TIBCO Nimbus Control ®

Author Client User Guide

Software Release 8.1.5
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Important Information

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Chapter 1

Overview

Overview

What is Nimbus Control

Nimbus Control is a process management mapping application that allows corporate information to be presented graphically and hierarchically. Nimbus Control provides a simple user-interface to allow any employee within an organization to access the information that is relevant and important to fulfill their role.

Compliance to industry-standard regulations is achieved through statement set functionality, including compliance of Sarbanes-Oxley, SA 8000, ISO 9000, ISO 17799, ISO 14001, OHSAS 18001, Business Excellence Model, etc. Measurement of how well business processes are contributing to a business is achieved by aligning business processes with business strategies and link results through to key performance indicators.

Administrators have complete control over the system and security is provided by a whole host of accessibility options that can be assigned to individual users and user groups, functionality and diagrams and associated objects.

The Document Registry is a file management system that allows supporting documents (media files, Microsoft Office files, media files, etc) to be registered. Documents in the Document Registry can then be linked to the appropriate activities in process maps.

Nimbus Control enables users to collaborate on the design of process maps. Before a process goes live, an authorization cycle is required from key individuals. This includes documents and files contained within the Document Registry. Collaboration via memos, notes and change requests means that processes and files are always relevant and up-to-date.

In a nutshell, Nimbus Control enables you to implement, manage and improve business processes throughout an enterprise. Through the establishment of a Business Process Portal, users are empowered to easily access, understand, follow and improve their processes. This encourages ownership and provides a mechanism for providing feedback to promote change management and continual improvement.

For more information click here.

Chapter 2

Getting Started in Nimbus Control

Getting Started in Nimbus Control

Map Fundamentals

Finding Maps

Find a map

Maps can be searched for in the Open/Manage window.

- Searches against map names and level 1 diagram titles.
- Searches only on maps that you have access to.
- Searches on draft **and** master maps in all folders (except the Deleted folder).

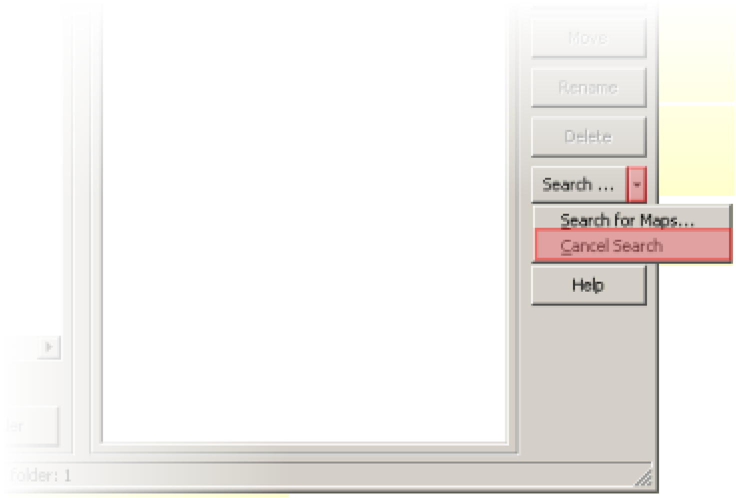
The search operation works by filtering the maps on view in the Open/Manage window.

Method

1. From the **File** menu choose **Open/Manage**.
2. Click **Search**.
3. Enter your search term in the search text box, then click **OK**.

   Note: Previous searches are remembered and can be selected by clicking the drop-down arrow to the right of the text box.

   Any maps that don't match the search term will be hidden. To redisplay all maps again choose **Cancel Search**:



Related topics

Opening maps

Creating maps

Saving maps

Printing maps

Deleting maps

Copying maps

Renaming maps

Chapter 3

Administration

Administration

Installation and Setup

Installing

Installing Nimbus Control

Please refer to the Administration Guide that is included on the CD for information on installing Nimbus Control.

Registration code

For new installations of Nimbus Control, or for upgraded installations, an unlock code must be obtained from Nimbus Support. To obtain this you must quote the current code as displayed on the Registration dialog. The registration code determines the number of process author and user licenses that you have and additional licenses can be purchased.

If a request for an unlock code is being presented and you are not expecting it, this may be because you initially had a temporary unlock code that has now expired, in which case you need to contact Nimbus Support for a new code. It may also be caused if Nimbus Control cannot find the process repository due to the settings in the Nimbus Control shortcut that were used to run Nimbus Control. Please ensure that the correct path is defined in the Nimbus Control shortcut. It may also be a result of double-clicking the Nimbus Control executable directly instead of using the Nimbus Control shortcut.

To access the Registration dialog:

1. From the **Help** menu choose **Registration**.

Create a shortcut

It is recommended that shortcuts are created automatically through a network installation, thereby ensuring that the Windows registry is correctly configured. Once a shortcut has been created it can be made available to users to copy onto their desktops.

Note: Creating a shortcut manually may fail if you do not have administrative privileges on the operating system.

To manually create a shortcut:

The shortcut properties should be set as follows:

Description: Control
Target (or Command Line): <*program directory*>\Ctrl.exe <data directory>

For example:
C:\Nimbus Control\Client\Ctrl.exe "C:\ControlES6.5\Process Repository"

Note: If there are any spaces in the directory paths then you must include inverted commas.

Passwords

Recover a password

If you have forgotten your password then please contact your administrator. If you are an administrator then please contact Nimbus Support.

Reset a user's password

For information on resetting a user's password see Resetting a user's password.

Change a password

You can change your existing password.

Note: Administrators can enforce that users change their password after a specified time in the system options.

1. From the **Tools** menu choose **Users** and then **Change Password**.
2. In the **Current Password** text box enter your current password.

3. In the **New Password** text box enter a new password.
4. Click **OK**.

Running from the Command Line

Run Nimbus Control from the command line

Nimbus Control can be run from the command line and a specific map or diagram can be automatically opened.

1. On the Windows **Start** menu click Run.
2. Enter the path to Nimbus Control, for example C:\Nimbus Control\Client\Ctrl.exe.
3. At the end of the path, type a space and then type a startup switch if required.

Command Line Parameters

It is possible to run Nimbus Control and specify a map or specific diagram to open. These command line parameters can be obtained from the Where Am I? dialog (from the **Map** menu choose **Where Am I?...**).

Example 1

"C:\Nimbus Control\Client\Ctrl.exe" "C:\Nimbus Control\Process Repository\" "Draft\My First Process Repository"

This command will launch Nimbus Control and open the map My First Process Repository at level 1.

Example 2

"C:\Nimbus Control\Client\Ctrl.exe" "C:\Nimbus Control\Process Repository\" "Draft\My First Process Repository.MAP\9FBCF02D6F504A53B2CC5044754804BC"

This command will launch Nimbus Control and open the map My First Process Repository at the diagram ID that is specified at the end.

Transferring Text Between Languages

Transfer text between language variants

Following the migration from a previous major version, all diagram text and resource text is marked with the default English (United States) language variant. If your default language is not English US then you can copy or move the text to another language variant. This operation can be run on all maps in the process repository, or a selected map.

Note: For either operation to proceed, it will require the diagrams within the selected scope to be locked. If a lock cannot be established the selected operation will not commence and you will be notified which diagrams cannot be locked.

Logs - both operations are logged in the MajorOps.log file, which can be found in .../Process Repository/Users/LOG.

For information on creating language variants click here.

1. From the **Administration** menu choose **Language Variants**, and then either **Copy Text** or **Move Text**.
2. Select the scope of the operation.
3. Choose the **Source Language** and **Target Language**.
4. Click **OK**.

System Configuration

About the system configuration

Only administrators have access to the system options. System options are defined for an entire process repository and includes all maps, diagrams and files contained within.

1. From the **Administration** menu choose **System Options**.

   Hint: You can reset the system options back to the default settings by clicking **Reset** (located at the bottom-left of the System Options dialog).

Exporting the system options

You can export the system options setup as a CSV file by clicking **Export**.

Audit logs

Any changes to the system options is recorded in an audit log. To view this log click **Audit Log**.

General

General

Registration Code Expiry Reminder

A reminder can be set to notify administrators before the administration code expires.

Default Image Folder

A default image folder can be selected. This folder will be automatically accessed when users add new images to a diagram.

Actions

Define the settings for actions here. See About Actions for more information on actions, and Define Action Settings for information on defining action settings.

Help Menus

Alternative files or URLs can be specified for when users access the Quick Start Guide, On-line Guide and Tutorial from the Help menu.

1. Click **Configure Help Menus**.
2. Select the relevant checkbox for the source file that you want to redirect and click **File Browse** .

Landing Pages

Here you can define the available landing pages for users. A landing page is a URL, such as a Control Web Server page (or any URL), that users will be directed to after logging in to the Web Server. Default landing pages can be specified for all authors and end users, or for specific users.

Notes:

- 'http://' will be prefixed to any URLs that do not have a prefixed protocol.
- If users do not have access to a particular landing page, for example the Maps page, they will be redirected to their Home page.
- Relative paths can be used, for example '**/webmytopics/**' (these will only work if the slashes are correct).
- If URLs such as the Home page or Log In page are used, the user will be logged out.

1. Click **Landing Pages**.
2. Click **New Item** .
3. Specify the name and URL, then click **OK**.

Note: To edit an existing landing page, right-click it and choose **Properties**. To delete a landing page, right-click it and choose **Delete**.

To set the default landing pages for end users and authors, see Default End User Settings and Default Author Settings. Setting the landing page for a specific user is achieved in the Details tab of the User Accounts window.

Access

Access

Default new maps to private access makes all new maps created only accessible to administrators and diagram authors (creators), i.e. the default user access rights will be set to Access Denied. If this option is not selected then the default user access rights are Read and write.

Default new documents to private access makes all new documents that are registered accessible only to administrators and the user who registered it. All other users are denied read and write access unless the file's access rights are modified.

Show support buttons in Where Am I window enables a support button on the Where Am I window, allowing users to Email support.

Allow only administrators to set diagram access rights allows only map and Nimbus Control administrators to set access rights on diagrams. By default only diagram owners and authors can set diagram access rights.

Allow any author with read/write access to unlock a diagram enables any process author with read/write access to a diagram to unlock the draft following promotion. By default only diagram owners and authors, map and Nimbus Control administrators can unlock draft diagrams.

Allow any author with read/write access to request authorization enables any process author with read/write access to a diagram to request authorization. By default only diagram owners and authors, map and Nimbus Control administrators can request authorization.

Allow any author with read/write access to set authorizers enables any process author with read/write access to a diagram to set and update the list of authorizers. By default only diagram owners and authors, map and Nimbus Control administrators can assign diagram authorizers.

Allow all authors to update the access rights on scenarios enables any process author with access to a scenario to set access rights. By default only diagram owners and authors can set diagram access rights.

Suppress password sign offs to support use of SmartBadges disables the need for users to enter passwords when performing sign-offs, for example when authorizing and acknowledging diagrams, scheduling reviews, etc, both in the client and the web server.

