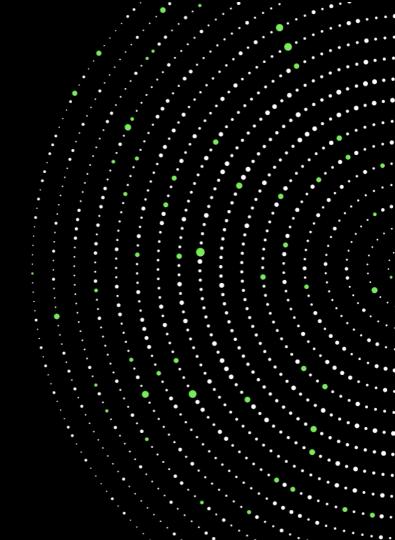
#### Celonis Process Designer

Quick Guide

March 2024



## Process Designer **Topics**





- Search process
- Model process
- Select views
- Store roles
- Release process

- Build a Process House
- Make process changes
- Store information and objects
- Design an organigram

- Create variants
- Apply filters/stereotypes
- Create process maps
- Mapp end-to-end processes
- Assign permissions
- Define Customer Journeys

## Process Designer **Topics**



 First Steps
 Test Environment
 Experience
 Requirements
 Start Trial

#### Beginner Test basic functions

- Search process
- Model process
- Select views
- Store roles
- Release process

#### Advanced

#### Apply functions

- Build a Process House
- Make process changes
- Store information and objects
- Design an organigram

#### **Expert**

Learn more functions

- Create variants
- Apply filters/stereotypes
- Create process maps
- Mapp end-to-end processes
- Assign permissions
- Define Customer Journeys

### Beginner Search Process

Log In	OPTION 1 Enter search terms	OPTION 2 Search list content	OPTION 3 Select scope filter	OPTION 4 Enter by role
Log in with access data received by mail Get familiar with the work area Navigate to one of the following search functions	Go to Header Enter term (use AND/OR) Filter by field (option) Select searched term in list	Navigate to PROCESSES in list view Click on magnifier icon Search by content	Set Scope filter(s) in Header See appropriate processes Non-applicable processes are greyed out	Vice Vices (10) PROZESS, PETER PROZESS, PETE
© Symbio	Open link in Detail Content	STRATEGY PROJECTS PROCESSES	Filters: No filter applied       Reset all filters       FILTER       Organizations       Locations       Tags       Note       All parent elements of selected leements will be evaluated implicitly.	The setted page is determine, how many elements per page LINEGUACE Provide Init Vision Two primery tengung to a primery elements Two primery tengung to standy the language your manity use is Strong. LineGuade Strong to the source language for frame- Strong to the strong to the source language for frame- tions. LineGuade Strong to the source language for frame- Strong to the strong to the source language for frame- Strong to the source languag
Header Main Navigation	Filter by field e.g., n.Management È. ID u. Unique ID n. Name	Search by keyword	Enter order + Ship goods	STANDARDS   REPORTS   REQUESTS
Navi- gation Content Main Content Detail Content	Phase Out Products/ Solutions Navigate to Use Graphic (filtered)	Search by Keyword  Search  Search  Search  Search  Search  Main Process  Main Process  N & Infrastructure  Sub Process  Scenario	Provide services	HOME   CUSTOMERS STRATEGY P role entries reports Processes Tasks Documents New   € 前   ℓ to

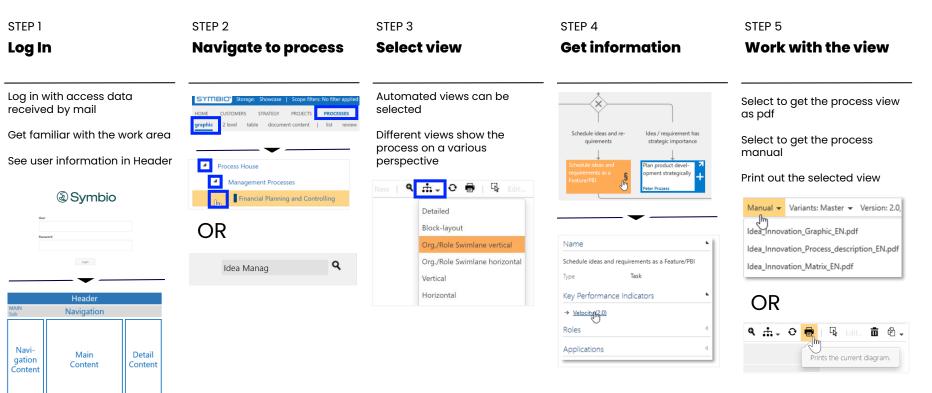
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#### Beginner **Model Process**

