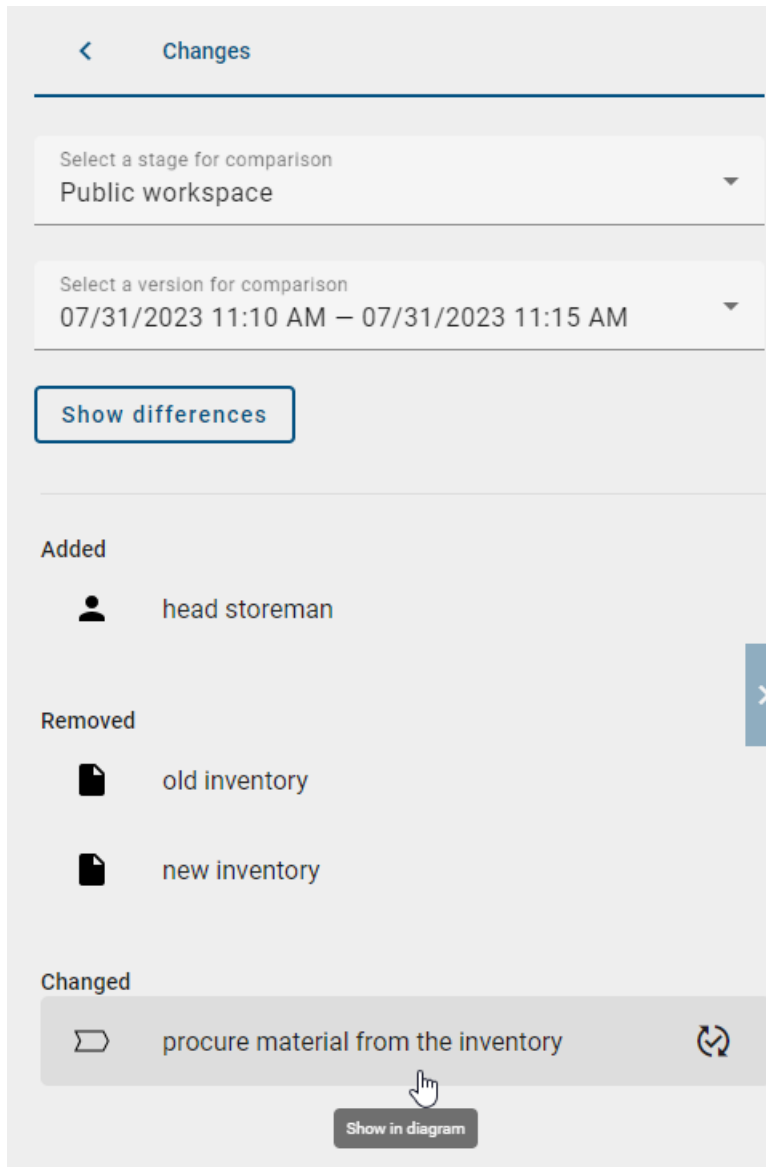
Then the object will be marked in the list and in the diagram. A green mark stands for *added* and a yellow mark for *changed*.

Note: Deleted elements are **only** listed and will not be shown in the diagram.

If you check out and then check in a diagram in which you only rearrange elements, this will also be saved in the archive as a comparison version. However, when you want to compare this version with the active one, you will be notified that no changes have been made.
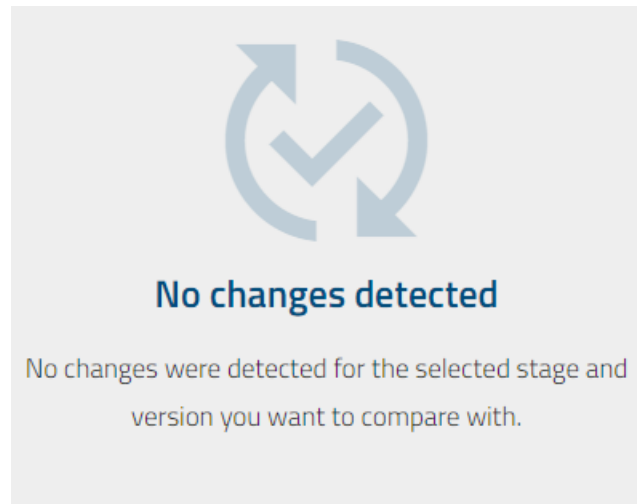
14.3 How can I see which attribute has changed?

To view the details of a specific change, you need to hover your mouse pointer over the change you want to have an overview of. On the right side of the entry, an *open changes* icon appears. To view the change, click on this icon.
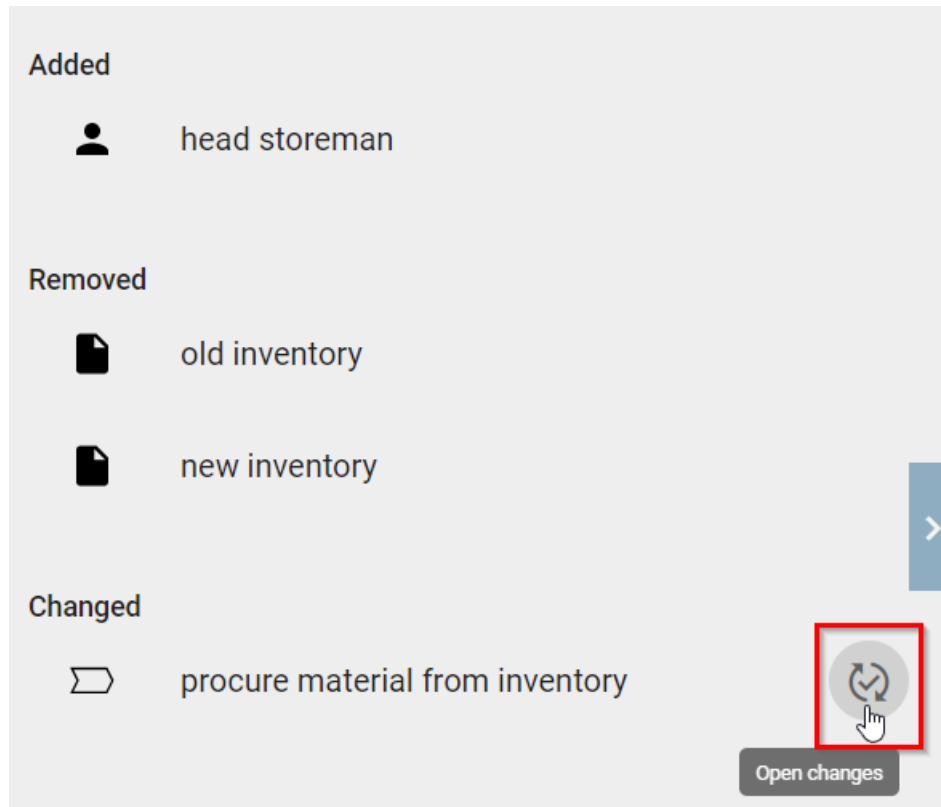
Note: The *open changes* icon **only** appears at entries of already existing entities. If an entity was newly added or deleted, the *open changes* icon does **not** appear.

Note: Changes in *external function allocation diagrams* will not appear, only changes in *internal allocation diagrams* will be considered.

Upon clicking the *open changes* icon, a chart will open listing the changes to the selected element. In the left column, you will see the *changed* changes made, while in the right column, you can compare the differences between the current version and the archive.

Relationship attributes within an entity are not visually represented. Nevertheless, the corresponding entities are listed under *Changed*. When you open these changes in the chart, you will see the row *Required input(s)* and the respective adjustments.

Changes

Activity

	Latest version		Archive	
Required input(s) (changed)	new inventory	old inventory	document	document

Close

Note: The gray markings represent *chips*, which refer to linked objects or diagrams.

GOVERNANCE COCKPIT

With the governance cockpit you can access your release workflows. These are displayed in a list. From there the workflow details are accessible and you can download the associated archive.

Note: Be aware that only users with user rights *Reviewer* or higher can enter the *Governance Cockpit* and view the *list of all workflows*. As an administrator or editor, you can also access the *analytics*.

15.1 Which information can I get from the workflow list?

To get to the release workflows list navigate to the *Governance Cockpit* with the corresponding entry of the menu.
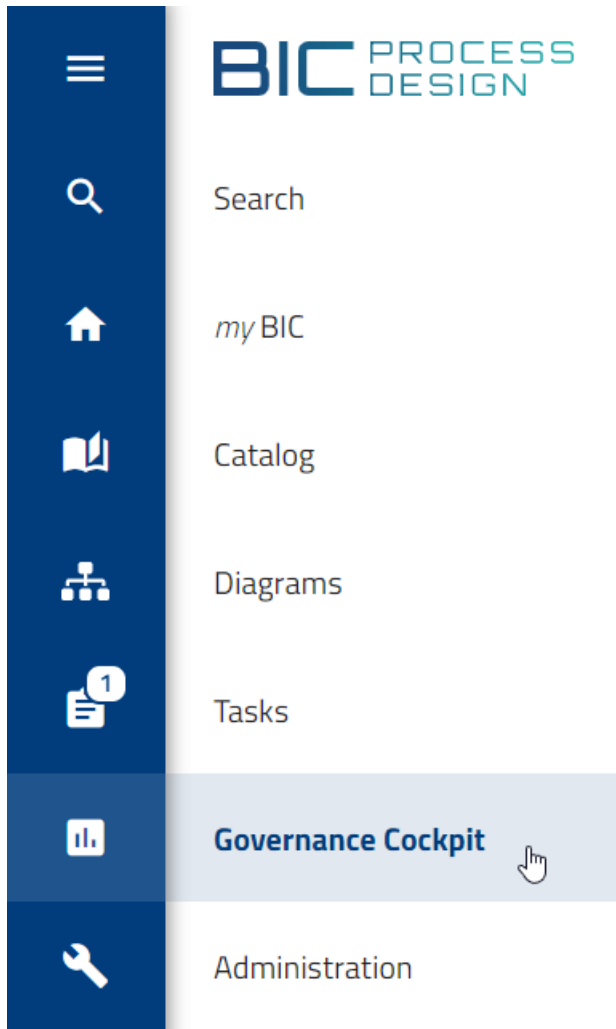
Here, a list of release workflows is displayed. This includes all publication and depublication workflows which you are or have been participating. A workflow is also listed if you have been participating but delegated your task.

If you have administrator or editor rights, the Governance Cockpit lists *all* workflows and also includes resubmission workflows.

Every entry contains the name, type, start and end date of the workflow. The circle symbol ("chip") on the left side of each entry shows, whether the workflow is an object or a diagram workflow. Diagram icons contain a diagram icon within the chip, while object workflows contain a document icon in it.

Note: The start date refers to the time when the workflow was initiated. Resubmission tasks are initiated by the system and start before the *Valid to* date in the attributes of the respective element. In the administration, you can specify exactly when a resubmission task is initiated. The end date denotes either the *Valid from* date of the item or the date when the respective workflow was completed, whichever comes later.

When selecting an entry you will automatically be directed to the *audit trail of the workflow*. There you can find additional information about the process of the workflow, as well as the option to download the archive.

With the *filter function* you can display the workflow list filtered in order to find a specific workflow. Alternatively, you can also search for a *workflow*.

15.2 How can I filter my workflow list?

In the *Governance Cockpit* you have the option to filter the workflow list in order to find the required workflow faster. To use this function first navigate to the workflow list.

Here you will find the *Filter* function in the right sidebar. This function contains various criteria according to which you can filter your workflow list. The filtered list is still *depending on your user role* and might not show all workflows of the selected criteria.

State: You can filter the list by the state of the workflows. Initially, all pending and closed workflows are displayed. A workflow is *Pending* if it is not completed yet. Workflows, that have been completed or canceled count as *Closed*. By selecting one of the options in the sidebar the actual list will be filtered according to your selected criterion.
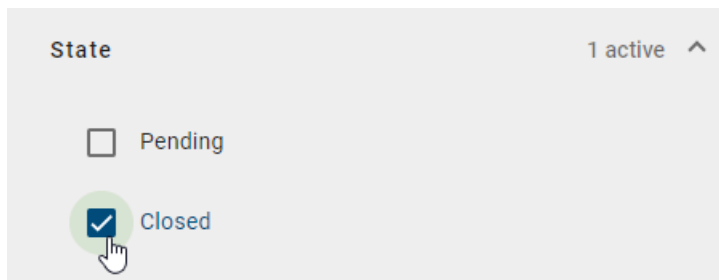
Period: In this filter, the period can be specified by selecting a start and end date. You can choose whether you enter the start or end date directly into the input field, or whether you select the corresponding day via the calendar overview. To get to the calendar overview, simply select the calendar icon on the right side of the corresponding input field.

Now the desired date can be selected via the calendar. After the date has been selected it will be shown in the respective input field.

As soon as the respective date has been selected or entered, it is displayed in the input field and the workflow list is automatically filtered. The date is displayed in the format of the selected *content language*. If only the start date is set, all workflows that were started after this date are displayed. If only an end date is selected, you will see all workflows that were completed before this date or were not completed at all. If both start and end date are set, all workflows that were started and completed in this period are listed.
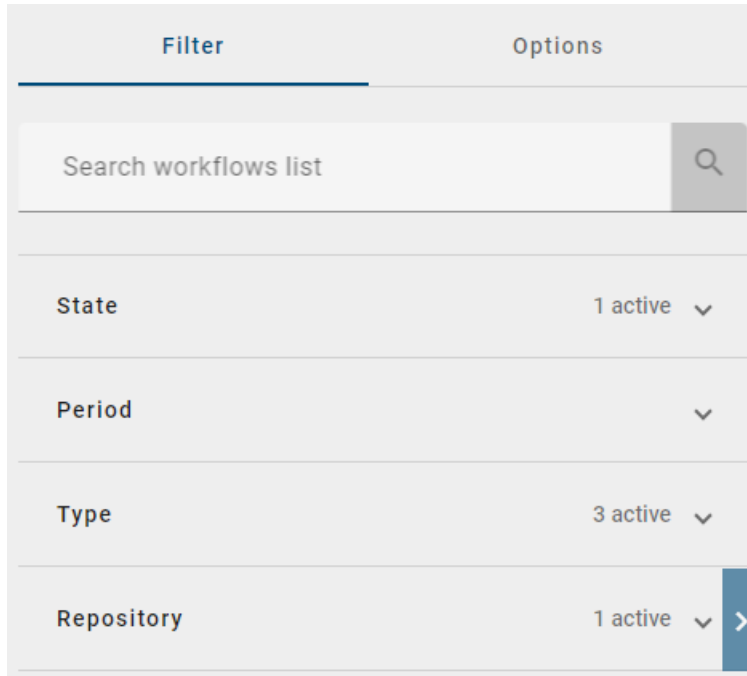
Type: The workflow types *publication*, *depublication* and *resubmission* can be filtered for diagrams and objects each. After you have made your selection, only the selected workflow types are displayed.
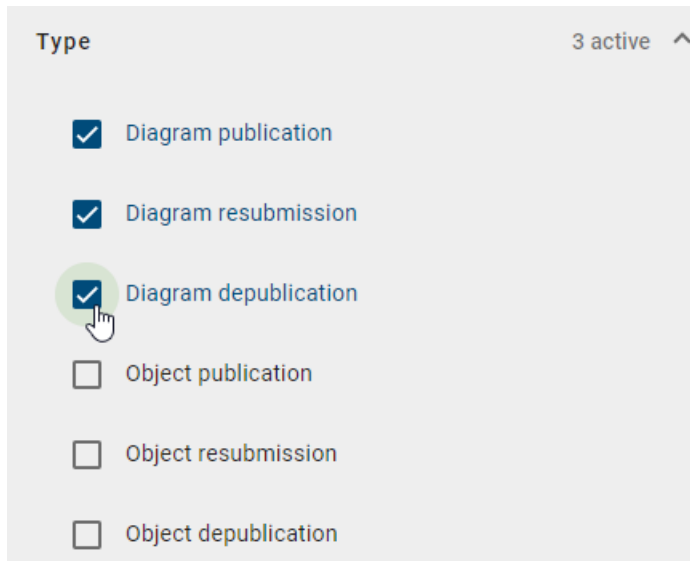
Repository: This filter lists the names of all repositories that you have access to. If a repository has not been named in your current content language, the value of the alternative language is taken into account. Select a name to filter the list for all workflows related to diagrams and objects of the corresponding repository. You can select several repositories at once.
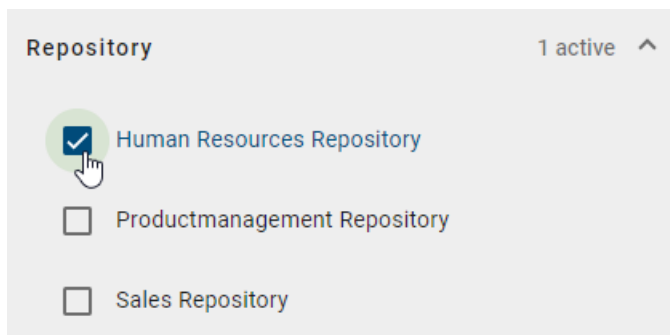
If at least one filter has been set, the number of set filters will be displayed next to the corresponding criterion. This means you can always see at a glance whether and how many filters have been set, even if the respective criterion is closed.

As an alternative you can also *search individual workflows directly*.

15.3 Which information can I get from the analytics?

Note: Note that only editors and administrators have access to the *analytics* tab.

Navigate to the Governance Cockpit und select *Analytics* in the header of the main area.
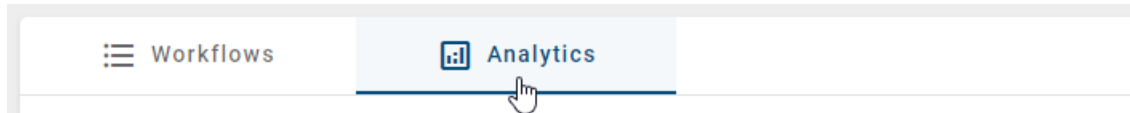
The analytics view for workflows summarizes the diagrams and catalog items of the selected repository in different bar charts. You can use the filter panel in the right sidebar to choose the repository you like to analyze.
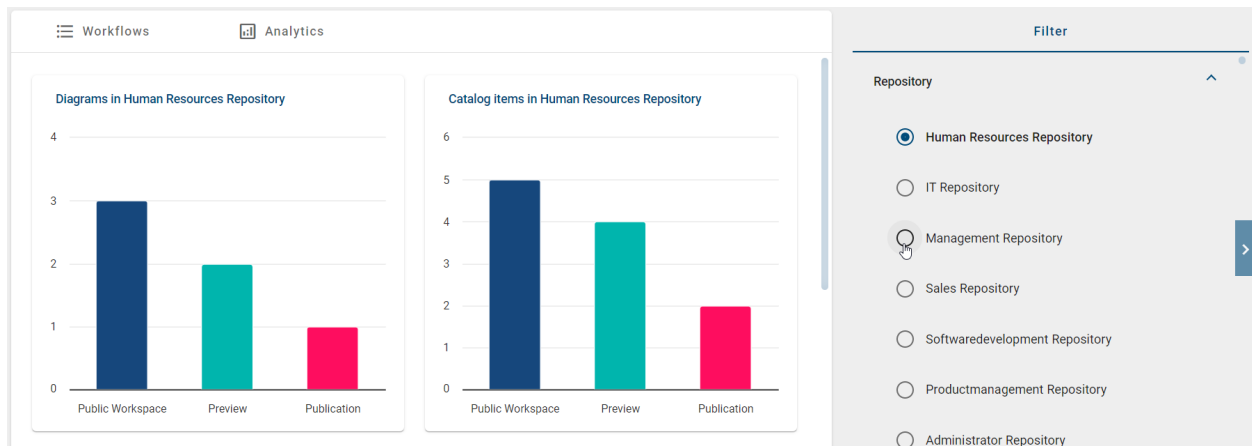
The following charts are shown in the analytics view:
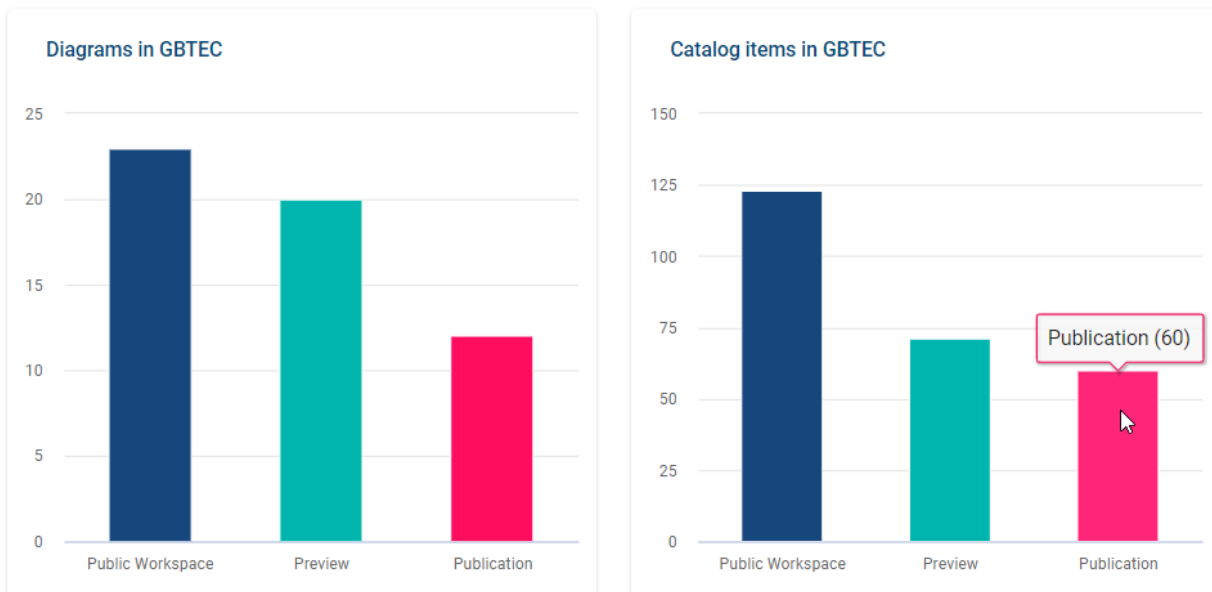
Diagrams (catalog items) in the selected repository: This bar chart compares the number of diagrams (catalog items) contained in the selected repository with respect to the stages. If you hover over a bar, a tooltip shows the exact number in the respective stage. In these charts you can directly see how many diagrams resp. catalog items are currently modeled and not yet available for all users in the publication stage. Moreover, a significantly higher number of entities in preview than in publication stage reveals that there are many open release workflows which should be completed.

Note: The number of catalog items that is shown in this bar chart for the publication stage might differ from the number of items that is shown to you in the catalog list. This situation can occur if the visibility of certain catalog object types is deactivated. If the visibility of a certain object type is deactivated, catalog items of this type will not be displayed in the catalog list (in publication stage), but they are counted in this bar chart anyways. Further information about the visibility of catalog items can be found in this section of the documentation of the old user interface.

If you select the bar representing a stage (public workspace, preview or publication), you will be directed to the *dashboard* view of all *diagrams* resp. the *catalog* in the respective stage. This navigation is done in the currently selected repository. You can find an explanation on the dashboard view in the linked sections.
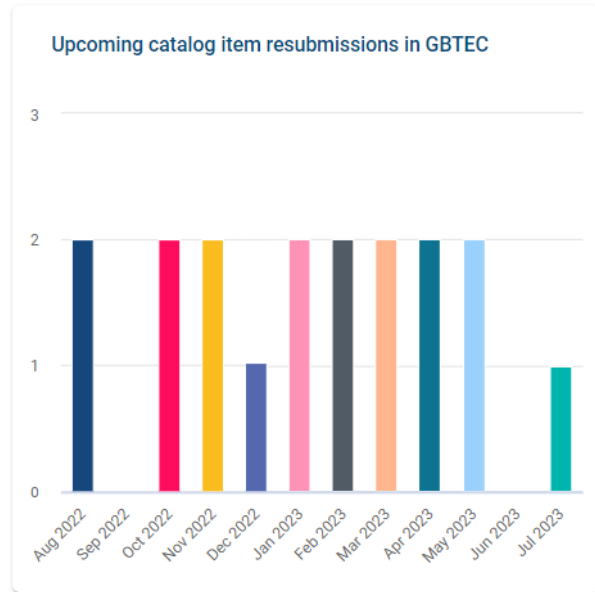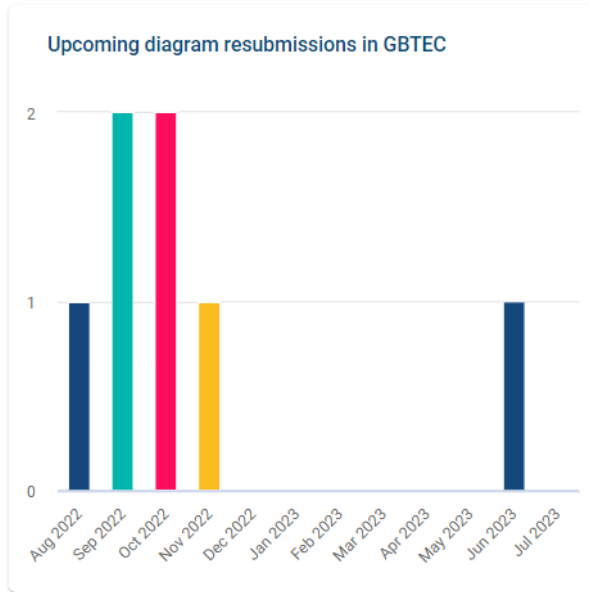
Upcoming diagram (catalog item) resubmissions: This bar chart summarizes the number of upcoming diagram resp. catalog item resubmissions of the next year. Each bar counts the diagrams resp. catalog items (of the selected repository) becoming invalid in the respective month. The first bar is always the current month. If you hover over a bar, a tooltip shows the exact number in the respective stage. You can use this forecast to plan the resubmission workload in advance and thus handle the quality assurance of your processes.
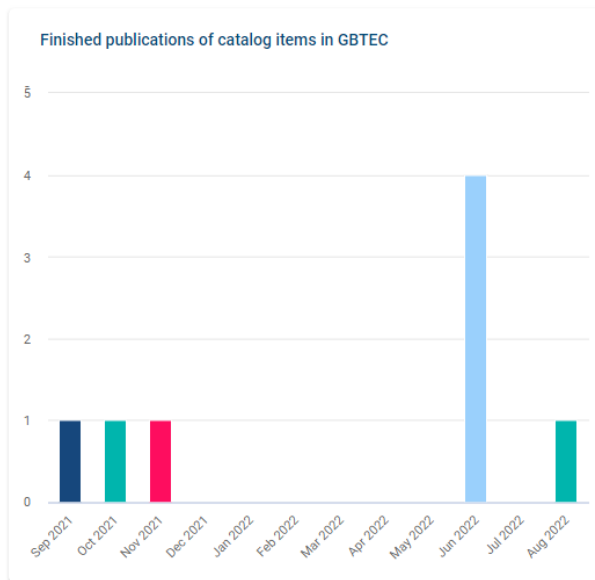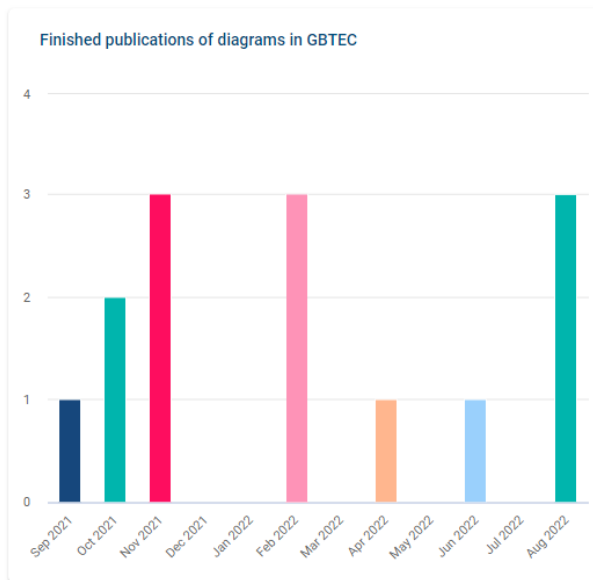
Finished publications of diagrams (catalog items): In order to observe the publications of the selected repository, these bar charts summarize the published diagrams resp. catalog items with respect to the time of completion. Each bar represents the number of diagrams (catalog items) that have been released in each month of the last year whereas the date of the final release step is taken into account. The last bar shows the number of diagrams released in the current month. If you hover over a bar, a tooltip shows the exact number of published items.

Hint: Please note that the upcoming resubmissions, as well as the finished publications of diagrams and catalog items, contain the validity date. Unlike in the workflow list, the dates refer to the *valid to/valid from date* and not to

the *start and end dates*.

15.4 How can I search for a workflow?

You have the possibility to search for the name of objects and diagrams in the workflow list. In addition, you can search for user names and e-mail addresses of initiators or users who had or have a workflow task. To do this, click on *Search workflow list* in the *Filter* panel. Enter your search term in the input field and start the search via the *Enter* key or a click on the magnifier glass.
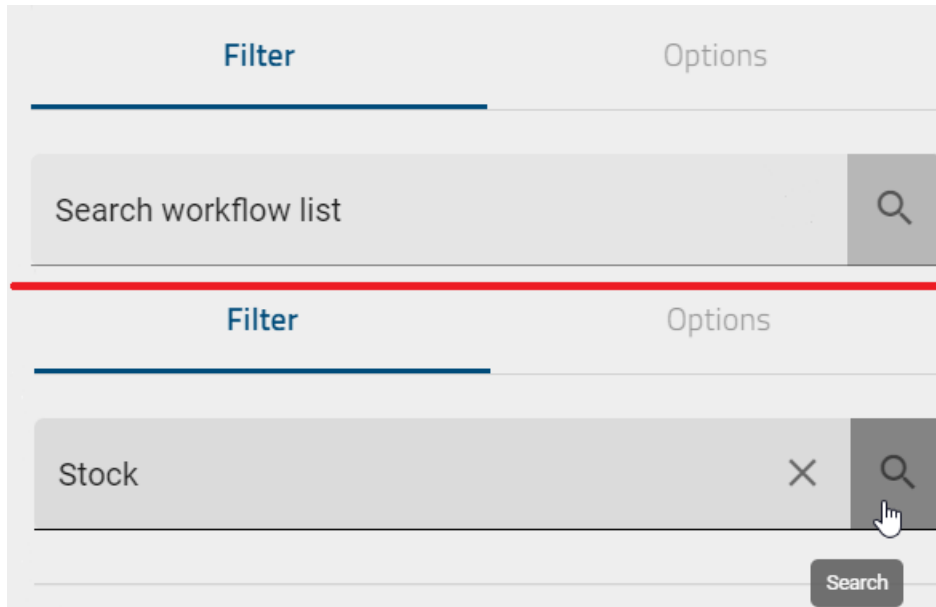
You will then see all the search results that contain the specific term.

If there are no matching workflows for your search term, the main area will show a corresponding hint as well as the button *Toggle language & search again*. You can select this button to set the alternative language as your content language and restart the search in this new content language.

If you want to display your entire workflow list again, click *Clear search* next to the magnifier glass icon to reset your list.
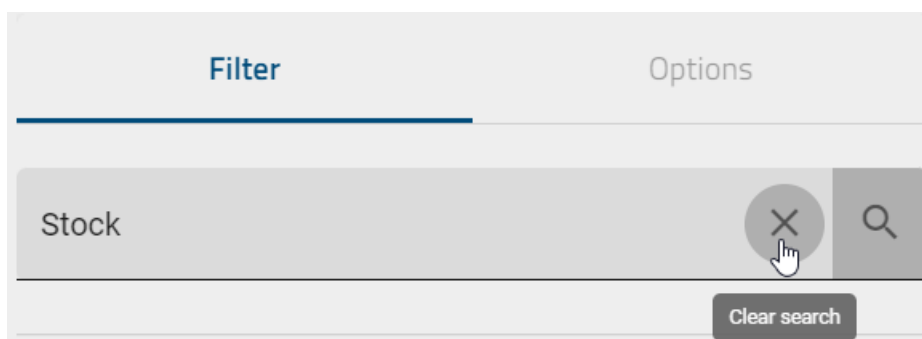
Note: *Here* you can find an overview of the different options you have for search terms.

15.5 How can I export the workflow tasks as an Excel file?

Administrators and editors may export all workflow tasks in the Governance Cockpit. This data is gathered in an Excel file. If you filter the workflow list before generating an export, the export includes the filtered list only.

To do so, navigate to the workflow list in the Governance Cockpit and open the options in the right side bar. Then select the start button of the option *Export workflow tasks*. Please note that this option is not available when you view the *analytics*.
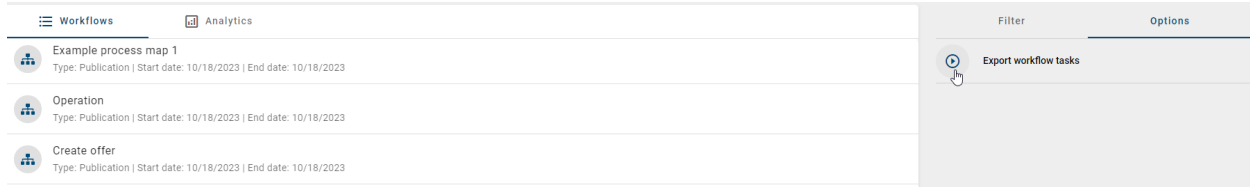
The export will be generated. A message in the bottom right corner informs you about this. As soon as the export is available, a second message is presented and you can select a link to download the Excel file within this message. If an export has been generated, a download button (arrow) is also displayed at the task.
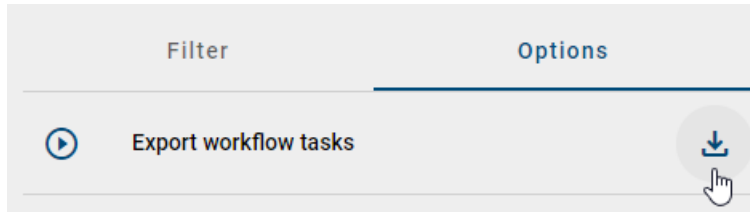
The Excel file contains the sheet "workflow_export" which shows the following data:

Information about the workflow

- workflow ID

- workflow type (publication, depublication or resubmission; each for objects and diagrams)

- name of the concerning entity and its type

- start date of the workflow

- end date of the workflow

Information about the task

- ID of the task

- task type ((de-)publication (initiation), approve the publication or removal, review for publication or resubmission)

- task owner (e-mail address for users, user group name for groups)

- date of task assignment

- date of task completion (empty for open tasks)

- task status

Hint: The date information you find within your exports (e.g., "Valid from", "Valid to", "Created date", and similar) undergo conversion to the time zone of the currently active user. This ensures that the display of date information always aligns with the user's current time zone.

Note: If a participating user is marked as *inactive* in the workflow task export, the user has been deleted.

Hint: The name of a deleted user will only be marked as *inactive* if they were deleted from version 7.9.0 onwards. Please note that users deleted before version 7.9.0 cannot be displayed.

15.6 What Information can I get from a workflow's audit trail?

To get to the audit trail of a workflow first navigate to the *Governance Cockpit*. There select the desired workflow in the workflow list. After this, the audit trail will be displayed. Here, in addition to the start date you will find all steps which have been done during the workflow process. These are arranged from bottom to top in chronological order. The first step is always the initiation of the workflow. On the left side of the step you will find a chip that shows the initials of the user who carried out the step. If you hover over the chip with your courser the name of the user will be displayed in a tooltip. If the selected workflow is a resubmission workflow the chip will display an android icon with the tooltip *Resubmission assistant*. In addition to the individual steps you will find the corresponding comment on the right hand side, if one has been specified.

Note: If a participating user is marked as *inactive* in the Governance Cockpit with a tooltip, it means that the user has been deleted.

Hint: The name of a deleted user will only be marked as *inactive* if they were deleted from version 7.9.0 onwards. Please note that users deleted before version 7.9.0 cannot be displayed.

In addition to the information that you can get from the audit trail, you can also use the *Options* within the right sidebar.

From the audit trail you can directly navigate to the concerning object (diagram or catalog item). Select the option *Open diagram* resp. *Open catalog item*.
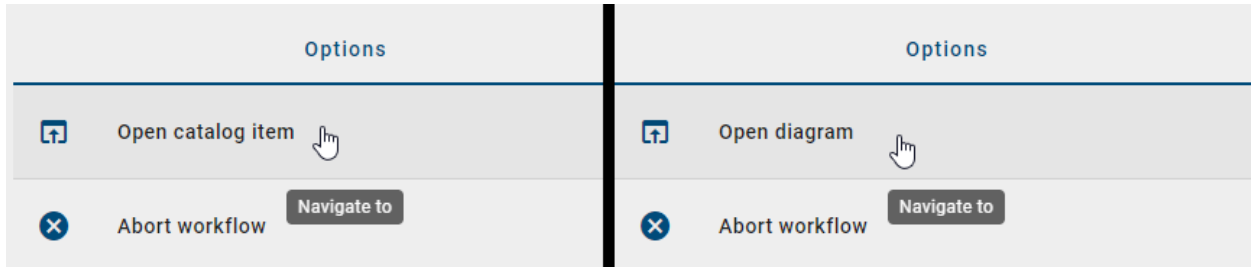
If you do so, the object is presented to you in the relevant stage. This means for resubmission or depublication workflows you will be navigated to the publication stage. If you view the audit trail of a closed publication workflow, you will be navigated to the published version of the concerning object as well. But in case the workflow is open, the object will be presented in the preview stage. This stage is also selected if you choose to view a diagram that needs to be reworked during the publication workflow.

In addition, you may use the following options in the audit trail resp. the right sidebar. Further explanation can be found in the linked sections.

- *Abort the workflow*
- *Delegate a pending workflow task*
- *Download the archive*

In case you want to navigate back to the workflow list, you can do so by selecting the function *Go to Workflow* in the header next to the name of the workflow.

15.7 How do I abort a workflow?

A workflow can be terminated by the initiator of the workflow, an administrator or an editor. Canceling is possible as long as a workflow task is pending for the respective user or user group.

Navigate to the *Governance Cockpit* and open the desired workflow by a click. Select the option *Abort Workflow* in the right sidebar.
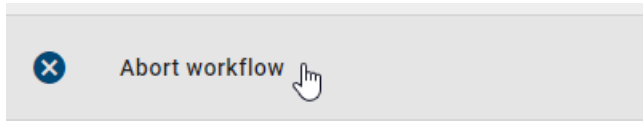
In the appearing window, click on *Abort Workflow* to confirm the procedure.

Then the workflow is terminated and the usual way of a (de-)publication is aborted. No other user gets a task. The initiator and *possibly involved users* will be notified of the cancellation by e-mail. The version of the diagram or object

remains in the stage where it was during the termination. For example, when you cancel a publication the *Preview* stage still contains the diagram that should have been published.

15.8 How can I delegate a workflow task?

As an administrator or editor, you can delegate workflow tasks. Navigate to the *Governance Cockpit* and select a desired running workflow, indicated by the end date "Still pending". In the audit trail the pending task is listed on top and an arrow-shaped button on the right enables you to *Delegate the task*.

If you click the option, a dialog window opens where you can use the suggestion list to select the user who should take over the task. Clicking on *Delegate* assigns the task to the selected user. The task will be removed from the former assignee and will appear in *tasks* of the recently selected user. The task should not be delegated to a user of the role *Reader*, as this user role does not have the necessary access permissions.

You can also see the assignment in the audit trail of the workflow.

Review for publication - Pending
10/21/2021

➡

A ➡ BC Review for publication -
Delegated
10/21/2021 - 10/21/2021

A Diagram publication - Initiated   New process!
10/21/2021 - 10/21/2021

If a workflow has been closed (i.e. finished or *aborted*), no task can be delegated.

15.9 How do I download the archive of a workflow?

For some workflows you may use the *Download archive* option. If it is possible, you find the active option in the right sidebar.
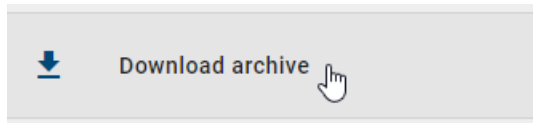
⬇ Download archive

In order to be able to download an archive, a few conditions must be met. The type of the selected workflow has to be *Depublication*. Furthermore, no other workflow that is more up-to-date than the selected one, should exist for the respecting element (catalog item, diagram). The option is greyed out and the archive can not be downloaded, if one condition is not met.

⬇ Download archive
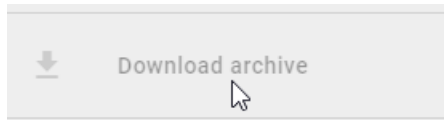
Hint: Only the archive of the last depublication is available for a workflow. For example, if a workflow is depublished multiple times, you will only have access to the archive of the last depublication.

FAVORITES

16.1 How do I add diagrams, dashboards and catalog lists to my favorites?

Favorites are used to quickly find diagrams and catalog lists, which are often edited or important for another reason. Diagrams, catalog lists and dashboards marked as favorites can be found on your myBIC page. Your personal favorites are not stored in the browser and are therefore available to you independently of the browser used. Pay attention to the *stage* in which you are located, because the favorites are stage-dependent. So you can favor a diagram, a catalog list and a dashboard in several stages.