Allow only administrators to run reports across a map selection enables only administrators to use the Map Selection scope option when running a report. This is useful in a large environment where running a report across an entire process map with a large amount of content may cause a system performance bottleneck for users accessing the system.

Auto set map administrator when map is created via exporting or copying will maintain the map administrator of any diagrams that are exported or copied.

Change log entries are read only will allow new change log entries to be added but existing change log entries cannot be edited.

Allow viewer users access to the document registry allows anonymous viewers (guest users) to access the Document Registry in the web server.

Allow Shapes Toolbar allows process authors to use the Shapes toolbar. Note that this option can also be set for individual maps in the Map Properties.

Allow data table records to be added and edited in master maps allows users with sufficient access rights to add and edit data table attachment records in master maps.

Default Access Rights

You can assign the default and specific access rights for new documents and new maps.

Note: If the option to default new maps or documents to private access is enabled then you cannot specify the respective default access rights for maps and documents.

New Document

Default Access allows you to define the access rights for all users when a document is registered in the Document Registry.

Read and write assigns read and write access to new documents, allowing all users to view the documents and edit the details.
Read only assigns read only access to new documents, allowing all users to view but not edit the documents.

Access denied assigns access denied to new documents, preventing all users from viewing and editing the documents.

Specific User Access allows you to define the access rights for specific users or user groups when a document is registered. For example, you may want to set the default user access to read only but allow certain users read and write access to all new documents. Click **Add** ✚ to search for and add users and user groups (see Searching for and adding users for more information).

Grant all users access to new Master documents will automatically allow all users to view a document when it is promoted from a draft to a master version, regardless of the access rights defined for the draft document.

Transfer Draft document access rights on initial Master promotions will maintain the access rights of a draft document when it is promoted to a master version.

New Map

Default Access allows you to define the access rights for all users when a map is created.

Read and write assigns read and write access to new maps, allowing all users to view and edit them.
Read only assigns read-only access to new maps, allowing all users to view but not edit them.
Access denied assigns access denied to new maps, preventing all users from viewing and editing them.

Specific User Access allows you to define the access rights for specific users or user groups when a new map is created. For example, you may want to set the default user access to read only but allow certain users read and write access to all new maps. Click **Add** ✚ to search for and add users and user groups (see Searching for and adding users for more information).

New Scorecard

Default Access allows you to define the access rights for all users when a new scorecard is registered.

Read and write assigns read and write access to new scorecards, allowing all users to view and edit them.
Read only assigns read-only access to new scorecards, allowing all users to view but not edit them.
Access denied assigns access denied to new scorecards, preventing all users from viewing and editing them.

Specific User Access allows you to define the access rights for specific users or user groups when a new scorecard is registered. For example, you may want to set the default user access to read only but allow certain users read and write access to all new scorecards. Click **Add** ✚ to search for and add users and user groups (see Searching for and adding users for more information).

Display

Display

Custom Text

Text allows you to define text to be included in the footer of printed diagrams and HTML exports. Select the relevant options (**Include on Print** and **Include on HTML Export**).

Default Currency Display

The display of currency when conducting costing can be defined.

Calculate cost period and total FTE with rounded values will round up or down the cost periods and FTEs when calculating the total cost period and FTE for diagrams.

Default Custom Colors

Custom colors can be defined and will be available on the color palette whenever the option to use colors is available. For example, when changing diagram object colors and creating style sheets.

To define custom colors:

1. Click **Define Custom Colors**.
2. Select a custom color box and click **Define Custom Colors**.
3. Choose a color by moving the cross-hairs on the color palette and click **Add to Custom Colors**.

Note: After moving the cross-hair you must move the slider on the right to choose the depth of color.

Default Font

The default font will be used whenever text is applied, for example when defining an activity or flow line.

Default resource hint text behaviour

Hint text can be associated with resources so that when users roll their mouse over a resource it will display some text. One of the options when enabling hint text for a given resource is to use the system option hint text. Here you can specify what the system option for resource hint text is.

Show custom hint text will display the custom hint text that has been defined for a particular resource. If no custom hint text has been defined then no hint text will be displayed.

Show resource info field 1 as hint text will display a resource's info field 1 as hint text.

Show resource info field 2 as hint text will display a resource's info field 2 as hint text.

Templates

Templates

Default Template allows you to choose a default template. Default templates can be automatically applied to new maps that are created and applied to existing diagrams that do not have an associated template (see below).

Automatically apply default template to all new maps will automatically apply the default template to all diagrams when new maps are created.

Automatically apply default template to diagrams without a template will apply the default template to any diagrams that do not have a template assigned. **Note:** This function will not work on diagrams that have been marked as none.

Only allow administrators to apply templates to authorized diagrams will prevent all users (except administrators) from applying templates to authorized diagrams.

Allow administrators to apply templates on master maps will allow only administrators to apply templates to master maps.

User-defined Templates

You can define three user-defined fields to be made available to insert into free text boxes when creating templates.

Styles

Style Sheets

Default Style Sheet will apply the selected style sheet to a diagram object when users choose to **Apply Style** using the right-click pop-up menu.

Automatically use default style sheet on new objects will automatically apply the selected default style sheet to all new objects created.

Free Text Style Tag Names

Up to ten different styles can be defined and made available for stylising free text objects using the right-click pop-up menu. Here you can rename the styles to something more appropriate.

To define or modify a free text style tag, see Defining free text styles.

Language Variants

Multiple text variants can be stored against a number of diagram objects, such as activities, free text, note bubbles, flow lines, etc. A user's locale setting will determine which object text variant is displayed. Since a single map can store multiple text translations at the object level, there is no need to create multiple versions of a map for different languages. Attachments and links can also be tagged for a specific language.

Note: Text can be transferred between language variants - see Transferring text between language variants for more information.

To add a new language:

1. Click **Add**.
2. From the **Language** drop-down list choose the language.

   Is Default Language will set the language as the default language for Process Authors when creating diagram objects. Other languages specified can be selected. Only one language can be set as the default language.

   Default Attachment Logo Hint allows you to modify the default hint text of attachment logos for the language.

   Default Drill Down Logo Hint allows you to modify the default hint text of drill downs for the language.
3. Click **OK** to finish.

To edit an existing language variant:

Select the language and click **Edit**.

To delete an existing language variant:

Select the language and click **Delete**.

Document Control

Document Control

Promotion

Automatically update version numbers on promotion will update the version number of diagrams and Document Registry documents following promotion.

Whole number version numbers in the Masters will assign only whole numbers when automatically updating diagram and Document Registry document version numbers upon promotion. Master versions will assume the next whole number (for example, a draft version 1.00 will become master version 2.00, 1.3 will become 2.00, etc). Draft version numbers will also be updated to match the master version numbers.

Override promotion is an administrator only function will allow only administrators to use the override promotion option when promoting diagrams.

Automatically unlock draft after promotion will unlock diagram and Document Registry document drafts following promotion. **Note:** This option is not advised for large installations of Nimbus Control where multiple users are responsible for promoting and unlocking drafts.

Automatically promote after draft has been authorized will automatically promote draft diagrams and Document Registry documents to master copies following authorization. **Note:** Automatic promotion will only begin if the user who completes the authorization cycle has the rights to promote the diagrams or Document Registry documents. This function is not available in the web server. This option is not advised for large installations of Nimbus Control where multiple users are responsible for promoting and unlocking drafts.

Automatically send an acknowledgement request after promotion will automatically send an acknowledgement request to the assigned mandatory users of a diagram or document following its promotion. If enabled then you must specify two parameters - ***x*** **Weeks for acknowledgement** defines the delay following promotion, in weeks, before a request is sent out. The **Default acknowledgement request due dates to *x* weeks in advance** is the default number of weeks to define the due dates on automatic acknowledgement requests after they have been sent out.

Always ask user to confirm prior to sending automatic acknowledgement request will prompt the user to confirm sending automatic acknowledgement requests to the mandatory users when a diagram or document is promoted. If No is selected then the diagram or document will still be promoted but acknowledgement requests will not be sent out. The 'Automatically send an acknowledgement request after promotion' option must be enabled.

Version Numbers

Default Format allows you to define the default version numbering format.

Separate version numbers for Internal WP Document attachments displays separate version numbers (to the associated diagram) for Internal WP Documents attachments, otherwise the version is assumed to be the same as the diagram and no version numbers are displayed.

Separate version numbers for Internal Image attachments displays separate version numbers (to the associated diagram) for Internal Image attachments, otherwise the version is assumed to be the same as the diagram and no version numbers are displayed.

Change Requests

Control Ref Prefix allows you to define a prefix to attach to change request IDs.

Default change request due dates to will automatically advance a change request due date by *x* number of weeks when a change request is progressed in either the Web Server or SharePoint environment. Note that this will also automatically advance the due date when progressing a change request in the Author Client, although users can update the date manually, if required.

Master Only Options

Acknowledgement requests to be raised in the master only will only allow an acknowledgement request to be made against master diagrams and Document Registry documents.

Subscriptions to be added in the master only will only allow users to be subscribed to master diagrams and Document Registry documents.

Archives

A number of system options define how archived maps are stored. It is also possible to allow web users to access archived maps.

Storage location for map archives allows a different location to be specified to store archived maps in. If left blank, map archives are stored in the Archives sub-folder within the process repository. **Note:** Consider you disk space requirements. You may want to store archived maps on a different server to provide more space for the process repository to grow. **Important:** If you specify a different location, it must be accessible to users and to the Nimbus Control Web Server in order to allow users to access archived maps.

Automatically archive on promotion will automatically archive diagrams and Document Registry documents following their promotion.

Store compressed static version of map archives will store compressed static versions of map archives. **Note:** This requires the Archive Utility (CtrlArchive.exe) to be scheduled to run at regular intervals - see the Administration Guide for information on this utility.

Automatically remove old archives after is the duration to store archived maps before either moving them or permanently deleting them. Choose one of the following two options:

Permanently remove old archives will permanently delete archived maps.

Move old archives to a specified location will move old archives to a specified location.

Allow quick access to archives up to is the duration (in months) to allow users to access archived maps in the client and web interface.

Authorization

Authorizers must enter notes when authorizing will force users to enter a note when they authorize a diagram or document.

Include reason field when authorizing will allow users to select a reason for authorizing a diagram or document from a predefined list.

Authorizers must select a reason when authorizing will force users to choose one of the predefined reasons when authorizing a diagram or document.

Authorization Reasons

When users authorize a diagram or document they can choose a reason from a predefined list. Items in the list can be added, deleted and edited.

To add a new reason click **Add**. To edit an existing reason, or to delete a reason, select the item in the list and click **Edit** or **Delete**.

Reviews

Review Sign Off is text that can displayed to users on the Review window when users are completing a review request. Note that this is optional.

Review Outcome allows you to manage the options that are available to users when completing reviews. Review outcomes must be associated with an action from the following list:

None will complete the review without further action required from users.
Raise Change Request will allow users to create a change request when completing a review request. Note that completing the change request form will be optional to users.
Raise Action will allow users to create an action when completing a review request. Note that completing the new action form will be optional for users.
Notify Review Requestor will email a reviewer's comments to the person that raised the review request.