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	Start editing	Create process	Model process	Store information
Log in with access data received by mail	In 'Viewer' mode, only released processes are shown	Select Main Process in Navigation Tree	New   🍳 📩 🗸 🖶   🖳 Edit	Add further information in Detail Content
Get familiar with the work area	Click on 'Viewer' to change to 'Editor' mode	Create Sub Process (BPMN2.0- Diagram)	Detailed Block-layout Org./Role Swimlane vertical	Update by refresh button
See user information in Header	Navigate to PROCESSES to create a new process	Start modelling in Main Content	Org./Role Swimlane horizontal Vertical	Analyze quotes
(a) Symbio	Viewe: Viewer PP Peter Prozess (EN)	Process House     Management Processes	Horizontal	§
Unar Passaword	<b></b>	in Financial Planning and Controlling	New 9 👬 - O	
Logit	View: Editor PP Peter Prozess (EN)	New	Start	Inputs/Outputs
Header	SYMBIC Storage: Showcase   Scope filters: No filter applied HOME CUSTOMERS STRATEGY PROJECTS PROCESSES	Type Sub process	<b>▼</b>	Applications
MAIN Navigation	graphic 2 level table document content   list review	Sub process	Start	Application services
Navi-				Documents

Ruleset negotiation concept (1.0, Valid)

#### Beginner Select Views



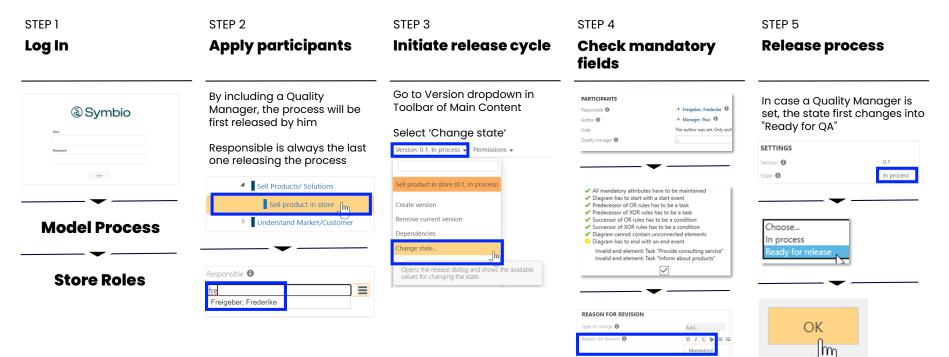
### Beginner Store Roles

Content



STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	Start editing	Create roles	Apply known roles	Apply unknown roles
Log in with access data received by mail Get familiar with the work area	In 'Viewer' mode, only released processes are shown Click on 'Viewer' to change to	Detailing Roles is done in the Detail Content	A swimlane is automatically generated for each Responsible (R) role	Customer requests con- sulting service search himself
See user information in Header	'Editor' mode Navigate to PROCESSES to create a new process	List (filtered) List Graphic New   $\odot$ $\widehat{m}$ $\stackrel{?}{2}$   $o^{o}$ $\stackrel{\sim}{20}$ $\stackrel{<}{20}$ Type Role Constructor	Customer requests con- sulting service Customer makes re- search himself Provide consulting service Inform about prod- ucts	Provide consulting service
Symbio Sur Present	View: Viewer PP Peter Prozess (EN)	Details		Roles
Leger	View: Editor PP Peter Prozess (EN)	Task Competence profile Add Accountability	Roles (R) Responsible  (R) Responsible  (R) X	ist (filtered) list
Header Sub Navigation Navi- gation Content Content	SYTTELO' Storage: Showcase   Scope filters: No filter applied HOME CUSTOMERS STRATEGY PROJECTS PROCESSES graphic 2 level table document content   list review		Constructor (0.1, In process) Customer consultant (1.0, Valid) 	V Search by keyword Type • Name • V Description Account Manager Accounts Payable Manager Approver