Mark diagram as favorite:

Navigate to the desired diagram in the diagram list and open it by clicking on the entry. In the header will now appear the menu area, the diagram name and the favorite star.

Diagrams > 01 Processes > 02 Human Resources > Vacation request ☆
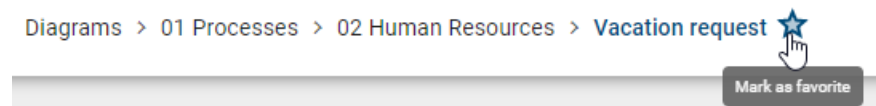
Mark as favorite

If the diagram is not yet marked as a favorite in this stage, the star button is called *Mark as favorite* and only the outline of the star is visible. By clicking on the star, you add the diagram to your favorites.

Diagrams > 01 Processes > 02 Human Resources > Vacation request ★
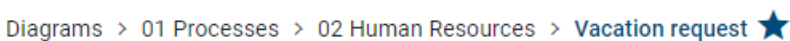
The star is now filled. Depending on the stage in which you have added the diagram to your favorites, you will always be notified by e-mail about changes to the diagram in this stage. This also applies to indirect changes to the diagram through modified and potentially reused catalog items. For example, in the public workspace, you receive a notification if the diagram is deleted or if changes are checked in.

Note: Only checked-in diagrams can be added to or removed from your favorites.

Mark catalog list as favorite:

Navigate to the catalog in the menu. If you have at least one catalog entry in your list, a star will appear in the header. Additionally, the stage where you can mark the catalog list as a favorite will be displayed.

Public workspace ▼   Catalog 511   ☆

If you have applied at least one filter to your catalog list and now want to save it as a favorite, a dialog window will appear. Here, you need to enter a favorite name under which you want to save the catalog list. Your favored catalog list, along with the entered name and the number of existing entries, will then be displayed on your myBIC page in your content language.

Add favorite

The catalog view will appear as catalog favorite on your MyBIC page. Please provide a name for the favorite.

Please enter a name*
Example Name

Cancel   Add

Hint: Your already favored filtered catalog list will be updated when a catalog entry with corresponding filters is added or removed in the same stage.

Hint: When you navigate to the catalog from your favored catalog list, the results are displayed in the language in which the catalog list was favored. If your current language settings differ from those of the displayed catalog entries, you will get a hint.

Mark dashboard as favorite:

Navigate to *Diagrams* or *Catalog* in the menu and navigate to dashboard. When you hover over a dashboard tile, a star will appear in the top right corner of the tile. Click on the star to add the dashboard tile to your favorites.
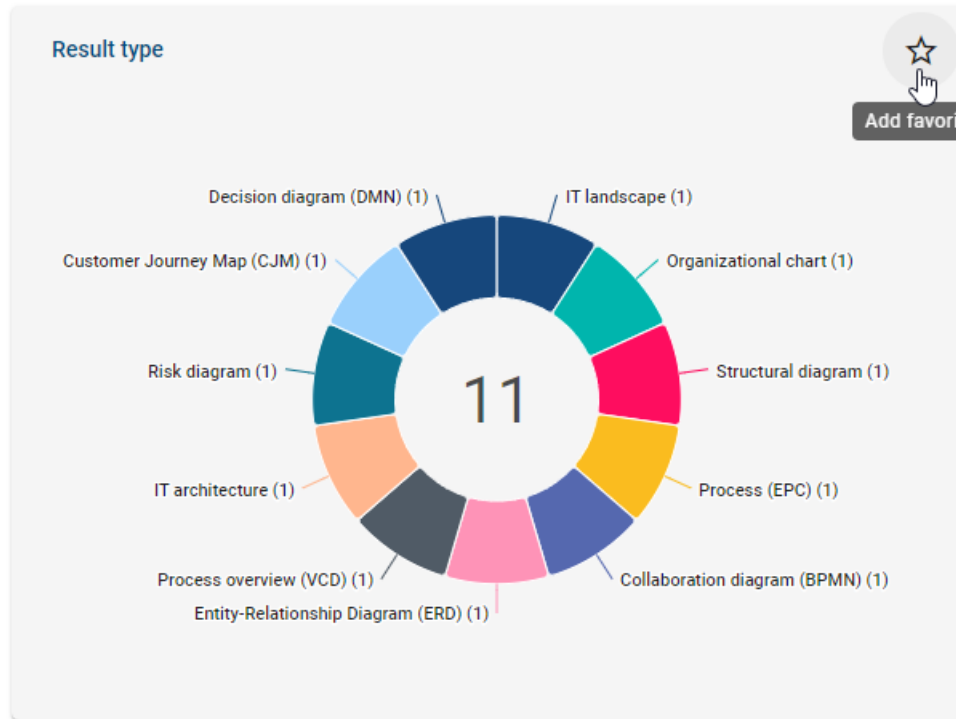
After clicking on the star, a dialog window will appear asking you to enter a name for the favorite.

Click on *Add* to add the dashboard to your favorites. It will now be displayed on your myBIC page along with your other personal favorites in alphabetical order.
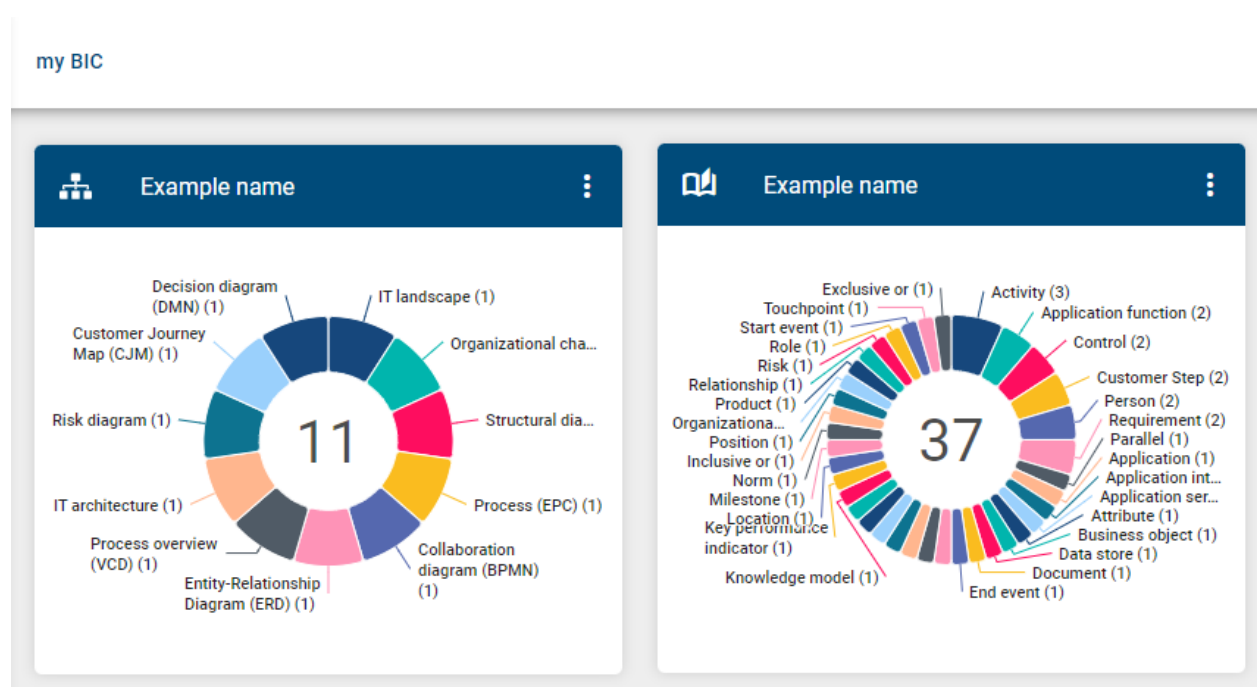
Additionally, your favored dashboards will be sorted alphabetically and displayed at the top of the corresponding dashboard.

Note: You can *rename* your personal favorites if necessary.

16.2 How do I remove a favorite?

For diagrams, navigate to *Diagrams*, select the desired diagram list entry, and open it with a simple click on the entry. For catalog lists, navigate to *Catalog* and apply filters (if used). For the dashboard, navigate to the corresponding menu entry to *Dashboard*.

Alternatively, you can also access the diagram favorites or the favored catalog list through the corresponding tile on your myBIC page. In the header, you will now see a filled favorite star next to the chart name or the catalog list. In the dashboard, it will appear in the favored dashboard tile.
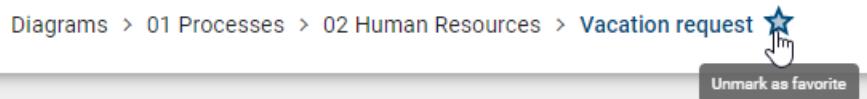
Click on this star named *Unmark as favorite*. The diagram, the catalog list or the dashboard has then been successfully removed from your favorites and the star is now only framed.

Note: Alternatively, you can *remove a diagram, a catalog list or a dashboard from your favorites on the myBIC page*.

16.3 How can I rename a personal favorite?

When you are on the myBIC page of the new user interface, you can view your personal favorites. When you open the context menu of a personal favorite, you will be offered the option to rename the favorite.
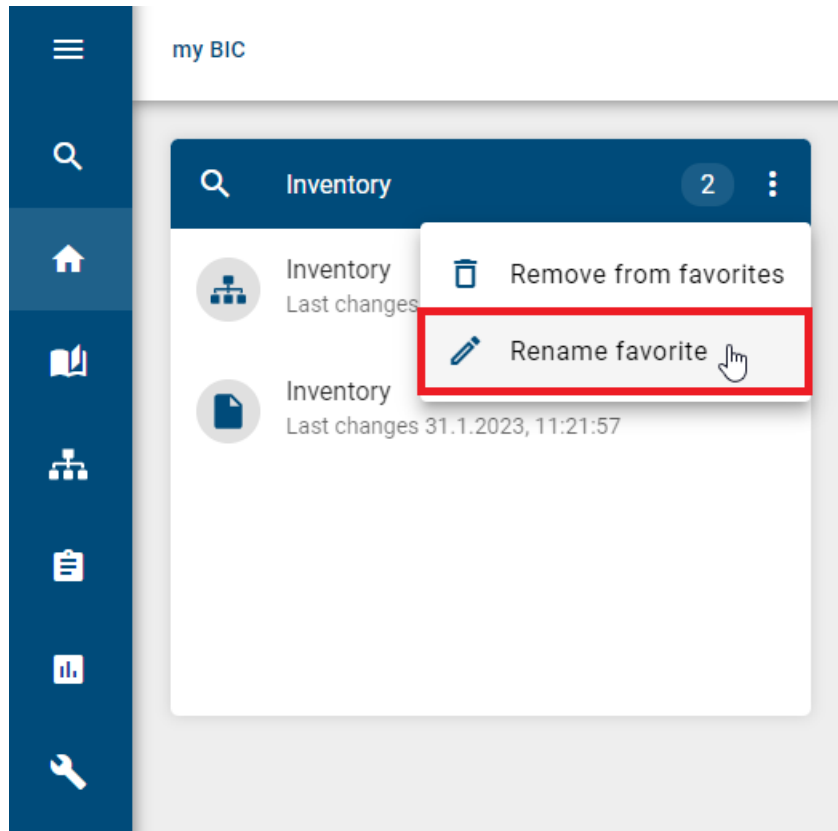
By selecting this option, a dialogue box appears which contains an input field with the current name, a *Cancel* option and a *Rename* option.

To update the name, you can click in the input field and enter the desired name. If you change your mind, you can cancel the changes at any time by selecting the *Cancel* option. This will not save the changes you have made and the favorite will keep its original name. However, if you select the *Rename favorite* option again, the updated name changes will be applied to the favorite. This takes into account the change in the user's active content language. The dialogue box is then closed and the updated name of the favorite is immediately visible on the tile.

16.4 How can I activate/deactivate notifications for favorites?

When you mark a diagram as a favorite, you will receive e-mail notifications regarding any changes made in the stage where the diagram is favored. To deactivate notifications, go to your myBIC page and open the context menu of your personal diagram favorite. Click on the option *Turn notifications off* to stop receiving e-mail notifications.
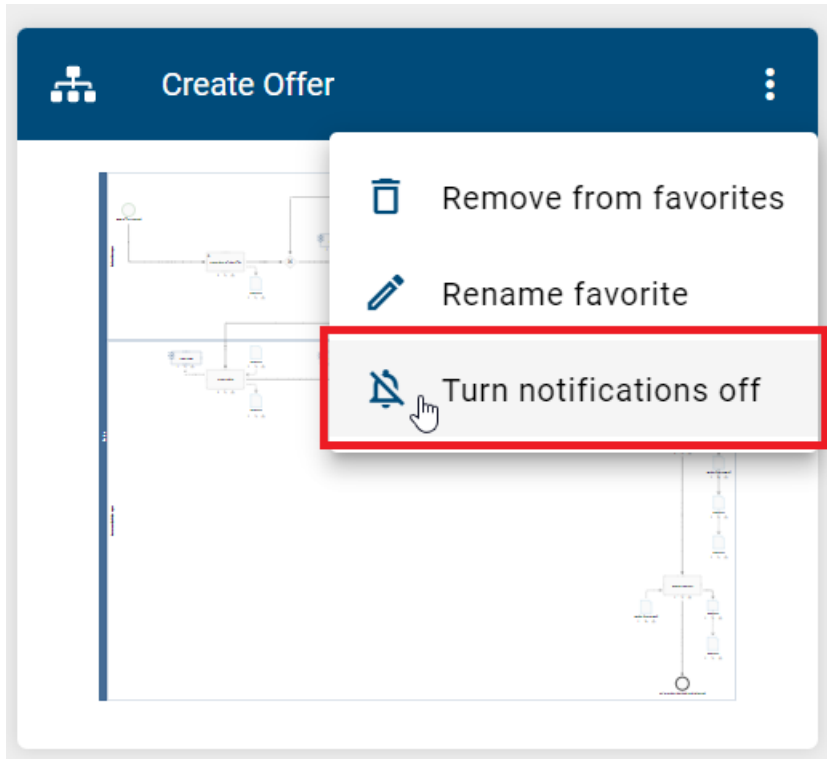
If you want to reactivate the notifications, click on *Turn notifications on* in the context menu of your personal diagram favorite. This will allow you to receive e-mail notifications again about new changes in the diagram.
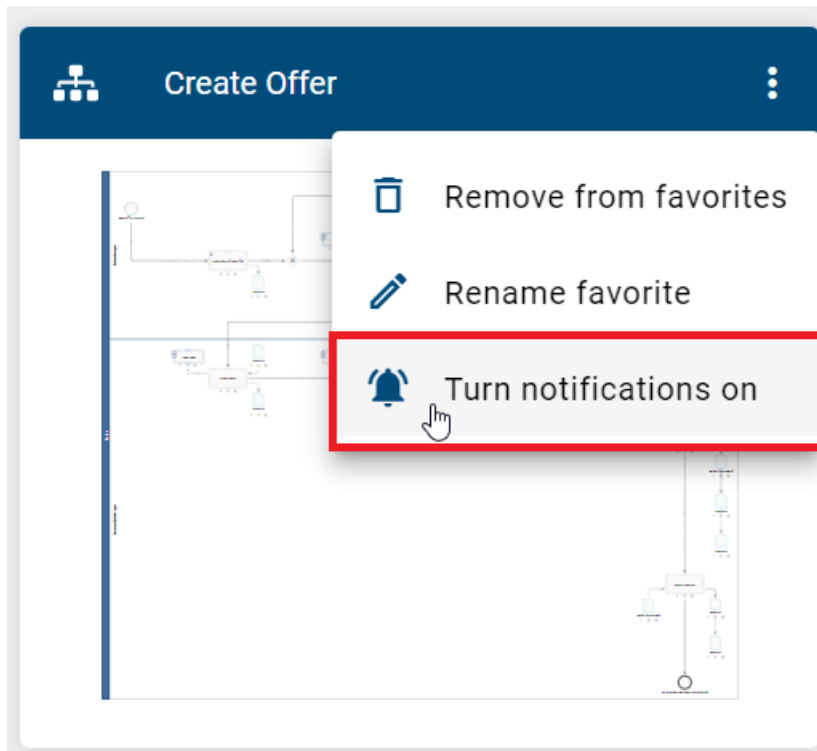
Note: Please note that you will not receive notifications about changes in the diagram that were made while the notifications were deactivated.

Additionally, there is an option to deactivate notifications by default when marking a diagram as a favorite. However, if you want to receive e-mail notifications about changes, you can activate this through the hint at the bottom right corner of the page.
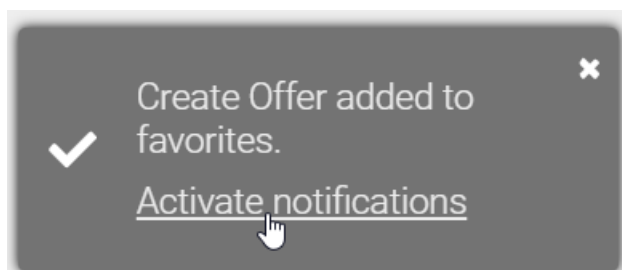
Hint: You cannot deactivate notifications for default favorites.

PROFILE

You can access the *Profile* via the menu entry of the same name. The following questions arise for your user profile.

17.1 How do I find my user profile?

In the user profile you will find your personal information. This includes your user name and the set e-mail address. You can also make some adjustments to your role, content and alternative language and set the high contrast.

Click on the *Profile* entry in the menu.
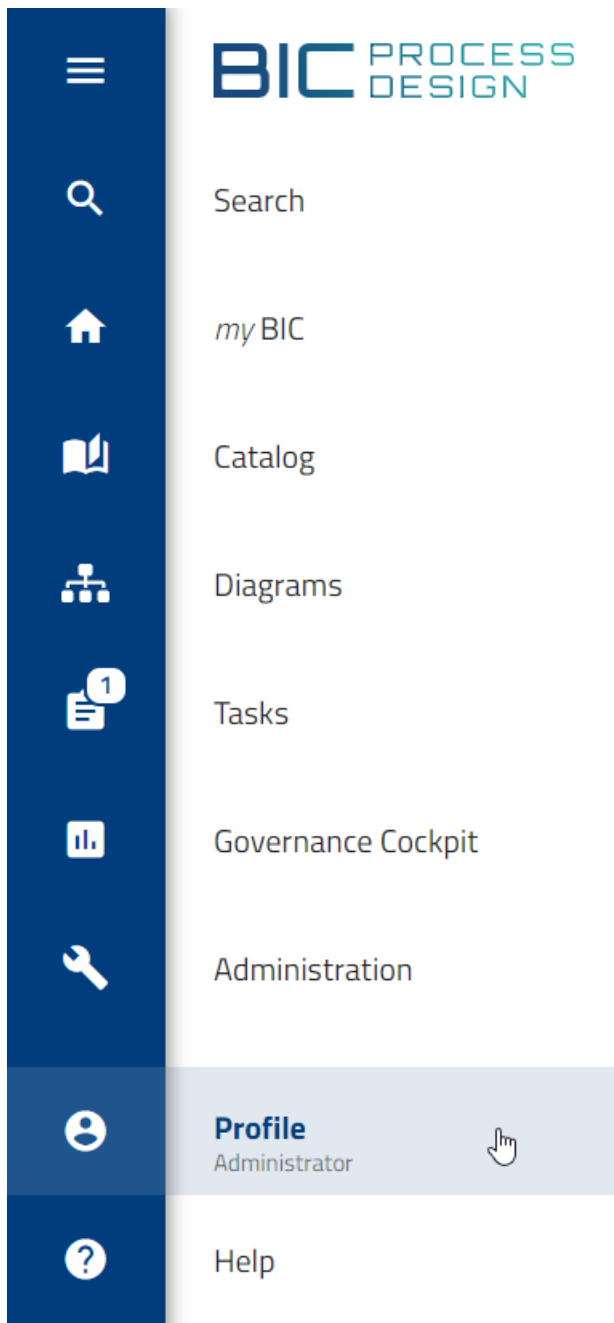
Your profile information is now displayed in the middle of your screen. You have read-only access to your name and e-mail address, but you can change the user role and languages and set the high contrast.

Profile

Name
John Doe

Email
admin@gbtec.com

Role
Administrator

Content language
English (English)

Alternative language
German (Deutsch)

Deputy

Show high contrast theme

17.2 Which user roles are available and which permissions do they have?

In general, you have five different user roles with different authorizations that build on each other. You can find information about your active user role either on your *myBIC* page through the corresponding menu entry or via the *Profile* menu entry.

Reader: Readers only have access to the publication stage. This means these users are able to see published diagrams and all attributes, symbols, catalog items and documents which are associated with these diagrams. In the publication area readers can create comments and reports and also use the print preview function. In addition they can add diagrams to their favorites.

Reviewer: Reviewers have similar access to the publication stage as Readers and possess the same permissions. Additionally, Reviewers have access to the preview stage and can view and work on assigned governance tasks (publication, depublishing, resubmission) if they are designated as a reviewing authority for a specific diagram or catalog item. However, Reviewers are unable to initiate a governance workflow themselves.

Author: Authors have essentially the same rights as Reviewers. They also have access to the public workspace. This allows them to see all catalog entries and diagrams in the public workspace. This generally allows them to model diagrams and automatically generate catalog entries. To use these features, users with the Author role must be entered as *Author* in the attributes of the corresponding diagram or object. This allows Authors to be used specifically for

modeling individual diagrams or editing individual objects.

Editor: Similar to authors, the role of Editor is used to edit and create diagrams. Unlike authors, Editors do not have to be set within the diagram attributes to model a diagram. Additionally, editors have the ability to make cross-diagram changes. This means users with the role of Editor have the right to manually create, edit, or delete catalog entries and are authorized to accept or decline catalog entries. Furthermore, editors have the ability to assume administrative tasks for governance workflows. They have the authority to view and manage all governance workflows. In the governance cockpit, editors have the same rights as administrators, which means they can delegate or cancel workflows.

Administrator: Administrators have all the rights that other user roles have. In addition, they have special administration rights. These include access to the administration area, the right to create, delete, and rename repositories, as well as the ability to unlock diagrams.

Accessible workspaces	Administrator	Editor	Author	Reviewer	Reader
Public workspace	entitled	entitled	entitled	not authorized(*)	not authorized(*)
Preview	entitled	entitled	entitled	entitled	not authorized(*)
Publication	entitled	entitled	entitled	entitled	entitled

(*)Read-only access can be granted to individual diagrams in the public workspace (view share diagram from public workspace)

Hint: If you use BIC Process Execution, you have the option to specifically set the user role for *Process Execution in the administration*.

Tip: You can *connect persons* or user groups with diagrams and objects. With that their rights and duties can be enhanced. In addition access restrictions can be set for single diagrams or repositories so that only defined users or user groups can access them.

17.3 How can I change my user 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.

Tip: In the *short profile* of the collapsed menu, you can change your active role quickly and from an arbitrary area within the application.

In the profile, your active role is displayed under *Change role*. Click on your active role or on *Change role* to open a drop-down menu.
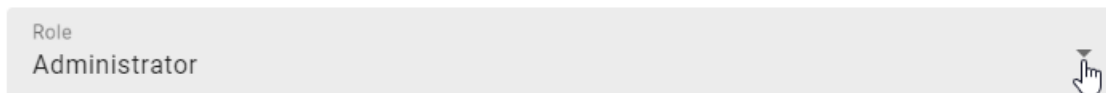
This opens the selection of user roles, which you can select with a single click and thus change the active role.

Reader

Reviewer

Author

Editor
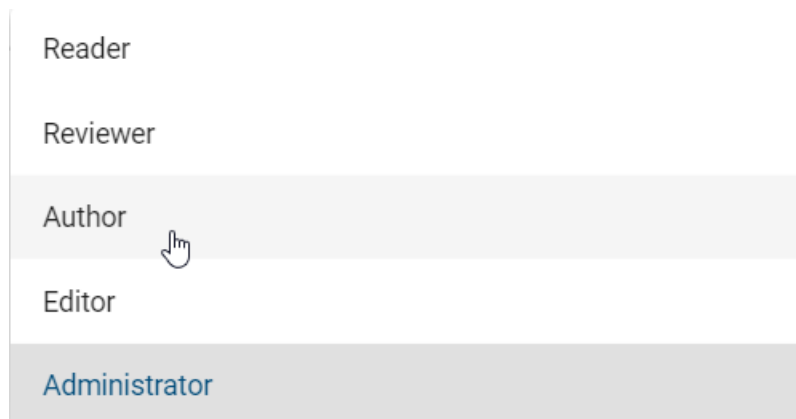
Administrator

The selected settings remain until the user explicitly changes back his or her role. This also applies to the new login: the role set by the administrator is not automatically used.

17.4 How can I set my deputy?

In the profile, you can set a deputy for your tasks, who can take over your tasks when you are not available for a longer time. This is possible for users who have more than "Reader" rights.

To set a deputy, navigate to the *Profile* via the menu and find the input field *Deputy*.

Deputy
Select a deputy to take over your tasks

Enter the desired user name and/ or select him from the suggestion list. Subsequently, the selected user has access to your tasks in his *deputy tasks*.
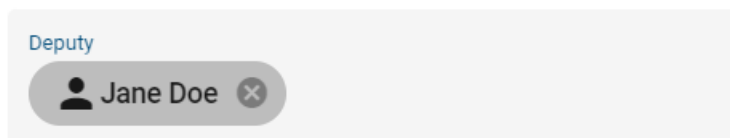
Deputy
👤 Jane Doe ⊗

If you want to remove the deputy, select the *delete* cross at the user name chip.

17.5 How do I change the content language and the alternative language?

You have the possibility to select a content language as well as an alternative language to display your diagrams. Attributes of the diagrams and objects are displayed according to the content language. The alternative language can be set to display a different language if an attribute or label is not maintained in the content language. You will see any attributes, including names and labels, without content if they have not been maintained in either the content language or the alternative language. Further information about the handling of languages is written in the chapter *Multilingualism*. The multilingual modeling is explained *here*.

In order to change the languages open the *Profile* in the side menu and select in the content or alternative language using the respective drop-down menu.

A more detailed description can be found in *this chapter*. Your changes will also be visible in the upper right corner next to your user name. Here you will find the abbreviations for the content and the alternative language in brackets, e. g. (EN/DE).
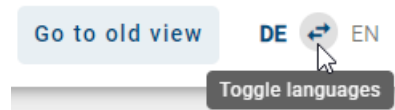
17.6 How can I turn on high contrast?

In the profile, you can find the *Toggle high contrast theme* button. Activate the button to display the application in a more contrasting view.
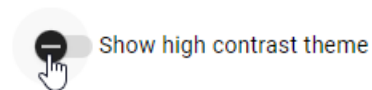
You can switch off this view in the same way. Moreover, you can always toggle the high contrast theme using the short profile within the collapsed menu where you can *change your active user role*. This can be done from all areas of the application.

17.7 How do I sign out?

We recommend you to sign out after finishing your work with BIC Process Design.

Open the *Profile* via the menu. In the desktop view, you will find the *Options* in the right sidebar. Click on *Logout*. Alternatively, you can use the *Logout* button on the *myBIC page*.
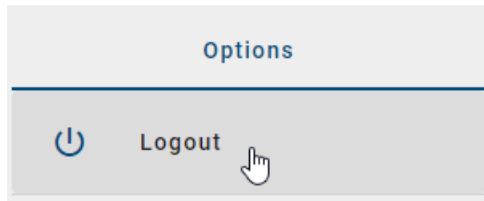
In the mobile view, you will find the option *Logout* via the corresponding button in the top right corner of the header.

You will then be redirected to the logout page. During your next login, BIC Process Design will redirect you to the repository you have worked in last.

Note: Your session will expire if you are inactive for at least 30 minutes by default. Five minutes before your session expires, you will receive a notification within the application asking you to extend your session. If you remain inactive after the five-minute notification, the application will automatically log you out and ask you to log in again.

NAVIGATION

18.1 How do I hide and show the sidebar?

By clicking the *Toggle sidebar* button in the left upper corner, you can always hide the sidebar on the left side. This function is accessible in every functional area, e.g. from *MyBIC*, *Diagrams* or the *Catalog*.
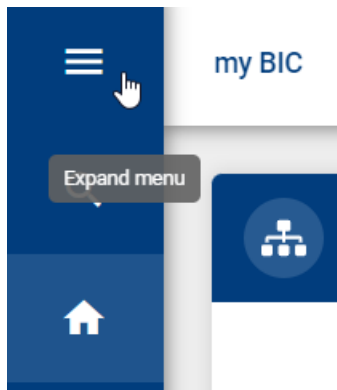
To show the sidebar, click the same button again.

18.2 How can I zoom?

In the new user interface of BIC Process Design you can apply the zoom on the whole window by holding down the *Ctrl* key and scrolling with the mouse wheel. Optionally, you can zoom by holding down the *Ctrl* key and pressing + to zoom in or - to zoom out.

If you view a diagram, you can zoom the diagram simply by scrolling with the mouse wheel. The mouse has to be placed in the diagram and its position determines the focus of the zoom.

18.3 How can I navigate through my browsing history?

In BIC Process Design, you can navigate through your browsing history. To use this feature, you need to log in to portal. The header includes an option to browse the browser history, with the *Back* and *Forward* buttons typically disabled.

When you navigate through elements in BIC Process Design, the *Back* button becomes enabled. This allows you to go back in the browser history, subsequently activating the Forward button. The *Forward* button then enables you to navigate forward in the browser history after having gone back. Both buttons respond to user actions and adapt to the browsing history.
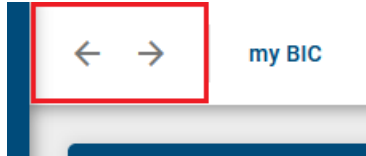
At the end of the session, the entire history, both backwards and forwards, is removed from the browsing history in BIC Process Design.

18.4 How can I navigate in the list of categories and diagrams?

In the *list of categories and diagrams* you can display the content of a category or diagram by a single click. The current path is shown in the head bar. Having navigated into a sequence of categories, you can navigate to a higher category by clicking on its name in the head bar.
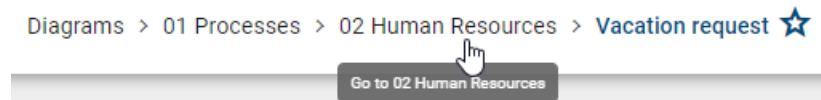
In the same way, you can change to a higher category when viewing a diagram.
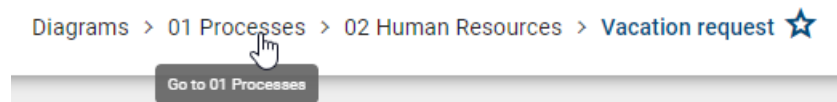
18.5 How can I navigate the diagram?

In the *diagram view* you can navigate by holding down the left mouse button. As known from Google Maps, scrolling here corresponds to zooming and no scrollbars are displayed.

Furthermore, there is a navigation bar at the right bottom of the editor in diagram view, which offers the following possibilities:

Adjust content to window size: By clicking on the first button the diagram will be zoomed and scrolled, so that you can see the whole diagram in the editor.

Scroll selection into view: If you have selected a symbol, clicking on the second button places the diagram so that the symbol is displayed in the upper left corner. If no symbol is selected, this function scrolls the diagram to 0/0 position.

Zoom level: The third function allows you to set different zoom levels in percent. Preset levels appear when you click on the arrow. You can then select one of the zoom levels from the list. Furthermore, it is possible to set your own zoom level between 25% and 800%. To do this, click on the displayed number, enter a new percentage and confirm with the Enter key or click on the diagram.

18.6 Which keystroke combination can I use?

Navigation in the application

Navigation in the application via your keyboard is possible as follows.

Shortcut	Action
Tab	Focus in application changes to the next button.
Enter	Selection of the button on which the focus is located.
Shift + Tab	Focus in application changes to the previous button.
Arrow keys in Explorer	Focus in application switches between diagrams, categories and favorites in Explorer. For this, the focus must first be in the respective area of the Explorer.

For a stronger emphasis of the focus you can toggle the high contrast theme.

Diagram view

These functions are available if you look at a diagram in *diagram view*. For example, they help navigate large diagrams.

Shortcut	Action
Mouse wheel	*Zoom in*, *Zoom out*
Pressed left mouse button	Diagram scrolling

Navigation in the designer

These functions are available for a checked-out diagram in edit mode. For example, they help navigate large diagrams and facilitate fast modeling without a mouse.

Shortcut	Action
Ctrl + + or Ctrl + Mouse wheel	*Zoom in*
Ctrl + - or Ctrl + Mouse wheel	*Zoom out*
Pressed right mouse button	Diagram scrolling
Ctrl + A	*Select* all objects
Shift + left mouse click	Select several objects one after the other
Ctrl + C	*Copy selected objects*
Ctrl + pressed left mouse button	Copy selected objects and paste by releasing mouse button
Ctrl + V	*Paste selected objects*
Ctrl + X	*Cut selected objects*
Del	*Delete selected objects*
Ctrl + Z	*Undo* the last modelling step
Ctrl + Y	*Redo* the last undo
Shift + pressed left mouse button	Move selected object only vertically or horizontally
Alt + pressed left mouse button	Move selected object when alignment lines are disabled
Arrow keys	Move selected object
Shift + Arrow key	Move selected object in big steps
Ctrl + B	*Description* bold
Ctrl + I	Description italicize
Ctrl + U	Description underlined
Tab	In formatted text attributes the tab key is used to indent the text.
Ctrl + Enter	Create the first element of the *mini symbol palette* of a selected object (inplace edit not active)
Ctrl + <number from 1 to 9>	Create the corresponding element of the mini symbol palette of a selected object (inplace edit not active)
F2	Access to the *text field* of a selected object (inplace edit)
Alt + Enter	Insert a line break in the text field of a selected object (inplace edit active)
Enter	End edit mode in text field with saving (inplace edit active)
Esc	Cancel edit mode in text field without saving (inplace edit active)
Ctrl + S	Save and then check in the modeling

18.7 How do I open a subprocess?

You can jump directly from a diagram into a refined diagram which is a maintained in the *subprocess attribute*.

Open a diagram containing an activity with a subprocess diagram. Then, click the highlighted attribute symbol below the object. Alternatively, the stored diagram also opens by double-clicking on the activity.
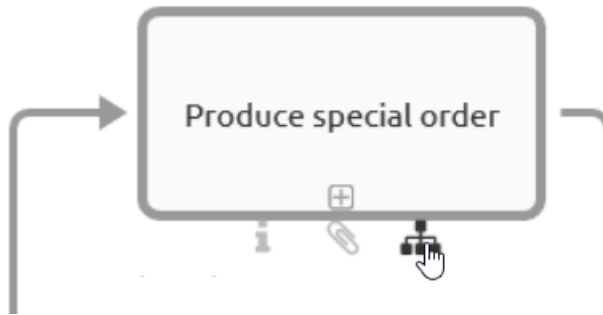
Note: The actual stage is Public Workspace and you have opened the diagram version Publication. If you want to change the diagram by clicking a subprocess or variants the stage will be changed to Publication. Published diagrams and categories are exclusively shown in the explorer. If the subprocess is not published, you will receive a *corresponding message*.

Note: Subprocesses also display diagrams to which you have no access. If you navigate into these diagrams, you will get a *corresponding message* and can not see the content of the diagram.

Tip: If no subprocess and no attachment has been maintained for a symbol, the attribute tab opens by double-clicking on the symbol.

18.8 How do I open a subprocess when multiple ones are maintained?

BIC Process Design offers the possibility to maintain *multiple variants within the attributes*. You can open them in the same way as *you can open one subprocess*. However, a simple click on the diagram icon under the object will give you an alphabetically sorted list of all the subprocesses. This gives you the opportunity to see at a glance which navigation options are available to you. The top entry reflects the subprocess field, followed by the variants. Select the required subprocess to follow the link.
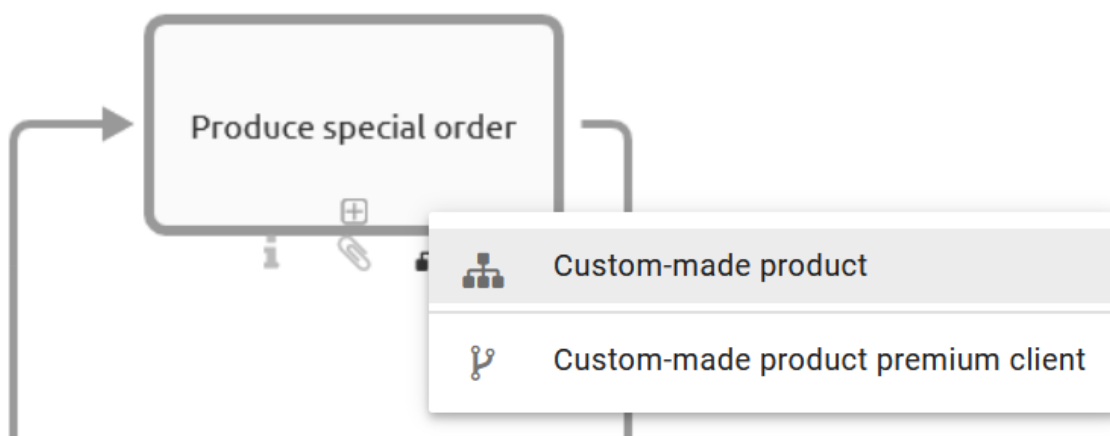
Note: A similar list is also displayed in a checked-in diagram when you double-click the object, provided you have maintained several *subprocesses and variants*. This allows you to quickly see which links have been set and to navigate through them accordingly.

18.9 What happens if a diagram is not available?

If you navigate to a diagram which is not available (for you) in the current stage, the following message will be displayed. In case there is an archived version of the diagram in the current stage, you can choose to navigate to the latest version.

Diagrams may not exist in single areas for different reasons. For example, you receive this message while following a subprocess in the publication to another diagram, which itself has not been published yet. When *navigating via deposited diagrams*, you switch to publication if you are not already there.

18.10 What happens if a catalog item is not available?

If you navigate to a catalog item which is not available (for you) in the current stage, the following message will be displayed. In case there is an archived version of the catalog item in the current stage, you can choose to navigate to the latest version.

MULTILINGUALISM

19.1 Which language settings can be made?

The following language settings are distinguished for the multilingualism of the application.

User interface language (UI language): This is the language of the user interface, which depends on your browser settings. The user interface includes all displayed dialogs, the administration interface, buttons, context menus and the displayed names of diagram, object and attribute types. The UI language depends on the first language in the list of preferred languages in the respective browser settings. Depending on the browser these lists can be found at different places:

- *Internet Explorer*: Section "Preferred Language" in the Windows language settings

- *Mozilla Firefox*: Section "Choose your preferred language for displaying pages" in the browser language settings

- *Google Chrome*: Section "Order languages based on your preference" in the browser language settings

User language: The user language defines the language in which you receive your e-mails from the application. This language is set per user in the administration of BIC Process Design.

Content language: The content language refers to the representation of the contents of diagrams and attribute values. The content in the content language the displayed in the diagram itself, in the attribute bar, in reports and in the catalog in the form of catalog items. The content language is set *in the application* and can therefore differ from the UI language.

Alternative language: The *alternative language* can be set to display another language if an attribute has not been maintained in the content language. In this case, the attribute in alternative language and its abbreviation are displayed in brackets. The content remains empty if it was not maintained in the selected content language or the selected alternative language. This behavior applies to the public workspace, the preview and publication stage.

Note: While editing a diagram, you can only see values that have been maintained for the selected content language within the details of an object or the diagram. You can receive further information *here*.

19.2 What languages are displayed for the content language and the alternative language when logging in for the first time?

When you first log in to BIC Process Design, the default language set by the administrator at that time is displayed as the content language by default. The alternative language will correspond to the language of your browser (UI language).

You have the option to *adjust* your content language and alternative language at any time.

Hint: If your browser language is not activated as a language in the administration, the alternative language corresponds to the default language.

19.3 How do I set the content language and the alternative language?

In the profile, you have the possibility to select a content language as well as an alternative language to display your diagrams. You can also change the content and alternative language at any time using the *Toggle languages* button in the header.

To set a language in the *profile*, navigate to the *profile* via the menu. The current content language is displayed below *Content language*.
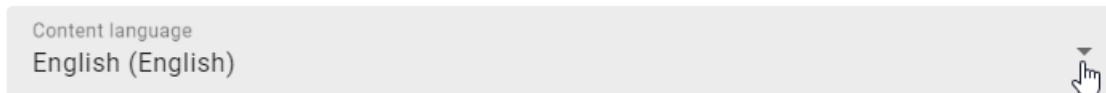
With a click on the button, a list of available content languages appears from which you can select a language. You can also click on the displayed language under *Alternative language*.
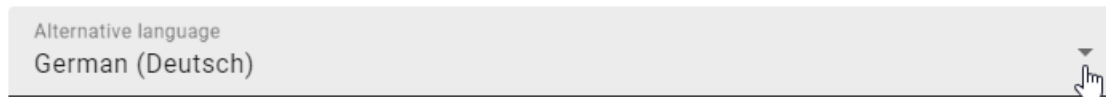
A list of available alternative languages appears. Select a language. Now you have set your content and alternative language and the selected changes are displayed.