Notify Owner will email a reviewer's comments to the owner of the content.
Raise Change Request (Mandatory) will force users to complete the new change request form when completing the review.

Links

Links

Links

Control always determines file associations when launching file links will override the application specified by users to launch attached file links with the Windows default application. For example, a user may have specified a .txt file to launch in Microsoft Word. If this option is enabled then the application will launch in Notepad, i.e. the Windows default application used to launch .txt files.

Force UNC paths when file links, metric links and registry documents are added should be used if users have different mappings on their machines to the network drives. File paths will be converted from mapped drives into UNC (Universal Naming Convention) path names (for example N:\documents will be converted to \\servername\share\documents\) when file links, metric links and document links are added to the system. If this option is not selected and users have different mappings for networked drives, they may not be able to access file links, metric links and Document Registry links. **Note:** This will not work for local drives.

Use action server when users launch an email link will use the internal Email system as opposed to using users' default Windows Email program. **Note:** The Action Server must be configured for this option to work. Please refer to the Administrator's Guide located on the CD.

Default new links to launch in the same browser window will launch URL links in the same window as the web browser. **Note:** This option can be overridden for individual URL attachments.

Always show popup menu for attachments will always display a popup menu when users access an attachment, even if only one attachment exists. **Note:** Enable this option with caution as process authors may hide menu functions on free text boxes, for example, or links that they may not want users to see.

Allow access to file properties from file links reports will allow users to view file properties in the Document Registry through Windows Explorer.

Allow use of Excel based metric links will allow the use of Excel-based metric links. By disabling this option, existing Excel-based metric links will not be updated on diagrams and in users' My Workspaces, and Process Authors cannot create these types of metric links in the Author Client. **Note:** Performance issues may arise if many Excel-based metric links are created, therefore this option is disabled by default.

Allow Excel macros to be launched for metric links will allow Excel macros to be defined and run for metric links.

Automatically refresh Excel metric links when opening diagram will refresh metric links when diagrams are opened. **Note:** This may affect performance and therefore may need to be disabled.

Force non-standard URL launching for all users allows non-standard URL launching for customers who are unable to launch URL links/attachments.

Include diagram titles in new or updated flow line link tables will include the title of diagrams when flow line links are created or updated.

Allow link navigation from master diagrams into draft diagrams in the Author Client will allow users to access links in the author client that point from master to draft diagrams. If this option is not selected then users will be prevented from accessing draft diagrams. Note that users must have access to the draft diagram to follow a specific link.

Allow users to follow links from master diagrams into draft diagrams in the Web will allow users to access links in the web server that point from master to draft diagrams. If this option is not selected then users will be prevented from accessing draft diagrams. Note that users must have access to the draft diagram to follow a specific link.

Example URL

This allows you to change the example URL that appears in the URL attachment window.

Maps

Maps

Drill Down Copy and Pasting

Maximum drill downs that can be pasted allows you to limit the number of drill down diagrams that can be pasted during a copy and paste operation. This prevents performance bottlenecks when copying large maps.

Maximum drill downs that can be imported allows you to limit the number of diagrams that can be imported as drill downs. **Note:** Administrators can override this limit when importing maps.

Override default warning message with this text will override the default system warning when users attempt to copy drill downs that exceed the value set above.

Deleted Maps

Remove maps in the Deletion Recover Manager after is the number of days to keep deleted maps before the SSync -mapsclean process removes them (this process must be scheduled to run). **Note:** 30 day is the maximum number of days permitted.

My Searches

My Searches

These options relate to Users' My Searches pages in the Web Server.

My Searches Page Options

Include My Accounts Section on the My Searches Tab will display the My Accounts section in users' My Searches in the web server, allowing users to change their password or log out.

Include To Dos Section on the My Searches Tab will display the To Dos section in users' My Searches in the web server, allowing users to access their to dos.

Include Processes Section on the My Searches Tab will display the Processes section in users' My Searches in the web server, allowing users to access their processes.

Include Documents Section on the My Searches Tab will display the Documents section in users' My Searches in the web server, allowing users to access their documents.

Include Storyboards Section on the My Searches Tab will display the Storyboards section in users' My Searches in the web server, allowing users to access their storyboards.

Include TIBBR Subject Messages on the My Searches Tab will

Include User Group Favourites on My Searches Tab will include any user group favourites that a user is a member in the list of favourites on their My Searches page.

My Searches Page Help Options

Override My Searches Help Option allows you to specify a different URL when users access the Help from their My Searches.

Specify URL to launch for the My Searches search results help allows you to specify a different URL to launch when users access the Help for the Current page from their My Searches.

Document registry category list to use for categorizing the search results will group returned documents from a search in users' My Searches. If <No Categorization> is selected then the documents returned by the search will not be grouped.

Notifications

Notifications

Email Notifications

Certain system notifications relating to the management of maps can be automatically Emailed to associated users (for example, an Email requesting acknowledgement can be automatically sent to mandatory users when an acknowledgement request is created). These automatically-generated notifications can be switched on or off. The email titles and notification text can also be modified, including the notification text sent to new users upon the creation of their account (the option to send an Email notification to new users of a particular user group must be switched on in the Email Notifications options).

Notify diagram's primary contact when user adds a memo will notify the primary contact (author or owner, as specified) when users add memos to diagrams. If disabled then notifications are not sent.

Notify memo topic creator when a reply is added will notify the creators of memos when other users reply to their memos. If disabled then notifications are not sent.

Notify requestor upon authorizer's approval will notify the user that requested authorization when authorizers have approved content. If disabled then notifications are not sent.

Notify draft diagram's primary contact when a memo is added on the master will notify the primary contact (author or owner, as specified) of draft diagrams when new memos is added to master diagrams as opposed to the primary contact on the master diagrams. **Note:** This also requires the **Notify diagram's primary contact when user adds a memo** option to be enabled.

Notify draft diagram's author when change request on master is allocated will notify authors of draft diagrams when new change requests are added to master diagrams as opposed to the author on the master diagrams.

To change the text of Email notification items:

1. Click **Advanced**, select the notification that you want to edit and click **Edit Text**.
2. Edit the **Email Subject**, if required.
3. In the Email Text tab, edit the email body text, if required.
4. Click **OK** .

Note: For information on each of the notifications see Notification Descriptions.

Substitution Text Fields

You can insert substitution fields in the notification text, for example you can add the name of the user by inserting <USER>. When editing the text for a particular notification, from the **Tools** menu choose **Insert Field** .

<BASE_URL> will be substituted by the base URL of the Web Server.

<BASE_URL_SHORT> is the base URL of the Web Server, but without CtrlWebISAPI.dll on the end.

Action Notifications

The following fields can be inserted into action-related notifications:

<ACTION_NUM>	ID number of the action record
<ACTION_SUBJECT>	Subject of the action record
<ACTION_OWNER>	Owner of the action
<ACTION_STATUS>	Status of the user's individual action record
<ACTION_DUEDATE>	Due date of the user's individual action record
<ACTION_CATEGORY>	Category of the action record
<ACTION_STARTDATE>	Start date of the action record
<ACTION_PRIORITY>	Priority of the action record
<ACTION_HOST>	Title and link to the associated host item, for example the diagram or document
<ACTION_DETAILS_LINK>	Direct link to the action record
<ACTION_SIGNOFF_LINK>	Direct link to the user's My Actions page with the 'Change Status of Action' dialog displayed for the particular action record

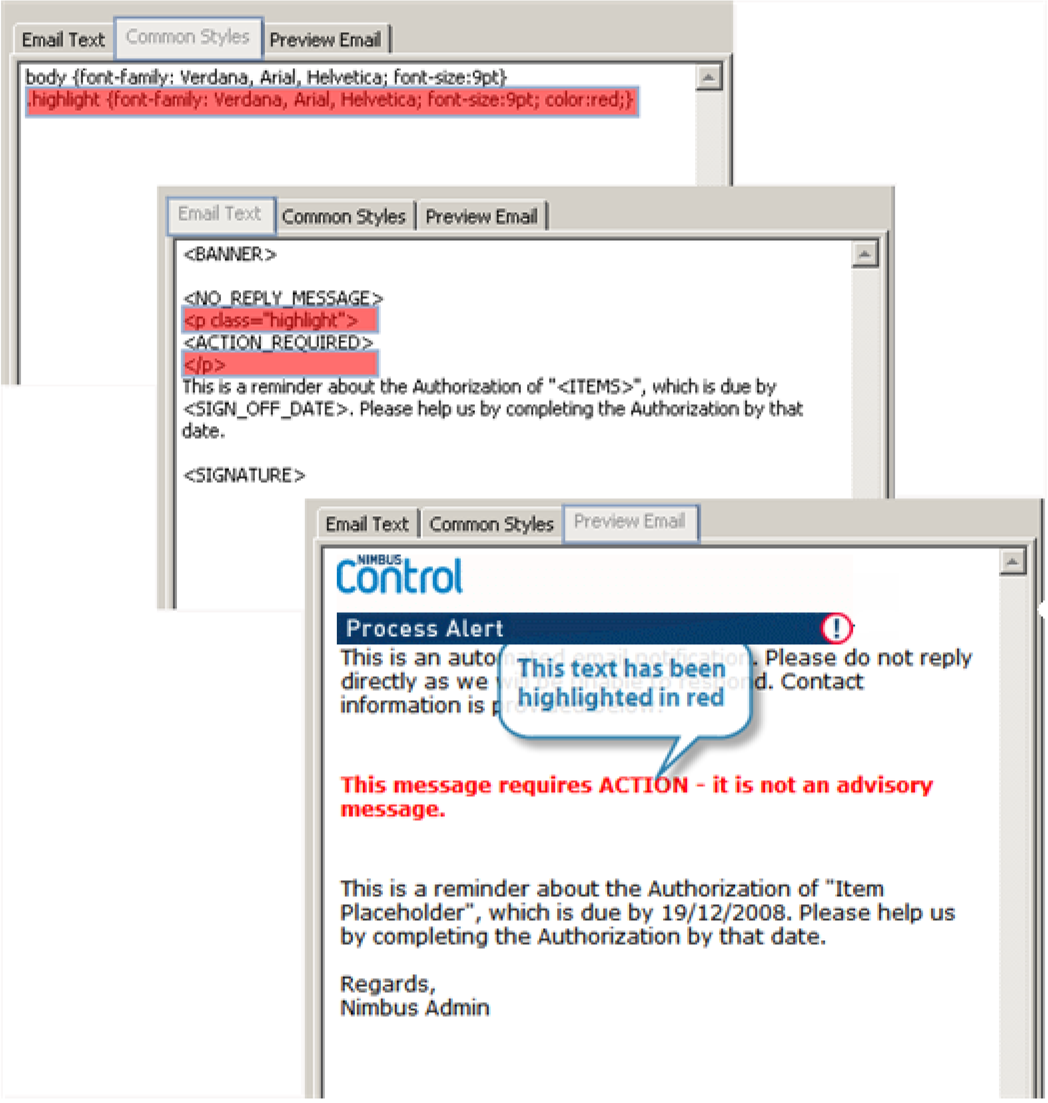
To modify the text of a number of the substitution text fields, from the **Tools** menu choose **Configure Text Fields**. Select the text field and click **Edit Text**. Modify the text, then click **OK** .