#### Beginner **Release Process**



## Process Designer **Topics**



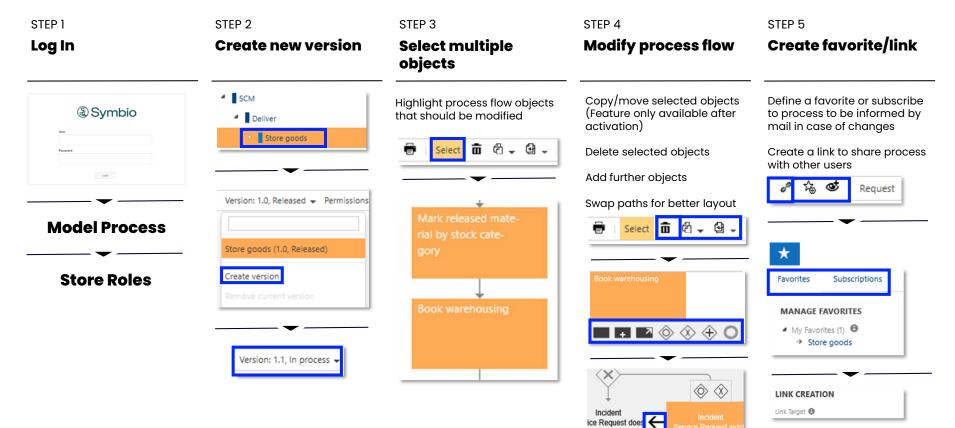
First Steps	Test Environme	ent <b>Experience</b>	Requireme	ents Start Trial
<b>Beginner</b> Test basic functio		<b>Advanced</b> Apply functions		<b>pert</b> arn more functions
<ul> <li>Search process</li> <li>Model process</li> <li>Select views</li> <li>Store roles</li> <li>Release process</li> </ul>	3	<ul> <li>Build a Process House</li> <li>Make process chang</li> <li>Store information and</li> <li>Design an organigram</li> </ul>	es • d objects •	Create variants Apply filters/stereotypes Create process maps Mapp end-to-end processes Assign permissions Define Customer Journeys

### Advanced Build a Process House

STEP 1		STEP 2	STEP 3	STEP 4	STEP 5
Log In		Start editing	Create first levels	Store information	Release Process House
Log in with o received by	access data / mail	In 'Viewer' mode, only released processes are shown	Process House	Compliance	Participants
	r with the work area formation in Header	Click on 'Viewer' to change to 'Editor' mode	New		Responsible 🗣
See user ini		Navigate to PROCESSES to create a new process	Type Category	<b>_</b>	
3	Symbio	View: Viewer PP Peter Prozess (EN)	Management Processes	Predecessor/successor process	<b>Release process</b>
User			<b>▼</b>	Accountable Organization	Step 3-5
Password		View: Editor PP Peter Prozess (EN)	Process House	Locations	
	Login	View: Editor PP Peter Prozess (EN)	Management Processes	Products	
	<b>~</b>	<b>▼</b>	<b>▼</b>	- Inputs/Outputs	
	Header Navigation	SYMEIC' Storage: Showcase   Scope filter: No filter applied HOME CUSTOMERS STRATEGY PROJECTS PROCESSES graphic 2 level table document content   list review	New J	<b>~</b>	
Navi- gation Content	Main Detail Content Content		Compliance	Accountable Organization (Global)	

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### Advanced **Make process changes**