Your changes are also visible in the top right-hand corner of the header in your desktop version. The abbreviation for the content language and the alternative language are displayed here, with the content language in bold.
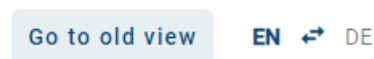
You can simply click on the arrows *Toggle languages* in the header to swap the content and alternative language directly. This function is always available in the header of the desktop version. Moreover, by clicking on your content and alternative language you can open a drop-down menu where you can select a new language.

SEARCH

20.1 How can I use the Search in BIC Process Design?

You have the possibility to use a global search in BIC Process Design. To do that, choose the menu option *search* in the left menu bar.
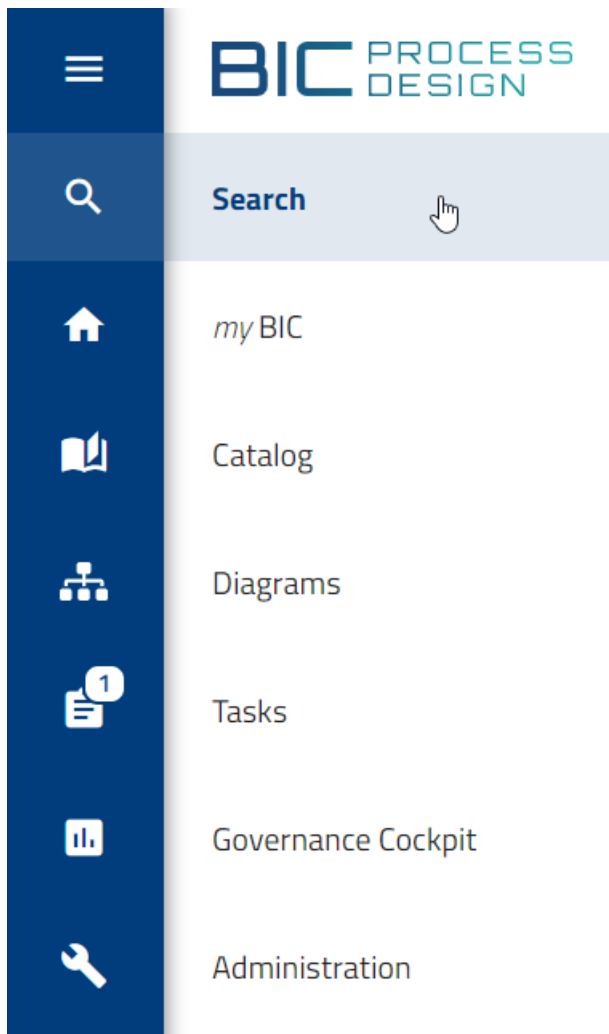
The search results depends on the current repository, stage and currently selected content language. Enter the search term into the search field and confirm by pressing the Enter key or the magnifier glass.

It is searched in the currently opened repository. The search results are displayed in a list sorted by relevance for the search term. In the top bar, the number of results is shown.
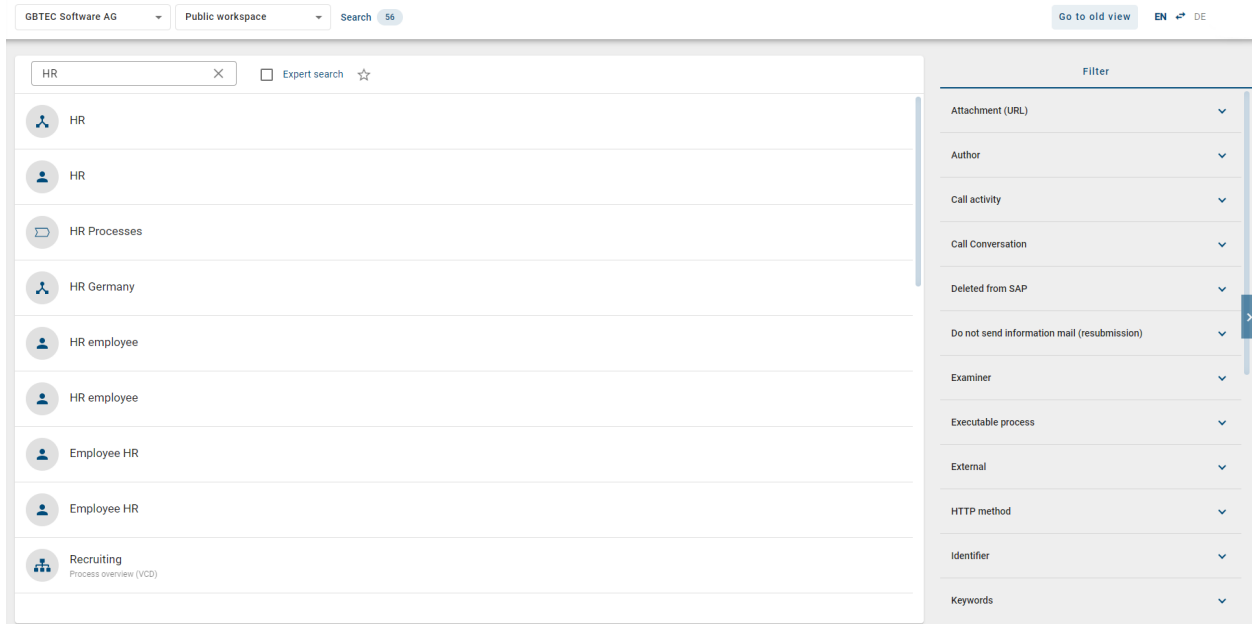
The search results thereby include all entities (diagrams and catalog items) and workflows in BIC Process Design. By clicking on the respective search result, you will be redirected to its detail page.

In order to specify and adapt your search, you can activate the checkbox *Expert search*. If you use an asterisk (*) in the search term, it is activated automatically. The expert search enables you to include Boolean operators, wildcards or special characters in your search query. You can find a list of all expert search possibilities in the section about the *options of the search*.

Moreover, you can *filter* the search results.

20.2 How can I search for specific content in BIC Process Design?

You can also search in BIC Process Design for specific entities. You currently have the possibility to use the search function in the *diagram list*, the *catalog* and the *Governance Cockpit*.

A search always depends on the selected stage and content language. The stage does not change by navigation. If you are searching in the stage *Publication* and English is your content language, all objects and diagrams maintained in this language and existing in the publication will be listed.

In all three functional areas, the search field is displayed in the *Filter* panel.

Search catalog list   🔍

Search workflow list   🔍

Enter the search term into the search field and confirm by pressing the *Enter* key or the magnifier glass.

Project   ✕   🔍

It is searched in the currently opened repository. The search results are displayed in a list sorted by relevance for the search term. In the top bar, the number of results is shown.

Click the X icon to cancel the search and view all entries of the list again.

Project   ✕   🔍

Tip: In case the search entry is a diagram you can open it directly with a click on the name.

20.3 What options do I have to search for specific terms?

Always keep in mind the search functions described below:

- The search is not case-sensitive.

- Line breaks and successive blanks are treated as one single blank.

- Phrase search: If the search term is enclosed in quotation marks, the search term is not changed, e.g. "process implementation". Here the search term must occur exactly in the searched data, and no wildcards characters are interpreted.

The following options are available for the search terms in the simple search.

- Search for one word: If the search term does not contain wildcard characters, the search term will be searched at every position, e.g. a search for "Process" will find "Process model" as well. Process is virtually expanded to Process* and then used to search the content.

- Search for several words: If two or more words are searched for, the words are concatenated using or. So it is sufficient, if one word exists. Here are also wildcards (*) added, e.g. process implementation is searched as process* OR implementation*.

Expert search:

In the central search, you can enable the expert search. Then you can use the following search options.

resources AND software   ✕   ☑ Expert search

- Search with special words: The search knows special words, which are interpreted, if they are part of the search term: AND, OR and NOT

    – AND concatenated words must both exist in the results, e.g. development AND software

    – OR concatenated words can appear in the results, but do not need to. It is sufficient, if one of the words exists.

    – A NOT concatenated search word must not exist in the results, e.g. development NOT software

    – **Note**: Do not mix up with the search for several words (see above), since wildcards are added there. This is not done, if one of the special words occurs.

    – You can use "!" or "-" instead of NOT (without the quotes).

- Search with special characters: The search knows special characters, which are interpreted, if they are part of the search term: +, - and !

    – These characters are not allowed at the beginning of a search term.

    – If a + precedes a search word, this word must exist in the results, the first search word is optional, e.g. development +software.

    – If a - or a ! precedes a search word, this word must not exist in the results, e.g. development -software or development !software.

    – Search words with NOT, - and ! give the same results.

- Search term with wildcard characters: These characters serve as placeholders in resp. at search terms to find more relevant results. By using a wildcard, the search term is expanded by an arbitrary number of characters. You can manually add wildcards to your search term. By default BIC Process Design automatically searches with wildcards at the end of every word.

    – The star * stands for none, one or more characters, e.g. "*process" will find "process" and every data that ends with "process", like "default-process"

    – The question mark ? represents exactly one character, e.g. implement?tion

- Group terms to form partial queries: The search recognizes round brackets in the sense of grouping clauses. This allows you to control the Boolean logic of a query.

    – For example, the query "a AND (b OR c)" will search for "a AND b OR a AND c". If the brackets are not set, "a AND b OR c" is interpreted as "(a AND b) OR c".

20.4 How can I filter search results?

In the central search, you can filter the search results using the filter in the right side bar. If you have received search results, you will see the types and available attributes of the results as facets. By clicking on the facet headings, they can be expanded and collapsed.

Expand a facet to see all filter options listed that correspond to the attribute values or result types. By setting a check mark for a filter, the search results are filtered according to this attribute value or result type. Multiple filters can be set simultaneously.
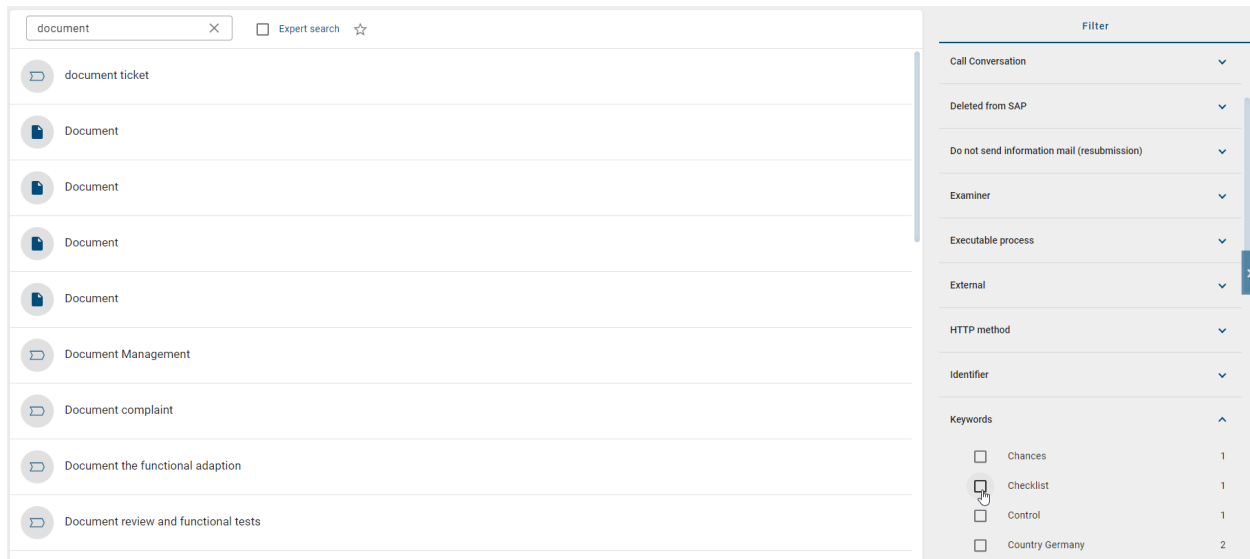
Available filters can be set via the administration in the old user interface.

20.5 How can I save a search as favorite?

To make it easier to call up an often-needed search and the corresponding results, you can save the search including settings stage dependent as a favorite. These favorites will appear on your *myBIC page* as a tile. Proceed as follows.

Enter the desired search term in the *central search*. Select the star icon next to the search field to enable the *Save search query* function.
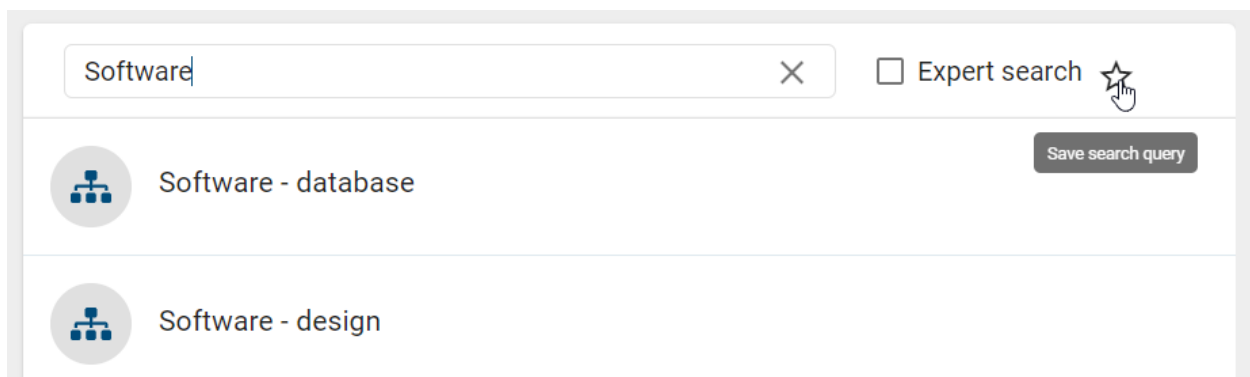
A dialog window open where you have to name the favorite. Then you can confirm by clicking *save*. Alternatively, you can *cancel* the process.
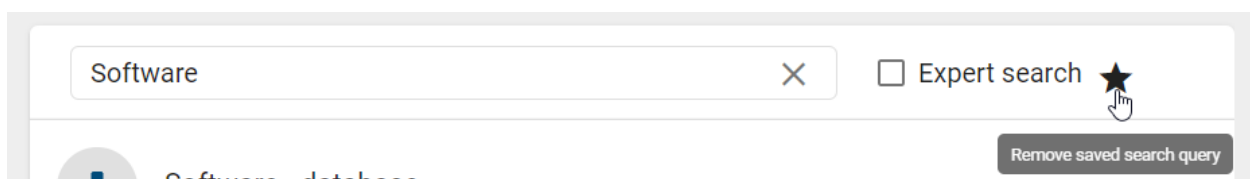
After saving your search, the star icon is filled. If you select it, you can *remove the saved search query* from your favorites again. A favored search also appears as a tile on your myBIC page. By clicking on the favorite tile you will immediately see your search results in the central search.
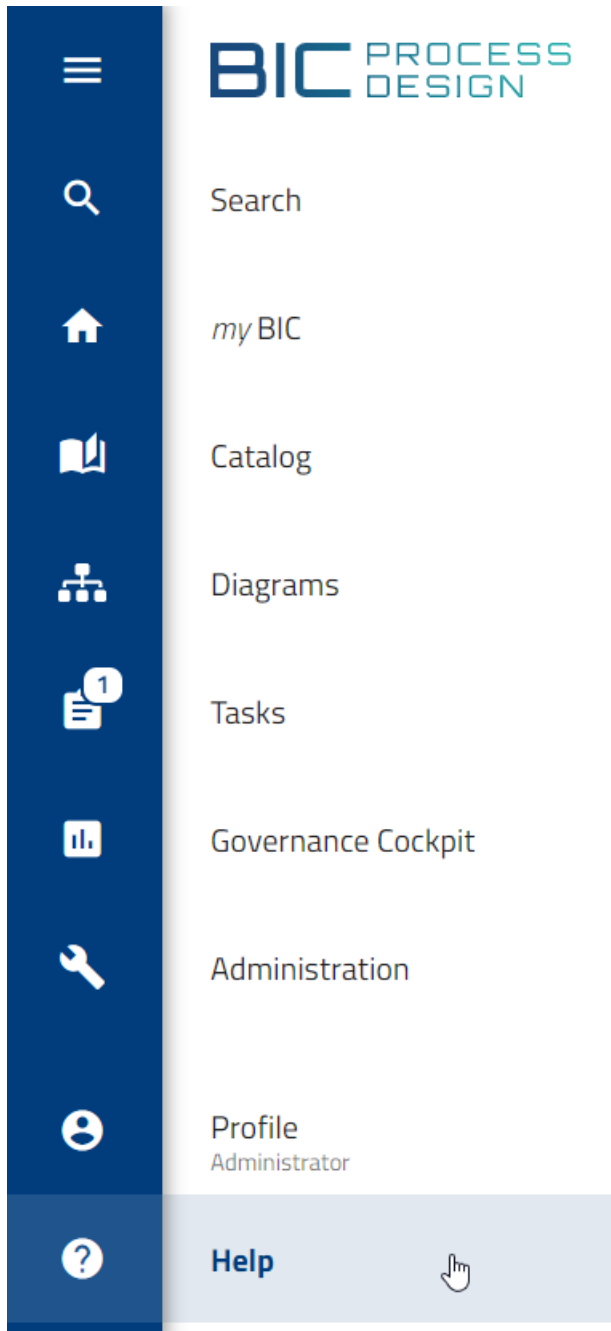
Note: In the mobile view, you can find the option to save (resp. remove) a search as favorite in the context menu (three dots menu).

TWENTYONE

HELP

The help menu can be reached via the menu item named *Help*.

21.1 Where can I find the help?

Open the *help* menu. In the main area of your screen you will then find the option *Help*. By clicking on it, you can open the user documentation in a new tab.
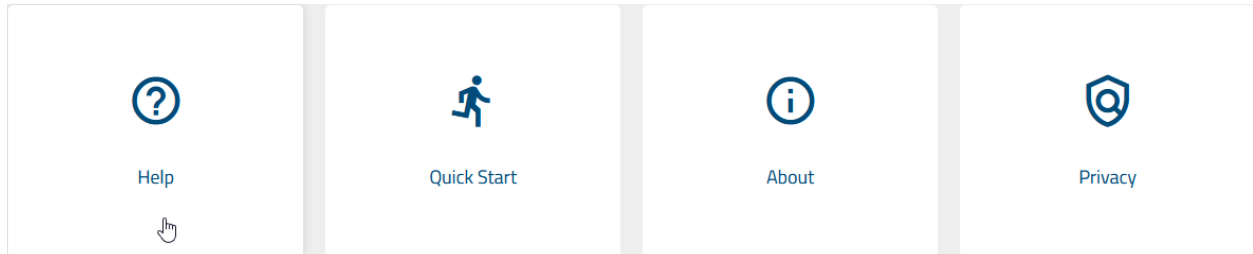
Note: You are currently reading the user documentation.

21.2 Where can I find the quick start?

Open the *help* menu. In the main area of your screen you will then find the option *Quick Start*. Click on it to open the Quick Start in a new tab. This also gives you the opportunity of providing your own document here as part of Customizing.
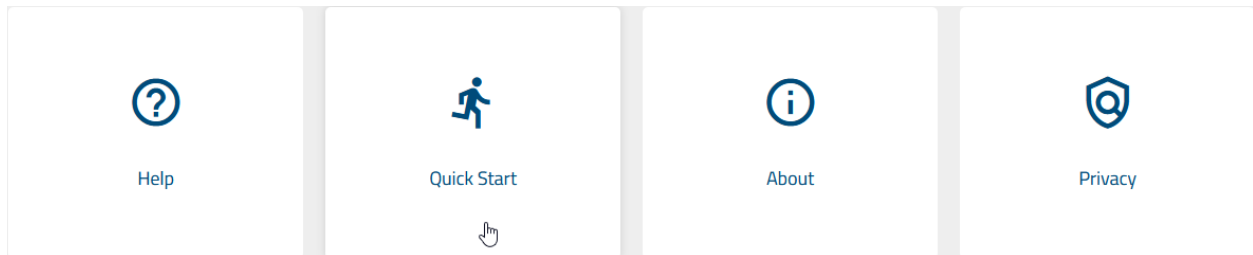
Note: The quick start of the user documentation can be found *here*.

21.3 Where can I find information about the version of the application?

Open the *help* menu. In the main area of your screen you will then find the option *About*. Clicking it opens a dialog that provides more information about your version of BIC Process Design and the current UI build.
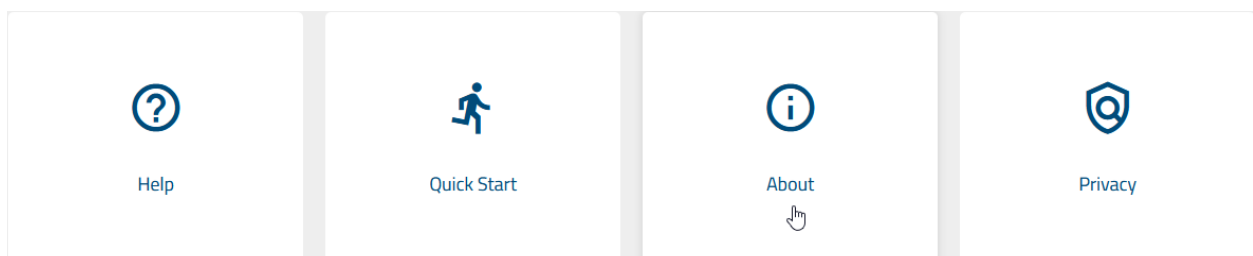
21.4 Where can I find the Data protection policy?

Open the *help* menu. In the main area of your screen you will then find the option *Privacy*. Clicking it redirects you to the GBTEC data privacy site. This will give you an overview on how we process your personal data.

Help	Quick Start	About	Privacy
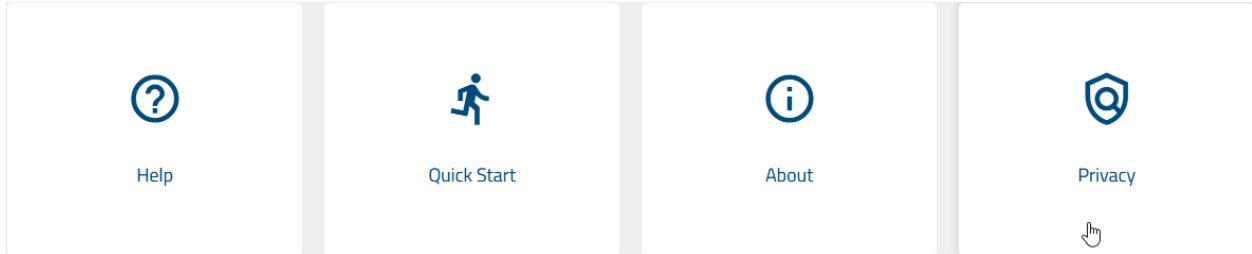
21.5 Where can I find the Statement of Accessibility?

Open the *help* menu. In the main area of your screen you will then find the option *Accessibility*. Clicking it takes you to the *corresponding chapter in documentation* and provides information about the current status of accessibility.

Help	Quick Start	About	Privacy

Accessibility

APPENDIX
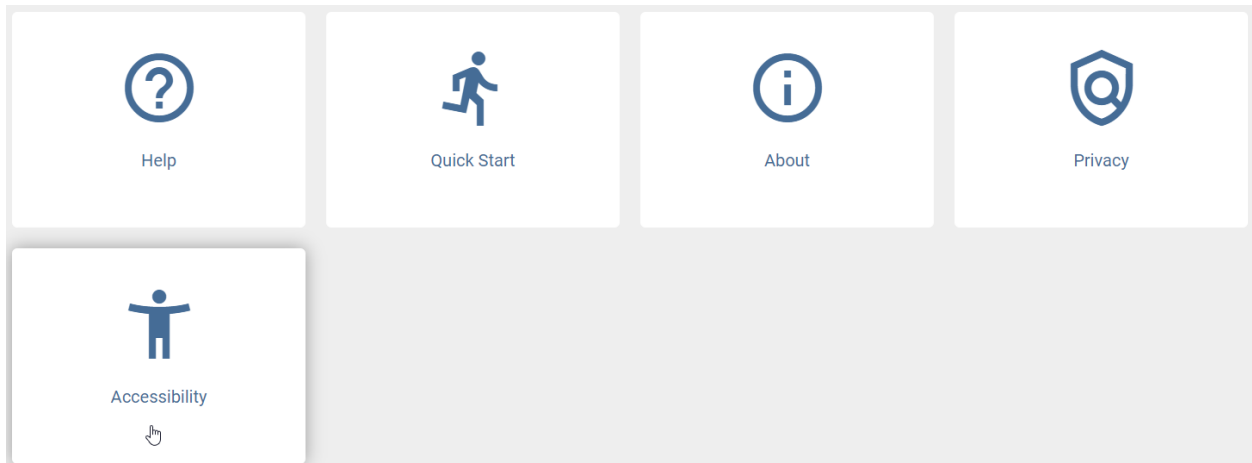
22.1 Which stereotypes exist by default?

The following are lists that give you an overview of the default diagram, object attribute and symbol stereotypes and their IDs:

Diagram type name (EN)	Diagram type name (ES)	Diagram type ID
Collaboration diagram (BPMN)	Diagrama de colaboración (BPMN)	DT_BPMN_COLLABORATION
Customer Journey Map (CJM)	Customer Journey Map (CJM)	DT_CJM
Decision diagram (DMN)	Diagrama de decisión (DMN)	DT_DMN
Entity-Relationship Diagram (ERD)	Diagrama de entidad-relación (ERD)	DT_ERD
IT architecture	Arquitectura TI	DT_IT_ARCHITECTURE
IT landscape	Equipamiento TI	DT_IT_LANDSCAPE
Organizational chart	Organigrama	DT_ORGANIZATIONAL_CHART
Process (EPC)	Procesos (EPC)	DT_EPC
Process overview (VCD)	Vista general del proceso (VCD)	DT_VCD
Risk diagram	Diagrama de riesgo	DT_RISK
Structural diagram	Diagrama estructural	DT_STRUCTURAL

Object type name (EN)	Object type name (ES)	Object type ID
Activity	Actividad	ET_ACTIVITY
Annotation	Anotación	ET_ANNOTATION
Application	Aplicación	ET_APP_COMPONENT
Application function	Función de la aplicación	ET_APP_FUNCTION
Application interface	Interfaz de la aplicación	ET_APP_INTERFACE
Application service	Servicio de la aplicación	ET_APP_SERVICE
Attribute	Atributo	ET_ATTRIBUTE
Business object	Objeto comercial	ET_BUSINESS_OBJECT
Control	Control	ET_CONTROL
Data store	Almacenamiento de datos	ET_DATA_STORE
Document	Documento	ET_DOCUMENT
End event	Evento final	ET_END_EVENT
Entity	Entidad	ET_ENTITY
Event	Evento	ET_EVENT
Event based	Basada en evento	ET_EVENT_BASED_GATEWAY
Exclusive or	Or exclusiva	ET_XOR
Free form object	Forma libre	ET_FFO

Table 1 – continued from previous page

Object type name (EN)	Object type name (ES)	Object type ID
Group	Grupo	ET_GROUP
Inclusive or	Or inclusiva	ET_OR
Intermediate event	Evento intermedio	ET_INTERMEDIATE_EVENT
Key performance indicator	Indicador clave de rendimiento	ET_KPI
Knowledge model	Modelo de conocimiento	ET_KNOWLEDGE
Location	Localización	ET_LOCATION
Milestone	Hito	ET_MILESTONE
Norm	Norma	ET_NORM
Organizational unit	Unidad organizacional	ET_ORG_UNIT
Parallel	Paralela	ET_AND
Person	Persona	ET_PERSON
Position	Posición	ET_ORG_POSITION
Relationship	Relación	ET_RELATIONSHIP
Requirement	Requisito	ET_REQUIREMENT
Risk	Riesgo	ET_RISK
Role	Rol	ET_ROLE
Start event	Evento inicial	ET_START_EVENT

Attribute type Name (EN)	Attribute type Name (ES)	Attribute type ID
Actual value	Valor actual	AT_ACTUAL_VALUE
Allocation model	Modelo de asignación	AT_ALLOCATION
Applicable documents	Documentos aplicables	AT_APPLICABLE_DOCUMENTS
Application consultant	Consultor de la aplicación	AT_APPLICATION_CONSULTANT
Attachment (URL)	Archivo adjunto	AT_ATTACHMENT
Author	Autor	AT_AUTHOR
Call activity	Actividad de llamada	AT_CALL_ACTIVITY
Call Conversation	Conversación de llamada	AT_CALL_CONVERSATION
Capacity (0 = unlimited)	Capacidad (0 = ilimitada)	AT_CAPACITY
Capacity (in hours)	Capacidad (en horas)	AT_ORG_RES_CAPACITY
Collection	Collección	AT_COLLECTION
Compensation task	Tarea de compensación	AT_COMPENSATION_TASK
Control effect	Efecto del control	AT_CONTROL_EFFECT
Cost rate (in € per minute)	Tasa de coste (en € por minuto)	AT_RES_COST_RATE
Damage control measures	Medidas de control de daños	AT_DAMAGE_CONTROL_MEASURES
Data source	Fuente de datos	AT_DATA_SOURCE
Data state	Estado de los datos	AT_DATA_STATE
Data type	Tipo de dato	AT_DATATYPE
Data unit	Unidad de datos	AT_DATA_UNIT
Decomposition	Descomposición	AT_DECOMPOSITION
Default value	Valor por defecto	AT_DEFAULT_VALUE
Description	Descripción	AT_DESCRIPTION
Development costs (€)	Costes de desarrollo (€)	AT_DEVELOPMENT_COSTS
Email	Email	AT_EMAIL
End of operational time	Final del funcionamiento	AT_OPERATIONAL_TIME_END
Event type	Tipo de evento final	AT_END_EVENT_TYPE
Event type	Tipo de evento	AT_EVENT_TYPE
Event type	Tipo de evento intermedio	AT_INTERMEDIATE_EVENT_TYPE
Event type	Tipo de evento inicial	AT_START_EVENT_TYPE

Table 2 – continued from previous page

Attribute type Name (EN)	Attribute type Name (ES)	Attribute type ID
Examiner	Examinador	AT_EXAMINER
Executable process	Proceso ejecutable	AT_EXECUTABLE_PROCESS
Execution interval	Intervalo de ejecución	AT_EXECUTION_INTERVAL
Execution of control	Ejecución del control	AT_EXECUTION
Execution type	Tipo de ejecución	AT_EXECUTION_TYPE
External	Externo	AT_EXTERNAL
Focus on target	Centrarse en el objetivo	AT_FOCUS_ON_TARGET
Group	Grupo	AT_GROUP
Identifier	Identificador	AT_IDENTIFIER
Identifying	Identificando	AT_IDENTIFYING
Idle time (minutes)	Tiempo de inactividad (minutos)	AT_IDLE_TIME
Impact on occurrence	Impacto en la ocurrencia	AT_IMPACT_ON_OCCURRENCE
Input/Output	Entrada/Salida	AT_INPUT_OUTPUT
Instances	Instancias	AT_INSTANCES
Instantiate	Crear una instancia	AT_GATEWAY_INSTANTIATE
Keywords	Palabras clave	AT_KEYWORDS
Life cycle	Ciclo de vida	AT_LIFE_CYCLE
Manufacturer	Fabricante	AT_MANUFACTURER
Material costs (Euro)	Costes materiales (Euro)	AT_MATERIAL_COSTS
Multiple instance type	Tipo de instancia múltiple	AT_MULTIPLE_INSTANCE_TYPE
Multiple Instances	Instancias múltiples	AT_MULTIPLE_INSTANCES
Name	Nombre	AT_NAME
Non interrupting	Sin interrupción	AT_NON_INTERRUPTING
Occupation	Ocupación	AT_OCCUPATION
Occurrence probability	Probabilidad de ocurrencia	AT_OCCURRENCE_PROBABILITY
Phone	Teléfono	AT_PHONE
Primary Key	Clave primaria	AT_PRIMARY_KEY
Priority	Prioridad	AT_PRIORITY
Probability (%)	Probabilidad (%)	AT_PROBABILITY
Process time (minutes)	Tiempo de procesamiento (minutos)	AT_PROCESS_TIME
Process time (Days)	Tiempo de procesamiento (días)	AT_TIME_TO_PROCESS
Process type	Tipo de proceso	AT_PROCESS_TYPE
Publish as PDF	Publicar como PDF	AT_PUBLISH_AS_PDF
Release	Versión	AT_RELEASE
Responsible	Responsable	AT_RESPONSIBLE
Responsible (definition)	Responsable (definición)	AT_RESPONSIBLE_4_DEFINITION
Responsible (resubmission)	Responsable (reenvío)	AT_RESUBMISSION_RESPONSIBLE
Responsible (survey)	Responsable (estudio)	AT_RESPONSIBLE_4_SURVEY
Restricted access	Restricción de acceso	AT_ACCESS_RESTRICTION
Risk category	Categoría del riesgo	AT_RISK_CATEGORY
Risk mitigation measures	Medidas de mitigación de riesgos	AT_RISK_MITIGATION_MEASURES
Risk owner	Propietario del riesgo	AT_RISK_OWNER
Risk probability (%)	Probabilidad del riesgo (%)	AT_RISK_PROBABILITY
Risk probability (classification)	Probabilidad del riesgo (clasificación)	AT_RISK_PROBABILITY_CLASSIFICATION
Root cause	Causa principal	AT_ROOT_CAUSE
Scope	Área de aplicación	AT_SCOPE
Setup time (minutes)	Tiempo de configuración (minutos)	AT_SETUP_TIME
Source	Fuente	AT_SOURCE
Start of operational time	Inicio del funcionamiento	AT_OPERATIONAL_TIME_START

22.1. Which stereotypes exist by default?

Table 2 – continued from previous page

Attribute type Name (EN)	Attribute type Name (ES)	Attribute type ID
State	Estado	AT_STATE
System administrator	Administrador del sistema	AT_SYSTEM_ADMINISTRATOR
Target	Objetivo	AT_TARGET
Target value	Valor objetivo	AT_TARGET_VALUE
Task type	Tipo de tarea	AT_TASK_TYPE
Temporal binding (in minutes)	Tiempo de vinculación (minutos)	AT_TEMPORAL_BINDING
Transport time (minutes)	Tiempo de transporte (minutos)	AT_TRANSPORT_TIME
Type	Tipo	AT_EVENT_GATEWAY_TYPE
Unit costs (€)	Costes unitarios (€)	AT_UNIT_COSTS
Valid from	Válido desde	AT_VALID_FROM
Valid to	Válido hasta	AT_VALID_TO
Value range	Rango de valores	AT_VALUE_RANGE
Variants	Variantes	AT_VARIANTS
Version	Versión	AT_VERSION
Weak	Débil	AT_IS_WEAK

Association type Name (EN)	Association type Name (ES)	Association type ID
A - Accountable	A - Aprobador	AST_ACCOUNTABLE
acts as	actúa como	AST_ACTS_AS
Aggregates	agrega	AST_AGGREGATES
Aggregation	Agregación	AST_AGGREGATES_CONTROL
Aggregation	Agregación	AST_AGGREGATES_DATA
Aggregation	Agregación	AST_AGGREGATES_KPI
Aggregation	agrega	AST_AGGREGATES_RISK
annotate	anotar	AST_ANNOTATE
Assigned to	Asignado a	AST_ASSIGNED_TO
Association	Asociación	AST_ASSOCIATION
Attribute link	Enlace de atributo	AST_ATTRIBUTE_LINK
C - Consulted	C - Consultor	AST_CONSULTED
Composes	compone	AST_COMPOSES
contains	contiene	AST_CONTAINS
Controls	Controla	AST_CONTROLS
counteracts	contrarresta	AST_COUNTERACTS
covers	cubre	AST_COVERS
depends on	depende de	AST_DEPENDS_ON
Ends measuring	termina medición	AST_ENDS_MEASURING
I - Informed	I - Informante	AST_INFORMED
inherits from	hereda de	AST_INHERITANCE
Input	Entrada	AST_INPUT
Is superior	Es superior	AST_IS_SUPERIOR
measures	medidas	AST_MEASURES
Message Flow	Flujo de mensajes	AST_MESSAGE_FLOW
occupied by	ocupada por	AST_OCCUPIED_BY
occurs	ocurre	AST_OCCURS
Output	Salida	AST_OUTPUT
R - Responsible	R - Encargado	AST_RESPONSIBLE
Realizes	Realiza	AST_REALIZATION
realizes	necesita	AST_REALIZES

Table 3 – continued from previous page

Association type Name (EN)	Association type Name (ES)	Association type ID
Relation link	Enlace de la relación	AST_RELATIONSHIP_LINK
Sequence Flow	Flujo de secuencia	AST_SEQUENCE_FLOW
Serving	Servicio	AST_SERVING
Specialization	Especialización	AST_SPECIALIZES
Starts measuring	empieza medición	AST_STARTS_MEASURING

Diagram type ID	Object type ID	Symbol type ID
DT_BPMN_COLLABORATION	ET_ROLE	NST_POOL
DT_BPMN_COLLABORATION	ET_APP_COMPONENT	NST_POOL
DT_BPMN_COLLABORATION	ET_ACTIVITY	NST_TASK
DT_BPMN_COLLABORATION	ET_START_EVENT	NST_START_EVENT
DT_BPMN_COLLABORATION	ET_INTERMEDIATE_EVENT	NST_INTERMEDIATE_EVENT
DT_BPMN_COLLABORATION	ET_END_EVENT	NST_END_EVENT
DT_BPMN_COLLABORATION	ET_XOR	NST_XOR
DT_BPMN_COLLABORATION	ET_AND	NST_AND
DT_BPMN_COLLABORATION	ET_OR	NST_OR
DT_BPMN_COLLABORATION	ET_EVENT_BASED_GATEWAY	NST_GATEWAY_EVENT_BASED
DT_BPMN_COLLABORATION	ET_DOCUMENT	NST_DOCUMENT_BPMN
DT_BPMN_COLLABORATION	ET_DATA_STORE	NST_DATA_STORE
DT_BPMN_COLLABORATION	ET_REQUIREMENT	NST_REQUIREMENT_BPMN
DT_BPMN_COLLABORATION	ET_ROLE	ST_ROLE_BPMN
DT_BPMN_COLLABORATION	ET_APP_COMPONENT	NST_APP_COMPONENT_BPMN
DT_BPMN_COLLABORATION	ET_RISK	NST_RISK_BPMN
DT_BPMN_COLLABORATION	ET_CONTROL	NST_CONTROL_BPMN
DT_BPMN_COLLABORATION	ET_KPI	NST_KPI_BPMN
DT_BPMN_COLLABORATION	ET_NORM	NST_NORM_BPMN
DT_BPMN_COLLABORATION	ET_GROUP	NST_GROUP
DT_BPMN_COLLABORATION	ET_ANNOTATION	NST_ANNOTATION
DT_BPMN_COLLABORATION	ET_TOUCHPOINT	NST_TOUCHPOINT
DT_EPC	ET_ACTIVITY	NST_PROCESS_INTERFACE
DT_EPC	ET_EVENT	NST_EVENT
DT_EPC	ET_ACTIVITY	NST_FUNCTION
DT_EPC	ET_XOR	NST_XOR
DT_EPC	ET_AND	NST_AND
DT_EPC	ET_OR	NST_OR
DT_EPC	ET_ROLE	NST_ROLE
DT_EPC	ET_ORG_UNIT	NST_ORG_UNIT
DT_EPC	ET_DOCUMENT	NST_DOCUMENT
DT_EPC	ET_BUSINESS_OBJECT	NST_BUSINESS_OBJECT
DT_EPC	ET_APP_COMPONENT	NST_APP_COMPONENT
DT_EPC	ET_REQUIREMENT	NST_REQUIREMENT
DT_EPC	ET_RISK	NST_RISK
DT_EPC	ET_CONTROL	NST_CONTROL
DT_EPC	ET_KPI	NST_KPI
DT_EPC	ET_NORM	NST_NORM
DT_EPC	ET_ANNOTATION	NST_ANNOTATION
DT_EPC	ET_TOUCHPOINT	NST_TOUCHPOINT
DT_CJM	ET_JOURNEY_STAGE	NST_JOURNEY_STAGE