To create a new substitution text field, in the Configure Text Fields dialog (**Tools**, then **Configure Text Fields**) click **New Field** , then enter the input field name. To define the notification text for the newly created substitution text field, select field and click **Edit Text**.

Notification Styles

Common styles can be defined and applied to the text in system notification Emails. In the Notification Email Text dialog, click the Common Styles tab (on the right) to select it. The Common Styles tab serves as a CSS (cascading style sheet), so you can define HTML styles and apply them to any notification text. Unless any other styles have been defined you will see the **body** style; this style is the style of all notification text that is not formatted by any other style.

To add or modify existing styles click **Edit Text**.



See Example

For examples on using CSS, see www.w3schools.com/Css

Additional Information

Include new change log entries in subscription emails will include a change log of any new changes made to diagrams and documents when subscribers are Emailed.

User must enter details when requesting authorization forces users to enter details when requesting authorization of diagrams and documents. This information will appear in the Email sent to authorizers.

Add change log entry when version number manually updated will automatically add a change log when users manually update the version number of a diagram or document.

Authorizers must enter notes when accepting an authorization will force users to enter a note when authorizing a diagram or document in the Client or Web Server.

What if multiple Web Servers exist?

If multiple Web Server installations exist that all point to the same Process Repository, you can specify which URL is sent in notifications for individual users. See User account details for more information.

Who gets sent what?

Authorizations

Authorization requests and notifications are sent to the respective assigned authorizers. Authorization rejections, cancellations and request cancellations are sent to the process author and owner of a map.

Acknowledgements

Acknowledgement request notifications are sent to the respective assigned mandatory users.

Reviews

Review request and review completed notifications are sent to the respective assigned reviewers.

Promotions

Promotion-ready notifications are sent to the respective assigned promoters.

Subscriptions

Subscription notifications are sent to the respective subscribers.

Draft Unlocked

When a draft diagram is unlocked, notifications are sent to the process author and owner of the diagram.

Actions

New actions notifications are sent to the respective assigned action users.

Overdue and Escalated Notifications

Overdue notifications, such as an overdue authorization notification, are sent to users to remind them about an overdue To-do item. Escalated notifications are sent to users' line managers to inform them that <User X> has an overdue To-do item.

Storyboards

Storyboards

Storyboards

Prompt user for change log entry if storyboard has changed will force a user to enter a change log entry when modifying a storyboard.

Create a log entry when a user changes a storyboard will automatically create a change log entry when a storyboard is modified.

tibbr

tibbr

Configure the integration between Nimbus Control with tibbr and define parent tibbr subjects for storyboards and My Searches.

tibbr Domain

Domain for your tibbr installation is the domain name for the tibbr installation. Please note that you must include the transfer protocol (for example, http://companyx.tibbr.com or https://companyz.tibbr.com).

User credentials for tibbr f (click **Change Credentials** to enter the username and password)

Storyboard tibbr integration

Enable tibbr integration between storyboards and tibbr subjects allows authors to create tibbr discussions from storyboard titles.

Parent tibbr subject for storyboard discussions is the parent tibbr subject that all storyboard discussions will appear under. Note that this subject must also be manually defined in tibbr.

My Searches tibbr integration

Enable tibbr integration between keywords and tibbr subjects allows authors to create tibbr discussions from keywords.

Parent tibbr subject for keyword discussions is the parent tibbr subject that all keyword discussions will appear under. Note that this subject must also be manually defined in tibbr.

Users

Users

User Accounts

User account name separator is the separator that is used when creating user accounts (for example, john.smith, john/smith, etc).

Default account name to lower case forces account names to be lower-cased.

Show logged in user name on title bar displays the name of the user name that is logged in on the title bar.

Show totals for each user type in user accounts window displays the total number of users in the system and the number in each user type category.

Show account name in full name displays the user's full name as well as the account name on the title bar.

Log On

Enable automatic log on when account name matches network log on name will automatically log in users when the client starts if their Nimbus Control user name is identical to their network user name. **Note:** LDAP must be enabled. For more information on LDAP synchronization see the Administration Guide that is included on the CD.

Notify Administrators when password retry limit is exceeded will Email the administrators when users exceed the permitted number of log in attempts as specified below.

Incorrect password retry limit is the number of failed attempts that users are permitted when logging into their accounts. After the number of permitted retries is exceeded, Nimbus Control will close and the user must launch the application to retry logging in.

Minimum password length defines the minimum number of characters permitted for user account passwords.

Minimum password complexity allows you to specify that passwords must contain at least 1, 2 or 3 of the following password security requisites (0 means that passwords do not require any of the requisites):

- Uppercase and lowercase characters
- Numericals (0 - 9)
- Non-alphabetic characters (e.g. !, $, #)

Password expiry period (in months) is the number of months that passwords are valid for before users are forced to change them.

Default Author Settings

These settings apply to all process authors.

Note: These features can also be enabled or disabled for individual process authors in their user settings.

General Map Function

Allow Map Packaging allows process authors to package any map that they have access to.

Allow Unpackaging allows process authors to unpackage a map into a process repository.

Allow Creation of New Maps allows process authors to create new maps. **Note:** If you deselect this option and do not want process authors to create new maps you must also deselect the **Default Map Creation** option in the System Options and select **User specific map creation privileges** option.

Allow Folder Create/Delete allows process authors to create and delete map folders in a process repository.

Resources

Central Resource Manager allows process authors to manage the central resource library, including being able to add, edit and delete central resource values. By default this will mean that process authors can see all central resource costs.

See Central Cost allows process authors to see all central resource costs.

Local Resource Manager allows process authors to create, edit and delete local map resources.

Web Interface Options

Allow Access to Maps Page allows process authors to view the Maps page in the web server.

Miscellaneous

Can save Document Registry as HTML allows process authors to export the Document Registry as HTML.

Action Manager allows process authors to create actions, edit actions and manage users' actions..

Action Creator allows process authors to create actions.

Data Tables Manager allows process authors to create, edit and delete data tables.

Rules Manager allows process authors to create, edit and delete highlight rules.

Storyboard Manager allows process authors to create, edit and delete storyboards.

Scorecard Manager allows process authors to create, edit and delete scorecards.

Scorecard Editor allows process authors to edit scorecards.

Statement Set Manager allows process authors to create, edit and delete statement sets.

Report Manager allows process authors to create, edit and delete scheduled reports.

Landing Page

Choose a default landing page for all authors. A landing page is a URL, such as a Control Web Server page, that users will be directed to after logging in to the Web Server. **Note:** Landing pages are defined in System Options - General.

Default End User Settings

These settings apply to all end users, regardless of what modules they have.

Note: These features can also be enabled or disabled for individual end users in their user settings.

Settings

Change Subscription allows users to subscribe and unsubscribe from diagrams and documents.
Access Logs allows users to view audit, acknowledgement and change logs.
Send Emails allows users to send emails to diagram owners and authors.
See Diagram Details allows users to view the details of diagrams.
Change the Diagram Scale allows users to change the scale of diagrams.
See Drafts allows users to view draft diagrams.

Memos

See Memos allows users to view all memos for process content that they have access to.
Add Memos allows users to add memos to process content.

Change Requests

See Change Request allows users to view all change requests for process content that they have access to.
Add Change Request allows users to add change requests.

Landing Page

Choose a default landing page for all end users. A landing page is a URL, such as a Control Web Server page, that users will be directed to after logging in to the Web Server. **Note:** Landing pages are defined in System Options - General.

Default Change Module Settings

These settings apply to all end users with the Change Module.

Note: These features can also be enabled or disabled for individual end users (with the Change Module) in their user settings.

Settings

See Drafts allows users to view draft diagrams.
See Scenarios allows users to view scenario diagrams.
See Central Cost allows process authors to see all central resource costs.

Web Interface Options

Allow Access to Maps Page allows users to view the Maps page.

Default Action Module Settings

These settings apply to all end users with the Action Module.

Note: These features can also be enabled or disabled for individual end users (with the Action Module) in their user settings.

Settings

Action Manager allows users to create actions, edit actions and manage users' actions.

Action Creator allows users to create actions.

Advanced

Advanced

Restructure Locking Timeouts

Inactive Use Timeout is the number of minutes of inactivity on a particular diagram before a user is automatically logged out.

Pending Lock Polling is the time period that the system will check for users waiting to perform a restructuring operation. See About diagram locking for more information.

Resources

Allow dynamic resource updating on draft locked diagrams will dynamically update resources in locked draft diagrams without having to unlock the draft and go through the authorization cycle again.

Enable advanced draft locked resources update facility will allow resources that have been renamed to be updated in locked draft diagrams without having to unlock the draft and go through the authorization cycle again. For more information on updating resources in locked draft diagrams see Updating draft resources.

Business Controls

Allow any report user to generate the HTML snapshot of a business controls report allows any user with reporting privileges to create a HTML static snapshot of business control reports.

Include resources when updating the style of a business control activity will update associated resources if a business rule is applied that changes the style of the activity. Deselect this option if you do not want the resource style to also change.

Reports

Minimum physical memory required to run a report is the minimum amount of free system physical memory required before any reports can be run. It is worth noting that running reports can consume a considerable amount of memory, especially in Citrix environments.

Image Handling

Large images can affect performance, especially if many images are used in process maps (such as images on diagrams and background images). The following settings will force the reduction of stored images.

Automatically reduce large images will reduce the size of images used in maps if larger than 800x600.
Maximum height before needing reduction is the maximum height permitted for original stored images before they are reduced.
Maximum width before needing reduction is the maximum width permitted for original stored images before being reduced in size.
Reduced image size should be no more than is maximum percentage size permitted for stored images compared to the size of the displayed images.

Reminders

Reminders

These settings apply to reminders for acknowledgements, reviews, actions and authorization requests.

Note: SMS and email reminders can only be sent to users if they have a mobile number and email address specified in their user account. For escalation reminders, the line manager must be specified in the Reports To field in users' accounts.

Enable email reminders will send email reminders to users for any overdue To-do items.

Enable SMS reminders will send SMS reminders to users for any overdue To-do items.

Reminder interval (days) is the frequency of days in which email and SMS reminders are sent.

Start reminders prior to due date (days) is the date in which to start sending email and SMS reminders prior to the due date.

Enable escalations will send email and SMS reminders to users' line managers in order to escalate a request.

Start escalation after due date (days) is the number of days to send an email notification to users' line managers.

Allow authors to change settings allows process authors to modify the notification and escalation settings, as set above, before a request is sent out. If this option is disabled then the options set in the system options will be applied and cannot be modified.

> The respective **Reminders & Escalation user group permission** must also be enabled for a particular user group to allow an author to edit the reminder and escalation settings when sending acknowledgement, authorization, review and action requests.

To change a value, double-click a row to display the options for a particular reminder. For example, double click the Enable escalations row to enable or disable escalations for a particular To-do type.

