

Process

This documentation shows what processes can be used for and how they are structured.

Along with the Topic and Course views, the Process view is one of the three main structural views on the user interface. This is where you model your business processes and subsequently assign roles and documentation.

The process modeling component in tts performance suite was designed as a tool for process-oriented documentation management. This explains why – compared to conventional process modeling tools – the functions here were intentionally pared down to the essentials and are directly geared toward documentation purposes.

The principal modeling functions are:

Creation of hierarchically structured, multilingual process trees:

Processes are depicted in a process tree in the process modeling component. Functions relating to the structure of this tree were designed in a way to ensure that they can be handled in a manner that is as easy and intuitive as possible. The process tree can be maintained in several languages.

Adherence to a specified process level model:

Many companies structure their processes in accordance with a specified process level model. In other words, they define related, logical process levels (such as “main process”, “detailed process” and “activity”) to which the respective process elements are subsequently assigned. As an administrator, you can store such a model in the process modeling component, thereby ensuring that only valid process structures can be created. Colored bars help you to identify the process model in the structure tree.

Multiple use of processes within the process tree:

One aspect of process structuring is the fact that process steps are not just executed in a single process, but can also reappear in several processes. This explains why the process modeling component in tts performance suite supports the repeated use of process steps in the structure tree. Process steps that are used repeatedly are treated as a single object. Changes are therefore automatically transferred to all occurrences of the particular step. All occurrences are displayed under the **Where-used list** on the **Properties tab**.

Context-sensitive assignment of roles and documents:

Whenever a process element is used several times in the structure tree, you can decide whether the role or document assignments are to apply to every occurrence or just to those process steps that are explicitly selected. The process modeling component supports this context-sensitive assignment of roles and document in process steps that are used repeatedly.

1 Structure of a process step

A process step consists of:

- **Language-dependent metadata**

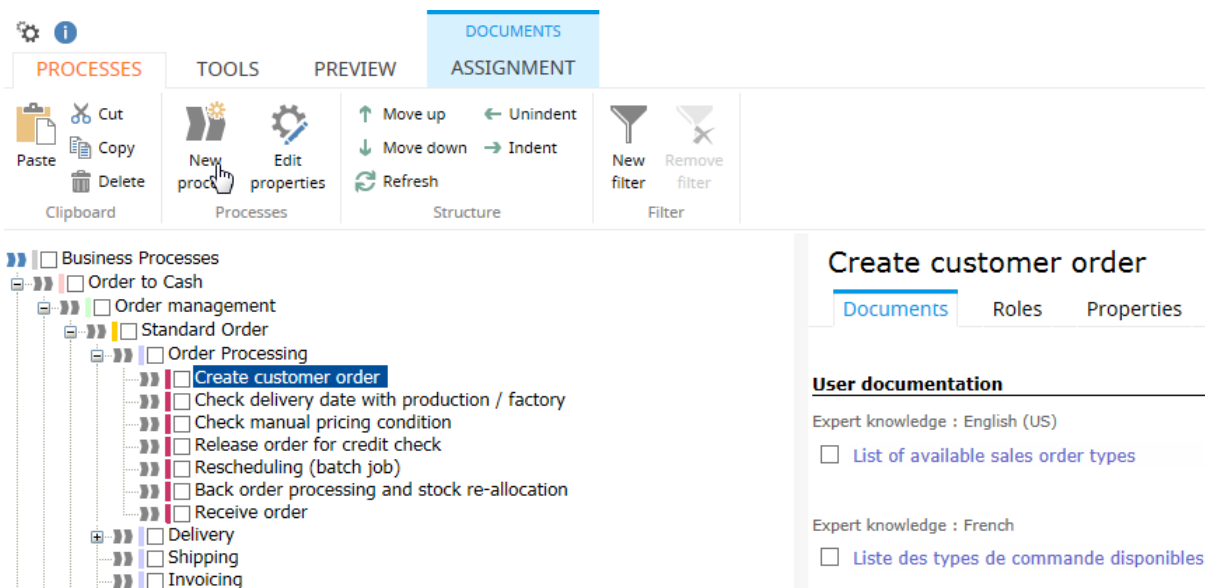
The metadata for every individual process step are displayed in the details section on the right of the screen in the **Properties tab** and can be edited via the **Edit properties function** in the **Processes function group**. The title, description and (if applicable) other text-dependent metadata can be stored on a per-language basis, ensuring that the process tree can be maintained in several languages.