Table 4 – continued from previous page

Diagram type ID	Object type ID	Symbol type ID
DT_CJM	ET_CUSTOMER_STEP	NST_CUSTOMER_STEP
DT_CJM	ET_TOUCHPOINT	NST_TOUCHPOINT
DT_CJM	ET_FFO	NST_FFO_TEXT
DT_DMN	ET_ACTIVITY	NST_FUNCTION
DT_DMN	ET_DOCUMENT	NST_KNOWLEDGE_SOURCE
DT_DMN	ET_BUSINESS_OBJECT	NST_INPUT_DATA
DT_DMN	ET_KNOWLEDGE	NST_BUSINESS_KNOWLEDGE
DT_DMN	ET_ANNOTATION	NST_ANNOTATION
DT_ERD	ET_ENTITY	NST_ENTITY_CHEN
DT_ERD	ET_RELATIONSHIP	NST_RELATIONSHIP_CHEN
DT_ERD	ET_ATTRIBUTE	NST_ATTRIBUTE_CHEN
DT_ERD	ET_ANNOTATION	NST_ANNOTATION
DT_IT_ARCHITECTURE	ET_APP_COMPONENT	NST_APP_COMPONENT
DT_IT_ARCHITECTURE	ET_APP_FUNCTION	NST_APP_FUNCTION
DT_IT_ARCHITECTURE	ET_APP_SERVICE	NST_APP_SERVICE
DT_IT_ARCHITECTURE	ET_APP_INTERFACE	NST_APP_INTERFACE
DT_IT_ARCHITECTURE	ET_ENTITY	NST_DATA_OBJECT
DT_IT_ARCHITECTURE	ET_ACTIVITY	NST_FUNCTION
DT_IT_ARCHITECTURE	ET_LOCATION	NST_LOCATION
DT_IT_ARCHITECTURE	ET_RISK	NST_RISK
DT_IT_ARCHITECTURE	ET_CONTROL	NST_CONTROL
DT_IT_ARCHITECTURE	ET_DOCUMENT	NST_DOCUMENT
DT_IT_ARCHITECTURE	ET_BUSINESS_OBJECT	NST_BUSINESS_OBJECT
DT_IT_ARCHITECTURE	ET_NORM	NST_NORM
DT_IT_ARCHITECTURE	ET_ANNOTATION	NST_ANNOTATION
DT_IT_LANDSCAPE	ET_APP_COMPONENT	NST_APP_COMPONENT
DT_IT_LANDSCAPE	ET_RISK	NST_RISK
DT_IT_LANDSCAPE	ET_CONTROL	NST_CONTROL
DT_IT_LANDSCAPE	ET_ANNOTATION	NST_ANNOTATION
DT_ORGANIZATIONAL_CHART	ET_ORG_UNIT	NST_ORG_UNIT
DT_ORGANIZATIONAL_CHART	ET_ORG_POSITION	NST_ORG_POSITION
DT_ORGANIZATIONAL_CHART	ET_ROLE	NST_ROLE
DT_ORGANIZATIONAL_CHART	ET_PERSON	NST_PERSON
DT_ORGANIZATIONAL_CHART	ET_ANNOTATION	NST_ANNOTATION
DT_VCD	ET_ACTIVITY	NST_FUNCTION_VCD_START
DT_VCD	ET_ACTIVITY	NST_FUNCTION_VCD
DT_VCD	ET_ACTIVITY	NST_FUNCTION
DT_VCD	ET_ROLE	NST_ROLE
DT_VCD	ET_ORG_UNIT	NST_ORG_UNIT
DT_VCD	ET_BUSINESS_OBJECT	NST_BUSINESS_OBJECT
DT_VCD	ET_DOCUMENT	NST_DOCUMENT
DT_VCD	ET_REQUIREMENT	NST_REQUIREMENT
DT_VCD	ET_APP_COMPONENT	NST_APP_COMPONENT
DT_VCD	ET_RISK	NST_RISK
DT_VCD	ET_CONTROL	NST_CONTROL
DT_VCD	ET_KPI	NST_KPI
DT_VCD	ET_NORM	NST_NORM
DT_VCD	ET_MILESTONE	NST_MILESTONE
DT_VCD	ET_TOUCHPOINT	NST_TOUCHPOINT

Table 4 – continued from previous page

Diagram type ID	Object type ID	Symbol type ID
DT_VCD	ET_ANNOTATION	NST_ANNOTATION
DT_RISK	ET_RISK	NST_RISK
DT_RISK	ET_CONTROL	NST_CONTROL
DT_RISK	ET_ACTIVITY	NST_FUNCTION
DT_RISK	ET_APP_COMPONENT	NST_APP_COMPONENT
DT_RISK	ET_ORG_UNIT	NST_ORG_UNIT
DT_RISK	ET_ANNOTATION	NST_ANNOTATION
DT_STRUCTURAL	ET_DOCUMENT	NST_DOCUMENT
DT_STRUCTURAL	ET_BUSINESS_OBJECT	NST_BUSINESS_OBJECT
DT_STRUCTURAL	ET_KPI	NST_KPI
DT_STRUCTURAL	ET_NORM	NST_NORM
DT_STRUCTURAL	ET_PRODUCT	NST_PRODUCT
DT_STRUCTURAL	ET_ANNOTATION	NST_ANNOTATION

RELEASE NOTES

23.1 Version 7.14.11

23.1.1 Resolved bugs

- [DES-6343] Checkin fails after removing updated non catalog item

23.2 Version 7.14.10

23.2.1 Resolved bugs

- [PT-14549] When clicking on the options entry "Reports & Exports" in the diagram gallery view, the available reports are not listed

- [PT-14640] Newly created catalog entries are not sorted alphabetically

- [PT-14876] Context menu for nodes inside a pool is not appearing anymore after converting the pool to a suggestion and dropping new nodes to the pool

- [PT-14928] Users are not suggested when adding user assignments to an attribute

- [PT-15045] Catalog Index does not get updated on catalog item change, leading to outdated views & facet results in catalog

- [PE-9640] The case owner is not shown in form field when the task is not started yet

- [PE-9682] Task assignment to case creator as fallback is not working in app stage

- [PE-9782] Diagram changes in production are not transferred to ProcessApp when it has cases with instance attachments

23.3 Version 7.14.9

23.3.1 Resolved bugs

- [PT-14741] Suggestions for assignment governance attributes are not filtered by range

23.4 Version 7.14.8

23.4.1 Resolved bugs

- [PT-14550] Opening files (PDF) directly in the integrated browser viewer behaves inconsistently throughout the application and opens file with uuid as name instead of the real file name
- [PT-14619] Diagrams cannot be checked in when assigned entities are not available
- [PT-14721] Recreating catalog index runs into error message due to missing revision information
- [PE-9146] Service Reports can not access string variables longer than 4000 characters
- [PE-9616] When in app stage, task assignee follows assignation steps of test stages
- [PE-9369] Call Activity with active status after archiving the parent case is shown in MyTasks view
- [PE-9530] When a second group task is started, it should be assigned back to the group if the previous user is out of office
- [PE-9620] Email Template fails replacing variables longer than 4000 characters when parsing html content
- [PE-9624] User Form's multiple choice fields does not load correctly the key/value pairs

23.5 Version 7.14.7

23.5.1 Resolved bugs

- [PT-14551] Chips are cut and full chip title cannot be reached

23.6 Version 7.14.6

23.6.1 Resolved bugs

- [DES-5840] Users and groups with short names sometimes not reachable in attribute suggestion list
- [PE-9531] Cannot complete a task when a variable associated with the identifier of a role is set to empty string
- [PT-14136] Users and groups with short names sometimes not reachable in attribute suggestion list
- [PT-14377] Diagram cannot be checked in when diagram assignment attributes contain inaccessible or circular references
- [PT-14415] Potentially long running upgrade step does not indicate progress

23.7 Version 7.14.5

23.7.1 Resolved bugs

- [DES-5859] Changing symbol type of a node does not apply on related processwarehouse export (fix for new symbol assignments)
- [PT-12924] Key value is displayed instead of title in diagram and catalog dashboard
- [PT-13564] Reduce the amount of calls and loaded data when validating a diagram
- [PT-13641] Cursor focus disappears on Catalog/Diagram edit page when typing in a value on an empty formatted text field
- [PT-13750] Opening an attachment opens a file with a uuid as name instead of the real file name
- [PT-13896] Checking in a diagram is not possible when using Firefox browser
- [PT-13965] Display of edit button for catalog entries is inconsistent for authors
- [PT-13987] Filter facets cannot be opened on mobile devices
- [PT-13988] Mobile touch scrolling not working on catalog filter facets
- [PT-14145] Re-indexing of catalog-search fails instead of appropriate error handling
- [PT-14165] Inconsistent data can cause publication steps to be repeated
- [PT-14183] Catalog entries with assignments are reindexed multiple times during bulk index
- [PE-9360] Claimed group tasks cannot be delegated by group members
- [PE-9194] Several diagram updated message in a short period cause loss of updates
- [PE-9372] Deputy: Task is reassigned when the person responsible does not have an assigned status
- [PE-9447] Formula for conditional hidden field not working properly
- [PE-9448] User Form Editor's details section scrolls the whole editor out of view

23.8 Version 7.14.4

23.8.1 Resolved bugs

- [DES-5926] UpdateMessages sent after the bulk update of diagrams don't have the correct priority
- [DES-5974] No archives are created for bulk updates
- [PE-9178] Files used in a JSON body of a REST service task include line breaks
- [PE-9278] Multi-line text fields link option is displayed incorrectly
- [PE-9300] ProcessApp Analyst has not access to the process app monitoring tab

23.9 Version 7.14.3

23.9.1 Resolved bugs

- [PT-14095] Workflow execution may result in endless loop

23.10 Version 7.14.2

23.10.1 Resolved bugs

- [PE-9115] Option labels are too long and oversize the fields in forms
- [PE-9124] Case progress calculation is inconsistent with the displayed flow
- [PE-9213] Call Activity Editor dialog is not centered and lacks a background
- [PE-9093] A text area in the form causes task completion to fail in the "My Tasks" view
- [PE-9135] The German translation of "Creator" in instance facets is incorrect

23.11 Version 7.14.1

23.11.1 Resolved bugs

- [DES-5888] Wrong thread pool configuration in some services

23.12 Version 7.14.0

23.12.1 New Features

Setting new standards in process modeling with Arty

In our effort to further revolutionize business process modeling and management, we are pleased to introduce Arty, our intelligent AI-based modeler and editor. Arty integrates the latest AI technologies to save you time while improving the accuracy and consistency of your modeling. By using Arty, you can ensure that your processes are modeled and documented not only faster and more accurately, but also with fewer resources.

Hint: Please note that the AI-powered features of Arty are not included in the standard license. Please contact your sales representative for more information.

Automatic BPMN process modeling

Arty provides the ability to *automatically generate complete BPMN processes*, including all associated resources. This feature is ideal for teams that need to create high-quality process diagrams quickly and without prior knowledge. By minimizing human error and accelerating the entire modeling process, you can be confident that your processes will be created not only faster, but with higher quality

Smart name suggestions during modeling

With the ability to *generate naming suggestions* for the next process flow elements as you model, Arty helps you maintain clear and consistent naming that seamlessly integrates with existing process structures.

Automatic generation of descriptions

In addition to modeling, Arty also supports the *generation of descriptions* for processes and process elements. This automated creation of clear and concise text facilitates documentation and improves accessibility and understanding of your process landscape.

Generation of catalog items

With Arty, you can now quickly and efficiently *create new catalog items*, such as documents or applications, from which you can directly select and create the appropriate items. Arty allows you to quickly expand your catalog without manual effort, greatly increasing efficiency.

With these advanced features, Arty sets a new standard for efficiency in business process modeling. We are confident that these innovations will significantly increase your productivity and help you efficiently meet the demands of modern business.

Filters for the governance lifecycle of diagrams and catalog entries

In the new user interface, we have introduced the ability to filter diagrams and catalog entries in the public workspace by their *governance lifecycle*.

Publication

- **Not published:** Filters content that has not yet been published.

- **Published:** Filters content that has been published.

- **Depublished:** Filters content that was previously published and then depublished.

Revision

- **Unmodified:** Filters content that has not been changed since it was published.

- **Modified:** Filters content that has been modified since it was published.

Workflow

- **Publication:** Filters content that is in the process of being published.

- **Resubmission:** Filters content that has been resubmitted for review.

- **Depublication:** Filters content that is in the process of being depublished.

These new filters help you keep track of the status and lifecycle of your diagrams and catalog items, enabling more efficient management in the public workspace.

Hint: The filter options were introduced with this version and cannot reflect the life cycle before the update. For example, diagrams or catalog elements that have already been published only appear in the "Published" filter category once they have been edited in the public workspace. The "Revision" filter category also only shows changes when the diagram or catalog item is published again. Until then, the value is "unknown".

Quick access to recently visited diagrams

We have introduced quick access to *recently visited diagrams* in the new user interface. When you open a diagram, you now see a list of your five most recently viewed diagrams in the diagram header. This list allows you to quickly and easily switch between your most recently viewed diagrams. Simply click on one of the diagrams in the list to open it directly and continue working seamlessly.

Gallery view for diagrams

A new "Gallery" tab is now available when navigating to the "Diagrams" section on large screens. This tab displays all diagrams in a selected category as gallery tiles, enhancing visual navigation and interaction.

Set access to archives in the publication

Administrators now have the ability to specify whether readers can access archived versions within the new user interface. This setting provides more granular control over what historical data is available to readers. If readers are allowed to access archives in the publication, they can now select all archived versions in the change view and compare them to the current version. This setting only applies to the new user interface.

Export of the current diagram version in the publication

With the new user interface, it is now possible to directly export the current version of a diagram in the publication. This removes the previous limitation that only archived versions could be exported.

Improved usability in the new user interface

We have significantly improved the interaction with the category explorer: You can now minimize the explorer further and resize it more easily using drag-and-drop, with a preview of the new size.

We have simplified catalog navigation: On the details page of a catalog entry, you can now navigate directly to a linked object, such as a diagram or another catalog entry, by simply clicking on the chip.

The height of all list entries has been optimized to take up less space, allowing more list entries to be visible at once.

Other optimizations have been made for low-resolution devices: In the Diagram list, Catalog, and Governance Cockpit, options are now available in context menus instead of on the bottom panes. When opening a category, diagrams are now displayed first, followed by categories.

Finally, the RACI matrix in the new user interface now displays all modeled RACI relationships between a role and an activity. Previously, only one relationship was shown.

Based on your feedback, we have renamed the "Properties" tab back to "Details" in the new UI to make it easier to find attributes and profiles. In the old interface, these views were called "Details".

Statement of Accessibility

We are constantly working to remove barriers in BIC Process Design. On the login page and in the help section, you can now view our *Statement of Accessibility* to learn about known barriers.

23.12.2 Existing administration functions available in the new user interface

The new user interface gives you access to familiar administrative functions. You can now easily manage and configure the following areas:

- *User*
- *User groups*
- *Attribute and profile view for diagrams and objects*
- *MyBIC*
- *Reports*
- *Corporate Design*
- *Method, Symbol color and layout assistant*
- *Catalog*

In future versions, we will integrate the remaining administration functions into the new user interface.

23.12.3 Process-Execution

Instance Progress Tracking

You can now easily monitor the progress of your instances directly from the case list. This feature provides real-time insights into the status of each instance in your workflow, enabling better decision-making.

Reports with Access to Tasks

Access all executed tasks of a case when generating reports, allowing for comprehensive and detailed insights into case activities. With this feature, users can generate more detailed reports.

Parallel Multi-Instance Activity

You can now define parallel Multi-Instance Activities within processes, enhancing workflow efficiency and scalability. This feature allows multiple tasks to be executed simultaneously based on a collection of data.

Group Emails

It is now possible to address user groups in send tasks. This enables effective communication by sending email notifications to all group members set as recipients, facilitating seamless collaboration and information sharing.

End Events Inside the Instance View

Enjoy improved process transparency with end events that are now visible to users within the process flow. This feature provides users with a clear understanding of process completion points, facilitating better process monitoring.

Overdue Task Notifications for Case Owners

Stay on top of task deadlines with notifications of overdue tasks within your cases. This feature empowers case owners to take timely action, reducing the risk of delays and ensuring smooth case execution.

Simplified Multiline Field View

Experience an enhanced user interface by viewing the value of multiline fields without the toolbar when not in editing mode. This feature provides a clutter-free view, allowing users to focus on content without distractions.

Multi Column User Forms

You can now customize user forms with multiple columns, offering greater flexibility and compactness. This feature enables users to design forms tailored to their specific needs, enhancing usability and efficiency.

Case Ownership Management

Improve accountability and ownership with the introduction of case owners. This feature assigns responsibility for case management, ensuring clear ownership and streamlined collaboration.

Analyst Case Visibility

Analysts can now easily view all cases to which they are assigned as the analyst for the ProcessApp. This feature provides analysts with quick access to relevant cases, streamlining their workflow and enhancing productivity.

Studio Stage Email Testing

Test emails from send tasks executed in the studio stage or test stage are now sent to the case creator only. This feature enables thorough testing of processes without disrupting other users, ensuring smooth process development.

Unified Handling of Results with the Collect Hit Policy

To have a consist handling of output variables with DMN tables using the hit policy "Collect", the result is now also an array if there is only one result. This feature simplifies data handling and processing.

REST API Signal Events

You can now trigger signal events via the REST API to allow waiting processes to continue. This feature provides greater flexibility and control over process execution, enabling seamless interaction with external systems.

Consistent Field Hinting

Maintain consistency in UI design with read-only fields now displaying hints in the same font color. This feature enhances visual clarity, improves user experience, and reduces cognitive load.

Overdue Reminder Optimization

Reduce notification overload with overdue reminders that are no longer sent for successful automated tasks. This feature streamlines communication, ensuring that users receive relevant notifications.

HTML Code Visibility in Email Templates

Users can now opt to see the HTML code to resolve issues, providing greater transparency and control over their content. This feature allows users to troubleshoot formatting issues more effectively and make precise adjustments directly in the HTML code.

Call Activity Subcase Management

Subcases started by a call activity now have a system creator as the case creator. However, the case owner remains the task owner of the call activity. This feature enhances traceability and accountability, ensuring clear ownership of subcases.

Usability Improvement

Enjoy improved usability with the increased size of the Task Dialog opened from the task list. For multi-column forms, the task form popup is 75% of the browser width, and for simple forms, the popup is 50% of the browser width. This feature enhances user interaction, makes it easier to work with large user forms, and improves the overall user experience.

23.12.4 Resolved bugs

- [DES-4826] User export does not work for customer with large number of users (>90k)

- [DES-5449] Security Improvements

- [DES-5778] The configuration for the max header size for the bpm-service uses the wrong property key in docker-client

- [DES-5853] Docker health check for proxy return always unhealthy if extra domain names are configured

- [PT-1580] Invalid characters in formatted text attribute blocks process warehouse export

- [PT-4375] Attachment not downloadable from chip with a cut name

- [PT-4872] Entity profile performance issue

- [PT-5614] Simulation of business rule fails when DMN contains date and time function

- [PT-6262] Document stamping fails if file ending is not all lower case

- [PT-6692] Empty examiner 2 and 3 get stamped

- [PT-6766] Comment emails will be sent to more recipients than the configured limit

- [PT-6982] Wrong styling of filters of Governance Cockpit

- [PT-12136] Placeholder texts exceed input field size

- [PT-12168] Catalog edit mode design issues

- [PT-12267] Tooltips are missing for administration cards

- [PT-12324] Stage switch does not get updated correctly

- [PT-12362] Help link in administration redirects to wrong section in online help

- [PT-12386] Catalog archives will be displayed in enabled edit mode

- [PT-12420] Input limit does not work for user group names in Portal

- [PT-12434] Some OCL rules lead to errors leading to an empty validation

- [PT-12531] Debug tool does not work correctly with relationship attributes

- [PT-12598] User group administration issues in Portal

- [PT-12667] User administration issues in Portal

- [PT-12683] Buttons on click (hold) have too strong color

- [PT-12711] Security improvement

- [PT-12804] Changed file upload limit is not respected in Portal

- [PT-12819] Top bar badge font color is wrong

- [PT-12832] User group members are not filtered out in add dialog

- [PT-12927] Request token does not get updated

- [PT-12960] Delete file in all languages dialog does not get displayed

- [PT-12962] Attachment attribute label gets display without a value

- [PT-12979] Direct link to an attachment leads to errors

- [PT-13023] Central search URL misses parameters

- [PT-13057] SVG does not get updated on language switch

- [PT-13082] Radio buttons on touch devices behave incorrectly

- [PT-13084] Catalog facet does not show custom attribute name changed in a object context

- [PT-13091] Printing does not work with a SVG logo set as footer or header

- [PT-13191] Missing tool tip for cut attachment names in Portal

- [PT-13205] Pasting a selection with free form elements or big images can cause errors

- [PT-13280] Label in quick modeler dialog is incorrect

- [PT-13281] Entity profile report availability is not taken from report descriptor

- [PT-13413] Error toasts get displayed to all users

- [PT-13440] Deleting assigned objects in catalog details page is not persisted

- [PT-13456] Diagram dashboard not displayed in Portal

- [PT-13463] Generate smart description tooltip is incorrect

- [PT-13465] Generated smart description gets inserted in wrong attribute

- [PT-13496] BPMN quick model import does not work with associations without edge symbols

- [PT-13540] Wrong error handling in central search

- [PT-13546] Validity expiration banner does get updated when switching stages

- [PT-13548] Invalid archive retention period values can get persisted

- [PT-13558] Archive export does not work on repository level

- [PE-1356] If a column in a DMN table contains prefilled values, not only strings are presented as dropdowns.

- [PE-1468] When delegating to a group, the instance is permanently listed.

- [PE-4135] A new tab created from the run link is not being updated if it is changed.

- [PE-7622] Dragging the scrollbar of the process flow view is not working and shows a not allowed icon.

- [PE-7791] The "My cases" list does not update the process name when a new case is created and a second tab is open.

- [PE-8059] Elastic is rejecting write operations due to the flood stage watermark being reached

- [PE-8153] The regexmatch formula returns the matching expression by default.

- [PE-8331] Sorting by status on the "My tasks" view is not working as expected.

- [PE-8399] Attachment names are not shown correctly.

- [PE-8513] The ordering arrow for columns in the case list is not shown if there is not enough space.

- [PE-8562] Fetching users from a group only returns the first 20 users.

- [PE-8566] The user form loads slowly.

- [PE-8663] Terminate end events are not archiving the case when the fragment where the event belongs is not completed.

- [PE-8749] German translations are incorrect in some places across the application.

- [PE-8896] Line breaks within the ProcessApp titles do not consider proper hyphenation.

- [PE-8906] Attachment URL is shown instead of the title of the attachment.

- [PE-8908] DMN evaluation filters variables with null values and makes the evaluation fail because there is no value for the corresponding input.

- [PE-8924] DMN tasks in error status do not show the error icon.

- [PE-8925] The attribute labels in the form inside the process flow view are not shown after refreshing the page.

- [PE-8978] The autocomplete suggestion list for formular fields in the form editor is not working in the form preview and default value

- [PE-8979] A ProcessApp beginning with a parallel gateway gets stuck.

- [PE-8983] Inclusive gateways at the beginning of a ProcessApp are failing.

- [PE-9048] Script/REST service task is stuck when it is not possible to add variables.

23.13 Version 7.13.24

23.13.1 Resolved bugs

- [PT-14876] When a pool as approved catalog item gets converted into a suggestion and activities will be dropped inside you cannot get the menu of the activity by right clicking

23.14 Version 7.13.23

23.14.1 Resolved bugs

- [PE-9624] User Form's multiple choice fields does not load correctly the key/value pairs
- [PE-9369] Call Activity with active status after archiving the parent case is shown in MyTasks view
- [PT-14741] Suggestions for assignment governance attributes are not filtered by range

23.15 Version 7.13.22

23.15.1 Resolved bugs

- [PT-14550] Opening files (PDF) directly in the integrated browser viewer behaves inconsistently throughout the application and opens file with uuid as name instead of the real file name
- [PT-14619] Diagrams cannot be checked in when assigned entities are not available

23.16 Version 7.13.21

23.16.1 Resolved bugs

- [DES-5840] Users and groups with short names sometimes not reachable in attribute suggestion list
- [PE-9447] Formula for conditional hidden field not working properly
- [PT-14136] Users and groups with short names sometimes not reachable in attribute suggestion list
- [PT-14377] Diagram cannot be checked in when diagram assignment attributes contain inaccessible or circular references

23.17 Version 7.13.20

23.17.1 Resolved bugs

- [PT-13750] Opening an attachment opens a file with a uuid as name instead of the real file name
- [PE-9194] Several diagram updated message in a short period cause loss of updates
- [PE-9372] Deputy: Task is reassigned when the person responsible does not have an assigned status

23.18 Version 7.13.19

23.18.1 Resolved bugs

- [PT-14145] Re-indexing of catalog-search fails instead of appropriate error handling
- [PT-14165] Inconsistent data can cause publication steps to be repeated
- [PT-14183] Catalog entries with assignments are reindexed multiple times during bulk index

23.19 Version 7.13.18

23.19.1 Resolved bugs

- [DES-5926] UpdateMessages sent after the bulk update of diagrams don't have the correct priority
- [DES-5974] No archives are created for bulk updates

23.20 Version 7.13.17

23.20.1 Resolved bugs

- [PE-9178] Files used in a JSON body of a REST service task include line breaks
- [PE-9278] Multi-line text fields link option is displayed incorrectly
- [PT-14008] Delete file in all languages dialog does not get displayed

23.21 Version 7.13.16

23.21.1 Resolved bugs

- [PT-13896] Checking in a diagram is not possible when using Firefox browser
- [PT-13754] Deleting user-assignment values is not possible in Portal

23.22 Version 7.13.15

23.22.1 Resolved bugs

- [PT-13564] Reduce the amount of calls and loaded data when validating a diagram
- [PT-13641] Cursor focus disappears on Catalog/Diagram edit page when typing in a value on an empty formatted text field

23.23 Version 7.13.14

23.23.1 Resolved bugs

- [PE-9084] Forms which are too big for the available screen size cannot be completed from the MyTasks view
- [PE-9093] Text area in form makes completion of task from My Tasks view fail

23.24 Version 7.13.13

23.24.1 Resolved bugs

- [DES-5888] Wrong thread pool configuration in some services

23.25 Version 7.13.12

23.25.1 Resolved bugs

- [PE-9029] Javascript Script Task do not have access to Java classes anymore

23.26 Version 7.13.11

23.26.1 Resolved bugs

- [PE-8952] Process Instance Monitoring View is partially hidden
- [PE-8979] A ProcessApp beginning by a parallel gateway get stuck
- [PE-8983] Inclusive gateways at beginning of ProcessApp are failing
- [PE-8993] Page layout incorrect when user lands on Mytasks page from a link - App stage
- [PE-8046] Elasticsearch is overload due to many request
- [PE-8955] Boolean fields with default value true are not working properly

23.27 Version 7.13.10

23.27.1 Resolved bugs

- [PE-8907] Disable Nashorn compatibility mode in the script engine to support JavaScript ECMA version 13
- [PE-8919] Breadcrumb is not shown in flow view when the page is refreshed
- [PT-13376] Notify UserFlow about enabled AI features
- [PT-13434] Default attribute values are not applied when creating a new entity
- [PT-12305] Default attribute values are not applied when an entity is created in the catalog

23.28 Version 7.13.9

23.28.1 Resolved bugs

- [PE-8796] Process variables of type Array are not available in reports

- [PE-8804] Diagram without a start behaves erroneous

- [PE-8811] ProcessApp is not checked in when it has multiple starting points and one of the paths is a single node

- [PE-8824] Logout button gets redirect to login page

- [PE-8826] Form data is lost when the application tokens expire because of inactivity

- [PE-8838] Formula Field producing values NaN causes a Bad Request when saving variables

23.29 Version 7.13.8

23.29.1 Resolved bugs

- [PT-12919] Update gpt-api version

- [PT-12927] Render-service runs into infinite request loop when request token is expired

- [PT-13257] Non-localized multi-value link attributes are not shown in the Catalog Details view in the new UI

23.30 Version 7.13.7

23.30.1 Resolved bugs

- [PT-12374] Attachment titles get double encoded

- [PT-13077] Object attribute icons will not be removed anymore after removing the node and undo the change

- [PT-13148] When opening or using an approved catalog item with a description that is missing a surrounding <p> tag, a suggestion is created without any user interaction

23.31 Version 7.13.6

23.31.1 Resolved bugs

- [PT-13078] Selecting an entity in a relationship attribute does not update symbol condition (Portal designer)

- [PT-13079] Removing an activity with entities in relationship attribute can cause inconsistent diagram data

23.32 Version 7.13.5

23.32.1 Resolved bugs

- [PT-13025] Chromium update centers the catalog list vertically, making half of the list inaccessible
- [PE-8699] Smart variables are mapped from sub case to parent case

23.33 Version 7.13.4

23.33.1 Resolved bugs

- [PE-8672] The placeholder replacement with text empty values make formulas fail
- [PE-8678] User Task's Boolean Fields are not initialized when starting the task

23.34 Version 7.13.3

23.34.1 Resolved bugs

- [PT-6076] Disabled content language gets set as alternative language on first login
- [PE-8443] Due date value does not work bidirectionally with process variables
- [PE-8480] REST, Report and Script tasks are being executed inside a transaction
- [PE-8539] User Form Default values are applied when the variable has a falsy value but not null nor undefined
- [PE-8566] User form is loaded slowly

23.35 Version 7.13.2

23.35.1 Resolved bugs

- [PT-12833] Reports execution fails when using a client token

23.36 Version 7.13.1

23.36.1 Resolved bugs

- [PT-7872] Cursor jumps to beginning of HTML attributes
- [PT-10599] Workflow-service sometimes does not restart automatically
- [PT-12409] Autocomplete list shows less than 5 results when potential results are already used
- [PT-12413] Enumeration values of 0 aren't displayed and cannot be validated
- [PT-12495] Removal of an internal allocation diagram generates broken visual data
- [PT-12550] Wrong context menu functions for approved catalog items in diagram editor

- [PT-12589] Disable process draft feature in UI

- [PT-12827] Copy pasting does not work anymore

23.37 Version 7.13.0

23.37.1 New features

Receive translation suggestions via DeepL connector (separate licensing)

In the public workspace of the new user interface, translation suggestions for language-dependent text attributes can be requested via the DeepL API. This enables even faster translation of multilingual content from *diagrams* and *catalog entries*. The feature is available in diagram and catalog translation modes and requires a connection to a DeepL account. Administrators can easily link their company's DeepL account in the new BIC Process Design administration to *connect their system to the DeepL API*.

Note: Please note that DeepL integration is separately licensed and needs to be activated for your account. Before linking a DeepL account, ensure your company policies allow data exchange with DeepL.

Bulk editing of diagram attributes in the public workspace

In the new user interface, we have significantly simplified the management of existing diagrams. Administrators and Editors can now comfortably make *bulk changes to the assignment attributes of diagrams* in the public workspace. The bulk editing function allows for efficient updating of an attribute value for multiple diagrams simultaneously.

Creation of a BPMN Quick Model including resources

In the *BPMN Quick Model Excel template*, resources for an activity can now also be captured. When importing the completed Excel template, the associated resources are automatically included in the generated BPMN diagram.

Note: Please note that importing resources may generate new catalog suggestions and does not rely on existing catalog entries.

Open PDF attachments directly in your browser's integrated PDF viewer

PDF attachments in both the old and new user interfaces are now opened directly in the browser's integrated PDF viewer. This allows you to easily view PDF documents even if you do not have a separate PDF viewer installed on your device or if you want to view the document before downloading it.

23.37.2 Existing functions available in the new user interface

Translate diagrams in the public workspace

We have improved the *translation mode for diagrams*. You can now access it in the public workspace without having to check out the diagram. The translation mode can be found in the diagram options.

Export repository

Administrators can *export a repository* via the category tree to download the data from the public workspace, preview, or publication.

Publish repository

Administrators and Editors can now *publish repositories* from the public workspace. To avoid unintended publications, we have implemented an additional security measure: Before publishing a repository, a confirmation dialog is displayed. This ensures users that the publication is intentional.

23.37.3 Improvements in the new user interface

Display diagram and object type

The type of a diagram or selected object is now displayed in the properties.

Integrated forward and backward navigation

We have improved navigation in the new user interface. You can now use the *integrated forward and backward navigation* to navigate forward and backward along your navigation path.

Property view for relationship attributes

You can now also open and display the properties of relationship attributes in diagrams and objects. This feature was already available for assignments and has been extended to relationship attributes.

Marking objects with comments in the diagram

We have improved *interaction with object comments*. Users can now select commented objects directly from the comment area to mark them in the diagram and move them into the visible area.

Displaying occurrence attributes in all diagram views

The values of occurrence attributes are now displayed in all diagram views. Please note that you may need to customize the profile view of objects to display the desired attribute.

23.37.4 Existing administration functions available in the new user interface

The new user interface provides access to familiar administration functions. You can now easily:

- Set *content, alternative, and default languages*
- Set *reminders for workflow tasks and resubmissions*
- Adjust archiving settings
- Set standard configuration of *header and footer for print outputs*
- Customize BIC Process Design to match your company's *corporate design*
- Select filters for *central search*

In upcoming versions, we will integrate additional missing administration functions into the new user interface.

23.37.5 Process-Execution

Timestamp in case overview

Users can now see in the case overview when a task was started and completed. Intermediate timer events are also displayed in the process flow view of a case. The trigger time of the intermediate event is also displayed. This promotes the transparency and traceability of your work processes.

Event-based process control

From now on, a message with the event ID is sent for throwing events such as end events or certain intermediate events. A corresponding catching event such as start events or certain intermediate events with the same identifier are automatically triggered by this message. This function enables a more transparent and precise control over your work processes.

Immediate process termination by end event

Cases can now be instantly terminated by terminating end events. This is useful whenever the process contains parallel paths, and the parallel activities no longer need to be executed when a certain end event is reached.

Configuration of output document reports

With Service Tasks, documents can now be created based on templates, like BIC Process Design. Users have the option to fill a Word template with data from the case and to flexibly choose between output formats Word and PDF. This extension enables efficient document creation and opens a wide range of application options for individual process requirements.

Defining multiple expected HTTP status codes

Users now have the option to specify multiple expected HTTP status codes when configuring REST requests. This new feature provides enhanced flexibility in API usage, allowing you to make your applications more robust and reliable. This is important, for example, if a particular endpoint sometimes responds with 200 and sometimes with 201. With the introduction of a new variable, "_response", you can access to the status code, enabling you to control the further course of the case.

Summary of case information in a variable

Until now, various pieces of information about the case were available in individual variables (e.g., creatorName). With the introduction of the new smart variable "_case", we have now summarised this information for all newly created processes. With the "_case" variable, customers can easily access case information.

Improved task and case search

Users now can search the task and case list using advanced filtering options, enabling efficient management and prioritization. These features allow you to quickly sort the lists by a specific column and order, as well as filter by due date to identify and focus on important tasks or cases. Additionally, you can search for tasks by name.

Input documents in subprocess

As a user, you now have the option to provide documents in the case for a subprocess. To do this, you simply need to model the document as input in the main process for the subprocess, and the file will be automatically made available in the subprocess.

Corporate Design and Redesign

The color configurations from BIC Process Design are now also adopted in BIC Process Execution to ensure a consistent design of the application. Additionally, we have further optimized the UI in BIC Process Execution and aligned it with the new UI from BIC Process Design.

Process variables for archived cases

From now on, ProcessApp Administrators can also access process variables for archived cases. For the ProcessApp Creator role, access to these variables remains limited to the Studio and testing environment.

Quick identification of signature tasks

Users can now identify which tasks are configured as signature tasks in their task list. This function allows for quickly identifying signature tasks and determining where additional authentication is required.

Notification for unsupported browsers

From now on, users will receive a notification when attempting to access the application using an unsupported browser. This notification aims to ensure that users have the best possible experience with the application and encounter no limitations due to their used browser.

23.37.6 Resolved bugs

- [DES-2920] Wrong warning information regarding the SAML group mapper configuration in the installation documentation

- [DES-4161] Security Improvement

- [DES-4481] Security Improvement

- [DES-4502] BPMN import fails if "<text>" section for an "textAnnotation" is missing

- [DES-4507] API Documentation contains "unresolved directive" problems in domain-service

- [DES-4983] SQL Statement to identify SSO-tenants in the toolbox does not collect all relevant tenants

- [DES-5330] Public-apigateway is not part of the "docker-compose-64.yml"

- [PT-1390] Examiner does not receive depublication mail

- [PT-6552] Date input field doesn't apply new value

- [PT-7248] Tenant customized colors are not applied to previously unsaved entities

- [PT-7504] AR and PL templates are not included in the template overview for manual reports in admin ui

- [PT- 8216] Matrix View becomes unresponsive with bigger data sets (Portal)

- [PT-8530] No search results default page will be displayed shortly

- [PT-9238] Workflow task dialog is displayed incorrect

- [PT-9844] Search facets in catalog change order

- [PT-9969] Catalog Favorites are saved as an empty tile

- [PT-9971] MyBIC Page in Portal reloads tiles when switching content language

- [PT-10299] MyBIC tiles don't work in high contrast mode

- [PT-10301] Interaction with item bar reloads attribute view

- [PT-10305] Check in warning dialog appears when using default values for access restriction

- [PT-10406] Catalog headers differ in different screen sizes

- [PT-10817] "Read more" button on long description is not reachable (Portal)

- [PT-11005] Renaming favorite fails (Portal)

- [PT-11198] Main diagram cannot be saved

- [PT-11256] Catalog resubmission isn't automatically closed after the depublication

- [PT-11359] Arabic, Japanese, and other supported languages text not displaying when printing a PDF

- [PT-11364] System attribute are displayed in profile view (Portal)

- [PT-11458, PT-11659] Security improvement

- [PT-11459] Report executions do not work for certain timezones

- [PT-11476] Empty mandatory attribute value prevents checkin
- [PT-11550] "Show more" option of description disappears (Portal)
- [PT-11562] Diagrams with allocation diagrams stuck in the loading screen
- [PT-11602] Export to excel only works by clicking the icon (Portal)
- [PT-11662] Suggestion list for assignment attributes is not usable
- [PT-11689] Character limit will be ignored in translation mode
- [PT-11701] Missing toast when modifing a catalog item within a diagram
- [PT-11709] [Firefox] Catalog list loses scroll position when navigating back from details
- [PT-11751] Incorrect behavior of long names (Portal)
- [PT-11932] Diagram navigation bar is not shown correctly for certain window sizes
- [PT-11943] Catalog edit button is displayed in Publication
- [PT-12066] Add user to group dialog is blank
- [PT-12068] Latest version option for a selected stage is disabled (Portal)
- [PT-12075] Design error
- [PT-12081] Occurrence attributes do not show up on attribute profile view (Portal)
- [PT-12082] Switching content/alternative language does not update columns in catalog translation mode
- [PT-12087] Commentator name is not visible in the comment hub (Portal)
- [PT-12108] Process Warehouse export shows disabled attribute types
- [PT-12186] Edit link dialog in rich text field freezes diagram editor
- [PT-12262] Catalog translation mode can be left without dialog (Portal)
- [PT-12266] Catalog translation button is visible in Publication (Portal)
- [PT-12289] Incorrect visual feedback for unavailable assignments in Profile View (Portal)
- [PT-12292] Removing a description in diagram does not delete the value
- [PT-12348] Subcategories are displayed duplicated in category tree (Portal)
- [PT-12355] [Firefox] Customer logo is sized incorrectly (Webclient)
- [PT-12376] Back button does not work after opening a diagram through Governance cockpit
- [PE-2297] Field Size in form field editor doesn't change width
- [PE-4635] Mobile View: Background fails to scroll to last element while scrolling the menu
- [PE-5753] Group icon missing in process flow and in form in responsible chip when group is assigned
- [PE-7774] Service Task "OAuth2" error message will not go away, after we change the authentication type
- [PE-7859] Edit Process Variable and Archive Instance Button are shown after an Instance is completed
- [PE-7884] Prometheus endpoints are not installed
- [PE-7905] Subcases and cases with attachments with expired retention period are not removed
- [PE-7939] Sonar test coverage is not calculated
- [PE-7965] Many threads crash the system with an OOM Exception
- [PE-8001] Date picker input fields do not allow manual date entry

- [PE-8159] Email reminders are notifying for tasks with due date today a day before the expected one

- [PE-8175] "Show more" button of the form description is not displayed when description is long

- [PE-8311] Conditional text area loses content when hiding and un-hiding (visual issue)

- [PE-8316] Sort by task name is not working properly

- [PE-8318] Mandatory validation of form fields is not enforced when claiming and completing tasks very quickly

- [PE-8347] Exporting report does not work

- [PE-8357] Insufficient error logging for deletion of non-execution users or groups

- [PE-8358] Out of memory is thrown when a process definition with many cases is updated

- [PE-8382] Tasks list columns are not aligned with their headers

- [PE-8392] Inconsistent update of assigned role in cases across database

23.38 Version 7.12.21

23.38.1 Resolved bugs

- [PT-13896] Checking in a diagram is not possible when using Firefox browser

23.39 Version 7.12.20

23.39.1 Resolved bugs

- [PT-13564] Reduce the amount of calls and loaded data when validating a diagram

23.40 Version 7.12.19

23.40.1 Resolved bugs

- [PE-9029] Javascript Script Tasks do not have access to Java classes anymore

23.41 Version 7.12.18

23.41.1 Resolved bugs

- [PE-8955] Boolean fields with default value true are not working properly

- [PE-8979] A ProcessApp beginning by a parallel gateway get stuck

- [PE-8983] Inclusive gateways at beginning of ProcessApp are failing

- [PE-8046] Elasticsearch is overload due to many request

23.42 Version 7.12.17

23.42.1 Resolved bugs

- [PE-8907] Disable Nashorn compatibility mode in the script engine to support JavaScript ECMA version 13
- [PE-8919] Breadcrumb is not shown in flow view when the page is refreshed

23.43 Version 7.12.16

23.43.1 Resolved bugs

- [PE-8804] Diagram without a start behaves erroneous
- [PE-8811] ProcessApp is not checked in when it has multiple starting points and one of the paths is a single node
- [PE-8824] Logout button gets redirect to login page
- [PE-8826] Form data is lost when the application tokens expire because of inactivity
- [PE-8838] Formula Field producing values NaN causes a Bad Request when saving variables
- [PE-8897] Entire reindexing fails, if single document update throws an exception

23.44 Version 7.12.15

23.44.1 Resolved bugs

- [PT-13077] Object attribute icons will not be removed anymore after removing the node and undo the change
- [PT-13148] When opening or using an approved catalog item with a description that is missing a surrounding <p> tag, a suggestion is created without any user interaction

23.45 Version 7.12.14

23.45.1 Resolved bugs

- [PT-13078] Selecting an entity in a relationship attribute does not update symbol condition (Portal designer)
- [PT-13079] Removing an activity with entities in relationship attribute can cause inconsistent diagram data

23.46 Version 7.12.13

23.46.1 Resolved bugs

- [PT-13025] Chromium update centers the catalog list vertically, making half of the list inaccessible

23.47 Version 7.12.12

23.47.1 Resolved bugs

- [PE-8672] The placeholder replacement with text empty values make formulas fail
- [PE-8678] User Task's Boolean Fields are not initialized when starting the task

23.48 Version 7.12.11

23.48.1 Resolved bugs

- [PE-8568] Blank values in the process variables form for certain data types gives an error
- [PE-8566] User form is loaded slowly

23.49 Version 7.12.10

23.49.1 Resolved bugs

- [PT-7872] Cursor jumps to beginning of HTML attributes
- [PT-12409] Autocomplete list shows less than 5 results when potential results are already used
- [PT-12413] Enumeration values of 0 aren't displayed and cannot be validated
- [PT-12495] Removal of an internal allocation diagram generates broken visual data

23.50 Version 7.12.9

23.50.1 Resolved bugs

- [PE-8539] User Form Default values are applied when the variable has a falsy value but not null nor undefined
- [PE-8448] User Form does not activate after starting a step manually
- [PT-10599] Workflow-service sometimes does not restart automatically

23.51 Version 7.12.8

23.51.1 Resolved bugs

- [PT-11659] Security improvement
- [PT-12287] Internal allocation diagrams cannot be opened in new UI

23.52 Version 7.12.7

23.52.1 Resolved bugs

- [PE-8341] Performance issues updating ProcessApp definitions
- [PE-8364] Tasks with only attachment form fields cannot be completed
- [PE-8390] Signature tasks cannot be completed

23.53 Version 7.12.6

23.53.1 Resolved bugs

- [PT-12270] Improve SVG compressing

23.54 Version 7.12.5

23.54.1 Resolved bugs

- [PT-12223] SVG image compression is performed on every request and blocks following requests
- [PT-12231] Fit SVG to screen is always enabled in new UI

23.55 Version 7.12.4

23.55.1 New features

- [PE-8297] Delete instances not found in Camunda for studio/test stage and notify for app

23.55.2 Resolved bugs

- [PE-8311] Conditional text area loses content when hiding and un-hiding

- [PE-8318] Mandatory validation of form fields is not enforced when claiming and completing tasks very quickly

- [PE-8324] Postgres error resizing shared memory because no space left on device

23.56 Version 7.12.3

23.56.1 Resolved bugs

- [PT-8786] Manual report shows tables in description attribute with minimal width

- [PT-11601] Content language changes unexpectedly in Portal

- [PT-11657] Change comparison only works when an archive is already existing in Portal

- [PT-11704] Attribute hub does not update data after deleting name and switching between nodes of the same type

- [PT-11752] Blocking OCL rule violations do not prevent the user from check in

- [PT-11783] Cross stage diagram comparison doesn't work in Portal when there is no archived version yet

- [PT-11930] Long text attribute values are not cut and make 'Show changes' button unreachable in Portal

- [PT-12022] Relationship attributes for input and output create wrong edge direction

23.57 Version 7.12.2

23.57.1 Resolved bugs

- [PT-9229] Description of catalog items is missing on catalog list in Portal

- [PE-7982] Text variables which represent a ISO date values are always saved like date but only is needed for Service tasks and external cases creation

23.58 Version 7.12.1

23.58.1 Resolved bugs

- [PT-10139] "Open in new window" attribute gets changed after checking a diagram / catalog item out

- [PT-11140] Switching the suggestion filter on hides entity type filter

- [PT-11305] Pool generated by the excel import can not be copied

- [PT-7251] Responsible gets logged in audit trail and mail instead of responsible (resubmission)

- [PT-10582] Document links created via "Copy URL" are not valid hyperlinks

- [PT-10803] Diagrams sorted incorrectly when filtering

- [PT-10816] Role restrictions are incorrectly applied in Portal

- [PT-10964] Attachment containing special characters cannot be downloaded in Portal

- [PT-11232] Hidden attributes are getting exported in process warehouse

- [PT-11272] You cannot delete free form lines from the canvas

- [DES-4809] Deletion of tenant data for tenants with a huge amount of documents/archives could fail

- [DES-4847] User export is not working for tenants with thousands of users

- [DES-4934] Repository export may fail in case of a complex category structure

23.59 Version 7.12.0

23.59.1 New features

Automatically create a BPMN diagram via Excel import

Administrators and editors can now *download an Excel template for BPMN diagrams* from the online help and easily, consistently, and efficiently capture their processes in Excel. Add activities and responsible roles and import the Excel file into the public workspace of the new user interface. A graphical BPMN diagram is automatically generated with the specified responsible roles as pools and lanes. Activities are connected by a continuous sequence flow.