Notification Text

The text that is sent out in notification emails can be modified in the **System Options**. The following items in the Notifications system options apply:

Acknowledgement Reminder
Action Reminder
Authorization Reminder
Review Reminder
Overdue Acknowledgement
Overdue Action
Overdue Authorization
Overdue Review
Escalated Overdue Acknowledgement
Escalated Overdue Action
Escalated Overdue Authorization
Escalated Overdue Review

Map Administration

About map administration

Maps are a collection of diagrams, created by process authors, that reside in a process repository. A map is initially created as a draft version until it is promoted to a master version. Maps may also comprise a number of scenarios. Access rights can be assigned to individual users and groups, allowing or preventing access to an entire map or parts of a map. Map administrators can be assigned and these users have administration privileges for a given map.

Topics...

Assign map administrators and draft promoters	Promote multiple maps	Create a folder in the process repository
Edit folder access rights	Override user map viewing options	Protect a map
Delete a map and recover a	Set map access points	Set map options

deleted map		
Create and remove drafts	Update draft resources	Build line link back links
Refresh diagram titles	Remove non-visual data	Define map abbreviations and references
Toggle the display of activity IDs on or off	Remove broken file links	Remove broken diagram links
Remove broken flow line links		

About diagram locking

When a user accesses a diagram it becomes locked in order to prevent other users from editing it, i.e. other users have only read-only access to the diagram. A lock could be caused by another user performing, or waiting to perform, a restructuring operation from a parent diagram, for example resetting ID numbers, inserting a diagram, etc. The diagrams affected by a restructuring operation will remain inaccessible until the operation is complete.

You can Email users. Click **Details**, select the users that you want to Email and then click **Email Users**.

Note: This option may not be available in some circumstances.

After a period of user inactivity (set in the system options) the lock will be automatically released and the diagrams can then be accessed.

Assign map administrators

Map administrators have certain administrative privileges on maps. For example, map administrators can modify map properties, change access rights, add and remove authorizers, request authorization, cancel authorization, add and remove reviews, add and remove mandatory users, request acknowledgement and manage subscriptions. Only process authors and administrators can be assigned as map administrators.

Note: Assigning a user as a map administrator does not automatically provide them with access to a map.

---

1. From the **Map** menu choose **Map Properties**.
2. Select the **Map Administrators** tab.
3. Click **Add Administrator** to add users.

Assign a Primary Email Contact

The Primary Email Contact can be set as either the owner or author for a scope of diagrams. Primary Email Contacts are notified when new change requests are submitted, or existing ones resubmitted, when draft diagrams are unlocked and when new memos are submitted against a diagram.

---

1. From the **Manage** menu choose **Primary Email Contact**.
2. Choose either owner or author.
3. Select the scope to assign the Primary Email Contact to, then click **OK**.

Assign draft promoters

Draft promoters can promote draft diagrams to master diagrams. By default the person who created the map is automatically assigned as a draft promoter but any user can be a draft promoter.

Note: Assigning a user as a draft promoter does not automatically provide them with access to a map.

---

1. From the **Map** menu choose **Map Properties**.
2. Select the **Draft Promoters** tab.
3. Click **Add Promoter** to add users.

Promote multiple maps

Multiple maps can be promoted in one operation from the Open and Manage window.

Available to administrators only

1. In the Open and Manage window (from the File menu choose Open / Manage), hold **Ctrl** and select the maps that you want to promote.
2. Right-click a selected map and choose **Promote**.

Create a folder

Maps can be organised in folders within a process repository and access to these folders can be defined. Only administrators and process authors may create, delete and edit folders. **Note:** They must have the **Allow Folder Create/Delete** option enabled in their user settings.

1. From the **File** menu choose **Open/Manage**.
2. Click **Create Folder**.
3. Click in the **New Folder Name** text box and enter the folder name.
4. Select the default view rights of all users.

   Access Allowed allows users to view the folder and access the maps within.
   Access Denied prevents users from viewing the folder and accessing the maps within.

   Note: To define specific users or user groups view rights, click **Add** and select the user(s) or user group(s).

   Hint: To optimize security it is also advised to establish a secured process repository. For more information please refer to the Administrator's Guide that is supplied on the CD.

Rename a folder

Map folders can be renamed.

Note: You must have access rights to a particular folder to rename it.

1. From the **File** menu choose **Open/Manage**.
2. Right-click the folder that you want to rename and choose **Rename Folder**.
3. Click in the **New Name** field and type the new name for the folder, then click **OK**.

Edit folder access rights

Access rights to folders within the process repository can be defined for all users and specific users and user groups. Only administrators can modify folder access rights.

1. From the **File** menu choose **Open/Manage**.
2. Right-click a folder in the process repository and choose **Edit Access Rights**.
3. Select the default view rights of all users.

   Access Allowed allows users to view the folder and access the maps within.
   Access Denied prevents users from viewing the folder and accessing the maps within.

   Note: To define specific user or user group viewing rights, click **Add** and select the user(s) or user group(s).

   Hint: To optimize security it is also advised to establish a secured process repository. For more information please refer to the Administrator's Guide that is supplied on the CD.

Override viewing options

You can enforce a number of user viewing options for a particular map that will override users' preferences.

1. From the **Map** menu choose **Map Properties**.
2. Select the Override Preferences tab.

   Note: The option **No Change** will maintain users' preferences.

View & Print

Whole Screen View will hide all non-floating toolbars and panels if switched on, thereby providing a larger viewing area.

Zoom On Diagram Access will zoom in or out to fit the screen when users access a diagram (**Always zoom to fit**), zoom out if a diagram is too large for the screen (**Zoom to fit, when needed**) or reset the zoom to 100% (**Always reset zoom**).

Highlight Parent Activity will highlight the parent activity when users navigate to a lower level and then back.

Print All Activity Notes will print all activity notes when diagrams are printed.

The following panels can be displayed or hidden:

Document Control Panel

Basic Costing Panel

Volume/F.T.E. Panel

Floating Level Titles will display the level title as a floating element.

Toolbars

The following toolbars can be displayed or hidden:

System Button Bar

Diagram Button Bar

Flowchart Shapes Button Bar

Document Control Button Bar

Navigation Button Bar

Zoom Button Bar

Scenario Button Bar

Related topics

Nimbus Control interface

Protect a map

A map can be password-protected so that any user trying to access it must enter a password.

Note: This does not apply to the web server.

1. From the **Map** menu choose **Map Properties**.
2. Select the Protection tab.
3. Enter a password.
4. Choose a date to begin protection from the **Start Protection From** date selector.

   Note: To disable a password simply delete the password.

Set map access points

You can define whether process authors and users access a map at the draft or master level.

1. From the **Map** menu choose **Map Properties**.
2. Select the **Access** tab.
3. Choose the default entry point from the relevant drop-down list for process authors and users.

   Note: To define specific user and user group entry points click **Specific User Entry Point**. Click **Add** and select the user(s) or user group(s).

Set map options

Map settings can be applied for all users of the map. Advanced features allow drafts to be created or removed, resources updated, line link back links to be built and all non visual data to be removed.

1. From the **Maps** menu choose **Map Properties**.
2. Select the Options tab.

Settings

Include master map in web search will include the master version of the map when users search in the web interface.

Include draft map in web search will include the draft version of the map when users search in the web interface.

Include scenario map(s) in web search will include any scenarios of the map when users search in the web interface.

Show draft banner when in draft copy will display the word Draft in the background of all draft diagrams. This is automatically turned on when a draft is promoted.

Prevent unpackage overwriting will prevent the map from being overwritten in an unpackage operation.

Include map when processing metric link notifications will allow the master map to be processed by the Business Intelligence Server in order to permit live measures to be continually monitored.

Allow Shapes Toolbar allows process authors to use the Shapes toolbar.

Create a log entry when a user changes a diagram will automatically create a 'Updated at <hh:mm> log entry whenever a diagram is changed or saved.

Advanced Features

Create New Draft
Update Draft Resources
Clear Non Visual Data
Remove Draft Copy
Build Line Link Back Links
Remove Broken File Links
Remove Broken Diagram Links
Remove Broken Flow Line Links

Add maps to users' favorites

You can add a selection of maps to one or more user groups' Web favorites. When a map is added, it will add the level 1 diagram to users' favorites.

1. From the **File** menu choose **Open/Manage**.
2. Select the map(s) that you want to add to user groups' favorites.

Hint: Hold **Ctrl** to select multiple maps.

3. Right-click one of the selected maps and choose **Add to User Group Favorites**.
4. Select the user group(s), then click **OK**.

Create and remove drafts

Existing drafts can be deleted and a new draft created from the master. This could be useful if a master has been packaged and a draft is required in order to work on, for example.

To remove the current draft and create a new draft:

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Create New Draft**.

To remove the current draft without creating a new draft:

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Remove Draft Copy**.

Related topics

Scenarios

Update draft resources

Automatically update all resource names in a map that have been renamed in the resource library.

Note: This option is only available if the **Enable advanced draft locked resource update facility** system option is enabled. See Advanced System Options for more information.

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Update Draft Resources**.

Build line link back links

You can ensure that all flow line links have working links to other diagrams in a selected scope of diagrams, i.e. all inputs connect to outputs and vice-versa.

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Build Line Link Back Links**.
4. Select the scope of diagrams to check and click **OK**.

Related topics

Flow line links

Remove broken file links

Broken file links can be removed from all diagrams within a map, i.e. any links that point to non-existent files can be removed, including locked diagrams and master maps. This is useful if you want to share a map without the associated attachments.

Note: Any diagrams that you do not have at least Read access to will be ignored.

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Remove Broken File Links**.
4. Click **OK** to continue with the operation.

Remove broken diagram links

Broken diagram links can be removed from all diagrams in the currently open map, including diagram attachment links, sign posts and sign post logo links. Note that links to diagrams in the Deleted folder are not treated as broken and therefore will not be removed as part of this operation.

Note: Any diagrams that you do not have access to will be ignored.

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Remove Broken Diagram Links**.

Remove broken flow line links

Broken flow line links can be removed from all diagrams in the currently open map. A broken flow line link is a flow line that links to a non-existent diagram or map. Note that if the diagram that is linked to still exists, but the target flow line no longer exists, the flow line link will be maintained. This rule also applies to links to diagrams in the Deleted folder.

Note: Any diagrams that you do not have access to will be ignored.

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.
3. Click **Remove Broken Flow Line Links**.

Refresh diagram titles

When a drill down is created from an activity, the child diagram title will assume the parent activity's id. You can automatically update child diagram titles if the parent activity IDs are modified.

1. From the **Map** menu choose **Refresh Titles**.
2. Select the scope of diagrams to refresh the titles for.

   Current Diagram updates the current diagram from the parent diagram only.

   Current Diagram And Lower Levels updates the current diagram from the parent diagram and all child diagrams from that level.

   Current Process Map updates all diagrams in the process map.

Remove non-visual data

Non-visual data (memos, change requests, subscriptions, acknowledgement log, change log, history audit log, authorizers, reviewers and mandatory users) can be removed from a selected scope of diagrams.