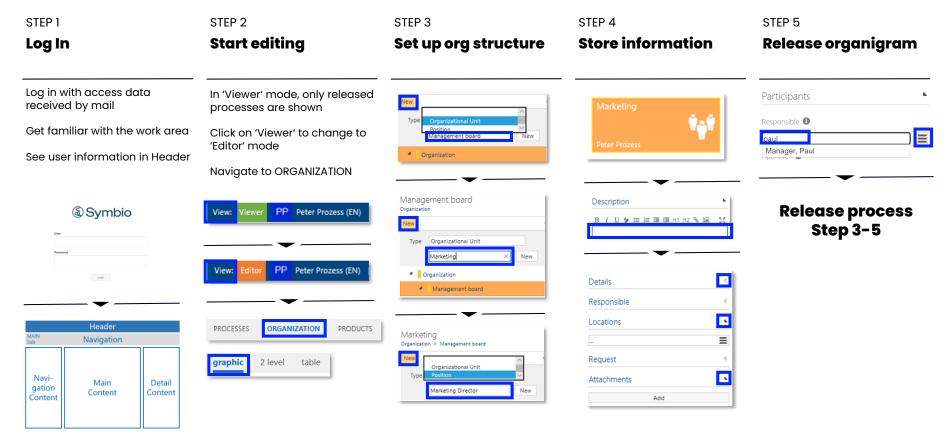


not exist

#### Advanced **Store information and objects**

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	Start editing	Set object architecture	Define listed objects	Release objects
Log in with access data received by mail Get familiar with the work area	In 'Viewer' mode, only released processes are shown Click on 'Viewer' to change to	Define further object architectures for DOCUMENTS, RISKS, REQUIREMENTS etc.	Create further objects in a list like roles, locations etc. Consolidate objects if they are	Participants
See user information in Header	'Editor' mode Navigate to SYSTEMS	New Type Building block Management systems New	redundant	Manager, Paul
la Symbio	View: Viewer PP Peter Prozess (EN)	System landscape	inputs/outputs	Release process Step 3-5
Personal	View: Editor PP Peter Prozess (EN)	New Bilding block Type Building block Application interface Node/Device Data object Communication network Path System software	Input/Outputs	-
Header <sup>MAIN</sup> Navigation	PRODUCTS SYSTEMS DATA DOCUMENTS	Application service Technology service	Nang Briefly The Anouneet Driving a chine is one is used Californiatic. Public Developed of communication between and Cause of error Course of an unacceptate enables Congoneet ceters Products related registric on system performance with	
Navi- Main Detail gation Content Content	graphic 2 level table		n 😧 🖉 🏂 🎯 🛛 Request	

## Advanced **Design an organigram**



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# Process Designer **Topics**



First Steps	Test Environment	Experience	Requir	ements	Start Trial
<b>Beginner</b> Test basic functior		<b>vanced</b> bly functions		<b>Expert</b> Learn mo	re functions
<ul> <li>Search process</li> <li>Model process</li> <li>Select views</li> <li>Store roles</li> <li>Release process</li> </ul>	•	Build a Process House Make process changes Store information and Design an organigram	objects	<ul> <li>Apply</li> <li>Creation</li> <li>Mappediate</li> <li>Assignment</li> </ul>	te variants y filters/stereotypes te process maps o end-to-end processes yn permissions e Customer Journeys

#### Expert Create variants

Prerequisite: Variant options are available (created by Admin)

STEP 1 Log In	STEP 2 <b>Create variant</b>	STEP 3 Set up localizations	STEP 4 <b>Delocalize</b>	step 5 <b>Update variant</b>
الله الله الله الله الله الله الله الله	Select variant via hamburger button	Mark task to localize a single element OR	Go to 'Localization reasons' in Detail Content	Update only if Master has been changed
Pessword	Go back to Toolbar	Localize entire process flow	Click button to delocalize task or process	Localized element or process flow remain unchanged
Loga	SCM     Deliver     Store goods	Variants: Munich 👻 Version: 0.1, In pr Master Munich	Localization reasons	Variants: Munich 👻 Version: 0.1, In pr Master
Model Process	<b>\</b>	Create variant Update variant	Delocalization	Munich Create variant
Store Roles	Variants: Master 👻 Version: 0.1, In process	Localize element Localize process flow	Delocalize element	Update variant
	Create variant Update variant	LOCALIZATION REASON B I U I III III III III III III IIII II	DELOCALIZATION REASON B I U I II	UPDATE VARIANT update variant  NOTE  There are attribute changes of Enter order.  There are attribute changes of Enter order.  There are attribute changes of state.  There are attribute changes of task.  There are attribute changes of Start.

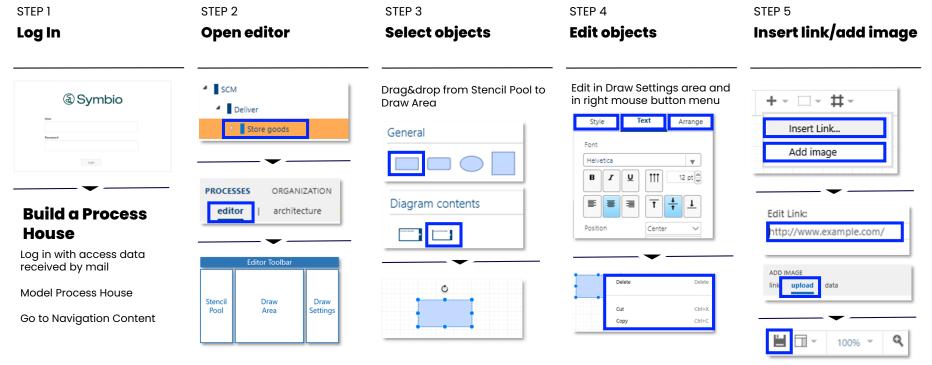
(c)