Hint: Please note that this feature is only available in the new user interface. If further editing of the graphical BPMN diagram is required, users need to switch to the old user interface. In future versions, we plan to add support for satellites.

Restructured occurrence list and extended evaluation for assignment attributes

We have made significant optimizations to the occurrence list in the catalog and diagram options for modeled objects to enhance clarity and detail.

The structure of the occurrence list has been reorganized to include a dedicated entry for each diagram. Instead of a long list of uses, you will now find separate entries for each diagram in which the object is used. These entries are easily accessible and give you a detailed view of how the object is used in that diagram. With just one click, you can seamlessly navigate to the precise usage and quickly visualize connections.

Additionally, we have extended the occurrence list to display the usage of assignment attributes. This means that you can easily review all instances of an object's usage, allowing you to navigate to specific use cases effortlessly.

New sorting for multivalued attribute values

We have improved the search for specific attribute values when dealing with multiple entries in the new user interface. The user's current content language is now automatically used to sort the values of assignment attributes, text attributes, links, and files alphabetically. Examples of such attributes are standard attributes like 'author', 'reviewer', 'keyword' and 'attachment (URL)'. Custom attributes are sorted similarly. The sort order is applied in the matrix view, in the properties, in the quick access under an icon in a diagram, and on the details page of a catalog entry.

Hint: Please note that alphabetical sorting is currently not supported in reports and exports. We are actively working to remove this limitation in future updates. This sorting is not available in the old user interface.

Execute reports on archived diagram versions

The new user interface now allows you to run reports on archived process versions. You can simply *open the archive of a diagram version* and execute a *report on that version* without the need to manually restore the diagram version. This saves time and greatly simplifies your work. You can run reports at any time, which is important for long-term projects that started with an archived process version.

Hint: Please note that reports do not explicitly indicate whether the version is archived.

Change of report templates for add-ons

Administrators now have full control over the change of add-on-provided report templates.

Hint: Please be aware that the customization options for add-on templates may differ from the standard ones. Refer to the according add-on documentation for details. Changing templates can impact the functionality of these reports.

Converting timestamps for reporting and exporting

The time zone of a logged-in user is now considered when creating reports and exports to ensure that the timestamps refer to the same reference time zone as in the user interface.

Additional content language

Persian can now be *enabled as a content language* in the administration.

23.59.2 Method

Method for modeling in attributes

The standard method has been updated to faciliate the transition to modeling resources and satellites within attributes, if you are considering this innovative approach. The default method now includes predefined relationship attributes that can be activated in activities. Additionally, an alternative symbol has been added to indicate that there are resources that are not graphically visible on the modeling interface.

The following attributes are available in the standard method:

- · A - Responsible role(s)
- · C - Contributing role(s)
- · I - Role(s) to be informed
- · Supporting application(s)
- · Required input(s)
- · Produced output(s)
- · Risk(s) Occurring

When these relationship attributes have a value, an icon is displayed within the alternate activity symbol, drawing attention to the specific attribute.

Hint: Please note that we recommend making any necessary changes to the method either after training or by requesting us to make the customization. The configuration may not be suitable for inexperienced users. To customize your method, access to the BIC Method Editor is necessary.

Validation of properties of assigned objects

The properties of objects within a diagram can now be validated using OCL in validation.

Hint: Please note that the default validation does not contain a rule that uses this possibility. To customize the validation rules, you need access to the BIC Methods Editor.

23.59.3 Existing functions available in the new user interface

Manage repositories in the administration of the new user interface

In the new user interface, *repository management* has been moved to Administration. You can find all existing repositories there and *edit* and *delete* them. Deleting a repository has been provided with an additional security confirmation prompt to minimize the risk of accidentally deleting it and losing valuable data.

Currently, the list of repositories does not include repositories that have access restrictions set that exclude the administrator. In future versions, administrators will be able to view all repositories. However, they will not have access to the contents of a repository if access restrictions prohibit it.

Printing with individual print settings

The *print settings* can now be customized in the diagram options. All print options that were available in the old user interface are still available.

23.59.4 Process-Execution

Intermediate Timer-Events

Designers can now define intermediate timer events, enabling fine-tuned control over case progression. This feature allows you to specify a waiting time, ensuring that your cases pause for the defined duration. This precision enhances process orchestration and helps you optimize your case management.

Data Mapping in Service Task

When configuring a service task , you can now set it to ignore the response. This additional control prevents the automatic mapping of response bodies to process variables, enabling you to customize the handling of service task responses according to your specific needs.

Service Task Response Handling

When using a service task , the response is now automatically stored in a process variable named "_response.". This variable provides access to the header of the response, allowing for greater flexibility in handling and utilizing the data in subsequent process steps.

Enhanced Task Monitoring

In this release, we've made it easier for case managers to track the tasks by introducing the ability to view open tasks organized by assignee. This feature simplifies task management and provides clear visibility into assignments, making it more convenient to manage and prioritize work.

File Fields in Form Editor

When configuring forms, you can now add a file field, providing you with additional customization options for handling files within your processes. This enhancement empowers you to tailor file-related configurations to meet your specific requirements, making form design more versatile.

Enhanced File Upload Experience

When interacting with file uploads in forms, users will now see a visual representation of the uploaded file's name. This feature enhances the user experience by making it easier to identify and manage uploaded files.

Integrated Browser Viewer

You can now open PDF files directly in the integrated browser viewer, allowing you to quickly view file content without the need to download. This feature saves time and improves accessibility, making it easier to access and review files within your processes.

Full Text Search for Case Names

Users can now perform comprehensive full-text searches in the case list, enhancing your ability to find and access specific cases quickly. This feature streamlines case discovery, saving you time and effort in navigating your cases.

Case and Task List Sorting

Users now have the option to sort the task list and the case list, enabling efficient management and prioritization. With this feature, you can quickly identify and focus on the most critical tasks or cases at hand.

Access Control

Access control has been refined in this release to provide more tailored permissions. Please note that with Version 7.12, it's essential to assign the specific ProcessApp roles to your users. These roles are now checked for compliance, and proper role assignment is crucial to ensure a seamless and secure experience with BIC Process Execution:

- ProcessApp Creators now have exclusive access to execution editors, granting greater control over process execution and refinement. In previous versions, all authors had the ability to configure tasks in Process Execution Editors.

- ProcessApp Creators can seamlessly view and edit process variables directly in the studio stage, streamlining ProcessApp development and customization.

- Creating new instances now requires the ProcessApp User role, giving you greater control over different stages in your processes.

- Task assignment and work can only be carried out by ProcessApp Participants. This helps maintain clear responsibilities and ensures that only authorized users can interact with tasks.

- The admin area is now exclusively accessible to ProcessApp Administrators, ensuring the secure and efficient administration. It's worth noting that a BIC Design Administrator can no longer access the administration area in BIC Process Execution.

Gateway Task Assignment

Tasks created at gateways are now automatically assigned to the corresponding lane, providing more effective responsibility allocation. This feature simplifies task management, ensuring that tasks are consistently assigned to the right team or individual.

23.59.5 Resolved bugs

- [DES-3483] Security improvement

- [DES-4036] Caching of method failed because of serialization issues

- [DES-4132] BPMN file can't be imported if it contains xsi:type="dc:Point"

- [DES-4139] Missing migration for entities that have AT_NAME as node attributes

- [DES-4152] The system does not prevent users from creating domain objects in stage Preview and Publish

- [DES-4153] When importing BPMN files, for some edges the import uses outdated edge-symbol stereotypes

- [DES-4541] Deleting a single document does not remove the data properly

- [PT-10035] Failed workflows are not correctly aborted

- [PT-10285] Edit option for catalog item is displayed in preview in Portal

- [PT-10978] Add-on reports are incorrectly listed in catalog in Portal

- [PT-10994] Relationship attributes are not displayed in the publication and preview

- [PT-10999] New user group gets displayed in list only after refreshing the page

- [PT-11014] Diagram gets duplicated after cut and paste in category panel in Portal

- [PT-11034] Phrase search cannot be saved as search favorite in Portal

- [PT-11058] Missing spacing to the right for default favorite badges on small resolution devices in Portal

- [PT-11080] Properties panel can be opened in audit trail on small resolution devices in Portal

- [PT-11101] Filter of diagram view not working reliable in Portal

- [PT-1754] Switching the role from Reviewer to Reader does not switch stage to Publication in Portal

- [PT-4481] Some special characters in a comment are shown in unicode in emails

- [PT-4918] Attachments cannot be downloaded in catalog in Portal

- [PT-8106, PT-8342, PT-9322] Security improvements

- [PT-8663] Users in user groups are sorted incorrectly and duplicate entries will be shown while scrolling through the list

- [PT-9033] Diagram editor logs misleading error message

- [PT-9547] Multi-value attributes are not testable via OCL

- [PE-1108] The option "Add team member" is not completely displayed in the German version within the case's details

- [PE-2698] Boolean fields should default to false in DMN Tasks

- [PE-2779] Gateway Evaluation fails when checked string variable is null

- [PE-2975] Progress bar does not differ between completed and running tasks on overdue

- [PE-3667] Formating applied on email editor is not set in Execution email preview

- [PE-4170] Process with multiple gateways does not start first task

- [PE-4504] ProcessApp Icon Color is not consistent across the application

- [PE-4821] When deputy is delegated an error task, task counter is not update immediately

- [PE-4998] Ng-hal-forms not setting default header

- [PE-5060] Collection cards do not have ellipsis overflow

- [PE-5113] Process Apps in favourites tile show randomly in the wrong order

- [PE-5838] User Picker errors when User/Group begin with the same substring

- [PE-5908] Role assignment is not set in sub case

- [PE-7165] My task/Group task list don't upgrade correctly when task list is empty

- [PE-7178] Forms Editor fails to detect circular dependencies in in formulas when changed in the field list

- [PE-7313] Instances of deleted diagrams can still be created in app stage

- [PE-7319] Gateways whose execution result in no decision being made end up in state completed, instead of error

- [PE-7324] In certain situations there is a problem with the forecast where a case is not able to show the flow

- [PE-7343] Error creating instance in ElasticSearch for instances created from a timer start event

- [PE-7370] Date Input fields are not editable on smaller screens or when zoomed in

- [PE-7404] Instance is not archived in ElasticSearch

- [PE-7438] Textbox is not alligned with checkbox on Editor Service

- [PE-7514] In the list of fields, you cannot select a field if you click inside the input.
- [PE-7527] Reduce the attributes information of the flow steps to avoid performance issues getting the flow of case
- [PE-7629] Initial readonly and mandatory expression evaluation is failing
- [PE-7707] Update and remove Process Collections templates are sent to NO Admin users in ProcessApp view
- [PE-3272] Process flow calculation breaks on loops with non-exclusive gateways
- [PE-6058] Performance issues on ProcessApp Collections view
- [PE-6148] Script tasks with float variables fails
- [PE-7326] Some Material Icons are missing
- [PE-7344] Can not open link of Disabled URL Field in Firefox
- [PE-7362] Too many variables makes URL too long when requesting variables leading to 414
- [PE-7363] Error evaluating formulas in field conditions
- [PE-7410] Pending task reminder mails are sent without pending tasks
- [PE-7513] Not all Owner are shown as filters in the case list view of a ProcessApp

23.60 Version 7.11.15

23.60.1 Resolved bugs

- [PT-13148] When opening or using an approved catalog item with a description that is missing a surrounding <p> tag, a suggestion is created without any user interaction

23.61 Version 7.11.14

23.61.1 Resolved bugs

- [PT-13025] Chromium update centers the catalog list vertically, making half of the list inaccessible

23.62 Version 7.11.13

23.62.1 Resolved bugs

- [PT-7872] Cursor jumps to beginning of HTML attributes
- [PT-10599] Workflow-service sometimes does not restart automatically
- [PT-12409] Autocomplete list shows less than 5 results when potential results are already used
- [PT-12495] Removal of an internal allocation diagram generates broken visual data

23.63 Version 7.11.12

23.63.1 Resolved bugs

- [PE-8390] Signature tasks cannot be completed
- [PE-8448] User Form does not activate after starting a step manually

23.64 Version 7.11.11

23.64.1 Resolved bugs

- [PT-11659] Security improvement

23.65 Version 7.11.10

23.65.1 Resolved bugs

- [PT-11783] Cross stage diagram comparison doesn't work when there is no archived version yet

23.66 Version 7.11.9

23.66.1 Resolved bugs

- [PT-11657] Change comparison only works when an archive is already existing in Portal

23.67 Version 7.11.8

23.67.1 Resolved bugs

- [PE-7946] A String variable with date format 'DD-MM-YYYY' is converting into date and the generated date is not correct
- [PE-7982] Text variables which represent a ISO date values are always saved like date but only is needed for Service tasks and external cases creation

23.68 Version 7.11.7

23.68.1 Resolved bugs

- [DES-4934] Repository export may fail in case of a complex category structure
- [PT-11580] Move activities to other lanes is not possible

23.69 Version 7.11.6

23.69.1 New Features

- [PE-7495] As a process designer, I want to store the response of a service task as a process variable, so that I can access and utilize various parts of the response in subsequent steps of the process
- [PE-7699] Prepare services so that quay labeling for legacy releases is easy possible

23.69.2 Resolved bugs

- [PE-7598] Long automatic tasks could block all database connections
- [PE-7629] Initial readonly and mandatory expression evaluation is failing

23.70 Version 7.11.5

23.70.1 New Features

- [PT-9819] As a user, I want to see changes in relationship attributes in version comparison so that I can identify the differences of two versions
- [PT-10264] As a user, I want to use OCL for relationship attributes
- [PT-9916] As a symbol editor, I want to use association types as conditions for formatting symbols

23.70.2 Resolved bugs

- [PT-10694] When deleting a node that has Relationship Attributes maintained, the Relationship nodes do not get deleted and produce ghost nodes
- [PT-10626] Catalog items are created without default assignment in Portal

23.71 Version 7.11.4

23.71.1 Resolved bugs

- [DES-4550] Wrong max-http-header size configuration for some services
- [DES-4053] Elasticsearch frequently restarts due to memory problems
- [PE-7586] In a JSON body, when utilizing placeholders for string arrays, the quotation marks are missing
- [PE-7607] Hyperlinks in disabled/readonly fields are not functional in Firefox

23.72 Version 7.11.3

23.72.1 Resolved bugs

- [PE-7457] Migration of gatewaypoints fails

23.73 Version 7.11.2

23.73.1 Resolved bugs

- [DES-4447] SQL Statement to identify SSO-tenants in the UPGRADE.md for version 7.11.0 does not collect all relevant tenants
- [PT-10321] Categories cannot be reached on small resolution devices
- [PT-10477] Associations of relationship attributes are created in the wrong direction

23.74 Version 7.11.1

23.74.1 Resolved bugs

- [PT-9944] Scrolling diagram filters does not work on small screens (e. g. mobile devices)
- [PT-10063] Unable to search in categories for diagrams after the category or diagram was moved
- [PT-10302] Process cost analysis report does not calculate resources
- [PE-7342] ObjectOptimisticLockException when calculating the path with gateway expressions
- [PE-7391] Task details view does not open on mobile

23.75 Version 7.11.0

23.75.1 New Features

Set validation scope of languages for mandatory attributes

Administrators now have more control over the *validation of mandatory language-dependent text attributes* during publishing workflows. With this update, administrators can now specify whether these attributes should contain a value in any content language, a value in the enabled default content language, or a value in all enabled content languages. These settings apply to new workflows from the beginning, while ongoing workflows keep their existing settings. This configuration can only be set in the new user interface administration.

Improved notifications for editorial releases and favorites

In this release, we have made adjustments to the default behavior for *scope e-mails* in editorial releases and notifications for updated favorites. **By default, the scope will no longer receive notifications about changes when an editorial workflow is initiated.** However, users still have the option to send scope e-mails by selecting the mail sending feature in the workflow start dialog.

Similarly, in the new user interface, we have updated the default behavior for *change notifications related to newly marked favorites*. **By default, we will no longer send change e-mails for newly marked favorites.** Instead, users are now required to actively subscribe to receive change notifications for their favorites. **Change e-mails will continue to be sent for favorites marked in the old user interface.**

It is important to note that we will continue to send change notifications for existing favorites to facilitate a smooth transition to the new default behavior. Users can manage their change mail subscriptions, including subscribing and unsubscribing, on their myBIC page within the new user interface.

Favorite catalog lists

In the new user interface, we have introduced a new feature that allows users to *mark lists in the catalog as favorites*. Once marked a catalog list as favorites, this lists will conveniently appear as tiles on your myBIC page, providing easy access to their preferred catalog items. We do not send change notification e-mails when a favorite catalog list is updated. Additionally, at present, there is no explicit subscription option available for these updates.

It is important to note that the catalog favorites feature is exclusively available in the new user interface. If you are using the old user interface, you will not find the Catalog Favorite tile on your myBIC page, and you will not be able to mark a catalog list as a favorite in the catalog of the old user interface. Furthermore, Administrators cannot set a catalog favorite as a myBIC configuration for their organization.

Alternative to the graphical modeling of resources

We have introduced a new feature that allows you to model the relation between resources and activities within the activity attributes. Once you have prepared your method accordingly, you can select a catalog entry in the corresponding activity attribute or directly create a catalog proposal from the suggestion list. This automatically establishes the configured relationship between the selected catalog entry and its activity.

This alternative approach to graphical modeling offers many advantages. For example, the resources of an activity no longer need to be arranged graphically, and existing processes can be more easily maintained throughout their lifecycle. Readers see the resources in a more natural representation and do not need to learn a specific notation to understand the process.

Please note that this new capability needs to be activated in your method and is not available automatically. Before enabling this feature, we recommend checking its impact on your modeling conventions. Currently, the functionality of this new modeling option is still limited. Version comparison is not yet optimized for this new approach, and validation needs to be extended. However, these limitations will be improved shortly.

Save simulation parameters and continue working with them

We have optimized the simulation to enhance usability. From now on, you can assign individual names to simulation scenarios, enabling better navigation among different scenarios. Additionally, you can now *save the entered parameters* of a scenario and continue working on them later if needed. These saved scenarios are also visible to other simulation users, promoting collaboration.

Please note that scenario names cannot be changed afterwardsand that scenarios saved in new diagram versions will no longer be available if the previous diagram version has been archived.

Existing features available in new user interface

Print diagram graphic with default print settings

In the new user interface, you now have the option to *print the diagram graphic* of a checked-in diagram through the options panel. Currently, you have access to default standard print settings that cannot be customized individually. Nevertheless, enhancements in this aspect are scheduled for the near future.

Rename personal favorites on myBIC

On your myBIC page, you can now *rename* diagram, catalog list, and search result favorites using the context menu of each respective tile. Renaming does not affect the content of the personal favorite but exclusively contributes to better user clarity. The changes made apply only to the active content language.

Please note that standard favorites defined by the administrator cannot be renamed.

23.75.2 Process Execution

Filter Facet Date Range Options

We are excited to introduce a brand-new feature that enhances your task and case management experience. As a user, you now have the power to conveniently filter your lists of tasks and cases based on specific date ranges for due dates. This means you can easily narrow down your workload and focus on the tasks that matter most within your desired timeframe.

Task Status Monitoring

We have added a task status monitoring feature that displays the status of your open tasks. This means you'll have quick and easy access to see how your tasks are progressing without having to dig through details. Stay informed and in control with this new addition.

Global Variable Management

We are thrilled to announce that users can now use global variables in their processes. This powerful addition allows you to create more dynamic and adaptable workflows, utilizing variables that can be accessed throughout your processes.

We have also rolled out a handy enhancement that gives you more control over your application's configuration. You now have the ability to delete global variables that are no longer needed. This helps keep your application clutter-free and ensures you're utilizing resources efficiently.

Process Enhancement - Task Start Restrictions

Authors and users working with ProcessApps, this one is for you. We've added a feature that allows authors to define restrictions on manually starting tasks. This means you can have better control over your process flow, ensuring tasks are initiated only when appropriate. This enhancement provides a more streamlined and efficient process.

Process Enhancement - Skip Case Creation Start Form

We are all about optimizing your workflow. Authors, we heard you! You can now define that the case creation start form will be skipped. By skipping this form, you gain the advantage of creating a specific form as the first task in a process. This opens up possibilities for delivering a tailored and engaging user experience right from the start.

Seamless Navigation to BIC Process Design

Users can now seamlessly jump from their ProcessApp to the corresponding diagram in BIC Process Design. This feature enhances collaboration and ensures a smoother transition between design and implementation.

Base64 Encoded File Transfer

Need to send files as part of your JSON request? We have got you covered. With this new feature, users can now send files as base64 encoded strings in JSON request bodies. This simplifies the process of sharing files and streamlines data integration across your systems.

Starting Timer Event Option

We have tidied things up to ensure a clean and user-friendly experience. You will notice that when a process has a starting timer event, this event will not appear as an option during manual process initiation. This design decision emphasizes the automatic triggering nature of timer events, ensuring a more intuitive and efficient user experience. This subtle adjustment helps maintain clarity in your process options.

23.75.3 Resolved bugs

- [DES-3793] Missing logging configuration for elasticsearch and audit-logstash in docker-compose-local.yml(.example)
- [DES-4040] domain-data-archive-service creates error logs for repository exports
- [DES-4054] BPMN import seems to run indefinitely if an internal error occurs
- [DES-4151] Metrics configuration for spring services are not correct
- [DES-4276] Logout is not possible when user token size is above 4KB

- [DES-4439] Some modules do not support SCRAM authentication for database connectivity

- [PT-1859, PT-1951, PT-2355, PT-4104, PT-9724, PT-9725, PT-9726] Navigating to a different repository does not update repository switch

- [PT-1860] Custom name for catalog item profile is not displayed correctly (Portal)

- [PT-6871] File title is HTML encoded in title edit dialog

- [PT-7585] Sanitizing HTML attributes is too strict

- [PT-7818, PT-9089, PT-9312] Security improvements

- [PT-8743] Header of catalog item details page is not sticky

- [PT-9255] Pasting content into HTML attribute takes over unsupported HTML tags

- [PT-9265] Search field clearing fails to clear filter facets in diagrams, catalog, governance, and central search

- [PT-9436] Publish option is missing for categories (Portal)

- [PT-9442] User login count is capped to 10000

- [PT-9467] Catalog item profile report cannot be triggered (Portal)

- [PT-9489] Indexing attachments causes memory errors

- [PT-9703] Administration tiles in Portal are not colored

- [PT-9729] Misleading description of process warehouse report

- [PT-9753] Favorite update mail has wrong reference

- [PT-9843] Applicable documents cannot be downloaded (Portal)

- [PT-9999] Catalog item profile report has wrong page break

- [PT-10063] Unable to search in categories for diagrams after the category was moved

- [PT-10134] Changing to suggestion a catalog element doesn't update publish button properly

- [PT-10140] Approve/Reject button is briefly shown when opening catalog details view in publication

- [PE-6883] Exporting in the DMN Editor does not work on Firefox

- [PE-6888] Update a task takes to long

- [PE-6898] Improve Flow View loading screen when creating a case of an empty diagram

- [PE-6919] XS/S version: Filter Design is incorrect

- [PE-7056] Error when case name exceeds 100 characters

- [PE-7057] Non-Admin users see the Process Monitoring tab

- [PE-7096] Null token is allowed on root API end-point

- [PE-7152] Visual error because scroll overlay doesn't work

- [PE-7167] Visual error to enter name with space when create a case

- [PE-7187] Details section inside the form field doesn't show the 'Show more' button

- [PE-7240] When we have multiple starting timer events and one of those events is triggered we see a manual decision at the beginning of the flow

- [PE-7263] Recreated User groups do not work properly

- [PE-7268] Wrong font in attachment link

- [PE-7299] ProcessApp Collection color bug after resizing

- [PE-7301] Case stuck waiting on a gateway
- [PE-7314] ProcessApps Search box is moving when clicking on "Toggle Sidebar" button
- [PE-7315] Variables cannot be updated when form field changes from single choice type to multiple choice
- [PE-7345] User Tasks with FormulaJs are not executed in the Task Popup View

23.76 Version 7.10.17

23.76.1 Resolved bugs

- [PT-11783] Cross stage diagram comparison doesn't work when there is no archived version yet

23.77 Version 7.10.16

23.77.1 Resolved bugs

- [PT-11657] Change comparison only works when an archive is already existing in Portal

23.78 Version 7.10.15

23.78.1 Resolved bugs

- [PE-7629] Initial readonly and mandatory expression evaluation is failing

23.79 Version 7.10.14

23.79.1 Resolved bugs

- [PT-10626] Catalog items are created without default assignment in Portal

23.80 Version 7.10.13

23.80.1 Resolved bugs

- [PE-7482] Step with mandatory text area can be completed without value inside in mobile view
- [PE-7457] Migration of gatewaypoints fails

23.81 Version 7.10.12

23.81.1 Resolved bugs

- [PT-10321] Categories cannot be reached on small resolution devices

23.82 Version 7.10.11

23.82.1 Resolved bugs

- [PE-7342] ObjectOptimisticLockException when calculating the path with gateway expressions
- [PE-7391] Task details view does not open on mobile

23.83 Version 7.10.10

23.83.1 Resolved bugs

- [PT-9944] You cannot scroll correctly through the diagram filter list on small screens (e.g. mobile devices)
- [PT-10302] When I use process cost analysis report, it does not calculate resources

23.84 Version 7.10.9

23.84.1 Resolved bugs

- [PT-9753] Favorite update mail has wrong reference

23.85 Version 7.10.8

23.85.1 Resolved bugs

- [PT-10240] First entity type is not displayed in publication catalog
- [PT-10245] Some modules do not support SCRAM authentication for database connectivity
- [DES-4439] Some modules do not support SCRAM authentication for database connectivity

23.86 Version 7.10.7

23.86.1 Resolved bugs

- [PT-10130] Catalog search sends wrong locale for facet request

23.87 Version 7.10.6

23.87.1 Resolved bugs

- [PT-9321] Configure time zone for date values in stamped attachments

23.88 Version 7.10.5

23.88.1 Tasks

- [PT-9347] As administrator, I want that the creation option for catalog items in an assignment attribute depends on the administration settings for catalog items

23.89 Version 7.10.4

23.89.1 Resolved bugs

- [PE-7144] Execution Apigateway does not manage HTTP headers larger than 8192 bytes
- [PE-7146] Parallel gateway starts next fragment before finishing all of incoming fragments

23.89.2 Tasks

- [PT-7901] As simulation user, I want to save my entered simulation parameters so that I can continue working on it later

23.90 Version 7.10.3

23.90.1 Resolved bugs

- [PT-9258] Simulation parameters for lanes of imported BPMN diagrams cannot be maintained
- [PT-9298] Editing link title of a catalog item opens maintained URL
- [PT-9314] Security improvement
- [PT-9320] Security improvement
- [PT-9470] Dynamic valid from date is not set in PDF on publication

23.91 Version 7.10.2

23.91.1 Resolved bugs

- [PE-6661] Process-execution-service gets killed several times a day, because it consumes too much memory

- [PE-7035] Restore missing attachment relations

- [PE-7058] Mishandled NPE when completing a task with formulas or default values

- [PE-7060] Flow Step Skeleton Screen does not hide on User Tasks without any field

23.92 Version 7.10.1

23.92.1 Resolved bugs

- [PT-9234] A catalog item can added in wrong stage when you change your role

- [PT-9258] Simulation parameters for lanes of imported BPMN diagrams cannot be maintained

- [PT-9298] Editing link title of a catalog item opens maintained URL

- [DES-4134] After a BPMN import from Signavio the renaming of entities in the diagram does not work properly

23.93 Version 7.10.0

23.93.1 New Features

Relationships between catalog items

We've enhanced the analysis capabilities for catalog items by adding *relationships to other catalog items* in the occurrences lists of the catalog. The new user interface catalog now includes a comprehensive list of all assignments of a catalog item to other catalog items, making it easier to analyze relationships between items. In a separate panel, you can view all catalog items to which the selected item has been assigned. By clicking on a listed catalog item, you can access more details about that item.

If you've already assigned a catalog item to another item (e.g., you've assigned a person as the author of a document), you can immediately see the assigned item in the occurrences list.

Switch stage and repository in top bar

We have added two new features that make it easy for you to switch between different *stages* and *repositories* while working in the new user interface. The active stage and repository you are working on are now always displayed at the top of your screen. This allows you to quickly switch between the different stages and repositories, navigate between them, view the contents, and keep track of the stage and repository you are currently working in. Both features are available in the stage- and repository-specific areas, such as diagram list, catalog, or central search.

Hint: Users can only select stages that they have access to. Since Readers have access only to the Publication stage, they do not see the stage switch at all.

Reassign the connection between symbols

We've made modeling easier by enabling the *reassignment of connections between two symbols*. To reassign a connection, simply drag it from the original symbol and drop it onto the desired new symbol. It's important to note, however, that the new symbol must allow the connection for the edge to be successfully reassigned.

This new feature streamlines the modeling process and allows for more efficient editing and updating of diagrams. With the ability to reassign connections quickly and easily, users can make changes to their diagrams with ease without the need to redraw entire connections of the diagram.

Session lifetime reminder

In the new user interface, users now receive a session lifetime reminder 5 minutes before they are automatically logged out. This feature allows users to refresh their session without the need to log in again, ensuring uninterrupted work.

Improvements in process simulation

We have added new functionalities for customers who have licensed our simulation component. They can now view the *resource utilization of a simulation run* as a bar chart in the Charts tab, in addition to the Heatmap tab. Furthermore, simulation results can be exported as a CSV file, allowing for easy analysis of the results in other applications. Please note that all KPIs are listed in the CSV file with varying levels of granularity, which may require adjustments to fit your specific needs.

Furthermore, it is now possible to enable the simulation component in Public Cloud systems. If you are interested in utilizing the simulation component and your system is hosted in a Public Cloud environment, you can now benefit from this functionality. However, please note that an additional license is required for the simulation component.

Additional validation rules for governance attributes

We've added new validation rules to the validation hub that help you keep track of the maintenance of governance attributes. The validation hub will show you if a diagram has no assigned responsible person, if the diagram's scope hasn't been maintained, if the valid-to date is earlier than the valid-from date, or if the valid-to or valid-from date is in the past. You can customize the rules that are applied or deactivate them entirely, according to your preferences. Note that this is done in the BIC Method Editor.

Additional resubmission decision "End task and inform Governance participants"

The resubmission task has received an *additional decision option* called "End task and inform Governance participants". This option is designed to streamline the resubmission process and make it easier to manage tasks. When a task assignee selects the "End task and inform Governance participants" option, they'll be prompted to enter a comment explaining why the task is being closed. Furthermore, the governance group will be automatically notified of the decision, ensuring that all parties involved are kept up to date with the task's progress. This feature is particularly useful in cases where a decision may not be required or if a task can be closed without further action.

Switch currency in process costs/simulation report

The Excel-based process *costs/simulation report* now includes support for Dollar as a currency. Users can conveniently switch between currencies within the Activities worksheet. Please be aware that the default currency in your method is Euro, but it can be easily modified in the BIC Method Editor.

23.93.2 Existing features available in new user interface

New design for top bar, menu, and category explorer

We have implemented major redesigns and added new functionalities to the category explorer, menu, and top bar. The *category explorer* is now easily expandable by clicking on the repository bar besides the diagram list and can be collapsed with the repository or collapse icon at the edge of the category explorer. The edge of the category explorer can also be used to broaden the category explorer for easy access to even deep category structures.

The menu on the left side and the top bar have been reworked. The menu is collapsible and can still be used for navigation, with icons representing menu entries available in the *collapsed state*. Users can now access the most important profile settings in a card by clicking on the *profile icon*. To adjust further settings, the "open complete profile" button needs to be clicked. Additionally, *search fields* for diagrams, catalog items, and governance workflows have been moved to their respective filter sections. These improvements provide a more streamlined user experience and easier navigation within the application.

Select any diagram version for comparison to see changes

The version of a diagram open in the content area in a stage can now be *compared with any version from different stages* to see the changes between them. Administrators, Editors, and Authors can choose between the Public Workspace, Preview, and Publication, and select a diagram version from these stages for comparison with the version currently opened in the content area. Readers can only see the comparison with the latest version in the Publication and cannot select any other stage or chart version. Reviewers have only access to diagram versions in Preview and Publication.

Import and export diagram archives, BPMN files, and categories

Diagram archives, BPMN diagrams, and categories can now be *imported* from the context menu of the repository and category, as well as from the options panel of an opened category. To *export a diagram*, you can access it from the diagram list via the context menu of the diagram or from the options panel of the diagram's details page. Category import and export options can only be accessed from the context menu of a category.

Hint: Please note that the repository import and export options are only available to Administrators and will be located in the administration area of the new user interface. This functionality is currently not available and will be added in upcoming versions.

Depublish catalog items and diagrams

We've added the depublication feature, which allows published catalog items and diagrams to be removed from the Publication. The depublish option can be found in the options panel on the details page of the *catalog item* and *diagram*, as well as on the list view.

Both Administrators and Editors have the ability to initiate an editorial depublication as well as a depublication that requires approval. Authors, on the other hand, are only able to depublish diagrams and catalog items using an approval workflow.

Publish a category

Administrators and Editors can now *publish* categories from the Public Workspace. This option is available in the context menu of a category and triggers the publication workflow for all subordinated diagrams, including those in sub-categories. We've added a confirmation dialog that requires the user to enter the category name before the publication can be confirmed. This ensures that the user is intentionally publishing the correct category and prevents accidental publication.

Create, rename, and delete a category

Categories can be *created*, *renamed*, or *deleted* by Administrators, Editors, and Authors in Public Workspace.

Cut and paste categories and diagrams

Diagrams and categories in Public workspace can now be *cut and pasted* into a different category in the same repository. Please note that a cut diagram or category cannot be pasted to a different repository.

Import and update catalog items

Administrators and Editors can now *import and update catalog items* using the process warehouse report for catalog items. To import items, simply filter the catalog by entity type and set the content language to the language of the items being imported. This will automatically determine the entity type and language for the import.

Translate catalog items

We've introduced a new *translation mode for catalog items* in the Public Workspace catalog. This feature is activated after applying a filter for a specific entity type, and you can further refine the list of catalog items to be translated by applying additional filters or a search term. The translation mode displays all language-dependent attributes of a catalog item and provides a column for each content language defined in your tenant. The first column in the translation mode represents the active content language and remains visible as you scroll through other language columns. Administrators and Editors can translate all catalog items, while Authors are only permitted to translate catalog items to which they have been assigned as an Author.

Hint: This feature is not available on small resolution devices.

Reorganize unused catalog items

Administrators and Editors can *reorganize* the Public Workspace catalog to delete catalog items that are no longer needed (not referenced in diagrams or attributes). This feature is activated after applying a filter for a specific entity type. We have improved this feature by adding a confirmation dialog that requires the user to enter the entity type name before the reorganization dialog can be confirmed. This ensures that the user is intentionally deleting the correct entity types and prevents accidental deletion.

Hint: This feature is not available on small resolution devices.

Approve or reject catalog suggestions

Administrators and Editors can now make decisions about catalog items either directly from the catalog list or by accessing the options on the details page of a catalog item. You can use the "Only show suggested" filter to view catalog suggestions and determine which items need a decision. Once a *catalog suggestion is approved*, it can no longer be modified during the modeling process. Conversely, if a *suggestion is rejected*, the object will remain in the diagram or attribute as a standalone object without any connection to the catalog.