1. From the **Map** menu choose **Map Properties**.
2. Select the Options tab.

3. Click **Clear Non Visual Data**.

4. Select the items that you want to remove.

5. Select the scope of diagrams that you want to remove the items from.

   Create a backup archive before clearing the selected items will create an archive of the selected diagrams. It is advisable that this option is enabled as removing non-visual data cannot be undone.

Delete a map

Maps can be deleted.

Note: This method will not permanently delete a map and maps can be restored following this operation.

---

1. From the **File** menu choose **Open/Manage**.

2. Select the process map and click **Delete**.

   Note: To permanently delete a map you must do this from the Deletion Recovery Manager (from the **File** menu choose **Deletion Recovery Manager**).

Related topics

Recovering deleted maps

Recover a deleted map

Deleted maps and diagrams can be restored. Master and draft maps must be recovered separately.

Note: Diagrams that have been deleted by removing a drill-down will be restored as a new map. To reintegrate it back into a map you must import it as a drill down.

---

1. From the **File** menu choose **Deletion Recovery Manager**.

2. Select the maps and diagrams that you want to recover.

   Note: Hold Ctrl to select multiple maps or diagrams.

3. Click **Recover** and select a destination.

   Clearing Recovered Map Entries

   Once a map or diagram has been recovered it will appear as grey in the list. To remove all recovered map log entries, from the **File** menu choose **Clear Redundant Entries**.

Related topics

Deleting maps

Define abbreviations

Abbreviations that are used in maps can be defined and made accessible to users in the web server. Abbreviations that are added to master maps will be automatically copied to the draft version. Abbreviations added to draft maps will be copied over to the master version when a diagram or map is promoted. Administrators and process authors can add, edit and delete abbreviations in the web server.

---

1. From the **Map** menu choose **Abbreviations**.

2. From the **File** menu choose **New**.

3. Enter the abbreviation and its meaning in the respective text boxes.

4. Click **OK**.

   Note: To delete an abbreviation, select it from the list and from the **File** menu choose **Delete**.

Importing Abbreviations

You can import a set of abbreviations from a CSV file with the following format:

<Abbreviation>,<Meaning>

For example:

WIP,Work in progress
TBC,To be confirmed
...

From the **Map** menu choose **Abbreviations**. From the **File** menu choose **Import from CSV**. Select the file to import and click **Open**.

Related topics

Defining references

Define references

References that are used in maps can be defined and made accessible to users in the web server. References that are added to master maps will be automatically copied to the draft version. References added to draft maps will be copied over to the master version when a diagram or map is promoted. Administrators and process authors can add, edit and delete references in the web server.

1. From the **Map** menu choose **References**.
2. From the **File** menu choose **New**.
3. Enter the reference id and reference in the respective text boxes.
4. Click **OK**.

Note: To delete a reference, select it from the list and from the **File** menu choose **Delete**.

Importing References

You can import a set of references from a CSV file with the following format:

<Reference>,<Description>

For example:

CAUR,Common Approach Uncommon Results (Ian Gotts)
BPM,Business Process Management (John Smith)
...

From the **Map** menu choose **References**. From the **File** menu choose **Import from CSV**. Select the file to import and click **Open**.

Related topics

Defining abbreviations

Toggle the display of activity IDs

The display of activity IDs (automatically assigned by the system when an activity is created) can be toggled on or off.

1. From the **Map** menu choose **Toggle IDs**.

2. In the Toggle Activity IDs panel choose to turn activity IDs on or off.

3. Select the scope of diagrams to apply the operation to.

Related topics

Diagram scope lists

Document Registry Administration

About Document Registry administration

The Document Registry, accessible in both the client and the web server, allows you to manage and control external files (MS Office files, drawings, multimedia files, etc) and also make them available to authors in order to associate with process activities. The Document Registry provides the following benefits and functionality:

Manage document information and version control

Information can be defined for individual files and all files have a unique ID. Information such as division, department, document type, confidentiality level, etc, can be defined for files and files are subject to version control.

Register files easily

Individual files or files within a folder can be registered easily, as well as being able to register attached files that are not already in the Document Registry.

Access files with simplicity and speed

Files can be easily accessed from the Document Registry, assuming users have the correct privileges to do so. A powerful search facility allows documents to be searched for by a number of different fields, including defined custom categories. Users also have the same access in the web server.

Link to files from maps

Documents in the Document Registry can be directly linked to from a number of different objects within a map. The benefit of storing documents in the Document Registry means that users do not need to know the location of the file.

Administration

Access to the Document Registry is determined by users' Document Registry access settings. Also, separate access rights can be defined for individual files in the Document Registry. Document Registry administrators can define Document Registry settings, document parameters, document types and confidentiality levels. Document Registry administrators can also correct mistakes or change controlled information specific to a file without the need to reauthorize a file.

Set the Document Registry system options

Document Registry system options allow administrators and Document Registry administrators to configure and control various aspects of the Document Registry.

---

1. From the **Documents** menu choose **Document Registry**.

2. From the **File** menu choose **Administration** and then **Document Registry System Options**.

General

Fields that must not be empty allows you to specify which fields are mandatory to define when users register files.

Show All Files filter option by default makes the All Files option the default selection in the authorization drop-down list.

Keep deleted records will keep any files that are deleted in the Document Registry. Deleted files appear as light grey in the list and cannot be accessed unless reinstated (right-click the file and choose **Undelete**).

Enforce notes when unlocking draft forces users to enter a note when unlocking a draft document.

Include all files with master documents in authorized filters will include files that have been promoted already (i.e. they have master versions) but are undergoing another review (i.e. their status is Update Pending) when users choose to search by All Authorized in the Authorization filter.

Show access denied documents will include files that users do not have the rights to view in Document Registry searches.

Automatically create back links for related documentation will automatically add back links to files that are being referenced as related documentation by other files. For example, if you are adding File B as related documentation for File A, then File A will also be added as related documentation in the details for File B. This option will also remove both links if one of the related document links is removed.

Maximum list results for cached records mode is the maximum number of files that are returned when users perform a Document Registry search in Cached Records mode.

File Locations

- **Automatic relocation of new documents (Drafts)** defines what happens to files when they are registered in the Document Registry.
- **Do not relocate** will link to files in their existing location.
- **Copy new documents when added** will make copies of files in the Document Registry.
- **Move new documents when added** will move files into the Document Registry.

Location of for promoted documents (Masters) defines where files are saved to when they are promoted.

Web Link File Locations allows you to specify the location to save draft and master web link files (.cwl) to. If no locations are specified then web link files will be saved to the Process RepositoryATTACH\Web Links\Draft and the Process RepositoryATTACH\Web Links\Master folders.

Reviews

Manual Review Scheduling will require users to manually schedule file reviews, i.e. they must specify the date and all other file review options.

Automatically schedule review upon authorization will automatically schedule a review when a file is authorized. If this option is selected then you must specify the time period for the automatic schedule to begin.

Defaults

Default Promoter allows you to specify a user who will automatically become the draft promoter when files are registered.

Note: To assign specific users or user groups select the **Default to specific user** option, click **Define** and then click **Add** to add user(s) or user group(s).

Drop Downs

Define the display filter drop-down titles.

Prompt for drop down list item codes allows a code to be manually specified when Document Registry drop-down items are created. If this option is disabled then a code will be automatically assigned to drop-down items upon creation. If automatically creating a drop-down category, the first 3 letters will be used (for example, if a drop-down list is called Department, then drop-down list items would have the codes DEP01, DEP02, etc.).

Access

Allow drop down fields to be updated on locked records allows the drop-down fields of promoted files to be updated.

Allow comment field to be updated on locked records allows the comment field of promoted files to be updated.

Allow author field to be updated on locked records allows the author field of promoted files to be updated.

Allow draft version field to be updated on locked records allows the draft version of promoted files to be updated.

Allow only administrators to set document access rights restricts the setting of file access rights to administrators and Document Registry administrators only.

Allow owners and authors to define document promoters allows file owners and authors to define document promoters, otherwise only administrators and Document Registry administrators can define document promoters.

Define category drop downs

Up to seven category drop-down lists can be defined and used to categorize documents, thereby facilitating filtered searching in the Document Registry. Drop-down items can be nested so that the selection of one item is dependent upon the selection of a previous item.

To define the category labels:

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then **Document Registry System Options**.
3. Click the Drop Downs tab to select it.
4. Define or edit any of the drop-down labels.
5. Click **OK**.

To add category items to drop-down lists:

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then one of the Drop Down <*x*> List options.
3. Click **New drop down item** .
4. Enter the details for the drop-down item.

General tab

Code (optional) allows you to enter a code. This is only visible if you add the respective code column for the Document Registry and cannot be searched against.

Note: There is a Document Registry system option that disables this field, allowing the system to automatically assign category item codes.

Name is the name of the drop-down item that is available for users to select from the drop-down list.

Group Under (optional) allows you to choose a drop-down item from a parent drop-down list. **Note:** Drop-down list 2 items can only be grouped under drop-down list 1 items, drop-down 3 items can only be grouped under drop-down 2 items, etc. If Item 2 is grouped under Item 1, then Item 1 must first be selected before the user can select item 2.

Default allows you to set the drop-down list item as the default item. This will automatically select the item in the drop-down list when a new file is registered.

User Groups tab

Associate user groups with a category item. When a file is registered and a category item is selected that has associated user groups, those user groups will be automatically assigned to the file. See About My Searches for more information.

1. Select the user group from the list of Available User Groups and click **Add** .

Keywords

Associate keywords with a category item. When a file is registered and a category item is selected that has associated keywords, those keywords will be automatically assigned to the file. See About My Searches and for more information.

Note: File categories can be updated over a scope of documents or all documents in the Document Registry. See Updating file categories for more information.

1. Select a keyword from the list of available keywords and click **Add** .

Define specific user filter access

You can grant or restrict access to individual filter options in the authorization drop-down list for specific users and user groups. For example, you may want to restrict users within a user group from being able to search for unauthorized documents in the Document Registry.

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then **Specific User Filter Access**.
3. Click **Add** ✚.
4. Click **Select User or Group** ... and select a user or user group.
5. From the **Filter Option** choose the Authorization filter option.
6. From the **Access** drop-down list choose to either grant or deny access to the filter option.
7. Click **OK**.
8. Repeat steps 3-7 for each filter option that you want to define.

Restore an archived document

A file is archived when a draft copy is overwritten with a new draft copy or a master copy overwritten with a new master copy. Archived files can be restored.

Note: Files cannot be overwritten when restoring an archived file.

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then **Administer Archive Manager**.
3. Select the file that you want to restore and from the **File** menu choose **Restore File**.

   Note: To permanently delete a file from the Document Registry, select the file and click **Delete**.

Replace path names

Search and replace document file paths if the location of documents in the Document Registry have changed.

Note: This operation cannot be undone and therefore an option to backup the Document Registry is provided (files are backed up in the DocRegistry/Backup folder).

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then **Path Name Replace**.
3. In the **Search On** box either enter the path name or click **Select Path Name To Search** to select the path that you want to replace.
4. In the **Replace With** box either enter the path name or click **Select Path Name For Replace** to select the path that you want to replace with.