- **Assigned documents**

All the documents assigned to every individual process step are displayed in the details section on the right of the screen in the **Documents tab**. New documents are added at the top of the screen via the **Documents / Assignment tab** and their order can be sorted. The order will then be transferred to the views in WebAccess and QuickAccess.

- **Assigned roles**


All the roles assigned to every individual process step are displayed in the details section on the right of the screen in the **Roles tab**. Roles are added at the top of the screen via the **Roles / Assignment tab**. This becomes active when the tab is activated in the details section on the right.



2 Multilingual maintenance of the process tree

If you want to use the process tree in several languages, you need to maintain the metadata for each process step in every desired language. This can be done with the help of the export and import functions for properties in the **Translations function group** on the **Tools tab**. The evaluation functions on the same tab allow you to generate a report for monitoring the multilingual creation process.




The assigned documents are then listed on a language-by-language basis. Roles can also be maintained in several languages and then appear in the appropriate language.

 With regard to the end-user view in the portal, there are fallback rules covering processes, documents and roles for whenever elements are not available in the respective language. The English-language elements are displayed first under the default setting. However, this depends on your local customizing.

3 Context-sensitive assignment of documents


The context-sensitive assignment of documents is done in the properties of the document. All uses are listed under the **Context heading**. A closed eye indicates that the document is not displayed in this particular process context, whereas an open eye means that the document is displayed. Visibility can be changed by clicking the eye.

Please choose the process contexts in which the document is to be visible:

	Order to Cash	Order management	Standard Order	Order Processing	Create customer order
	Order to Cash	Order management	Bulk Order	Order Processing	Create customer order
	Order to Cash	Order management	Free of Charge Order	Order Processing	Create customer order

4 Context-sensitive assignment of roles

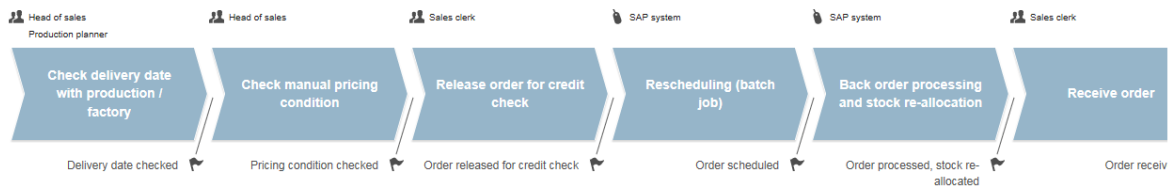
Roles are assigned in a context-sensitive manner by simply adding them as a role to the appropriate process step. Here, the rule holds that roles in the process hierarchy are inherited upward.

 You should therefore always maintain roles at their lowest-level occurrence, e.g. in the detailed process or activity, because this is where the role holder is responsible for the corresponding activity. The system then automatically aggregates all roles to the main processes.

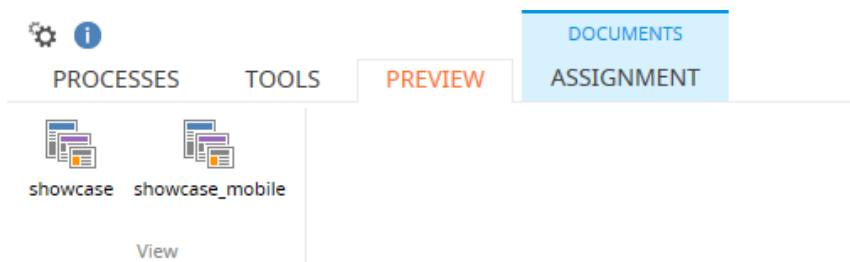
ORDER PROCESSING



Sales Showcase



5 Preview



The preview allows you to display the process in the desired configuration ("Preview" tab, "View" function group). The preview of a process includes **all** process steps, regardless of whether they have been released or not. The scope of the preview is therefore different to that which the end user sees in the portal. The whole point of the preview is to see how the process would appear once all steps have been released.

- If end users access the system by logging on to a portal, please note that they can only view the released processes and documents to which their respective role grants access.