Publish catalog item from catalog list

In addition to the option to publish a catalog item in the options panel on the details page, catalog items can now also be published from the context menu of a catalog item in the catalog list.

23.93.3 Process Execution

Monitoring dashboard now available for running cases

We have added a monitoring dashboard next to the case list. This dashboard provides first metrics of all running cases, including those that are on time, overdue, and have no due date. This is the first step towards providing various metrics for instances.

Export feature enables quick and easy process data analysis in BIC Process Mining

The application now supports exporting an event stream as an Excel file. This file can be easily used for analyzing instances in process mining tools, such as our own product, BIC Process Mining. Exporting event streams as an Excel file allows administrators to quickly and easily analyze process data and identify areas for improvement. It also makes it easier to share process information with other stakeholders, such as process owners or auditors.

Improved form fields with dynamic options using process variables for flexible choices

Previously, single and multiple-choice fields in forms could only provide static values. Now, you can use a process variable to provide dynamic options. The ability to use process variables for dynamic choices in forms makes it easier to maintain and update forms as business needs change. It also allows greater flexibility in the types of choices that can be offered to users.

Skeleton screens added for improved user experience

Using skeleton screens helps to improve the perceived performance of the application by providing users with visual feedback that content is loading. This can help to reduce a users frustration and improve the overall user experience.

Dynamic due dates for process tasks

We have renamed the "Process time in days" attribute to "Due Date" attribute for activities. You can still use numbers to provide the number of days for performing an activity. Additionally, you can use date variables from the process to set the due date for a task. The ability to use date variables from the process to set due dates for tasks makes it easier to manage and track task deadlines. It also provides greater flexibility for users, as they can set due dates based on the specific needs of their process.

Get notified about new tasks in your reminder emails

The reminder emails that inform users about due tasks now include tasks that were assigned within the last day. This helps users organize their work more efficiently. Including newly assigned tasks in reminder emails helps users stay on top of their work and prioritize their tasks more effectively. It also helps to reduce the risk of tasks being missed, which can improve process efficiency.

Prediction of upcoming tasks based on previous completed cases

The application now displays an automatic forecast for instance if historical data is available. Based on past instances for a process version, the application shows the most likely next steps in an instance. The automatic forecast feature helps users anticipate upcoming tasks and plan their work more effectively. This can help to reduce delays and bottlenecks in the process and improve overall process efficiency.

Restriction of task completion for synchronous call activities to administrators only

Previously, users could finish call activity tasks manually before the subprocess was finished, which could cause problems. Restricting the complete action to administrators for synchronously started call activities helps to prevent users from inadvertently causing problems in the process by prematurely completing tasks. This will help to improve process accuracy and reduce the risk of errors.

23.93.4 Resolved bugs

- [DES-4046] Method-service has less memory configured in the 64GB configuration than in the default 32GB configuration
- [DES-4124] Exporting in the DMN Editor does not work on Firefox
- [PT-510] Boolean facets in central search show true or false
- [PT-4355] Suggestion list overlaps input label in diagram editor
- [PT-4415] Missing scrollbar in process flow view (Portal)
- [PT-5367] Facet count of catalog item has wrong value when using suggested filter
- [PT-5369] Facet count of catalog item has wrong value when using search term
- [PT-5874] Description preview in catalog will not displayed when text contains HTML formatting [Customer action required]

- [PT-6385] Set start diagram prevents Readers to switch repository
- [PT-6480, PT-6481] Security improvement
- [PT-6845] Pasted image cannot be moved in diagram editor
- [PT-7031] Default value for enumeration attributes cannot be defined in BIC Method Editor
- [PT-7258] Overlapping dashed or dotted edges result in a solid edge
- [PT-7265] Dynamic valid from date is not set in PDF on publication
- [PT-7333] Catalog list and dashboard tab is not displayed on small screens
- [PT-7418] Diagram changes get lost during checkin attempt
- [PT-7513] Scroll bar disappears when searching or filtering in workflow list (Portal)
- [PT-7530] Catalog does not respect the time zone in date filters
- [PT-7531] Language switch does not change the translations in favorites page
- [PT-7534] Language switch does not change the translations in the matrix of a diagram
- [PT-7535] Language switch does not change the translations in workflow list
- [PT-7766] Diagram changes default value for archived assignments
- [PT-8063] Admin set background colors of a symbol cannot be overwritten by format options in a diagram
- [PT-8150] MyBIC favorites are not sorted in alphabetically (Portal)
- [PT-8175] Accessibility improvement
- [PT-8245] Activities in manual report for VCD are sorted incorrectly
- [PT-8451] "Show changes" button has wrong tool tip (Portal)
- [PT-8529] System attributes are displayed wrong when clicking in a specific order
- [PT-8542] Option entry for simulation is available in read-only stages (Portal)
- [PT-8616] Boolean facets in catalog show true or false
- [PT-8666] Undo / redo breaks visual diagram data in allocation diagrams
- [PT-8685] Mimetype is displayed for attachment titles with special characters (Portal)
- [PT-8740] Templates for "Manual with Assignments" report cannot be downloaded after modification of report descriptor
- [PT-8797] Attachment titles with special characters have wrong name after PDF conversion
- [PT-8915] Special characters in name of catalog item lead to wrong representation in breadcrumb
- [PT-9027] Publication dialog shows domain object name in random locale
- [PT-9064] Role-rights table is incorrect in documentation
- [PT-9095] Access permissions of Readers miss detailed information in documentation
- [PT-9215] Non smooth scrolling through the search result list and entity type name is missing
- [PE-5992] Corrupted data in Camunda causes process to be irresponsive
- [PE-6057] Inconsistency on number of processes
- [PE-6358] Task join gateways behave differently depending on order of execution
- [PE-6400] The user picker is displayed incorrectly

- [PE-6445] Rest Editor OAuth2 Client Authentication Dropdown does not save

- [PE-6532] Exception is thrown when having multiple last fragments

- [PE-6544] Concurrently changing variables leads to org.camunda.bpm.engine.OptimisticLockingException

- [PE-6616] As a user I can see group task without belong to any group

- [PE-6635] Error toasts in the Process Cases View persist into the Flow View after creating a new case and navigating to it

- [PE-6636] Process Instances List receives the Instance Created Message before the Instance is available in the BE's datasource

- [PE-6638] Diagram modification are not applied to ProcessApp in studio stage

- [PE-6639] Mail are not sent when a overdue task is assigned or delegated to other user/group

- [PE-6649] User Task's Multiple Selection Dropdown Form Field is not showing it's current value

- [PE-6660] Performance issues on Flow and Step detail views

- [PE-6682] Problem with attachment on automatic task

- [PE-6695] Variables that include dots are not assigned when doing a REST call

- [PE-6720] Enhance 2.2.0 sql scripts using white spaces

- [PE-6722] Create instance using the external API fails with text variables bigger than 4000 characters

- [PE-6736] User Task Formulas aren't evaluated correctly when a value is an empty List

- [PE-6742] I/O takes place on subprocesses when call activities are asynchronous

- [PE-6851] Wrong redirection on Collections view

- [PE-6883] Exporting in the DMN Editor does not work on Firefox

- [PE-6886] Gateway waits unnecessarily for token from loop

- [PE-6887] An error toast is shown when a user starts a task which is already started

- [PE-6890] Overdue due date in "my cases" is not shown in red on mobile view

- [PE-6896] Subcases are not archived when main case is archived

23.94 Version 7.9.12

23.94.1 Improvements

- [PE-6643] Attachment cannot be accessible after upgrading to 7.9.*

23.95 Version 7.9.11

23.95.1 Resolved bugs

- [DES-4070] The maintenance mode fails because of wrong certificate locations

23.96 Version 7.9.10

23.96.1 Improvements

- [SRE-157] / [DES-3875]: Proxy recognizes changes in certificate

23.97 Version 7.9.9

23.97.1 Improvements

- [PE-6717] Remove "No forecast possible" message from process flow view

23.98 Version 7.9.8

23.98.1 Improvements

- [PE-6696] Create a feature flag to control error messages in UI

23.98.2 Resolved bugs

- [DES-3701] LDAPs configuration is outdated with Keycloak 20.0.3

23.99 Version 7.9.7

23.99.1 Resolved bugs

- [PT-8329] Tenant default language overwrites user's content language in the webclient on reload when userflow is enabled
- [DES-3927] The cleanup of temp files in the domain-data-transfer-service does not run
- [DES-3911] Diagram archive contains documents

23.100 Version 7.9.6

23.100.1 Resolved bugs

- [DES-3876] In some cases it is not possible to select a user in the attributes, when there are multiple users with a similar name
- [DES-3891] Missing update of the configuration for upload limits

23.100.2 Tasks

- [PT-7415 | PE-6598] Enhance data provisioning for onboarding tool
- [PT-7910] Enable font replacement mapping in workflow-service

23.101 Version 7.9.5

23.101.1 Resolved bugs

- [PE-6516] Security Improvements
- [PE-6541] Script to clean up process execution Elasticsearch data causes process execution service not to start
- [DES-3821] Security improvements
- [PT-7747] Apigateway memory configuration is insufficient

23.102 Version 7.9.4

23.102.1 Resolved bugs

- [PE-6472] Process execution not responding, all database connections blocked

23.103 Version 7.9.3

23.103.1 Resolved bugs

- [PT-6438] Security improvements
- [PT-6482] Security improvements
- [PT-6630] Adding missing translations for AR, IT, FR
- [PT-6732] Sync entity messages don't contain the repository ID
- [PT-7623] Default values for diagram attributes are not applied on diagram creation
- [PT-7706] Method editor does not allow the user to set attributes as mandatory for specific domain object types
- [PT-7709] Incorrect default configuration for the onboarding tool
- [PT-7754] Lists use wrong enumeration symbols in generated PDF reports

23.104 Version 7.9.2

23.104.1 Tasks

- [PE-6416] Security improvement

23.104.2 Resolved bugs

- [PE-6418] In progress tasks of archived cases are shown on task list
- [PE-6437] Expired cases cannot be removed

23.105 Version 7.9.1

23.105.1 Resolved bugs

- [PE-6418] Process gets stuck because of loop
- [PE-6437] Reindex of tasks results in an OOM

23.106 Version 7.9.0

23.106.1 New Features

Analyze views of published diagrams

All user roles, except Reader, can now analyze views of published diagrams. When you open the publication in the new user interface, you will find the "Diagram views" filter in the *filter area* to filter a range of values of views. If you want to see the number of views of a particular diagram, you can find the exact number of views in the system attributes of the diagram.

Hint: Evaluation starts after installation of this version. Logins before installation cannot be evaluated.

Hint: Views in the old and in the new user interface are all counted.

Analyze user logins in the administration

In the administration of the new user interface you now have the possibility to analyze *user logins*. The logins are summarized per month and are listed for the past 12 months.

Hint: Evaluation starts after installation of this version. A login before installation cannot be evaluated.

Export workflow tasks to Excel

In the Governance Cockpit of the new user interface, users with the appropriate user role (Administrator or Editor) can now *export all workflow tasks to Excel*. You can use the search or the filters to determine the workflows that should be exported to Excel.

Waypoint of edge trajectories can be set while dragging

If you want to create the *sequence flow* between two symbols on the modeling surface, then you can set the waypoints directly when dragging to define the flow. To do this, click once on the edge in the *mini symbol palette* at the output symbol to be able to set the manual sequence flow. If you want to set a waypoint, click with the left mouse button on the desired position. The manual flow will end when you click on the target symbol. The manually drawn sequence flow is considered by the layout assistant and is not changed.

Create catalog proposals in assigned attributes

You can now create a catalog suggestion directly in an assigned attribute if the desired catalog entry does not exist yet. The configuration of the attribute determines for which object type you can create a catalog suggestion. If several object types are provided for an attribute, you can choose between these object types.

Automatically check language-dependent mandatory attributes on publication

If a *language-dependent mandatory attribute* is assigned to a diagram, then it is checked whether the mandatory attribute has a value in the default language of your system (can be configured by the administrator), when the publication is started. If the standard language does not contain a value, the publication will be rejected. All other languages of your system will not be checked.

Automatically check mandatory attributes when publishing catalog entries

When the publication workflow for a catalog entry is started, it is checked whether all *mandatory attributes* have a value. Please consider for language-dependent mandatory attributes that only the set standard language is checked (analogous to the publication of diagrams).

Publishing of governed catalog entries in diagrams during diagram publishing

If you use a governed catalog entry in a diagram that is not yet published, the governed catalog entry is published as a draft with the diagram so that the *diagram publication* can continue without releasing the approving catalog entry first. The maintained attribute values of the catalog entry are not available in the *publication until it is released*.

Switch analysis data in the Governance Cockpit

In the *Analysis tab* of the Governance Cockpit of the new user interface, you can now easily switch between your repositories to change the data basis of the evaluations. If you have only created one repository in your system, the selection option is deactivated.

Create your own Word-based reports in administration

Administrators can now create their own reports and define Word-based report templates for them. With this feature, you can create your own reporting scenarios or offer existing report templates in different variations.

Change report templates for the manual with assignments report

In the administration area all report templates of the manual with assignments can be downloaded as a ZIP file to adapt the report templates to your needs. After adjusting the templates, you have to save all report templates again in a ZIP file to be able to upload the customized report templates. Please read the corresponding chapter in our documentation beforehand and keep the downloaded ZIP file, because the default templates cannot be restored.

Monitor licensing status in user report

The user report user report has been revised and now keeps the group and role membership of users in separate spreadsheets. In addition, you will now find an overview of purchased and used licenses in the user report. On the first spreadsheet you will find an aggregated overview as table and diagram.

Manage BIC Process Execution Roles in administration

In the user management, you can assign BIC Process Execution roles to users. Users can have multiple roles at the same time.

Extension of the Customer Journey Map

In the Customer Journey Map (CJM), you will now find alternative symbols for the Touchpoint, Customer Step and Journey Stage. Additionally, the Document, Application and Backstage Process symbols have been added so that you can model the Customer Journey in more detail and do not have to maintain this information in attributes.

"Decomposition" is now called "Subprocess" for activities

The "Decomposition" attribute on activities has been renamed to "Subprocess".

23.106.2 Existing features available in new user interface

Central search

The *central search* can be used to search for catalog entries, diagrams, or modeling objects in diagrams at the same time. You can use the expert search or save a search query as a favorite. After the search shows results, you can use the filters to further narrow down the search results. When you save a search query as a favorite, it is saved on your MyBIC page and you can navigate directly to your search query from the MyBIC.

Category tree

On the diagram list, the category tree is now available for navigation. If you use filters on the diagram list, then the selected category is also used as a filter so that you only see hits that are in the category or subcategories.

Hint: With the introduction of the category tree, the appearance of subcategories in the diagram list has been removed for high screen resolutions.

Hint: If you are accessing from an end device with a small screen resolution, then the embedded categories are still available for navigation. The category tree, though, will then not be offered for navigation.

Comparison of the current version with the direct predecessor version

In the new user interface, you can *compare* the active version in a stage with the direct previous version. Removed and added symbols are shown, as well as objects whose attributes have been changed. If the attributes of an object have changed, then you can compare the difference in tabular form.

Hint: You can currently run the version comparison only on the previous version. In future versions, you will be able to select another version of the diagram for comparison

Deputies can take over tasks from the task owner

In the task management of the new user interface, you can take over and execute deputy and group tasks.

Number of tasks in the menu

In the new user interface, the number of your own open tasks is shown as a badge on the menu entry. Substitute tasks and group tasks are not counted.

Perform tasks directly on the diagram or catalog entry

If you click on a task in your tasks, you will be directed to the diagram or catalog entry where you can perform your task.

Diagrams can be published

Users with the appropriate user role can start publication of a diagram on the diagram list and detail page of a diagram in public workspace.

Catalog entries can be deleted

In the catalog of the new user interface, you can now delete catalog entries and suggestions from corresponding user roles.

Labeling of catalog proposals in proposal lists

Non-accepted catalog entries are marked as catalog suggestions in suggestion lists.

Automatic search for keywords

You can click on a keyword to perform a search for the keyword.

23.106.3 Process Execution

New development of the process execution

With the version 7.9 the calculation of the process execution was substantially revised and accelerated. This has resulted in a higher reliability of process execution. Unfortunately, this improvement made it necessary to temporarily remove the forecast of future tasks. The forecast will be available again in the next version of BIC Process Execution.

BIC Process Execution also allows the execution of processes where no conditions were specified at sequence flows after gateways. Until now, the decision of these gateways was integrated into the task immediately before the gateway. This procedure was not always reliable and predictable for the user. With the new version, gateways where no conditions were specified now become active tasks for the task creator. The user is thus prompted by an explicit task to make a decision for the further process flow.

In processes that have multiple start events, it was previously necessary to start the case after creation. With the new version the creator of the process gets a task to decide with which event the case should be started. In this way, the process can no longer be simply overlooked.

> **Warning:** Running cases must be terminated before updating to version 7.9. Unfortunately, it is not possible to migrate running cases to the new version 7.9. All processes that have not yet been finished will be automatically archived when updating to version 7.9.

Enhancements in the form editor

The form editor now provides a field that supports the selection of users and user groups during process execution. This makes it even easier to dynamically assign roles in the process to users or user groups.

Selection fields in the form editor were previously simple texts. These now optionally support a key. So you have the possibility to use the key e.g. in formulas and don't have to use the display text.

Enhancements in the REST editor

The REST editor now allows to send configuration files as binary. This form of REST call is necessary e.g. when using MS-Sharepoint to upload a file.

In addition, more HTTP methods (e.g. HEAD, PATCH) are now available in the REST configuration. This allows to cover a wider range of API calls for external systems.

CI configuration in BIC Process Execution

BIC Process Execution now also adopts the CI configuration from BIC Process Design to achieve a consistent web presence of both products in the organization.

Breadcrumb for navigation

The breadcrumb is not only used to display where you are currently located in the application, but now also allows you to navigate to the higher levels of the application. For this purpose, the individual components of the breadcrumb can be clicked.

Next to the breadcrumb you will also find a way to navigate back and forth. This navigation makes it easier for the user to navigate back to the task list, for example.

Filter in the case and task list

The case list of a ProcessApp and the task list can now be filtered. The first filter available here is the owner or creator of the case and the ProcessApp to which a task belongs. More filters will follow in the next version.

Group tasks in the process

Group tasks can now also be claimed directly within the case. If the group task is not assigned to anyone yet, a button "Assign to me" is displayed. This eliminates the need to navigate to the task list to take ownership of the task there.

More compact task list

The task list has been redesigned to provide a more compact view that allows you to see more tasks on one page.

Changed display of tabs

The tabs in different areas of the application have been unified and show the name of the tab in addition to an icon.

23.106.4 Resolved bugs

- [DES-3023] Improve content security policy
- [DES-3359] Users cannot login via SAML from time to time
- [DES-3363] Inconsistencies prevent publication of diagram
- [DES-3412] Security improvements
- [DES-3435] Exception during the replacement of a used and connected entity
- [DES-3467] Import fails and cause a "DataIntegrityViolationException"
- [DES-3479] User report generation can run into timeouts
- [DES-3481] Security improvement
- [DES-3489] Failing export due to duplicate document id
- [DES-3665] Setting standard attributes to read-only has no effect for diagrams
- [PT-518] Users and User groups don't get loaded in alphabetic order in Administration
- [PT-1569] Audit trail is not visible anymore if the owner of an open task is deleted
- [PT-2001] Wrong default page of deputy tasks
- [PT-2997] Catalog has no default page (Portal)
- [PT-4087] OverlayEdgeCreation has no alignment assistance
- [PT-4467] Clicking on keyword always leads to a search in the public workspace
- [PT-4468] Attribute view shows date values in different format than the profile view (Portal)
- [PT-4844] Toasts are translated incorrectly (Portal)
- [PT-5277] Formatting of lane edges differs in printed diagram
- [PT-5416] Boolean conditional formatting is not triggered when a diagram gets freshly checked out after reloading page
- [PT-5487] First task listed in the group task list cannot be revoked after claiming it
- [PT-5688] Formatted text attributes not updated in edit mode when toggling languages
- [PT-6116] Requesting diagrams causes unacceptable loading times
- [PT-6211] Font loading produce wrong calculation
- [PT-6248] Third Examiner doesn't get a task (Portal)
- [PT-6330] Once a BPMN event label contains a line break, its edge overlaps with the label
- [PT-6352] Dates don't respect the locale variant
- [PT-6357] Governance analytics tab has options (Portal)
- [PT-6431] Security improvement
- [PT-6465] Missing ellipsis in MyBIC Titles
- [PT-6479] Notification about a new task is missing when assigned as an examiner on a catalog item

- [PT-6487] Task list shows only 50 items (Portal)

- [PT-6567] An edge docked at bottom port covers node name

- [PT-6579] Reports don't respect locale variants

- [PT-6580] Date filter in dashboards do not respect the filter values (Portal)

- [PT-6589] Unused catalog items in publication are not cleaned up

- [PT-6594] Break point of a sequence flow cannot be selected and moved

- [PT-6595] Message edge cannot be drawn straight

- [PT-6694] Freeform lines could not moved anymore after placing it on canvas

- [PT-6777] User report generation can run into timeouts

- [PT-6788] Attachment cannot be downloaded when filename has certain special characters (Portal)

- [PT-6791] Mimetype will be shown for attachments with special characters in filename (Portal)

- [PT-6792] Attachment that is published as PDF will be shown with its original file ending

- [PT-6854] Tenant symbol type colors are sometimes overwritten

- [PT-6880] Saved searches ignore set filters (Portal)

- [PT-6899] Security improvement

- [PT-7045] Workflow error toasts are displayed to all users (Portal)

- [PT-7214] Layouting two pools doesn't work correct

- [PT-7219] Suggestion list does not find expected hits when using a space character (Portal)

- [PT-7235] Disabled bulk publication option available in read-only stages (Portal)

- [PT-7257] Center port will not be highlighted if the edge does not exactly hover over center port

- [PT-7403] AUTHOR doesn't see "Publish" button in the List page for catalog and diagram (Portal)

- [PT-7404] AUTHOR doesn't see "Depublish" button in the catalog list (Portal)

- [PT-7420] Invalid diagram toast gets shown on last validity day already [User action required]

- [PT-7515] You cannot set a title for a document in upload dialog

- [PT-7519] Clicking on a validation item has a wrong behavior

- [PT-7521] Title of uploads and links are not given in reports

- [PT-7528] Date attributes are displayed differently depending on their attribute group

- [PE-2285] Wrong icon when there are no favorites

- [PE-4911] Unify Apidoc URL in all services

- [PE-5199] User tasks with only formula fields cannot be completed

- [PE-5540] A default value error message is displayed but there is no error on date type fields.

- [PE-5632] Variables saved as String throw an exception with more than 4000 characters because a database restriction

- [PE-5725] User form is not disabled if task is not assigned to me

- [PE-5863] Role occupation defined in process variable is not set in sub case

- [PE-5996] List created in a script task is not stored correctly

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- [PE-6049] The value in a formula field is not calculated when a value exist on task start

- [PE-6072] Query parameters encoding is not needed on Service tasks

- [PE-6073] Form values are not stored when the pattern for a text field is invalid

- [PE-6088] When I claim a group task, I want to be assigned for all following tasks of the group in order to be responsible for the entire instance

- [PE-6095] Performance issues in processes request

- [PE-6098] End event with multiple incoming edges crashes execution

- [PE-6099] Task can not be completed when optional field does not contain a value

- [PE-6106] Empty cases message is not properly align

- [PE-6107] The task counter doesn't work as expected

- [PE-6113] ACL for Elasticsearch Instance documents is not correctly populated

- [PE-6114] Selecting a different step in the process flow view causes the view to fully reload

- [PE-6114] Selecting a different step in the process flow view causes the view to fully reload

- [PE-6115] Sub case icon is not shown when the call activity is synchronous

- [PE-6116] How to remove process-execution elasticsearch data is missing in upgrade notes

- [PE-6123] Updating a process variable does not update the corresponding Elasticsearch document

- [PE-6130] Elastic Search throws timeout exceptions during re-indexing of Nightly

- [PE-6153] Service task does not attach the result file in a Document entity

- [PE-6162] Service Task fails if the URL is a place holder

- [PE-6165] When a case was stuck because of multiple paths, the synchronization after check-in was not working

- [PE-6168] Case creation restriction does not work when more than one identity is specified

- [PE-6169] Text area value is not shown properly in the Email task preview

- [PE-6186] When multiple paths are finish together, next fragments are not calculated and cases can be stuck

- [PE-6222] Republishing a diagram in production stage breaks decisions of previous version cases

- [PE-6224] The status of the first task of a new case is not shown properly when it was started automatically

- [PE-6260] On systems with cgroup v2, memory management fails in some Java services

- [PE-6270] New instances are added to the Archived Process' Instances View

- [PE-6273] Wrong german translation in the header of My Cases view.

- [PE-6276] The labels of new user form fields are not localized

- [PE-6306] Pagination of Collections view is broken

- [PE-6310] Upload a file to output documents does not work on cases belonging to previous versions of a ProcessApp

- [PE-6316] NullPointerException when republish a diagram

- [PE-6346] When a user belongs to more than one Restricted Access group the ProcessApp is shown multiple times as a result of a search

- [PE-6359] App url changes without view change should replace last navigation entry

- [PE-6363] Tooltips block the selection on steps of the Flow View

- [PE-6371] Form Editor Spanish translation misspellings

- [PE-6377]Signature user task does not get completed in the Flow View

- [PE-6380] Formatted Text Field with conditional hidden value fails to enable initially

- [PE-6383] Field with default value fails to execute conditional formulas

- [PE-6396] The list of cases is misaligned

- [PE-6398] Long username and email does not display properly in the Profile view

23.107 Version 7.8.19

23.107.1 Resolved bugs

- [PT-6997] Excel macros may not work after stamping

- [PT-7177] Document conversion during publication has a delay

- [PT-7178] Process Warehouse creation to fails

23.108 Version 7.8.18

23.108.1 Resolved bugs

- [PT-6623, PT-6793, PT-6900] Security improvements

- [PT-6809] Local files cannot be opened

- [PE-6072] Query parameters encoding is not needed on Service tasks

- [PE-6099] Task can not be completed when optional field does not contain a value

- [PE-6125] Not count the default instances in the "count open instances endpoint"

23.109 Version 7.8.17

23.109.1 Resolved bugs

- [PT-4234] The word file name is not correct, when the FileName field property in the word is being used

- [PT-3977] Formatted text attributes get stamped with HTML tags

- [PE-5752] Archive running instances to support the new flow calculation

23.110 Version 7.8.16

23.110.1 Resolved bugs

- [PE-5886] Variables calculated in a script task have an unexpected result
- [PE-5905] Rearranging columns in the dmn editor does not work as expected
- [PT-6663] Security Improvement

23.111 Version 7.8.15

23.111.1 Resolved bugs

- [DES-3419] Entities are replaced by different entities after re-opening a diagram

23.112 Version 7.8.14

23.112.1 Resolved bugs

- [SRE-45] Reliability improvement

23.113 Version 7.8.13

23.113.1 Resolved bugs

- [SRE-45] Reliability improvement

23.114 Version 7.8.12

23.114.1 Resolved bugs

- [PT-6471] Date attributes can not be cleared on the attribute list
- [PT-6575] Security improvements
- [PT-6618] Mismatch between selected date and displayed date for datepickers in old UI

23.115 Version 7.8.11

23.115.1 Resolved bugs

- [PE-5819] API key validity is not checked
- [PE-5782] Properties on form fields do not work as expected
- [PE-5773] When I move a column in a dmn task then only the column header is moved, not the rows with the values
- [PE-5755] User Form's Formatted Text field saves step variables on OnChanges instead of on OnBlur
- [PE-5750] DMN tasks show outputs that should be hidden
- [PE-5820] Optimize output mapping on call activity tasks
- [PE-5756] Save only changed variables
- [PE-5533] Run start timer only on production stage

23.116 Version 7.8.10

23.116.1 Resolved bugs

- [DES-3343] Archive import does not update entities correctly

23.117 Version 7.8.9

23.117.1 Resolved bugs

- [PT-6382] Workflow emails will be sent to more recipients than the configured limit
- [PT-5184] Workflow fails with uninformative error if any governance related group does not exist
- [PT-4119] Workflow related issue after temporary database connection failure

23.118 Version 7.8.8

23.118.1 Resolved bugs

- [PT-6316] Governance dates should be shown with the locale time of the viewing user
- [PT-6252] Images can be added to the description attribute which leads to unexpected behaviour

23.119 Version 7.8.7

23.119.1 Resolved bugs

- [PE-5651] Task list is not updated automatically when I complete a task

- [PE-5611] Request for task variables fails, if request gets to long, because of filters

- [PE-5650] Input/output mapping fails on multiple choice fields marked as "Save selected options as string array"

23.120 Version 7.8.6

23.120.1 Resolved bugs

- [DES-3323] User Export does not contain all users

- [PT-5858] Switching the language while editing description attributes displays the same value in both languages instead of an empty field

- [PT-6188] Replace unsupported list bullet characters during PDF conversion of MS Word documents

23.121 Version 7.8.5

23.121.1 Resolved bugs

- [PE-5612] After deleting and recreating a user, the query to search by email address gets multiple search results

23.122 Version 7.8.4

23.122.1 Resolved bugs

- [PT-6216] Add/Remove free space does not work if pools with multiple lanes are involved

23.123 Version 7.8.3

23.123.1 Resolved bugs

- [PE-5568] Formula execution resulting in null values results in npe

- [PE-5556] Default reminder schedule has wrong configuration

- [PE-5554] Input fields for DMN are not shown in task

23.124 Version 7.8.2

23.124.1 Resolved bugs

- [PT-6118] Diagrams with non-resolvable decompositions cannot be displayed in the webclient
- [PT-6207] Documents without stamping properties are not converted to PDF on repeated entity publications

23.125 Version 7.8.1

23.125.1 Resolved bugs

- [PT-3840] When using an occurrence assignment attribute to display a conditional formatting on the symbol, the format is not applied
- [PT-5827] Date attribute values are not displayed in the local timezone
- [PT-6005] SVG of diagram with over 2000 entities is not requestable and diagram cannot be displayed in portal or publication stage
- [PT-6104] Changing color settings is not consistent for all stages

23.126 Version 7.8.0

23.126.1 New Features

Governance Analytics

We extended the Governance Cockpit of the new user interface with an *analytics tab*. There you can display the most important information aggregated in charts and get an even better overview of your diagrams and catalog items.

Various evaluations are available to analyze your governance:

All diagrams or catalog items of a repository

The two evaluations show you the number of diagrams or catalog items per stage and offer you the possibility of drilling down on the aggregated view to get to the detailed view.

Upcoming diagram or catalog item resubmissions

The evaluations give you an outlook of how many diagrams or catalog items become invalid in which month so that a check of their validity is necessary. The outlook covers the next 12 months. The reminder interval for resubmissions is not considered here.

Finished publications of diagrams or catalog items

The evaluations present the past publications of diagrams or catalog items within the last 12 months and summarizes them per month.

After updating to the current version, it may take some time until all the data is available in the evaluations.

Resubmission and repository filter in the Governance Cockpit

In the Governance Cockpit, you can now *filter* for diagram or object resubmissions as well as for workflows originating from certain repositories. Both filters are available in the new and old user interface.

Bulk publication of catalog items

In the new user interface, you now have the option of publishing several catalog items at the same time. The function is in the options panel if you are in the catalog on the catalog list. If you select *bulk publication*, BIC Process Design pre-filters the catalog list so that you can only select catalog entries that can be published. Each entry is displayed with a checkbox. As soon as you have selected several entries, you can start the bulk publication for these catalog entries.

Please note that for each selected catalog entry a publishing workflow is initiated, and tasks and notifications are triggered (depending on the release type).

Document stamping with language localized attribute values and dynamic date values

If you publish your documents in BIC Process Design, then you can use *document stamping* to include values from governance attributes in the document. We have extended the function so that you can now also use the values of language-dependent text and enumeration attributes. It is necessary that you configure the intended language in the document beforehand.

Furthermore, you can now leave the "Valid from" date empty and use it in the stamping. If you have subscribed to the Extended Approval Package, you have the possibility to use the date values in the stamping that are set when the workflow is executed.

Please note the necessary preparation to stamp attribute values in a published document.

Configure cut process image in Word reports

In Word-based reports it is now possible to include a process as a cut graphic instead of an uncut graphic. To do this, you must first adapt the corresponding template by exchanging the placeholder for the graphic. After that you need to set the number of pages to be used to cut the process in the print settings of the process. The print settings are also applied to the print function.

Additional validation possibilities via OCL

We extended the *validation possibilities* and give you the opportunity to . . .

- . . . check the values of diagram attributes.
- . . . double check date values against the current date.
- . . . double check date values against defined intervals.
- . . . classify rules as blocker to prevent the check-in in case of a violation.

Please note that OCL rules are configured in the method editor. Currently, none of these options is applied in a validation rule in the standard method.

Pre-configured report scenarios in the Process Matrix report

We have extended the *Process Matrix report* with common reporting scenarios and integrated the existing report as additional pivot matrices. The pre-configured reporting scenarios are:

- Application usage (per activity and process)
- Document usage (per activity and process)
- RACI mapping (per activity and process)
- Risk occurrence (per activity and process)
- Diagram metrics (per process)

You specify the scope of the report, i.e., whether a diagram, the diagrams of a category or the entire repository should be included in the report, directly when generating the report. All processes listed in the content area are considered. If essential relationships or objects are not available in the report context, the affected report scenarios remain empty.

User overview as Excel report

Administrators can export a user overview as Excel report in the user administration. In the Excel file you can see the number of licenses used per user role, all users of your system and other details about a user such as name, email, user role, language, and stored user groups. If several user groups have been stored for a user, an entry is created for each user group.

Please note that activated filters or search terms are not considered for the export.

23.126.2 Existing features available in new user interface

Central search

The new user interface gained a *central search* which helps you to find diagrams, modeling objects and catalog entries.

Please note that the search does not yet include all functions and we will integrate them in the coming versions.

Set a deputy for tasks

Task owners can *set a deputy* in their profile. This setting could be made in the "My Tasks" area of the old user interface and has been moved to the user profile.

After a deputy has been chosen, all tasks also appear in the "Deputy tasks" list of the deputy and can be taken over, for example, if the task owner is absent.

Remove favorites

Favorite diagrams or search favorites can be *removed from your MyBIC page at the corresponding tile*. This option was available in the old user interface in the favorites panel above the current repository. Please note that you cannot remove favorites set for you by your administrators. Therefore, these tiles have no context menu.

Change catalog entry to suggestion

If you open the details view of an accepted catalog entry in the catalog of the public workspace, you have the possibility to change the *catalog entry into a catalog suggestion* in the options.

Please note that catalog suggestions, in contrast to catalog entries, can be changed in the modeling and the changes affect all occurrences.

23.126.3 Process Execution

Task form on your task list

Working on tasks is the main use case you will face in BIC Process Execution. Therefore, we have now enhanced the focus on your tasks and how to work on them. When opening your task list and clicking on one of them, the task form will open in this view as pop-up. You can then work on your task just in the same way as in the task form within the process flow view. When you complete the task, the pop-up closes, and the task is marked as completed in the task list. The option to provide a comment when completing a task is also integrated in the pop-up task form. In this way, it is now possible to edit all your tasks directly within the task list and no longer have to navigate into the process flow.

Remark: The pop-up task form will not include auto generated decisions for gateways without expressions! This is only a backup mechanism. You should always define expressions on the outgoing edges of a gateway. Please check the documentation for the pop-up task form to get more information.

E-Mail and URL as new inputs field for the user form

We have added two new input field types to the user form editor. As an author you can now add an email and an URL field to your user form. The fields provide built-in validation for emails and URLs. As an author you have the option to provide own definitions for the validation of the user inputs.

The URL field supports the URL functions of the browser, such as opening the URL when clicked. The email field also supports the mailto feature so that your local email client will be triggered to open the send email window.

Define default values on your input fields

There are some cases where it is necessary to have a default value on an input field. This can be a number, text, selection, or anything else. As an author you can define a default value that can be a fixed or calculated value and refer to process variables in the case. You can use the same formulas and options as on a formula field. The defined value will be calculated once the task is started. You are then able to change the value before completing the task.

Attachments in automatically sent emails

E-Mails can be sent automatically via send tasks in BIC Process Execution. You can provide all necessary information like the receiver, cc, bcc, subject, and body. Now also attachments will be included in automatically sent emails via send tasks. To add an attachment, you only need to model an input document on a send activity. When a document was uploaded in a step before, this document will be attached to the email. When you want to send multiple attachments, you simply need to model one input document for each attachment on the activity in BIC Process Design.

API key as dedicated authentication option for REST-Calls

We have improved the configuration for the API key authentication. You can now select the API key as authentication type in the connection section of the REST-Call configuration. When you have selected the API key authentication you can provide the name and the value of the API key and select whether to place it in the header or request parameters of the request.

OAuth2 as authentication for REST-Calls

Oauth2 is a common authentication method and provides various authentication workflows. BIC Process Execution now supports the OAuth2 client credentials flow for the REST-Calls in the service tasks. You can provide all necessary information in the editor when you select OAuth2 as authentication type.

Improved error messaging in user form editor

There are some conventions and mandatory fields to configure for a user form. When you try to save a form configuration that contains errors, the system will not allow you to save these settings and will give you feedback on the errors and where they occur. By that you can find and resolve the issues quickly.

Favorites as dedicated ProcessApp Collection

When you are using ProcessApp Collection, you now have a dedicated collection for your ProcessApp favorites. All ProcessApps that you marked as favorite are included in this collection automatically. This collection is shown by default when the ProcessApp Collections are configured. The favorites collection is always shown as the first collection in the ProcessApp Collections view.

"More ProcessApps" Collection to collect unassigned ProcessApps

When you are using ProcessApp Collection, you now have a dedicated collection for ProcessApps that are not assigned to any collection. This collection is shown by default when the ProcessApp Collections are configured. The "More ProcessApps" collection always appears as the last collection in the ProcessApp Collections view.

Edit ProcessApp Collection configuration

If you are an administrator, you can now edit the configured ProcessApp Collections. All settings except the collection ID can be adjusted. If you want to change the ID, you must delete and recreate the collection.

Improved usability in the header configuration of a REST-Call

We improved the usability in the header configuration of the REST configuration for service tasks. Adding new parameters to the header is now more intuitive and predictive. The provided fields are now also saved when not clicking explicitly on the plus icon.

New entry point for editors in the configuration panel of a diagram

When editing a diagram, you now have a new entry point for the BIC Process Execution editors of the different element types in a diagram. In the details section on the right side of the screen, you will find a new option for the editors. In the first step this is a place where you can open the existing editors. In the future, editors will be integrated into the side bar so that you can do the configuration in this place without opening a pop-up.

Redesign of the process flow view

We have updated the process flow view that you see when you open a case. Like this, we provide a better overview of the different tasks and types of activities that have been completed, are active and will be relevant in the future.

Redesign of DMN editor

In the past the *DMN editor* did not fit the design of the other editors. Therefore, we updated the design to align it and have a consistent UX on overall BIC Process Execution editors. The changes bring a better readability, better UX and add explicit buttons to save and cancel the changes.

Navigate into a ProcessApp Collection by clicking on the collection header

When you have configured the ProcessApp Collections, you can now navigate into a collection by clicking the header on the card of a collection.

Automatic group task assignment

Some cases contain group tasks that can be claimed by a member of these groups. Usually, a user who takes over a task for a group should automatically be responsible for all tasks of the respective case. Therefore, when you claim a group task, the system now assigns all following tasks for this group to you. By that you do not have to claim the tasks on your own.

Only the responsible for a task can now complete this task

In the past, you could complete tasks that were not assigned to you. This was a comfort function that we changed in this release. If you are not the responsible of a task, you cannot work on a task and cannot complete it. The task form is disabled, and the complete button is not shown. When you want to complete the task, you must be the assignee.

Only an authorized user can now delegate a task

Delegation of a task was previously available to all users. This was a comfort function that we changed in this release. If you now want to delegate a task, you must be the assignee, an administrator, or part of the group if it is a group task.

Store multiple-choice selection in an array

Multiple choice fields save the user selection in a process variable with the data type string. To have an easy handling of the selection in expressions, evaluations, etc., this data can now be saved as data type array. As an author you can set the type of storing in the configuration for the multiple choice field. Each field can be configured separately.

Remark: The use of storing multiple choice selection as string is no longer recommended. This functionality is deprecated and will be removed in 2023. Please check your processes and update them in the next months.