Build back links for related documentation

If a file is referenced by another file as a related document then you can create back links to ensure that the file being linked to also references the file being linked from, i.e. the related documentation link works both ways. This operation will run through the entire Document Registry and create back links for files that require it.

Note: A Document Registry system option **Automatically create back links for related documentation** will automatically create back links when documents are added as related documents.

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then **Build Back Links for Related Documents**.

Remove unused files

Files that are not linked to from process maps can be removed from the Document Registry and placed in a specified folder.

1. From the **Document** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then **Remove Unused Documents**.
3. Click **Select Folder** and choose a location to store the unused documents in.

Define user access

Access rights to the Document Registry can be defined for individual users. See Editing user accounts for more information.

User Administration

Summary of User Rights

Summary of user rights

In Nimbus Control v8.x, the following user account types exist.

Process Authors

Users responsible for the creation, editing and management (reviews, authorizations) of process content held within the Process Repository. Process Authors have access to both the Author Client and Web Server.

Process Authors with the Administrator role allow these users to perform the same tasks as the Administrator user account in previous versions of Control, for example they have access to all functionality in Nimbus Control, and they can undertake administrative tasks and also integrate with third-party applications.

End Users

Consumers of processes and related content who have access to the Web Server. End Users have limited access to functionality through the Web Server, however an End User's capability can be augmented by additional licenses of one or more modules.

- End Users with the **Action Module** have access to the action management functionality. This means that they can view actions, have actions assigned to them and create new actions.
- End Users with the **Change Module** have access to authorizations and reviews. This means that they can be requested to authorize and review process content. Additionally, End Users with this module can view the cost of central resources, access scenario maps, and access the Maps page in the web. If the license permits it, these users also have access to the Author Client (please contact Technical Support if End Users require access to the Author Client). However, without this module, End Users can still be requested to acknowledge process content, and they can also view and add change requests and memos.
- End Users with the **Mobile Module** can download storyboards and associated attachments from the Web Server to the Nimbus Control Player Desktop Edition, and to an Apple iPhone/iPod.

Functionality	End User Account		
	Basic End User	Change Module	Action Module
Authorize	✗	✓	✗
Review	✗	✓	✗
Acknowledge	✓	✓	✓
Create Change Requests	✓	✓	✓
Add Memos	✓	✓	✓
Create/View Actions	✗	✗	✓

See Central Resource Costs	✗	✓	✗
View Drafts	✓	✓	✓
View Scenarios	✗	✓	✗
View Maps Page	✗	✓	✗
Change Diagram Scale	✓	✓	✓

Table. Access Rights for End Users (in the Web)

Additional System Roles

There are a number of additional roles that can be assigned to Process Authors and End Users, providing them with further access to functionality within Nimbus Control. These roles are assigned in the Settings tab of the User Account window.

Process Authors

Action Manager allows users to manage users' actions, and create/modify action categories and statuses.
Action Creator allows users to create actions.
Data Tables Manager allows users to create, delete and modify data table structures.
Rules Manager allows users to create, delete and modify highlight rules.
Storyboard Manager allows users create, delete and modify storyboards.
Scorecard Manager allows users to create, delete and modify scorecards.
Scorecard Editor allows users to modify existing scorecard records.
Statement Set Manager allows users to create, delete and modify statement sets.
Account Manager allows users to create and manage non-administrator type user accounts.
Central Resource Manager allows users to manage the Central Resource Library. Users can add, delete and edit central resource values. By default these users can see all central resource rates.
See Central Cost allows users to see the cost rates of central resources.
Local Resource Manager allows users to create, edit and delete local map resources.
Report Manager allows users to create, edit and delete scheduled reports.

Note: Process Authors with the Administrator account type are assigned the above system roles by default.

End Users

Action Manager allows users to manage users' actions (requires Action Module), and create/modify action categories and statuses.
Action Creator allows users to create actions (requires Action Module).
See Central Cost allows users to see the cost rates of central resources (requires Change Module).

Resources and Roles

Resources

About resources

A resource dictates who, or what, is responsible for completing a particular activity in a process. At the higher level processes of an enterprise, the activity resource is usually the process owner, i.e. the person ultimately responsible for the overall process. At the lower levels, resources are usually the job titles, machines and systems responsible for executing specific activities. Multiple resources may be assigned to a single activity as well as permitting single resources to be assigned to multiple activities. It is also possible to merge two resources.

Resources are managed in resource libraries. Rates can be defined for resources which allows for activity-based costing to be performed for a process. Users that do not possess specific cost viewing rights will not be able to see costs for resources in the Central Resource Library.

Note: It is possible to automatically update all resource names in a map. For more information see Updating draft resources.

Reporting on Resources

A number of resource-based reports are available in the Author Client, including:

Resources: Identifies where a selected resource exists within a specified scope of diagrams and displays information such as the diagram, activity, other resources, etc. Note that Suppliers are the other resources on any activities connected as inputs to a particular activity, and Customers are the other resources on activities connected as outputs from a particular activity.

Resource Groups: Shows a list of all resource groups.

Resource Costs: Builds a list of all resource within the specified scope of diagrams and includes all costing information relevant to the activity resource relationship.

Resource Usage: A usage count for all central resources. This is based on the resources used across a selected scope of diagrams.

User Resources: Lists all the users and their resource roles.

User Activities: Identifies all activities where a selected user or user group exists based on their assigned resource roles within a specified scope of diagrams.

For information on reporting see Generating reports.

About resource libraries

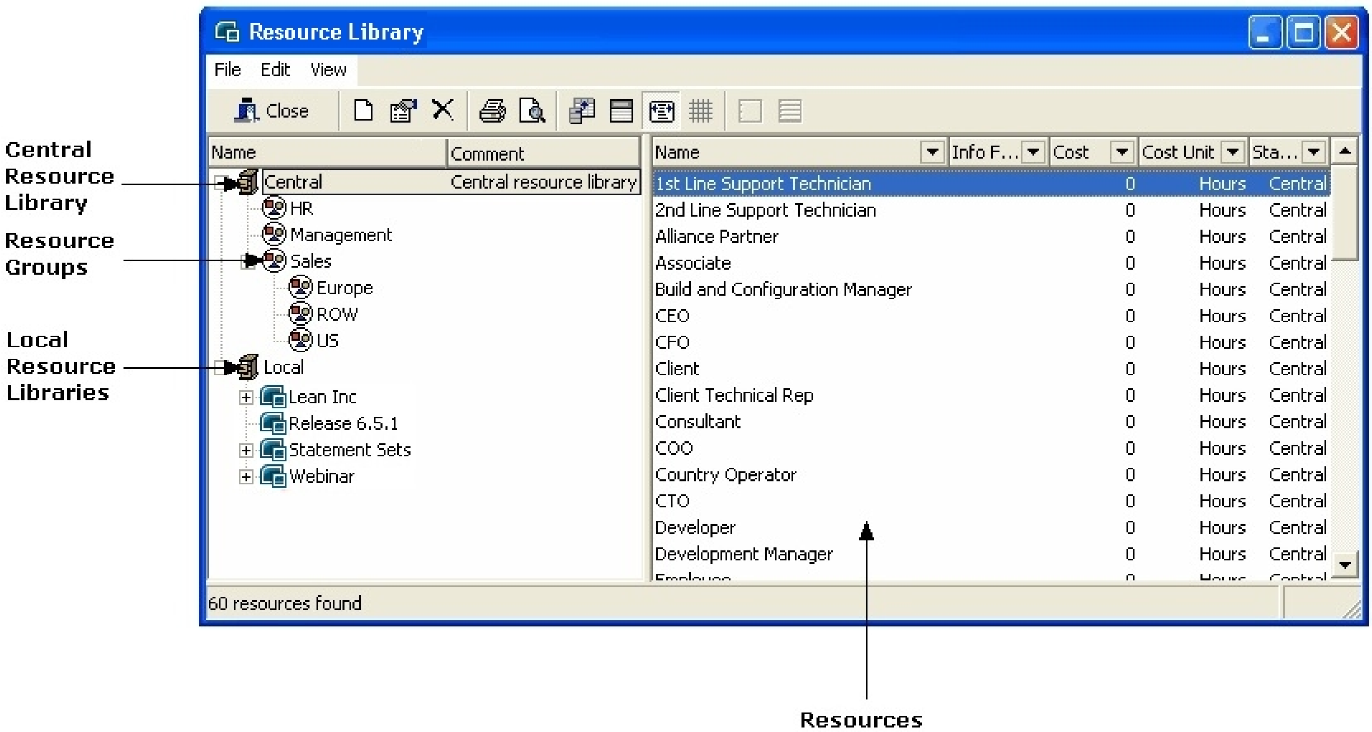
Resources are managed in resource libraries. Two types of resource libraries exist. A **Central Resource Library** holds resources that are available to all maps in the Process Repository. **Local resource libraries** hold resources that are associated with specific map versions, for example draft maps, scenarios, etc, and are only visible to those map components. Resources are usually created/added to local libraries and then moved to the Central Resource Library if that resource is going to be used as a standard resource within the Process Repository. Resources can also be grouped in the Central Resource Library.

Note: Where a resource exists in both the central and local library, the local resource cost will override the central resource when activity-based costing is calculated and the resource state will display **Override**.

Related topics

Creating resources
Creating resource groups
Importing resources
Editing resources and resource groups
Roles
Process costing

Resource Library dialog



Create a resource

Resources are job titles, systems or machines that are assigned to activities within a process to identify responsibility for completing an activity. For more information see About resources.

Click here to view a screenshot of the Resource Library dialog

To create a resource:

1. From the **Tools** menu choose **Resources** and then **Resource Library**.
2. In the Resource Library dialog, select either the Central Library or a local map.

   Note: If resource groups exist you can create a new resource within a group by selecting the group before proceeding to Step 3.
3. From the **Resource** menu choose **New**.
4. Enter the following details for the new resource:

   Resource Name is the full title of the resource (for example, Supervisor of IT Planning and Coordination).
   Display Name is the name of the resource as it will be displayed on activities (for example, Supervisor).
   Info Field 1 and **Info Field 2** allows additional information to be added about the resource, for example department.
   Rate is the rate of the resource, defined as **Per** second, minute, hour, day, week or year.

   Note: The Display Name will be used to display the resource on activities. If the Display Name is not specified then the Resource Name will be used.

   Support for multiple languages

   In the Language Variant panel you can define the resource in a different language (the available languages are set by an Administrator in the System Options). The resource text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular resource.
5. Click **OK**.

To copy resource to a resource group:

1. From the **Tools** menu choose **Resources** and then **Resource Library**.
2. Right-click the resource from the Central Library or a resource group and choose **Copy**.
3. Right-click the resource group and choose **Paste**.

   Note: A copy of the resource will always exist in the Central Resource Library. This method allows you to promote a local resource to a central resource.

Related topics

Adding resources

Merging resources

Importing resources

Creating resource groups

Deleting resources and resource groups

Editing resources and resource groups

Assigning roles

Merge resources

There may be a case where two resources exist in the resource library that are the same but assume different titles. Resources can be merged into one and all references to both resources will be directed towards the single merged resource.