### Expert Apply filters/stereotypes

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

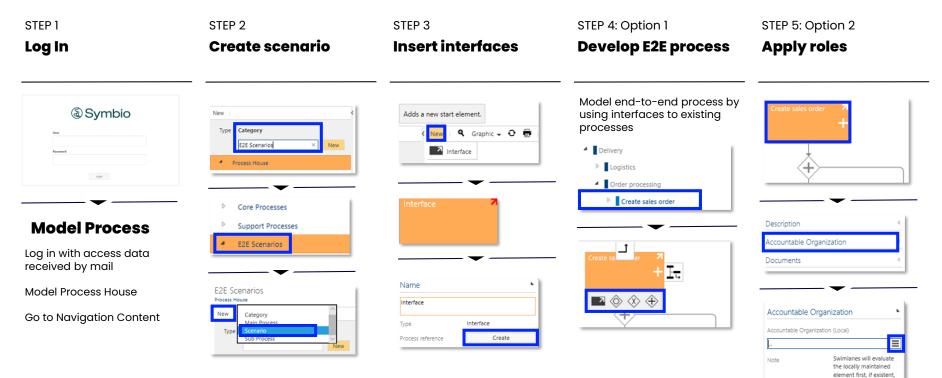
STEP 1	STEP 2	STEP 3	STEP 4: Option 1	STEP 4: Option 2
Log In	Set up Scope filters	Apply Scope filters	Set up stereotypes	Set task type/marker
la Symbio	Select Scope filter options via hamburger button	Set filter(s) in Header Non-applicable processes are	Go to 'Localization reasons' in Detail Content Click button to delocalize task	Go to Detail Content Choose task type and/or task
Pasanced	If no filters are set, process or object are displayed in any query	Greyed out	or process	marker from dropdown See BPMN2.0 icon on task (only available after feature
Model Process	SCM     Deliver     Store goods	FILTER Organizations Locations - Bags Note All parent elements of selected elements will be evaluated implicitly.	Deliver     Store goods	activation)
Store Roles	Scope filters	Enter order Ship goods	Name Store goods Type Sub Process	Type Choose
	Organizations ♥	Provide services + Create invoice +	Stereotype Choose External ID Internal Not relevant for audit Description Relevant for audit	Stereotype  Send Task Receive Task Disk type  Manual Task Business Rule Task
	→ Munich (1.0, Valid) Tags			Scan incoming goods

#### Expert Create process maps



Don't forget to save your changes!!!

#### Expert Map end-to-end processes (scenarios)



otherwise the globally maintained one.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	Select process	Permit user groups	Set permission mode	Verify permissions
الله الله الله الله الله الله الله الله	Use 'Permissions' in Toolbar to assign a specific permission set to a selected process	CHANGE PERMISSIONS change permissions PERMISSIONS	Choose option whether permissions may be inherited from parent process (or not)	Permissions -
Passard	Also apply for categories or objects if required	Permitted groups	Decide whether permission is exclusive or whether standard set remains unchanged	Effective permissions
ter O ♣ ♡ ✔ ♣ d · Nacet 6 cours out - April • Restance • Nor Restance • • • • • • • • • • • • • • • • • • •	SCM     Deliver     Store goods		Inherit permissions	DISPLAY PERMISSIONS FOR USER
Anna C C C C C C C C C C C C C C C C C C	Permissions 🗸	user groups report data	OR 🗌	PERMISSION SETS
Log in with access data received by mail	Change permissions	Name	<b>▼</b>	New element
Model Process House	Effective permissions	AdminInfo Management	Permission mode	Approve element Copen element
Go to Navigation Content		and a second	Choose Exclude other users	See existing permission right

ission rights for a specific user

Permissions of other users unchanged

## Expert Define Customer Journeys

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	Set up CEM structure	Work out CJM	Add information	Store information
(a) Symbio	Create a Customer experience management (CEM) consisting of Customer journey maps below	Design a Customer journey map (CJM) with the help of dropdown objects	Create all information that is necessary for the design of a Customer Journey, e.g. points of contact of a consumer with the product, sales paths,	Configure system extensions
Lippi	HOME   CUSTOMERS STRATEGY PROJECTS graphic architecture list editor   orphaned	Applcation Lifecycle Management Customers > Symblo Customer Journey New	participants involved etc.	<b>_</b>
	Customers	Type Customer journey map SAP Activate method × New	touch points sales channels	Touch Points
HOME   CUSTOMERS STRATEGY graphic architecture list editor	New Category		<b>▼</b>	Sales channels
	Symbio Customer Journey New	New 🤇 Graphic 🚽 🖸	Touch Points	Customer journey stages
	Customers	Interface	List Graphic	<b>▼</b>
Log in with access data received by mail	<b>—</b>	+ Customer journey map	New C II Y I & G V I Request	Touch Points
Go to CUSTOMERS navigation	New Category Type Customer experience management Application Lifecycle Man New	Customer journey step	Migration into	Mig × Migrate model company processes from SAP SolMan (1.0, Released) Migrate objects from SAP SolMan (1.0, Released)

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