23.126.4 Resolved bugs

- [DES-526] Missing documentation for Advanced Approval / Execution Signing
- [DES-1668] Administrator cannot filter SSO users using the role filter
- [DES-2832] Installation instruction in SAML has incorrect screenshot
- [DES-2893] Upload limits are incorrectly documented
- [DES-2905] Configuration of open relay SMTP leads to warnings
- [DES-2928] Nginx often crashes during the upload of a 1 GB file
- [DES-2995, DES-2996] Security improvements
- [DES-3022] Proxy does not work if more than one nameserver exists
- [DES-3024] Unlocalized attachment attribute in imported objects are invisible
- [DES-3039] GRC-Apigateway returns 500 by fetching big diagram
- [PT-1598] Catalog list filter display enumeration value instead of the name (Portal)
- [PT-2305, PT-5641, PT-5764] - Security improvements
- [PT-2779] Invalid diagram warning toast gets displayed on the expiry day already
- [PT-2786] Assignment is created in wrong stage when navigating from versions hub
- [PT-4650] Charts show index of enumeration instead of related name (Portal)
- [PT-4653] Tables are not inserted at cursor position in formatted text attributes
- [PT-4655] Format buttons in formatted text attributes are not correctly highlighted
- [PT-4914] Occurrence view does not show all occurrences (Portal)
- [PT-5019] Publishing a workbook could hide spreadsheets
- [PT-5148] Copied symbol format gets partially lost
- [PT-5357] Extend option in resubmission can affect preview stage
- [PT-5471] Undo function does not work properly
- [PT-5557] Filtering catalog leads to an empty export (Portal)
- [PT-5612] Entity release mail contains wrong language
- [PT-5642] Default configuration can lead to out of memory
- [PT-5822] Diagram layouter can break edges
- [PT-5882] Catalog state will always set to 'suggested' when this column is missing in the import
- [PT-5987] Removing free space on pools with nodes may prevent diagram check in

- [PT-6001] Opening a diagram by link doesn't switch to corresponding repository context
- [PE-5472] Formula is recalculated after task completion
- [PE-5471] Null comparison for null value in string variable does not work on sequence expression
- [PE-5425] The DMN output is not shown properly when the variable matches the label
- [PE-5347] The task following a DMN task shows the DMN form field
- [PE-5345] DMN evaluation does not work for default instance
- [PE-5342] Shown ProcessApps in Collection card do not fit the defined logic
- [PE-5298] Placeholder in text area is not visible
- [PE-5285] Retention period attribute missing on BPMN and EPC diagrams
- [PE-5224] User task list does not show all tasks when the app starts in the group task list
- [PE-5218] Security improvements
- [PE-5200] DMN editor jumps to top when I delete or duplicate a row
- [PE-4999] createdDate process variable only sends date without time in a service task
- [PE-4996] Formatting text in textarea does not apply the format
- [PE-4894] Setting a ProcessApp as favorite does not apply when switching to another site before the animation is not completed
- [PE-4892] Case flow view does not appear after creation
- [PE-4597] Warning toast pops up multiple times when starting process without clear entry point
- [PE-4171] Boolean field not checkable after textarea input

23.127 Version 7.7.8

23.127.1 Resolved bugs

- [PT-5270] Activities without name will sometimes be rendered with an undefined label
- [PT-5558] Diagram search results cannot be opened via left click in the portal
- [PT-5838] Images are displayed in wrong order when using "getImageWithPrintSettings" in report templates
- [PT-5839] Image resolution of large diagrams is too low when using "getImageWithPrintSettings" in report templates

23.128 Version 7.7.7

23.128.1 Resolved bugs

- [PT-5755] Signed PDF files cannot be published with stamping enabled
- [PT-5819] SVG rendering fails with custom symbol formats for BPMN pools
- [PT-5829] Catalog search in webclient incorrectly applies additional sorting
- [PT-5828] Stamping in document publication removes unmaintained properties instead of leaving them empty

23.129 Version 7.7.6

23.129.1 Resolved bugs

- [DES-2958] Message publishers will be blocked due to high watermark alarm

23.130 Version 7.7.5

23.130.1 Tasks

- [DES-2036] When the trial period has ended, the tenant should be deleted after a grace period
- [DES-2035] When the trial period for a tenant is over, the tenant should be blocked

23.130.2 Resolved bugs

- [PT-5529] Security Improvements
- [PE-5068] Role occupation does not work when creating a case via run link

23.131 Version 7.7.4

23.131.1 Resolved bugs

- [DES-2903] Serialization of domain data fails sporadically during field access via reflection
- [DES-2894] The usage of the Method-Service leads to OutOfMemoryError on multi-tenant systems
- [PT-5377] Donut charts does not get updated facet value counts

23.132 Version 7.7.3

23.132.1 Resolved bugs

- [PT-5237] Facet view moves when a hidden value gets displayed again
- [PT-4974] Multiple items get pasted from clipboard
- [PT-5341] Edit catalog item attributes after creation saves data only partially
- [PT-4642] Dynamic facet count does not work for catalog filter

23.133 Version 7.7.2

23.133.1 Resolved bugs

- [DES-2866] Keycloak cause Bad Request 400 in Authentication Configuration when the flow name contains a space
- [DES-2845] Username and other user attributes from Keycloak don't fit user-service columns
- [DES-2890] User cannot choose highest role when more than one role is assigned in Keycloak

23.134 Version 7.7.1

23.134.1 Resolved bugs

- [DES-2843] Add missing hint in Upgrade notes
- [DES-2785] Reindex cannot be triggered

23.135 Version 7.7.0

23.135.1 New features

Dashboards for diagrams

The new user interface provides a *dashboard view for diagrams* now. The dashboards evaluate the attributes of your diagrams in donut charts and since they are interactive, you can easily analyze your repository. The dashboard is an alternative view to the diagrams of your diagrams list. If you select pieces in a donut chart and navigate back to the list view, the list will contain exactly the diagrams which match your criteria.

To see dashboards for diagram attributes, you need to select those attributes in the administration. You can apply the same procedure to your self-configured attributes to evaluate them in the dashboards. In addition, these attributes are available as filter options in the diagrams list.

Process Warehouse export includes state of catalog entries

We added the column „Catalog state" in the *Process Warehouse export for catalog entries*. The values in the column indicate if the respecting entry is an accepted catalog entry or a catalog suggestion.

You can change the catalog state in a Process Warehouse export and import it to accept a large quantity of catalog suggestions or reset accepted entries to suggestions. If you create new catalog entries using a Process Warehouse import and change their catalog state to "APPROVED", these new entries do not have to be accepted manually in the catalog.

Please note that you should only display the columns of the attributes you would like to update with an import.

Including of graphics to diagrams and modelling objects

You can include graphics as a background of a symbol. For example, this can be helpful if the graphic serves as a navigation element. To do so, you must model and format a navigable object first and then add the graphic.

Hint: The formatting options do not show yet that a graphic has been included as background.

Moreover, you have the possibility to paste graphics directly from your clipboard. In the past, the pasting of a graphic had to be done via drag and drop which meant that you had to save it locally to add it.

Hint: If you have several items in your clipboard, all items will be pasted.

New catalog design

The design of the catalog in the new user interface has been reworked and adapted to the diagrams view. The dashboards are displayed in a new design which matches the diagram dashboards. The bar charts have been removed in the new user interface since this form of evaluation was redundant.

List of expired catalog entries in publication stage

Until now, BIC Process Design informed about expired catalog entries ("Valid to" date in the past) contained in a diagram via a banner in the new user interface. From now on, those entries are listed in the *validation*. You can simply click on an entry in the validation to highlight the expired catalog entry in the diagram and easily identify the specific occurrences.

23.135.2 Process Execution

Group ProcessApps in ProcessApp Collections

You can now group your ProcessApps in ProcessApp Collections. You can define your Collections in the BIC Process Execution Administration and create Collections based on departments, areas, topics and any other structure you need. A ProcessApp then can be assigned to one or multiple Collections. The Collections let you group your ProcessApps so that you have a clear structure and can find your relevant ProcessApps even quicker.

Single- and multiple-choice fields as dropdowns

When creating a user form, you can now configure single-choice and multiple-choice fields to be shown as dropdown fields. You do not need to create new input fields to do so. You can simply update your existing input fields and change the radio buttons and checkboxes into dropdowns.

Introducing the user profile

We implemented a user profile area in the application. Here you find your user information, the selection for the content language, and new profile settings. The user profile will include even more features in the future.

Define your deputy who will get your tasks when you are out of office

In the new user profile area, you are now able to configure your deputy and your availability status. Both features in combination ensure that your tasks will be handled even if you are out of office. You can define another user as your deputy and when you set your availability status to "Out of office", all new tasks assigned to you, will be delegated to your deputy.

When you are back in the office, you set your availability status back to "Available" and all new tasks will be again assigned to you.

Provide hint text for input fields

Some input fields need to provide more information to the user. We already have placeholders to provide information and from now on you can use hint texts for most of the input fields. The hint text will be shown right under the input field. In contrast to the placeholder, the hint text is visible even if there is a value in the input field.

Payload for case creation via REST API adjusted

In BIC Process Execution, you can create new cases for a process via REST call. You can include data for the case, like process variables, the case name, and roles in the payload of the REST call. The structure was a bit different to the structure we accept and the way we handle the payload in the REST calls of service activities. Therefore, we now have aligned this in the case creation API, so that creating the payload is more in common with the rest of the application.

Hint: You can use both variants, the old one and the new one. By that you do not need to adjust existing configurations.

Roles are included as process variable

Every case has some process variables that are created automatically when starting a case. Until now these process variables were the case name, creator name, creator email and creation date. We added the functionality that also roles are available when creating a case.

To have a role as a process variable, you must set an identifier on the role. By that the system creates a process variable with the defined identifier as name when creating a new case.

When you have defined a staffing for a role, the process variable contains either the email of the user or the name of the user group.

23.135.3 Resolved bugs

- [PT-5216] - Check in of a favorite fails on different repository
- [PT-5202] - Create new catalog item dialog has scroll bar on mobile view (Portal)
- [PT-5189] - Facets for an entity type are not shown if set to hidden in the method
- [PT-5119] - Automatic line break in description editor breaks lines within words
- [PT-5112] - Catalog search misses sorting for equal scores
- [PT-5109] - Titles are not properly removed from URLs
- [PT-4864] - Language switch doesn't work for diagrams (Portal)
- [PT-4837] - Catalog list is not update after deselecting a facet (Portal)
- [PT-4583] - Chart titles in catalog depend on content language (Portal)
- [PT-4571] - Generating an entity profile report in catalog fails sporadically
- [PT-2103] - Stamped attribute values are not updated after re-releasing a document
- [PT-1222] - OCL fails to evaluate association attributes
- [DES-2620] - GroupMapper should first try to use the groupId
- [PE-4725] - Outline is crossing label in the preview area in the form editor
- [PE-4724] - Drag and drop indicator line is too short in user form editor
- [PE-4599] - Curly braces instead of correct error is shown when unrelated formula field gets updated
- [PE-4525] - Long instance names overflow is disregarded
- [PE-4483] - New empty instance flows are not updated once the flow has been calculated
- [PE-4472] - Label fonts in form editor are blurred
- [PE-4305] - Push notifications are not sent when tasks are delegated
- [PE-3896] - JSON variables arraise an exception if has a field with an object value

23.136 Version 7.6.10

23.136.1 Resolved bugs

- [PE-5329] Role occupation does not work when creating a case via run link

23.137 Version 7.6.9

23.137.1 Resolved bugs

- [PT-5220] Adjust timeout for editor context menu items

23.138 Version 7.6.8

23.138.1 Resolved bugs

- [PT-5033] "You are offline" hint gets triggered when opening modeling context menu on slow connection

23.139 Version 7.6.7

23.139.1 Resolved bugs

- [PT-4834] As a user I want to confirm my identity in a single sign on environment so that the Advanced Approval works with SSO

23.140 Version 7.6.6

23.140.1 Resolved bugs

- [DES-2677] Keycloak fails starting for systems with more than one LDAP provider
- [PT-5110] Diagram cannot be rendered if it contains boolean attribute placements
- [PT-5021] Cursor in description fields jumps to beginning while typing

23.141 Version 7.6.5

23.141.1 Resolved bugs

- [DES-2472] Login with LDAP user fails when LDAP is set to read-only
- [PT-5020] Define a max limit for email recipients

23.142 Version 7.6.4

23.142.1 Resolved bugs

- [PT-4943] Allow check-in of catalog suggestions option in administration does not work
- [PT-4908] Stamping certain file formats blocks catalog publication

23.143 Version 7.6.3

23.143.1 Resolved bugs

- [PT-4450] Expired valid to dates are not shown in the validation hub

23.144 Version 7.6.2

23.144.1 Resolved bugs

- [DES-2485] Entity replacement does not create update event
- [DES-2482] Pagination is broken when fetching entity occurrences
- [DES-2508] Retrieving all users with projection fails
- [DES-2483] User groups with a stop word as name do not work in access restrictions
- [PE-4460] Security improvement
- [PE-4417] PWA on mobile devices is not working properly

23.145 Version 7.6.1

23.145.1 Resolved bugs

- [DES-2512] When entering two different passwords while setting a new password no hint message is shown
- [PE-4325] Case name is not changed when the Service or Script tasks change the caseName variable
- [PE-4324] Reminder just after creating an instance doesn't work
- [PT-4925] Provide actual user role to Userflow
- [PT-4861] Banners for validity period are not refreshed when changing stage
- [PT-2153] Original file format is not always kept during publication

23.146 Version 7.6.0

23.146.1 New features

Add tables and links in the description attribute

In formattable text attributes (e.g., Description) you can now *add tables* to structure your information. With this change you can also add external links in a dialog, which allows easier editing and more configuration options. These functions are also available for custom attributes with the data type formatted text.

Please be aware of the limitations:

- You can place the attribute on the modeling surface, but tables won't be displayed.
- The pop-up for the description in the mini bar can show tables but not their border lines.

- The catalog process warehouse report does not show tables in cells. Please keep this in mind when re-importing a catalog process warehouse.

Copy and paste of symbols between different diagram types and automatic symbol conversion

You can *copy single or multiple symbols and paste* them into a different diagram type. We automatically change the symbols copied to your clipboard to match the notation of the targeted diagram type and transfer the modeling objects. The object types must be allowed in the target diagram to enable copying and symbol conversion. Prohibited objects will not be pasted and you will receive a note. You can manage object types in the method to allowed entity types in diagram types and set the default for symbol types.

Please be aware of the limitations:

- The BPMN standard differentiates between start, intermediate, and end events. EPCs only have a generic event which can be used for all circumstances. Therefore, events will not be pasted.

- When pasting into a BPMN diagram, pools will not be automatically created.

Special retention periods for diagrams and catalog entries

You can assign a special retention period to diagrams and catalog entries for the publication stage, which differs from the general setting in the administration area. Use the *governance attribute "Special retention period (in years)"* to configure a special retention period to assign an individual retention period in years.

Please be aware that the attribute "Special retention period (in years)" is disabled in the standard method. You need to enable it in your method for productive use.

Declaration for expired catalog entries in published diagrams

When a catalog item is used in a published diagram and its *validity period* is reached the user will see a banner which informs them about that.

The banner text can be customized if it does not fit your needs, but only for Private SaaS or on-premises installation. Please contact your GBTEC project team.

Exchange symbol color settings

Administrators have the possibility to change the symbol color settings to easily switch between different designs or use predefined symbol color settings. You have the option to download the current symbol color settings in the administration. At the same place you can upload your own symbol color settings for example to use predefined symbol color settings.

Distribution types in the simulation

You now have the possibility to use different types of distributions when using parameters for the simulation. This allows you, for example to specify more precisely the duration of an activity or the incoming of a process instance.

EPC Symbol classified by task type

The EPC symbol for activities now shows an icon to visually identify the task type of the activity. Before that you could choose a task type, but it was not visible in the modeling surface.

Please be aware that already modeled symbols will not automatically change. You need to reassign the symbol.

EPC symbol classified as external

The EPC symbol for roles now switches its color to visualize external roles. Before that you could classify roles as external, but the symbol stayed in the same color.

Please be aware that already modeled symbols will not automatically change. You need to reassign the symbol.

23.146.2 Process Execution

Introducing signature tasks

Some processes contain critical tasks where you, as the task owner, must confirm that you and not someone else performed the task. You can obtain this confirmation with signing tasks. To complete the task, you must first authenticate yourself with your credentials. If the authentication is successful, the task is completed, otherwise the system refuses to complete it. The authentication follows your company's rules and is even requested when SSO is enabled by default.

Dynamic role assignment

Within a process flow, you can model different roles and store a default assignment for them. With our new feature, you can define which user or user group is responsible for a role during the runtime of a process. To achieve this, you can use different task types and methods. Roles can be assigned wherever process variables can be modified. This can occur, for example, within activities or also at the start when creating an operation from another system via the API interface.

Create cases automatically by timer

You can now define timers on start events. The system then automatically creates cases according to the defined timer. By that you can automate recurring processes and ensure that these processes will not be forgotten. When you have reached a state of full automation of a process, you will not even have to do one manual step.

Setting dynamic due dates on tasks

Tasks often need to be done in a specific time to keep projects and processes on track. Therefore, you can now define a processing time for each task in the processes. When reaching such a task during runtime, the due date will be calculated dynamically. You as assignee can see the due date on the task in the task list and in the case flow overview. By that, the tasks can be completed on time.

Getting reminders for due tasks

By having due dates on tasks, you can ensure that your cases will be handled in a proper time. To keep the task owners up to date and remind them about due and overdue tasks, the system sends reminder emails with a task overview. The tasks are grouped into pending, due today and overdue, so you can get the tasks listed by urgency and work through them.

If you are assigned a task that is already overdue or needs to be completed within the next 24 hours, the system sends a separate email for this task immediately after the assignment.

Every task mentioned in the reminder email contains a link to the task in BIC Process Execution so that you can directly access and work on it.

Perform subprocesses asynchronously

With release version 7.5 we introduced call activities that allow you to refer another process via call activity and by that create a subcase for that process automatically. In that version, the subcase will be processed synchronously. That means that the main case waits for the subcase to be completed to continue with the next steps.

Now you can mark a call activity as asynchronous. By doing so, the call activity task in the main process will be continued instantly when the case for the subprocess was created. The next task is started, and the main case can continue without waiting for the subcase to be completed.

Delete ProcessApp data in Studio and Test stage

When you create a ProcessApp, you usually test it intensively to make sure that everything works as defined. Some process designers duplicate ProcessApps and then work with that version. In the long run, this creates a lot of data that you will eventually no longer need. The Studio and Test environments are automatically cleared of ProcessApp operations when a new version of the process is checked in. Now you have the additional option of deleting the entire ProcessApp in the Studio and the Test environment in order to manually clean up the system.

JavaScript in script tasks

We introduced script tasks with release 7.5 where you can provide Groovy script to the ProcessApp and handle data in script tasks. Now BIC Process Execution is also supporting JavaScript as script language. You can switch between JavaScript and Groovy and will get syntax highlighting and code suggestions for both languages. With JavaScript, you have an easier access to script tasks.

Change case name

The case name is a specification that is also available as process variable within a case. There are use cases where you need to change the case name in a running case and see the change in the case list. We have improved the application there so that this change takes effect in all places where the case name is displayed.

Favourites within the ProcessApp list

The ProcessApp list was separated into "All ProcessApps" and "Favorites". We have merged these views as a preparation for features that will be available in the next release. When you have marked a ProcessApp as favorite, then you will see the favorite icon on this ProcessApp.

Actions on a ProcessApp

We changed the icons and the access to the functions of a ProcessApp in the ProcessApp overview. Additionally, to the ProcessApp icon there is only the favorite icon left. Other actions like the create case action are now placed in a context menu that appears on hover.

Improved error handling on send tasks

Send tasks can be configured to send emails automatically. But there can be an issue e.g., with the email server so that the task cannot be sent and is in an error state. When this happens, this task now becomes a user human task, and you can handle this task manually. The error is shown on this task and you can decide whether to send the task manually or try to send it again automatically.

Automatic email sending when placeholders are missing

Email templates can contain placeholders for process variables. In a generic email, you sometimes add placeholders for variables that are not provided in all cases. For these cases you can now specify the option to set an empty string at this point. In manual send task, you will not be confused by the placeholder any longer. In automatic send task, the system will send the email with an empty string.

Redesigning the task list

We redesigned the task list to provide a better overview of the pending tasks. The task entries now show the information in a more structured way. It also shows the due date for a task if one is set. Additionally, status icons will be shown when a task is in error state or overdue.

Updated application name and favicon

To ensure a consistent look and feel for all products, we have updated the application name and the favicon. Both changes can be seen in the browser tab.

23.146.3 Resolved Bugs

- [DES-2376] - Service calls sometimes fail because of expired access token
- [DES-2314] - The "visual-data" is not loaded lazy and can cause an OOM of the domain-service
- [DES-2312] - Diagrams may be displayed in the wrong context
- [DES-2161] - Misleading information in section "Configuration for automatic linking of SAML accounts" of installation documentation
- [DES-2092] - It is not possible to trigger the endpoint for creating an user without sending an first-login-email
- [DES-2017] - System requirements needs update
- [DES-1967] - Database backup may cause unexpected high disk usage

- [DES-1962] - Java Mail Properties set by environment variables have no effect

- [PE-4259] - Attachments are being handled in memory

- [PE-4178] - Form data is not saved when completing a task

- [PE-4176] - Button text size on mobile devices is too big on case archive action

- [PE-4169] - Hidden condition is not evaluated

- [PE-4143] - The Process Execution Apigateway is killed in production due to too much memory consumption

- [PE-4121] - Publishing of new process version aborted when creation case

- [PE-4107] - Can not download an attachment on activity

- [PE-4067] - Manual complete task is not possible for started task which does not have an assignee

- [PE-3981] - Form focus jumps to top when updating the form

- [PE-3975] - Menu is missing on mobile when accessing the application

- [PE-3878] - Error message for mobile view has wrong format

- [PE-3665] - NullPointerException on navigating to the default instance

- [PT-4886] - Online help download as PDF broken

- [PT-4841] - Special characters in link title breaks search when link is search facet

- [PT-4806] - Delete attachment in all languages does not work without attachment title

- [PT-4731] - Simulation parameters cannot be entered on custom symbols

- [PT-4488] - Typo in info banner

- [PT-4020] - Matrix view does not respect configuration

- [PT-3945] - Some fonts are not displayed correctly

- [PT-3710 | PT-3733 | PT-4455] - Security improvements

- [PT-3263] - Catalog import removes link titles

- [PT-3151] - Valid from date did not recognize UTC time zone in process warehouse report

- [PT-2787] - Third examiners do not receive an email on diagram publication completion

- [PT-2503] - Profile report for catalog items gets generated in browser language

- [PT-2014] - PDFs with extended rights do not work after publication (see *hint here*)

- [PT-1922] - Reports do not update Created / Last Saved property

23.147 Version 7.5.11

23.147.1 Resolved bugs

- [DES-3024] When the attachment attribute is configured as unlocalized, the attachments from imported objects are invisible. *Attention*: This fix not included in 7.6.x and 7.7.x.

23.148 Version 7.5.10

23.148.1 Resolved bugs

- [DES-2845] Username and other user attributes from Keycloak don't fit user-service columns

23.149 Version 7.5.9

23.149.1 Resolved bugs

- [PE-4762] Enhance how the JWT public key is loaded in Process Execution service

23.150 Version 7.5.8

23.150.1 Resolved bugs

- [PT-5110] Diagram cannot be rendered if it contains boolean attribute placements

23.151 Version 7.5.7

23.151.1 Resolved bugs

- [DES-2384] Improve "migrateToUserService" migration

23.152 Version 7.5.6

23.152.1 Resolved bugs

- [PT-4265] Last changed date of search hit is not correct
- [PT-4666] Sanitizing results in format differences
- [PT-4671] Pasting a link in third-party applications breaks URL

23.153 Version 7.5.5

23.153.1 Resolved bugs

- [PT-4632] Building search index is interrupted on uncommon office documents

23.154 Version 7.5.4

23.154.1 Resolved bugs

- [DES-2277] No User and Group related messages are sent for LDAP and SAML configurations

23.155 Version 7.5.3

23.155.1 Resolved bugs

- [PT-4557] - Security improvement

23.156 Version 7.5.2

23.156.1 Resolved bugs

- [PT-3770] - Redirect roles in feature toggle

23.157 Version 7.5.1

23.157.1 Resolved bugs

- [PT-4120] - Scale factor slider values in diagram print format settings are not correctly reproduced in print view
- [PT-4388] - Active resubmission workflows started before version 7.4.8 that are manually aborted will be recreated once if they are still valid
- [PT-4505] - Security improvement

23.158 Version 7.5.0

23.158.1 Key features

Easy inserting of a symbol in an existing sequence flow

Symbols can now be dropped on a sequence flow to automatically embed the new symbol in an *existing sequence flow*. You will see a visual feedback which signals that a symbol can be embedded in a sequence flow.

For example, you can drop an Activity or Gateway on the sequence flow between two other Activities and the new Activity is directly embedded in the sequence flow and connected to the other Activities.

Access to publication archives

Until now the archive export of depublished diagrams or catalog items were provided at the depublication workflow in Governance Cockpit. Users wanting to view an archived version in BIC Process Design needed to download the archive export and import it again.

The archived versions of diagrams and catalog items can now be accessed from the Governance Cockpit. When a diagram or catalog item was depublished, users can access the archived version from the audit trail of the depublication workflow. You will be informed that the diagram or catalog item has been depublished and have the option to open the archive. If you choose to open the archive you will directly see the diagram or catalog item and easily navigate through the different versions. Your Readers won't be able to access archived versions in publication since the archive access is in the Governance Cockpit, but you can share the URL to the diagram or catalog item with them, if they need to access an archive.

Please note that this is only available in the new user interface.

Linking Governance Workflows to diagrams or catalog items

In the old user interface, it was not possible to navigate from a workflow to a diagram or catalog item which is subject of the workflow. We enabled *this navigation* in the new user interface where you can now easily navigate from the workflow. The accessing link is located on the audit trail of a governance workflow and leads to the diagram or catalog item in the corresponding stage depending on the current state of the workflow (whether it is pending, rework or closed).

Displaying effective time span of archives

Archives were declared with the time stamp of the archive generation in the old user interface. In the new user interface, archive entries of *diagrams* and *catalog items* now display the actual time span in which the archive entry was the active version. This time span may differ from the governance attributes "valid from" and "valid to" since it displays the effective time span and not the set values in those attributes.

With the new declaration it is now easily possible to e. g. identify gaps in publication archives.

Arabic and Polish user interface

BIC Process Design now speaks Arabic and Polish in the new user interface! Both languages could already be chosen as content languages, but our user interface did not support those languages. The language of the user interface is determined by the set browser language. Our online help remains in English when accessing from an Arabic or Polish browser.

Serbian added as content language

We implemented Serbian as content languages, so that processes or catalog entries can be maintained in Serbian. Please note that this does not count for the language of the user interface.

Optimized search in catalog

We deactivated the alphabetical order of search results in the *catalog search* so that the list of search results is sorted by the relevance of each item. The alphabetical sorting of catalog items is still possible but not on search result list.

Optimization of task summary mail

Delegated tasks are now included in the *task summary mail* once a day. The task is still directly assigned in BIC Process Design and a toast informs the new task owner about the delegation.

Additional customization capabilities

We extended our customization capabilities so that some attributes can be excluded from being transferred to preview and publication stage. This is helpful if some attributes should not be archived in those stages, e. g. when they are only used in modeling.

We also enabled customization projects to perform validation on the start of publication workflows, so that individual rules can be validated. The workflow continues if the rule evaluation is positive and will be aborted if the rule evaluation is negative. In this manner, we can implement a variety of validations for you, for example to check whether the assigned Author is not also assigned as Responsible or whether the validity period is set correctly according to your governance definition.

Please note that both capabilities are highly individual and that your requirements can only be implemented by customization projects.

23.158.2 Existing features available in new user interface

Declaration of expired content in publication stage

When the validity period of a catalog item or diagram is reached the user will see a banner in publication that the catalog item or diagram exceeds the set "valid to"-date in the governance attributes. If the standard banner text does not fit the wording of your organization, then it can be adjusted for Private SaaS or on-premises systems. Please talk to your GBTEC project team about it.

Abort workflows and delegate tasks

In Governance Cockpit

- Administrators, Editors, and the initiator of a Governance Workflow can *abort running workflows* in Governance Cockpit. Simply open the audit trail of a Governance Workflow and you will find the option to abort in the option panel.

- Administrators and Editors can *delegate* a pending task of a Governance Workflow to a user in BIC Process Design. Users only need to open the audit trail of a Governance Workflow and click on the Delegation-Button on the pending task to delegate it to another user.

Filter catalog suggestions and access archives

In Catalog, users can now

- *filter* the catalog list in Public Workspace for catalog suggestions. Reviewers can filter the catalog list in Preview Stage for catalog items which need an approval.

- distinguish catalog suggestions from approved catalog items on the catalog list and on the details page of a catalog item.

- access *archived versions of catalog items* on the details page of a catalog item. Please note that a catalog item needs the Responsible being set to archive the version of a catalog item. You also need to set a Responsible to access the archived versions.

23.158.3 Process Execution

Introducing call activities in BIC Process Execution

Process designers are now able to include call activities in their processes. With call activities you can refer to other processes and create cases for them. During runtime a sub case will be created automatically when the call activity has been reached. All process variables and roles are transferred to the sub case and are available there. When the sub case is completed, the changes for the process variables will then be handed over to the main case.

Send emails from send tasks automatically

Process designers can already define email templates for send tasks, so that users have predefined emails. With this release the designer can mark a send task, so that the email will be sent automatically by the system. The system completes the task when the mail was sent, so that no user interaction is needed in the case.

Write own scripts and run them within script task

It is sometimes necessary to do complex calculations or interactions with process data. Many things can be done with formula fields within user forms. But sometimes this is not sufficient, so designers can now use script tasks for this. As the name already says, designers can write scripts that will be executed during run time. You can use all available process variables within the script, change them and create new process variables that will be available in the following steps of the case.

Define a retention period for your cases

Due to data protection purposes and system cleanups designers can now define a retention period for their processes. The retention period for a case starts when it is completed. BIC Process Execution deletes the case and all its data automatically after the defined period.

Use basic authentication in REST calls

It is best practice to use authentications when running REST calls against other systems. We introduce the basic authentication to extend our REST functionality. Process designers can configure the authentication easily in the REST configuration.

Possibility to handle data objects within user forms

Service tasks and REST are a common and powerful way to get data from external systems. That data is mostly structured as objects. User forms now support data object handling, so that the process designer can directly address attributes in data objects.

Updated administration page as preparation for coming features

The administration only contained the API-key configuration. With the coming releases there will be more things that need to be configured in the administration. That's why we've added a new page as overview of those things as administration entry page.

Mark a Boolean field as mandatory

Process designers can now mark a Boolean field in a user form as mandatory. As a result, a user must check this Boolean field to complete the task. By that you can force the user to actively accept or confirm data, information, etc.

User form editor design improvements

The design of the user form editor was improved. The preview section was increased, and the details section decreased in size. But both sections benefit from the change. The input fields in the details have now a row for their own. By that the size of the fields increases and the user can see even longer inputs.

Improve behavior of environments when deleting cases

User now get more detailed information when a case in the studio and test environment was deleted. Additionally, the user will be redirected to the instance when the case he/she had opened was deleted.

Include case functions in case flow menu

In the flow view of a case there were two menus – one at the top and one at the bottom of the flow. These menus have been merged so that there is only one menu left that contains all menu options from the former ones. It is shown at the top of the flow so that users can access it easily.

Use all output elements as document containers

By now it was only possible to use document objects as container for input- and output documents in BIC Process Execution. We improved the system so that business objects and other containers can be used. The user has now options to upload and download documents on those objects.

Show user error message on wrong REST response HTTP status code

Process designers usually define an expected HTTP status code for the response of their REST calls. When something goes wrong or the system simply returns an unexpected HTTP status code, then the user needs to know what happened. Therefore, BIC Process Execution now shows an error message to provide that information.

Show different start pages depending on user tasks

Different users have a different workload and a different type of work. Some have a lot of tasks in their task list, some have mostly group tasks, and some have most of their time no tasks and only create new cases. To match all those use cases and to improve the usability, we changed the behavior for the starting page when logging into BIC Process Execution. When the user has personal tasks to do, then he/she will see the task list. If there are no personal tasks but group tasks, the user will get the group tasks list. If there are no personal and no group tasks the user will be redirected to the ProcessApp overview to be able to create a new case quickly.

23.158.4 Resolved bugs

- [PE-3752] - Very long diagram names (>100 characters) causes an exception when the user tries to create an case of the process
- [PE-3698] - Task list in studio stage is not being updated after diagram update
- [PE-3546] - The size of the steps' icons in the instance flow view is not fitting with the design
- [PE-3456] - Mark, unmark and mark again a process as a favourite doesn't work as expected
- [PE-3442] - Mandatory fields have no mandatory indicator
- [PE-3376] - Updating a process in studio stage fails, if more than one user has marked it as favorite
- [PE-3375] - Input/Output documents should be retrieved by their association type and not edge type
- [PE-3342] - Alignment and line spacing in textarea for email editors are not being saved
- [PE-3339] - Email editor and preview content are not displayed correctly
- [PE-3184] - DMN task is not completed automatically
- [PE-3051] - Flow is breaking when having two associations with expressions pointing to the same entity
- [PE-2457] - Wrong warning message when trying to create an instance with creation restriction
- [PT-4381] - Wrong redirect on catalog list when creating a catalog entry (new UI)
- [PT-4172] - Switching between a main and allocation diagram can break visual data
- [PT-4127] - Converting PPT to PDF might fail
- [PT-4041] - Diagram editor allows selection of fonts not available for rendering, resulting in visual differences between stages and reports
- [PT-3941] - Diagram publication is not working correctly when started from publication stage
- [PT-3937] - Changing a title for an URL attachment decodes and breaks original link

- [PT-3910] - Document selector not working for multivalue attachments in documents view

- [PT-3892] - Local time zone is ignored after picking a date

- [PT-3778] - Open an URL needs double click to reach the destination (new UI)

- [PT-3771] - Updating numeric attribute values is not always possible

- [PT-3634] - Generated PDF doesn't display Cyrillic

- [PT-3630] - Diagram cannot be copied with broken edges

- [PT-3436] - Process flow calculation breaks on loops with non-exclusive gateways

- [PT-3060] - Only english translation for resubmission task toast is displayed

- [PT-2766] - "Share by email" is not working if the diagram name contains a special character

- [PT-2543] - Security improvement

- [PT-2529] - Reader see Tasks entry in navigation (new UI)

- [PT-1805] - Entity Resubmission Reminders still get sent after entity was republished with empty "Valid To" value

- [PT-1581] - Loss of image quality when creating a manual as a PDF

- [PT-1570] - Second and third examiner tasks are not included in entity publication mail

- [DES-1969] - Delete used catalog entries without replacement is not working

- [DES-1928] - Deletion of archive entries fails

- [DES-1919] - Repository archive entries are not properly removed

- [DES-1900] - Archive cleanup misses one entry

- [DES-1866] - Duplicated groups can be created by renaming

- [DES-1864] - Updating a node attribute through GRC-Apigateway does not work correctly

- [DES-1779] - Labels are broken after setting an attribute to hidden

- [DES-1736] - Differences between stages and reports due to unavailable fonts in rendering

- [DES-1275] - Layouter decreases pool size under specific circumstances

- [DES-562] - BPMN "call activity" can be set by two distinct attributes

23.159 Version 7.4.8

23.159.1 Resolved bugs

- [PT-3847] Resubmission data are incorrect

- [PT-4009] Catalog item replacement blocks diagram check in

- [PT-3949] Opening an allocation diagram from catalog can block check in

- [PT-3948] Opening an allocation diagram from catalog can double the main diagram

- [PT-3565] Saving larger diagram takes is not performant

23.160 Version 7.4.7

23.160.1 Resolved bugs

- [PT-3911] Frontend does not work in Internet Explorer 11
- [PT-3760] Role based UI selection is not reliable redirecting on first login
- [PT-3654] Security improvement

23.161 Version 7.4.6

23.161.1 Resolved bugs

- [PT-3517] Entity resubmission aborts on single failure
- [PT-3611] Search can't find assignment attribute values
- [PT-3568] Deputy tasks are limited to EDITOR or ADMINISTRATOR

23.162 Version 7.4.5

23.162.1 Resolved bugs

- [PE-3306] Uploaded documents are removed from cases when publishing new ProcessApp version

23.163 Version 7.4.4

23.163.1 Resolved bugs

- [DES-1835] As a new User I want to reach the application after I initially set my credentials

23.164 Version 7.4.3

23.164.1 Resolved bugs

- [PE-3297] Datepicker does not allow German inputs
- [PT-3509] Search filters may show IDs instead of names

23.165 Version 7.4.2

23.165.1 New features

- [PT-3273] As a user I want to see the KPIs when I hover over a node in heatmap view

- [PT-3181] As a user I want to see simulation scenario statistics in order to analyze the run

- [PT-2987] As a user I want to see the simulation results in a heatmap

- [PT-2985] As a user I want to execute a simulation based on a locally filled out scenario

- [PT-2511] As a user I want to specify scenario parameters in a simulation scenario

- [PT-2508] As a user I want to specify gateway parameters in order to apply decision probabilities to a simulation scenario

- [PT-2507] As a user I want to specify task parameters in order to apply these to a simulation scenario

- [PT-2505] As a user I want to create a simulation scenario so that I can define the scenario

23.165.2 Resolved bugs

- [PT-2262] Links on landingpage point to invalid URLs

23.166 Version 7.4.1

23.166.1 Resolved bugs

- [PT-2615] BPMN export misses outgoing sequences of a gateway in BPMN XML

- [PT-3250][DES-1804] Migration to find missing resubmission reminders fails to match e-mail addresses in different cases

- [PT-3231][DES-1809] Workflow participants can delegate tasks

- [PT-2962] Manual report doesn't display role satellites of first activity

- [PT-1586][DES-1821] Search filter based on assignments are not updated if the assigned object is changed

- [PE-3159] Completing send task results in error

- [PE-3149] Null comparison does not work in forms

23.167 Version 7.4.0

23.167.1 New features

Analyze repository with diagram filters

Up to now it was not possible to filter diagrams for diagram attributes and the only way to achieve filtered lists was to receive the process warehouse export and filter the diagrams in Excel or via the overall search. We now introduce *filter for diagrams* to analyze your repository. When you open the diagram view in the new user interface you will see the filter panel on the right side to tailor the diagram list. The feature enables you to quickly answer plenty of questions, like

- What resubmission effort will come up next month?

  Use Valid To filter and set time span to next month

- Which processes are in my department?

  Use Scope filter and set your department

- Which diagrams are maintained by me?

  Use Author filter and set yourself as author

- Which diagrams are in responsibility of a colleague who leaves the company next month?

  Use Responsible filter and set the leaving person as responsible

- Which are currently in modelling or needs to be reviewed?

  Use State filter and set the desired state

It is also possible to extend your method by custom attributes which then can be used to filter the diagrams. Just add them in the diagram type in your method, maintain the attribute in BIC Process Design and the filter will directly be available.

Apply custom colors to symbols

Administrators can change the symbol colors, namely border color, background color and font color, in the administration without changing the symbol definition in the method. A custom symbol code can be set for almost all symbols and can be directly applied to all diagrams in all stages.

Please note that changes to the symbol colors might have a huge impact on the appearance of the modeled processes in your organization. We recommend to carefully plan, coordinate, and communicate those changes.

Copy direct link to attached files

It is now possible to copy a *direct link to an attached file* into your clipboard so that you can easily share the URL to this attachment. Simply hover over an attached file at a catalog item, diagram or even a modeling object and copy the URL. The generated URL leads to the attachment in the corresponding stage and the file gets directly downloaded when a user follows the URL (depends on your browser configuration). We will check the user's permissions to access the file (valid BIC Process Design account, access permission to stage, access restriction) and show the context of the attachment to the user. The shared URL is stable if you give the new version of a file the same title.

Please note that this feature is available for attached files, not for external links or links to local files. You can only copy the URL in the new user interface and user who follow the URL will be directed to the new user interface.

Editors are now Governance Cockpit administrators

Until now Administrators where the only ones who could see and manage all governance workflows. This gave them a heavy workload besides their system administration tasks. We enabled Editors to take over the administrative tasks for *governance workflows* to ease the situation for Administrators. Users with the Editor role now can see and manage all governance workflows. They have the same rights in governance cockpit like Administrators, e.g. delegating or aborting a workflow.

Please note that Editors did not receive any other administrator rights. This feature only allows them to administer workflows.

Resubmission tasks for catalog items

Until now, the responsible or responsible (resubmission) received only an e-mail notification about the upcoming resubmission of a catalog item. We now introduce the *resubmission task* for catalog items, which is already available for diagrams. When a catalog item is going to be invalid, then the responsible or responsible (resubmission) is assigned to the task. The resubmission workflow for the catalog item is listed in the governance cockpit and the task will appear directly in the user's task list in BIC Process Design. We will also inform the task recipient in the task summary mail once a day. The resubmission task has the options to extend the validity for 1 year or depublish the catalog item (will be depublished when "valid to"-date is reached).

Please note that it is currently not possible to filter for resubmission workflows in the Governance Cockpit.

Participating Reviewer can access the Governance Cockpit

We introduced in version 7.3 that *task owner can track progress* of their governance workflows . We kept on improving this feature so that Reviewers can also access the Governance Cockpit in BIC Process Design to track the progress of their governance workflows where they have or had a task.

Resubmission information mail for governance participants

All governance participants (persons assigned to governance attributes) can receive an *information mail* that a resubmission for a catalog item or diagram has been initiated. This mail serves only for their information and is independent to the resubmission workflows. We also introduced an additional governance attribute "Do not send information mail (resubmission)" to deactivate the mail for a diagram or catalog item so that you can decide whether you want to inform the governance participants or not. This mail gets send per default and the attribute can be configured in the method, e.g. if you do not want modelers to deactivate the mail or if you want this mail to be never send. Please contact us if you have questions regarding the right method configuration.

Please note that the information mail can only be send for diagrams or catalog items published after this version.

Configure granular retention period for archives

Administrators can set the retention period for the publication stage up to 30 years with a yearly interval. The retention period for the public workspace and preview stage can be set up to 365 days with a daily interval. Please consider that changes to the retention period only affect newly created archives and that a newly set retention period does not affect already created archives.

Please note that we limited the archive period for the public workspace and preview stage to 365 days, but we will not change your configuration. When you already configured a higher period before version 7.4, then we will retain this period and convert it to days. When you change the period after the update, then you can only set the new limit for the public workspace and preview stage.

Copy & paste between diagram types

Copying & pasting modelled objects was only possible between the same diagram type until now, e.g. copying an activity from a BPMN diagram and paste it into another BPMN diagram. From now on you can copy a selection of modeling elements and copy them to your clipboard to paste the elements in a different diagram type, e.g. copy a risk from a risk diagram and paste it into a BPMN diagram. The only precondition is that the modeled object (symbol type, entity type and association type) is allowed in the target diagram type. We will remove the modeled objects during pasting if you have modelled objects in your clipboard which are not allowed in the target diagram type while allowed modeling objects are pasted.

Please note that you can configure the diagram types in the method and thereby allow modeling objects in a diagram type which are not enabled in the standard method. Thereby you could extend the transfer of modelling objects between diagram types according to your requirements.

23.167.2 Existing functionalities available in the new user interface

Please note that not all functionalities of the old user interface are yet available in the new user interface. You might miss some functions but be sure that we will transfer all. The new user interface is a work in progress state. We offer you the possibility to get used to the new user interface and give us feedback on it, so that we can keep on improving it.

Adding and editing catalog items

Catalog items can now be *added in the new user interface*. You can also edit existing catalog items and *maintain the attributes*. Please note that some catalog features, e.g. deleting catalog items or the catalog re-organization, are not yet available. We are working on the catalog to enable the whole functionality!

23.167.3 Process Execution

Introducing studio, test and production environment

In order to create and test your ProcessApps, you now have two additional environments in BIC Process Execution. We added the studio and test environments to enable authors and reviews to test their ProcessApps without creating testing data on the production environment and mix production and testing data. A big bonus of studio and test environments is that the test cases and data will be deleted automatically when you check in a new version of your ProcessApp. By that you will always have a clean system.

Create case and access BIC Process Execution directly from BIC Portal

You are now able to access BIC Process Execution directly from BIC Portal. You will find a button in the top right corner of the documented processes. As an author in the common stage, you will create a test case in the studio environment and as a reviewer in the review stage, you will create a test case in the test environment of BIC Process Execution in order to test the process quickly. As a "normal" user in the publication stage you will create a case in the public/production stage in BIC Process Execution.

Assign task to case owner as fallback

There are several cases where a task needs to be assigned automatically to a user. That can be an error on a service task, a missing role assignment, etc. To avoid that these tasks will not be recognized, they now will be assigned to the case owner as fallback. The case owner then can see this task in the task list and decide what to do.

Define a conditional expression for the mandatory property of a form field

We have already introduced the conditional expression for the "readonly" and "hidden" property if input fields. You can now define a conditional expression for the "mandatory" property, too. By that you are now able to create complete dynamic user forms that will react to the process and form data provided by the tasks and users.

Drag & drop form field from the field palette

You are now able to drag & drop a new form field directly from the field palette to the place of the form where you want it to be.

Default id for input fields in user form editor

When you are editing a user form in the designer and adding new input fields to your form, these input field will now get an automatic generated id. By that you are no longer forced to set an id by yourself. But you are still able to change the id to a more user friendly one.

Admins can start any task manually

It is sometimes necessary to start a task which is not the next one in flow of the documented process. Therefore, admins are able to start any task they want.

That function should only be used on an exceptional basis and only by admins who know what this action can lead to!

See datatype of process variables

When you are in the case flow view, you have the option to see all process variables in the "Edit process variables" dialog. In order to evaluate issues with these variables in the process, we added the datatype as information to each variable in this list.

Design improvement Text area

We improved the design of the text area input field to have a better look and feel in the user form.

Design improvement Menu Bar

We improved the design of the menu bar to have a more consistent look and feel over all BIC products.

Dates are shown in the format of your browser language

Dates will now be shown in your local format. The system evaluates the language and format from your browser settings. When you have set British English as language in your browser, the dates will be shown in British English format. When you have set American English as language in your browser, the dates will be shown in American English format. Same behavior for other languages.

23.167.4 Resolved bugs

- [PT-3187] - Resubmission workflow does not work as intended if the responsible is a user group

- [PT-3133] - Long names overlap dialogs

- [PT-3021] - Errors in email sending during publication interfere with resubmission mechanism

- [PT-2613] - Catalog Warehouse Export doesn't show the entity type for not maintained languages

- [PT-2304] - Fallback placeholder is missing in catalog list and detail page in new UI

- [PT-2647] - Clicking on the attachment icon in the SVG view may lead to wrong content language

- [PT-2151] - Entries in Matrix Report are duplicated

- [PT-2131] - Search subfolder with enums are not shown correctly in new UI

- [PT-2111] - Manual report in pdfa/pdfa2b format are missing icons

- [PT-2017] - Process Warehouse report doesn't show the content of certain rows for not maintained languages

- [DES-1673] - Formatting for some symbol does not work as expected

- [DES-1428] - When renaming a link, the title= parameter gets appended and not replaced, potentially leading to the display of the old title

- [DES-1364] - It is not possible move an attribute to the main attribute group

- [DES-1277] - If maintained attachments Urls are too long you cannot click the edit button

- [DES-1231] - Typo in path for updating the user group

- [DES-565] - Enumeration and indentation in description is wrong after check in

- [PE-3071] - Bug when routing from selection directly to end event to path having tasks

- [PE-3014] - Process is stuck after multiple gateways

- [PE-3012] - Process is stuck after first task with a following loop

- [PE-3011] - Space under Textarea is too small

- [PE-3010] - Error when resetting default instance being in a gateway and trying to change the decision after reset

- [PE-2970] - Drag & drop objects into textarea breaks forms

- [PE-2944] - Task acting like a gateway before a Pararell is not started

- [PE-2925] - Boolean value is saved as string

- [PE-2913] - Evaluation of booleans does not work dynamically with calculated fields values

- [PE-2912] - Checkbox in form show wrong value

- [PE-2861] - Can not start task after two gateways

- [PE-2860] - Manual gateway switch is missing on task

- [PE-2846] - Last character in textarea is removed after completing a task (sometimes)

- [PE-2797] - Gateway in one click ProcessApp does not work and destroys case

- [PE-2791] - First task can not be completed

- [PE-2763] - When completing a task the system starts overnext task, if next task is already started manually

- [PE-2762] - Process with loop on XOR gateway fails to calculate the flow on decision selection

- [PE-2734] - No step can be started after a GW

- [PE-2409] - Initial method resource request has no tenantId specified

- [PE-1678] - Fast typing deletes characters

- [PE-2736] - Service Task may fail when request body content contains double quotes

23.168 Version 7.3.5

23.168.1 Resolved bugs

- [PT-2947] - Values of occurrence attributes were duplicated to entity

- [PT-2781] - Diagram resubmission do not start

23.169 Version 7.3.4

23.169.1 New features

23.169.2 Process Execution

23.169.3 Resolved bugs

- [PE-2720] - Push notification links do not work

- [PE-2685] - Rest editor offers Http Methods that are not implemented in the BE

23.170 Version 7.3.3

23.170.1 New features

23.170.2 Process Execution

REST Configuration editor to define the details of a REST call

As a process designer you are able to do the configuration for the REST call within a dialog. This dialog structures the configuration in three steps. The connection, the request and the response. With that changes the user has a better experience and overview. It is also the basis for more configuration options in order to use REST with all its features.

Configure the header of a REST call

One new feature that we provide in REST calls is the request header. As a process designer you can add additional data in the request header. You can either use static key value pairs, or use placeholders to provide dynamic data from a case as request parameters.

Define a file as request body for a REST call

Sometimes it is necessary to send files and document via REST call to other systems. Therefore you can now configure in the new REST configuration a file that will be send in the request of the REST call.

Receive a file as response in a REST call

When doing REST calls, you always get a response from the system you are calling. This response can contain different data and data types. You can now receive a file as response, map it to an modeled output document and use it in further steps of your process.

Set a conditional expression for the hidden property of a form field

In order to create less complex diagrams and to improve the user experience, a process designer can now configure whether an input field in a uer form should be hidden or not on a dynamic basis. Therefore you can define an expression that will be evaluated during runtime and decide on the basis of the output if the field will be displayed or not.

Set a conditional expression for the read only property of a form field

Like the dynamic configuration for the hidden property of a field in a user form, you have the same option for the read only property. A process designer can define an expression do decide during runtime if that field is read only or not.

23.170.3 Resolved bugs

- [DES-1523] - Start diagram cannot be changed
- [PE-2628] - System does not route to flow view while calculating a case
- [PE-2591] - Initialize boolean variables as false if no value ist set
- [PE-2545] - The flow of "old" cases are not shown after changing the way to calculate integrated decision options
- [PE-2468] - Form calculation does not happen when using calculated values
- [PE-2453] - When a task after a gateway is started some of previous gateways are not block
- [PE-2377] - Wrong "Responsible" spelling for German language
- [PE-2337] - Mark and unmark a process as favourite doesn't work for processes listed in the search result
- [PE-1762] - There is no reload button on a decision when the selected task is below the changed gateway
- [PE-1715] - Localized content is not loaded on mobile when the tab is refreshed
- [PE-2414] - Deleting a group used in a process' "Create restriction" results in case list and process apps req failures
- [PE-2399] - Request timeout when creating a case via run link

- [PE-2379] - Flow is requested while in calculation leading to corrupted data

23.171 Version 7.3.2

23.171.1 Resolved bugs

- [PT-2748] - Correction in domain service migration
- [PT-2247] - Queries with two or more whitespaces break the catalog search
- [DES-1521] - Catalog item suggestions don't show entries when query contains umlauts
- [DES-1517] - Role suggestion list in modeler is missing correct search results

23.172 Version 7.3.1

23.172.1 Resolved bugs

- [PT-2736] - Workflow list is incorrect when user did not participate in any workflow
- [PT-2605] - Catalog list cannot be loaded when catalog items have a huge amount of custom assignments
- [DES-781] - Decomposition icon at nodes are not always highlighted

23.173 Version 7.3.0

23.173.1 New features

Breadcrumb navigation

We reworked and enhanced the design of the breadcrumb function in the new user interface. It is now always available for example when you are in a diagram, category or in the catalog. The breadcrumb can also be used for navigation so that it is now even easier to navigate through BIC Process Design.

Archive access for depublished catalog entries

We introduced the archive access for depublished diagrams in version 7.1 and continued our improvements. You can now also access the archived version of a depublished catalog entry in the corresponding depublication workflow in governance cockpit. Like for depublished diagrams, the archive of the depublished catalog entry is stored in the audit trail of the depublication workflow and can be downloaded there. We also enabled the archive access of already depublished catalog entries before this version.

Please note that this feature is only available in the new user interface and that we will also improve this feature in future versions.

Option to delete attachments in all content languages

We introduced localized attachments in version 7.2 and continued to improve this feature. When you uploaded a file or maintained an URL in all content languages, then you can delete those attachments with one click instead of deleting each attachment in all content languages. This reduces the maintenance effort a lot.

Task owner can track progress of their governance workflows

Governance participants who have an open task or had completed a task in a governance workflow can access the workflow in governance cockpit to track the progress of the workflow. You can also see your workflows even though you delegate the task to another user to track the progress of your delegation. All functionalities of the governance cockpit, like searching for a workflow or filtering the list of workflows, can be used.

Please note that reviewers cannot access the Governance Cockpit at the moment.

Alignment of BIC Process Design standard method with BIC GRC

We adjusted the standard method and changed the attribute context from occurrence to entity. This means that the set value now counts for the whole entity and no longer for an occurrence of this entity. We migrated the set values to the entity just in case the values of all occurrences were unique. For all other cases we discarded the value in modeling (public workspace). You might need to set a value again.

Please note that the migration was only executed in public workspace and does not affect the preview, publication, or archived versions.

The catalog entry "Risks" has already the option to maintain it as "Obsolete". We adjusted the standard method so that you can also maintain Controls as "Obsolete", e. g. when the corresponding Risk is obsolete.

Enhanced OCL custom validation

We enhanced our OCL (Object Constraint Language), so that it now uses the entity instead of its graphical nodes. For example, you can now create a validation rule (in method editor) to check weather an activity inside an application pool is typed as service task. You can also set a more specific validation context for an OCL rule (in method editor), modelling or validation, to define when the rule should be validated (during modelling or when a user check in a diagram).

Hindi and Indonesian added as content language

We implemented Hindi and Indonesian as content languages, so that processes or catalog entries can be maintained in those languages. Please note that this does not count for the language of the user interface.

Do you need to maintain your processes in a content language which is not yet available in BIC Process Design? Then please request the language at our Support team. We will give you a feedback whether we can provide your desired content language.

Administration in a new tab

When you open the administration in the application, then the administration gets opened in a new tab. You can then simply close the administration tab and all changes are saved.

23.173.2 Existing functionalities available in the new user interface

Identity validation for governance tasks

When you are working in the new user interface and your organization activated the re-validation of your identity for governance tasks, this feature is now also active in the new user interface. Task owner are directed to the login screen when deciding upon a governance task to validate their identity.

23.173.3 Process Execution

Create an API key in order to connect to BIC Execution

An API key can now be created in BIC Process Execution. This function enables you to securely connect external systems to BIC Process Execution so that only authenticated systems can access BIC Process Execution via REST call. API keys can be created and deleted in the administration area.

Create new cases via REST call

Cases can now be created from external systems. Therefore, a higher degree of automation can be reached for your processes. Technically speaking a HTTP POST request is sent to BIC Process Execution via a REST call. For a safe authentication, this call must contain an API key, which can be created in the administration area of BIC Process Execution. In addition, the case's name and process variables can be specified within the request. As soon as the HTTP POST request has been processed, the new case is available in BIC Process Execution and can be worked on immediately.

Search for ProcessApps

If you have many different processes that are made available as executable ProcessApps in BIC Process Execution, it can sometimes be difficult to find the right ProcessApp quickly. To ease this task for you, we have implemented a search function. Simply type in the name or a part of the name of the ProcessApp in the search bar and press enter to filter the ProcessApps.

Mark ProcessApps as favourites

As a user you have usually a couple of ProcessApps you are working with. To have a quick access to these ProcessApps, you are now able to mark ProcessApps as favourites. You can can do this for every app in the ProcessApps view. There you can also switch to the favorites tab in the top right corner.

Calculate data in user forms

User forms are powerful tools to get relevant data from the user during the process flow. But sometimes it is necessary not only to collect the data, but also to do calculations, checks, transformations, etc. To this purpose we have introduced the "Formula" field in the form editor. With that field, you can use different formulas to access and process data within your process instance.

All available formulas can be checked in the documentation of Formula.js.

Create an e-mail template for a send task

You can now create and configure e-mail templates in send tasks via the "Email template editor" in BIC Process Design. Process variables will be replaced during runtime to provide data dynamically for defined placeholders in the e-mail template, such as the recipient of the e-mail. The users who have been assigned to such a task in BIC Process Execution can see the email template in the corresponding task's form. With a simple click the e-mail template can then be transferred to their local email client for further editing, file attaching and sending.

Create a new case from the process's case list

Through the usage of a new implemented button the process's case list you can now create new cases directly for the corresponding process.

User form editor improvements

We implemented some improvements in the user form editor to provide a better user experience when creating a user form.

- The field type icon is displayed at the right side of a form field to show the user which form fields are already included in the form.

- The field type name is added to the details header on the right side of the user form editor.

- The error messages have been updated to provide a clear and more understandable error message.

23.173.4 Resolved bugs

- [PT-1352 | BC-14041] - User group assigned to scope and access restriction of same diagram is not shown as search facet in wildcard search

- [PT-1535] - SVG of a diagram look different in portal and design

- [PT-1621] - Fonts in reports differ in some user languages

- [PT-1786] - Delegation entry is missing in mail notification

- [PT-1793 | BC-14291] - Applicable documents are displayed twice in profile view

- [PT-1869] - Check out button is still present when opening allocation diagram

- [PT-1947] - Chips in catalog are not directly clickable because of overlaying tooltips

- [PT-1991] - Links to online help in mails are outdated

- [PT-2021] - Big imports bottleneck the messaging leading to unresponsive catalog usage

- [PT-2064] - Governance search facets missing user when user was maintained in several governance attributes

- [PT-2090] - Customized entity publication mails link to the entity in the common stage

- [PT-2096] - Depublication of managed document aborts with failure when the document is still referred in preview stage

- [PT-2261] - Indexing of documents with content length larger than 32KB is skipped

- [PT-2358] - Wrong default language for release notes

- [PT-2497] - Resubmission email templates cannot be changed for specific tenants

- [PT-2504] - Occurrences view misses elements

- [PT-2526] - Catalog import removes keyword in other languages

- [PT-2531] - Indexing of documents with number of characters larger than 100000 is skipped completely

- [DES-436 | BC-14482] - Methodeditor stores numerical default values as strings in the method file

- [DES-550] - OCL check works not as expected when creating objects via mini symbol palette

- [DES-645] - Security improvement

- [DES-654 | PT-465| BC-3067] - The text formatting window of an Annotation does not work correctly

- [DES-1107] - Parallel document downloads may lead to no response

- [DES-1140] - Content language in diagram SVG is not always update when switching language

- [DES-1176] - Context menu for attachment / decomposition link misses entries

- [DES-1281] - Edited link title gets not updated correctly

- [DES-1362] - Catalog creates occurrence attribute value for catalog item

- [DES-1363 | DES-1277] - Edit button for attachments with long names is hidden in catalog view

- [DES-1371] - Clicking on a keyword in catalog entry edit mode discards all unsaved changes

- [DES-1395] - Suggestion list misses some items with special character in name

- [PE-2278] - ProcessApps list not up to date on login or site reload

- [PE-2265] - Administrator cannot modify case details

- [PE-2264] - Gateway change causes error when form boolean switch is changed

- [PE-2259] - Drag & Drop icon on input field is always visible in user form editor

- [PE-2258] - When i create an instance via REST call, the first task should start automatically when it has a user or grouped assigned

- [PE-2251] - When receiving an user deletion message, then we should ignore the message

- [PE-2223] - DMN task can not be completed

- [PE-2184] - Change info message for archive cases when there are no cases in the list

- [PE-2183] - Typo in german no cases info text

- [PE-2181] - Archived cases button must not be present on archived cases list

- [PE-2177] - Missing error message and error is shown when unnecessary in user form editor

- [PE-2154] - Archive confirmation dialog has a horizontal scrollbar

- [PE-2112] - Readme has a typo in title

- [PE-2109] - Drag and trash icons are always visible on each form field in form editor

- [PE-2108] - German label name in form editor is wrong

- [PE-2107] - Task can not be completed if all form fields are read only

- [PE-2106] - Long formfield value texts are cut in user task view

- [PE-2099] - Adjust icon size of ProcessApps on a desktop

- [PE-2098] - Wrong color of active due date icon

- [PE-1970] - Wrong deign for input field placeholder text

- [PE-2224] - Gateway recalculation spinner is never removed when no input expression resolves to true

- [PE-2220] - Customer cannot create new instances because unique[email,tenant] constraint

- [PE-2216] - Escaping quotation marks in DMN Table attribute causes exception

23.174 Version 7.2.7

23.174.1 Resolved bugs

- [DES-1236] - Migration Service view is broken

23.175 Version 7.2.6

23.175.1 Resolved bugs

- [DES-1214] - Attachments are not migrated when checked out during upgrade across 7.2.0

- [PT-2225] - Nodes are not listed in manual report with path sorting

- [PT-2227] – Old and new user interface should handle non-localized attachments

23.176 Version 7.2.5

23.176.1 Process Execution

As an admin or instance owner, I want to set a due date for an instance

When you create a new instance of a process, you can add a due date. You can also add and edit the due date for an instance, when you go to the details of the instance. When you set a due date on an instance, it will be shown in the instance list. If the due date is expired, the entry for this instance will be shown with a red due date in the instance list.

As a user I want to see archived entries in the case list

You can move instances of a process into the archive. When you are on the instance list, you have the option to switch from your active instances to the archive by selecting the archive register at the top of the list. You can switch between the two available registers to show active or archived instances.

As a user I want to create a case with a run link from outside the application

As a user, you are now able to create a run link for a process to create a new instance from outside the application. You can use this link in other applications. By clicking on this link, you will be redirected to the create instance dialog in BIC Process Execution. If you are already logged in, the dialog will show up. Otherwise you will have to log in first. After logging in, you will be redirected to the create instance dialog.

When a DMN Task has all input it should be executed automatically

DMN tasks will now be executed automatically, if all input variables are available. The calculation will be done as soon as the task starts and the output will be shown directly.

23.176.2 Resolved bugs

- [PE-1818] - Instance list is partial hidden when windows size is to small.
- [PE-1854] - When a diagram is checked and for a while, form fields disappear if you close and open the form editor
- [PE-1991] - Menu toggle button doesn't work after some quick clicks
- [PE-2010] - TenantId should be checked for Camunda rest API requests
- [PE-2014] - DMN errors messages are always empty

23.177 Version 7.2.4

23.177.1 Resolved bugs

- [PT-2192] - Attachments are localized during import when they are non-localized in method
- [PT-2169 | PT-2187 | PT-2188] - Enumeration of process step path differs in matrix view and manual reports
- [PT-2159] - Recreating the SOLR index breaks sometimes

23.178 Version 7.2.3

23.178.1 Process Execution

Separate section for the user task form on the right side

When a user task has a configured form, the form will now be shown on the right side of the task in the flow view. The form is only visible if the task is assigned to a user.

ProcessApps view as an icon view

"Processes" is renamed to "ProcessApps" and the view is changed to an icon view. You can change the color of the default icon, so this color will be shown instead of the default color (primary color). You can also change the process app icon by a custom icon. You can change both in the automation group settings of your diagram in the process designer.

23.178.2 Resolved bugs

- [PE-1615] - Roles are shown under "Applications" section of task form
- [PE-1623] - Automatic Start next task throws an exception when the next task after a parallel gateway is already started
- [PE-1652] - Archived instances cannot access process variables
- [PE-1898] - Automatic DMN evaluation sends null variables value if untouched
- [PE-1925] - The process does not run correctly if the output is changed in a DMN task
- [PT-2136] - Update search-index without deleting it

23.179 Version 7.2.2

23.179.1 Resolved bugs

- [DES-948] – Changes to catalog items are not visible when switching between content languages in edit mode
- [DES-949] – Newly created links are only available in current content language when a title was directly added
- [DES-1025] - Assignments are limited to 100
- [PT-1852] – Scheduled workflow steps are not performed correctly
- [PT-1987] – Retrieving localized attribute values is not possible in report templates
- [PT-2084] - Assigned entities with own lifecycle get directly published when source entity gets published
- [PT-2092] – All entity assignments are not available when only one assignment is not available

23.180 Version 7.2.1

23.180.1 Resolved bugs

- [PT-1970] - Security improvement
- [PT-1997] - Error while sending task assignment emails
- [DES-916] - Adding a new lane does not change the parent for elements that are already on the pool

23.181 Version 7.2.0

23.181.1 New features

View diagram archives directly

When a diagram has an archived version, then you can *view the archive directly in BIC Process Design*. Just select the intended stage (e.g. publication) of the diagram and click on the archive entry! The displayed archive can only be viewed and so some functionalities are not available for the diagram archive. You can still download the archive and import it to use all functionalities.

Please note that this feature is available only in the new user interface.

Language dependent attachments

Attachments are now language dependent. Therefore, uploaded files will be stored in a specific content language. This enables you to provide attachments to users in their language, like you provide process translation in every content language. You can use the translation mode for diagram and catalog items to maintain the attachments for each content language or to gain an overview about the maintained attachments in each content language.

When you do not want to provide attachments in each content language, then you can still maintain only one attachment for each content language. The procedure is then the same as before, just do not uncheck the option to *Upload the attachment for all content languages*. The option is active per default.

Please note that you might want to rework your attachments for language localization to provide your current attachments in only specific languages.

Support for browser extensions to link local files

Browsers have become more restrictive when it comes to access locally stored files to raise the security of your data. Several browser extensions can help to overcome those restrictions and we did our best to support those extensions. But it depends on your browser, your browser settings, and the used browser extension whether our improvements work for your configuration. Browser extensions are not part of our software.

Path sorting of activities in reports

Activities of a process are now ordered in accordance with their sequence flow in a process when they are enumerated in reports processflow-based-exports>. If gateways or operators are modeled in a process, then we will rely on the maintained probability of the following activity to determine the order if the activities.

Resubmission workflows in workflow list

Resubmission workflows for diagrams and catalog entries now appear in the workflow list (and in *governance cockpit* of the new user interface). You can now track the process of a resubmission workflow, delegate a task, or abort the workflow.

Please note that you are not yet able to filter for resubmission workflows.

Summary mail for new tasks

We optimized our task notification. Your task will be directly available in the application, but we will not send you one mail per task each time a new task was assigned to you. We gather all new tasks and summarize them in a single mail once a day (during night).

Edit mode without alternative language

We still provide the fallback language, when a process or catalog item is in public workspace, preview or publication stage. But we *do not show the fallback language* when you are editing a diagram or catalog item. This adjustment enables you to complete your translation tasks faster and have a clearer overview about missing translations.

Explicit editing of catalog items

We also introduced a check out mechanism to edit catalog items. This mechanism avoids unintended changes to catalog items and allows you to view the fallback language when you only want to view a catalog item in public workspace.

Adjustments of standard method

The customer journey map attribute *Key performance indicator* is now a multi value attribute, so that you can assign several KPI to this attribute.

Adjustment of layout settings

In the administration area, the list of configurable layouts was reduced so that only diagram types appear for which a process layout can be configured. Those diagram types are EPC, BPMN and VCD.

Quick start guide

When you click on the quick start guide, then you do not receive a file any longer. Instead, you are directing to the quick start guide section in our documentation. If you have replaced our quick start guide file with organization specific files, those files will still be provided, and the users can receive them.

23.181.2 Existing features available in new user interface

Working with workflow tasks

Your workflow tasks go an audit trail, so that you can see the previous workflow steps including all given comments. You can navigate from the task directly to the process or catalog entry or perform the task directly in the task list. If you navigate from a task to a process, you can also perform the task directly on the process.

Searching for diagrams

The diagram search was aligned with known search logic from the old user interface:

- The list of search hits is no longer alphabetically ordered. The order is determined based on the ranking of a search hit so that more relevant hits are ranked higher.

- When you search for diagrams, the content of all diagram attributes will be searched now. For example, when you search for a diagram of a certain author you can just type the name to find all related diagrams.

Further improvements

- Catalog entries can be published from the catalog if you have maintained at least the responsible.

- The *RACI-Matrix can be filtered*, e.g., when you want to see only your process role.

23.181.3 Process Execution

- With the new version the user gets a push notification when a new task is assigned. Thus, each user stays informed about new events even if the application is not directly used at the moment.

- When a decision in a case was changed, the new tasks are shown directly without the need to press the update button on the gateway. The update button is only shown, if the user current selected task would be vanished.

- When the process flow is recalculated, the gateway shows a loading indicator to make ot visible for the user, that the process flow is about to be updated.

- Only administrators are now able to edit case variables.

23.181.4 Resolved bugs

- [PT-110 | DES-224] - 2nd / 3rd examiner and resubmission responsible cannot see an access restricted diagram

- [PT-370 | BC-13493 | PT-996] - Security improvements

- [PT-915] - Workflow list may show non-existing workflows as active tht cannot be aborted

- [PT-1056 | PT-1387 | BC-9323] - Depublication mail contains link to diagram

- [PT-1344] - Wrong link to online help in workflow notification mails

- [PT-1345] - GRC API Gateway only provides the first attribute value for multi value attributes

- [PT-1391 | BC-10696] - The local time when a workflow was started is not correct in workflow e-mails

- [PT-1398 | DES-490] - Misspelling in German mail template for resubmission tasks

- [PT-1485] - Governance attributes are displayed in wrong order

- [PT-1543] - Words get cut illogical in new UI

- [PT-1673] - Portal and Design show different reports based on the same report descriptor configurations

- [PT-1675] - Diagram Publication may fail if it's using an entity with its own lifecycle and the same "Valid From" date

- [PT-1741] - Link in entity release mail leads to common stage

- [PT-1757 | PT-1206 | DES-566] - Missing documentation of font usage restrictions for pdf output formats (Note: Please check out our documentation for applicable fonts.)

- [PT-1949] - Upgrade can cause workflow timer inconsistency

- [PT-1964] - Upload limit for attachments is calculated incorrectly

- [DES-246] - On MyBIC page images get overwritten

- [DES-488] - Document list is not scrollable in Designer

- [DES-527] - "Show more" for long attributes works properly only in 100% browser zoom

- [DES-528] - The cropping of the description is not consistent

- [DES-532] - Entity replacement for entities with associations

- [DES-533] - Watermark broken on pools and lanes

- [DES-537] - Line brakes in annotation are not consistent

- [DES-570] - Attribute "Name" of gateways is emptied after the field has values inside

- [DES-587 | BC-13505] - Methodeditor removes tooling after symbol definition changes or export

- [DES-590] - Download the online help as pdf does not work

- [DES-684] - Auto logout in "authenticateOnWorkflow" feature will break if the customer uses multiple tabs in browser

- [PE-1394] - Process Instances counter is wrong

- [PE-1587] - Mobile instances list update

- [PE-1596] - Flow calculation produces NullpointerException for specific constellation

- [PE-1616] - When a case is archived with new or assigned tasks. These are not disabled on the list and the hub shows the button to manual start or complete them

- [PE-1617] - Custom symbol types result in filtering out an activity

- [PE-1658] - Predecessor cannot be retrieved correctly, if gateway synchronizes and splits at the same time

23.182 Version 7.2.0

New features

Process Execution

- With this new version the user gets a push notification when a new task is assigned. Thus, each user stays informed about new events even if the application is not directly used at the moment.

23.183 Version 7.1.3

The following bugs have been fixed in this release

- [PE-1477] - Performance issue, when evaluating expressions while calculating the flow

- [PT-1713] - Resubmission workflow, that was initiated by the system, will be aborted with errors

- [DES-665] - Authentication on approval continues even after interruption

23.184 Version 7.1.2

New features

Process Execution

- In the main menu next to the "Tasks" menu item, the user can see how many tasks are assigned to him. This counter also changes immediately when a new task is assigned.

- The task list is also automatically updated when the status of a task changes or a new task is assigned. This keeps the user up to date while the task list is open.

- Application systems have a new attribute "Integration link". Here you can enter one or more URLs that will be used to call other systems. Within these URLs, data from the current process can also be transferred to a third-party system as parameters.

- The checklist for the process is now recalculated immediately if data changes within the process. Previously, data-based gateways were only calculated when the previous activity was completed. You can now see the consequences for the process after the data entry.

- If a task has an output (usually a document), the user can now upload his work result to the task. This file is then made available to other users in the following tasks if they have this document as input for their task. Files no longer have to be sent back and forth between users via email. The current file is always available in the context of the task.

The following bugs have been fixed in this release

- [PT-1584] - Depublished diagram archive cannot be downloaded (button inactive)

- [PT-1596] - Administration and MyBIC only shows a maximum of twenty shared favorites even if more are configured

- [PE-1015] - Group Tasks are not correctly updated

- [PE-1017] - Team edition is not instantly reflected in flow

- [PE-1250] - Showing default flow or creating instance fails, if staffing to an user group is defined, that is not existing

- [PE-1272] - When a new case is created and the user presses the enter key, a new dialog appears

- [PE-1302] - When I don't have admin rights I should not see an instance of a process in which I am not involved in

- [PE-1338] - DMN issues

23.185 Version 7.1.1

The following bugs have been fixed in this release

- [DES-536] - Bugs in release notes are missing predecessor ID

23.186 Version 7.1.0

New features

Governance Cockpit

- The *Governance Cockpit* is available in the user interface so that you can manage and analyze your workflows centrally.

- **We implemented existing features in the new user interface:**

    - You can access the complete *workflow audit trail*.

    - You can *filter the workflow list* and *search for workflows*.

- **We also added new features to the new user interface:**

    - The initiator of a workflow is the first entry of a workflow audit trail.

    - All comments of the examination steps and approval given in a workflow are accessible in the audit trail of this workflow.

    - Depublished diagrams are stored in the audit trail of the depublishing workflow and can be retrieved in the audit trail.

Utilization of external Functional Allocation Diagrams (FAD)

- When you use external FAD to model the resources of a process flow, then those activities are now utilized in the process flow. For example, the resources of the external FAD are utilized for the process flow in reports (both new and old user interface) or are displayed in the process flow view as integral resources of the process flow (only new user interface).

Extension options for Governance Workflow

- Governance-Workflows can be extended for individual validations prior to publishing diagrams or catalog entries. Customers have the option to implement industry-specific validations (for example FDA 21 Part 11). Industry-specific validations are individual, thus a custom-service is required to implement those requirements. Our customizing would be glad to realizes your requirements.

The following bugs have been fixed in this release

- [BC-14418] - Inplace-edit shows old label content if a condition of the label exists

- [BC-13282] - Catalog import does not remove attribute value

- [BC-11609] - Catalog Data Transfer Service cannot export a diagram if it contains values in enum attributes which not defined in the corresponding stereotype

- [PT-1392] - All existing report types are shown for each diagram type instead of only the types where a diagram type is included for

- [PT-1386] - Third row for myBIC tiles will not be used anymore when there are at least 7 Favorite tiles

- [PT-1372] - Misspelling on DMN loading screen in German UI language

- [PT-1355] - Diagrams are also listed when clicking on Attachments mini symbol (only new user interface)

- [PT-1220 | BC-14519] - Repository import performs entity postprocess on wrong entity

- [PT-1206] - Table of content has in published stage different amount of pages than in common stage

- [PT-1098] - Process Cost report references wrong rows

- [PT-1094] - When switching languages in opened Catalog List, some languages are only changed after hovering over other elements

- [PT-1075] - "No Diagram available" message is missing and leaving a blank page

- [PT-1071] - Process Flow starts with step second activity

- [PT-908] - Properties are not up to date when switching the content and alternative language

- [PT-907] - New UI displays the repository name not in the content language, but in the alternative language

- [PT-693] - Diagram manual with assignments styling issues

- [PT-672 | BC-13986] - User preferences do not save toggled content / alternative

- [DES-521] - Re-authentication of workflow tasks does not work with IDP

- [DES-457] – When a symbol was removed from sequence flow, then the sequence flow is behind the lane

- [DES-431 | DES-408 | DES-223 | DES-144 | DES-142 | DES-141 | PT-890 | PT-427 | PT-260 | PT-232 | BC-11755 | BC-13512 | BC-13778 | BC-14327 | BC-14348 | BC-14328] - Security improvements

- [DES-416] - Line breaks in formatted text attribute is not working

- [DES-400] - Inplace edit on a placed occurrence attribute is not saved correctly

- [DES-308] - Undo "branch catalog item" in diagram damages edges connected to that catalog item

- [DES-300] - Margin of diagram to border is too small in publication

- [DES-278] - French and Italian translations are missing for some method objects

- [DES-251] - Typo in validation hub on activity with invalid sequence flows

- [DES-232 | PT-502 | BC-4225] - In BPMN, the symbols on activity for multiple instances "sequence" and "parallel" are switched (Note: To correct the visualization in existing diagrams, use "Switch symbol" on affected activity symbols and re-apply the symbol type.)

- [DES-197] - Inplace edit causes a "New catalog entry" toast to show even though no entity was changed and no catalog entry was created

- [DES-159 | BC-12230] - Annotation symbol splits if selection contains only the bracket

- [DES-158] - Attributes details are rendered too often

- [PE-951] - Role is missing in process flow list when no one is assigned

- [PE-961] - When a case begins with a gateway, selection is not updated in flow

- [PE-973] - DMN form fields are displayed even if it is not a rule based task

- [PE-983] - Toggle button leads to a problem in 'My Tasks'

- [PE-984] - Hub is inaccesible when task's responsible text is long

- [PE-990] - Task name is partially hidden in the hub if the task name is long

- [PE-1046] - First task in a flow has disabled DMN form right after case is created

- [PE-1152] - Checkbox labels should do a line break if there is not enough space

- [PE-1179] - Group tasks should be only shown if the task is already created

- [PE-1039] - When there is more than one translation of a process, then the process is displayed duplicated in the process list

- [PE-1048] - Dmn evaluation request is not sent

SYSTEM REQUIREMENTS

24.1 Hardware Requirements User Workstations

BIC Process Design and BIC Process Execution are browser-based tools and there is no need of a separate client installation. Nevertheless, there are hardware requirements for the computer which runs the web browser.

CPU	RAM	Network data rate
4 CPU cores	8 GB (The user workstation must have 64-bit operating system to be able to use all physical RAM)	10 Mbps or more recommended[*]

[*]Since the application content is freely defined by the authors, the size of the content can vary in a huge range. For example, using high-resolution images in diagrams heavily increases the amount of data that must be transferred to display such diagrams. Limited data rates result in longer loading times for application and content, which can result in users experiencing impaired application performance.

On user workstations with less hardware resources performance of BIC will degrade. Performance may by sufficient for limited use cases like read-only viewing.

24.2 Software Requirements User Workstations

Web Browser	Web Browser Settings	Printing
Supported: Google Chrome, Microsoft Edge in the latest version, Mozilla Firefox (latest ESR) **Recommended:** Google Chrome	JavaScript and Cookies activated, at least 50 MB free memory for web databases	PDF Viewer (e.g., Adobe PDF)

ACCESSIBILITY

25.1 Statement of Accessibility

As part of our commitment to accessibility, we have had our product "BIC Process Design" tested by an external agency in accordance with the requirements of the EN 301 549 and WCAG 2.1 standards. The test was performed on software version 7.10.0 with the new product user interface. The independent test report dated August 23rd, 2023 indicates that we meet the accessibility requirements in many areas, but also points out that the product is currently not equally accessible to all user groups and that improvements are warranted.

We are committed to continuously improving the accessibility of our product software to provide an equitable user experience for all users. We are working to remove identified barriers and ensure that our products are accessible and usable by all people. We welcome feedback and input about barriers.

25.1.1 Current Status of Accessibility

The accessibility requirements are based on §§ 3 Paragraphs 1 to 4 and 4 of the BITV 2.0, which was enacted on the basis of § 12d BGG.

The assessment of compliance with the requirements is based on an evaluation conducted by Materna Information & Communications SE in August 2023 in accordance with legal requirements and global standards (EN 301 549, BITV 2.0).

The product is not fully accessible in all areas. We are actively working to remove identified barriers through technical revisions. In particular, the following areas have been identified (as of 23/08/2023):

- Not all controls are clearly indicated by a recognizable focus highlight or the focus highlight has insufficient contrast.

- The consistent use of language attributes is not consistently correct implemented.

- Mandatory fields are not identifiable as such for all form fields.

- In the main navigation, individual list items are not integrated as such.

- Some controls and modal windows lack clear or any text alternatives.

- The current state is not announced in collapsible sections.

- Interactive graphics are not fully operable with a keyboards and screen reader, as certain content areas cannot be filtered or operated.

- For controls indicating that content is filtered based on certain criteria, this information is not provided for screen reader users.

- Text overlaps occur when adjusting text sizes and spacing.

25.1.2 Creation of this Statement of Accessibility

The statement was created on August 24th, 2023, and last updated on December 8th, 2023.

25.1.3 Feedback on Accessibility

If you encounter any barriers in our product, please send us a corresponding notice with a description of where you noticed a limitation to our responsible contact person (accessibility@gbtec.com).

You can also contact us by mail or phone:

GBTEC Software AG
Gesundheitscampus-Süd 23
44801 Bochum (Germany)

Phone: +49 234 97645 -100

25.1.4 Arbitration Service

If, even after providing feedback to the contact mentioned above, no satisfactory solution has been found, you can contact the Arbitration Service according to the § 16 BGG. The BGG Arbitration Service is tasked with facilitating extrajudicial conflict resolution on accessibility issues between people with disabilities and federal public authorities. The Arbitration Service is free of charge. Legal representation is not required. Further information on the Arbitration Service and how to file a complaint can be found at: www.schlichtungsstelle-bgg.de.

You can reach the Arbitration Service at the following address:

Schlichtungsstelle nach dem Behindertengleichstellungsgesetz
bei dem Beauftragten der Bundesregierung für die Belange von Menschen mit Behinderungen

Mauerstraße 53
10117 Berlin

Phone: +49 (0)30 18 527-2805
Fax: +49 (0)30 18 527-2901
Email: info@schlichtungsstelle-bgg.de