1. From the **Tools** menu choose **Resources** and then **Resource Library**.
2. Right-click the resource that you want to merge with another resource and choose **Select Item for Merge**.
3. Right-click the second resource that you want to merge the first resource with and choose **Merge with Selected Item**.

Related topics

[Creating resources]

[Importing resources]

[Creating resource groups]

[Deleting resources and resource groups]

[Editing resources and resource groups]

[Assigning roles]

Import resources

Resources can be imported in CSV format.

The format is **name**,**cost**,**info field 1**,**info field 2**,**display name,group name**. For example:

Printer,2,HP (Color),First Floor,HP Color Printer,Printers
Fax Machine,2,Sony,Second Floor,Sony Fax Machine,Fax Machines

Note: All fields but the **name** field are optional. If you are specifying a group then it must already exist in the process repository as groups are not created as part of the import process.

---

1. From the **Tools** menu choose **Resources** and then **Resource Library**.
2. From the **File** menu choose **Import Resources**.
3. Locate the CSV file and click **Open**.

Related topics

[Creating resources]

[Merging resources]

[Creating resource groups]

[Deleting resources and resource groups]

[Editing resources and resource groups]

[Assigning roles]

Create a resource group

Central and Local resources can be grouped and resource groups can be nested within other groups. Once a resource group is created you can drag resources into the group.

Note: If the resource is a Central resource then it will be copied into the resource group.

---

1. From the **Tools** menu choose **Resources** and then **Resource Library**.
2. Select the Central or Local library.

   Note: You can create a sub-group by selecting an existing resource group.
3. From the **Group** menu choose **New Group**.
4. Enter the group name and a group description.

   ⊟ Support for multiple languages

   In the Language Variant panel you can define the resource group in a different language (the available languages are set by an Administrator in the [System Options]). The resource group text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular resource group.
5. Click **OK**.

Related topics

Creating resources

Merging resources

Importing resources

Deleting resources and resource groups

Editing resources and resource groups

Assigning roles

Edit a resource or resource group

1. Right-click the resource or resource group and choose **Properties** or **Group Properties** respectively.

Related topics

Creating resources

Merging resources

Importing resources

Creating resource groups

Deleting resources and resource groups

Assigning roles

Delete a resource or resource group

Resources and resource groups can be deleted (if you have the rights to do so). Deleting a local resource will remove the resource and all references to it in a map. Deleting a central resource will remove the resource and all references to it in maps except where a local copy exists, in which case the references will remain. Deleting a resource that exists in a resource group, or deleting a group, will only remove the resource from the group, i.e. it will not delete the resource. Where the resource exists in both a local library and the central library and the resource is deleted from the local library, the resource will remain in the central library and all map references will then refer to the central resource.

1. From the **Tools** menu choose **Resources** and then **Resource Library**.
2. Right-click the resource or resource group and choose **Delete** or **Delete Group** respectively.

Related topics

Creating resources

Merging resources

Importing resources

Creating resource groups

Deleting resources and resource groups

Editing resources and resource groups

Assigning roles

Roles

About roles

Users can be assigned a variety of roles within an organization and this can be reflected in Nimbus Control. Roles provide the ability to align people with what they do in a process and to make their involvement visible. In Nimbus Control, roles are created by assigning central resources to users or user groups. For example, a resource exists called Area Manager. By associating this resource to Fred Smith, Fred Smith will assume the Area Manager role and any responsibilities associated with the role.

Roles can be associated with users, user groups, diagrams and storyboards. Assigning a role to a user group will assign the role to all users within the group.

In the web server, users can search master diagrams, storyboards and transactions against their assigned role(s). Users also have the ability to search for diagrams, storyboards and transactions against other roles that exist.

Related topics

Assigning roles

Importing user roles

Creating resources

Assign a role

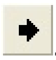
Roles can be assigned to users, user groups, diagrams and storyboards. Assigning roles to user groups will assign the role to all users within the group. For more information see About roles.

Note: Roles are associated with diagrams by assigning resources to specific activities. See Assigning resources for information on assigning roles to diagrams.

To assign a role to a user:

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right-click a member and choose **Roles**.
3. In the Select Roles dialog specify the resource search criteria and click **Find**.

   Note: You can enter the resource name directly if you know it. You can also filter the search to the Central Resource Library or to a specific local resource library. If you want to retrieve all resources within the Process Repository then ensure the <ALL CENTRAL> group is selected and click **Find**.

4. Select a role and click **Add Resources To List** .

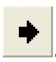
   Hint: You can select multiple roles by holding Ctrl.

5. Click **OK**.

To assign a role to all users within a user group:

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right click the user group and choose **Group Properties**.
3. Click **Roles**.
4. In the Select Roles dialog specify the resource search criteria and click **Find**.

   Note: You can enter the resource name directly if you know it. You can also filter the search to the Central Resource Library or to a specific local resource library. If you want to retrieve all resources within the Process Repository then ensure the <ALL CENTRAL> group is selected and click **Find**.

5. Select a role and click **Add Resources To List** .

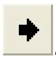
   Hint: You can select multiple roles by holding Ctrl.

6. Click **OK**.

To assign a role to a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. Right-click the storyboard and choose **Properties**.
3. Click **Roles**.
4. In the Select Roles dialog specify the resource search criteria and click **Find**.

   Note: You can enter the resource name directly if you know it. You can also filter the search to the Central Resource Library or to a specific local resource library. If you want to retrieve all resources within the Process Repository then ensure the <ALL CENTRAL> group is selected and click **Find**.

5. Select a role and click **Add Resources To List** .

   Hint: You can select multiple roles by holding Ctrl.

6. Click **OK**.

To remove roles from users, user groups and storyboards:

1. Select a role from the list of associated roles (on the right) and click **Remove Resources From List** .

   Hint: You can select multiple roles by holding Ctrl.

Related topics

About roles

Import user roles

User roles can be imported from CSV formats. A single resource may be assigned multiple roles.

The format is **user account,role**

For example:

Fred.Smith,General Manager
Fred.Smith,Technical Director
Kate.Jones,General Manager
Kate.Jones,Analyst

Note: If the user account does not exist then the line will be ignored.

1. From the **Tools** menu choose **Users**, then **User Accounts**.
2. From the **File** menu choose **Import User Roles**.
3. Locate the CSV file and click **Open**.

Users

About user accounts

There are three active user account types that exist, including:

Process Authors

These users create, edit and manage the content held within the Process Repository.

Administrator - this allows Process Authors to perform administrative duties in Nimbus Control, including creating and maintaining user accounts, configuring the system, running administrative tasks, integrating with third-party applications, etc.

End Users

These users have access to the Nimbus Control Web Interface only. End users cannot create or modify content in the Process Repository. See Summary of user rights for more information.

Change Module - allows end users to assist in change management, including authorizations, reviews, promotion, etc.

Action Module - allows end users to use the action management functionality. Users can access the Action Registry, be assigned to actions, edit actions and create actions. **Note:** To create actions users must also be assigned either the Action Manager or Action Creator role (in the Settings tab).

Mobile Module - allows end users to download storyboards and associated attachments to their Desktop Storyboard Player, iPhones and iPods (limited to 3 devices).

Unassigned

These users have no rights or access in either the Desktop Client or the Web Interface.

Summary of User Rights...

Related topics

Summary of user rights

Create a user account

Each Nimbus Control user, including users of the web server, must have a user account set up that defines their access rights, contact information, group membership, etc.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. From the **Member** menu choose **New User**.

   See User details for information on defining a user account.

Related topics

Group permissions

Importing user accounts

Editing user accounts

Creating user groups

Assigning roles

Edit a user account

Administrators and account managers can update user accounts. See User details for more information on user accounts.

Note: User accounts can be accessed from the User (Details) List report (accessed from the **Reports** menu in the User Accounts window). Double-click a user account to access it.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right-click the user account and choose **Properties**.

   Hint: You can select the user's group in the left-hand pane to filter the display.

Related topics

User account details

Deleting user accounts

User account details

The following settings apply to user accounts. Depending upon the user account type, some settings will not be applicable. To access a user's account details see Editing a user account.

General tab

First Name and **Last Name** are the user's real names.
Account is the user account name. This is automatically created once the user's first and last names are defined, although it can be edited. **Note:** The account separator (default '.') is set in the System Options by an administrator.
Password is the user account password that is required for the user to log into Nimbus Control.

Additional informational fields include their mobile number and Email address for contact purposes.

Important: For users to receive notifications, such as To-Do notifications, a valid Email address must be specified.

Account Type is the user account type. For more information see About user accounts.

This account is not to be managed via LDAP will allow you to manage a user's account outside of LDAP. By deselecting this option you can configure any of the parameters, for example user name, password, etc, for a particular user account. LDAP will ignore the user account when synchronization occurs. **Note:** This option is only displayed if LDAP has been enabled. See the Administration Guide that is supplied on the CD for more information on LDAP synchronization.

Details tab

Additional information can be added for the user.

Reports To is the user's line manager. Past due (overdue) To-Do notifications are sent to users' line managers.
Job Title is the user's job title.
Comment allows you to add a comment about the user (such as favorite animal).

The **URL substitution** field allows dynamic URL links that are user-specific to be defined in diagrams. If <USER> appears in a URL link then it will be replaced by whatever text appears in the URL substitution field for a specific user when the user accesses the URL. For example, USER1 has a URL substitution of DEV and USER2 of CON. A diagram URL link is defined as the following:

http://companyx/example/list.asp&dept=<USER>&view=1

When USER1 launches the URL they will be directed to http://companyx/example/list.asp&dept=DEV&view=1.

When USER2 launches the URL they will be directed to http://companyx/example/list.asp&dept=CON&view=1.

Preferred Server allows you to choose the URL of the Web Server to send out in email notifications to a particular user, assuming multiple Web Server installations exist. If no Web Server is specified then the default Web Server will be assumed. The Web Server URLs are defined in the ServerURL.dat file (.../Nimbus Control/Process Repository).

Landing Page allows you to choose a landing page for the user. A landing page is a URL, such as a Nimbus Control Web Server page, that users will be directed to after logging in to the Web Server.

> **Notes:** Landing pages are defined in the System Options - General. Administrators can specify a default landing page for all authors and end users. However, specifying a landing page for individual users will override the default landing page.
>
> **Hint:** To specify a landing page for multiple users, hold **Ctrl** and select the user accounts (in the User Accounts window), right-click a selected account and choose **Set Landing Page**.

Settings tab

Process Authors

The following roles and settings are available for Process Authors:

Allow Map Packaging allows users to package maps that they have access to.
Allow Unpackaging allows users to unpackage maps into the Process Repository.
Allow Folder Create, Rename and Delete allows users to create, rename and delete map folders in the Process Repository.
Allow Creation of New Maps allows users to create new maps in the Process Repository.

Allow Access to Maps Page allows users to access the Maps page.

The following settings allow you to define how SAP transactions are launched (**note:** SAP must be enabled and configured by an administrator):

Allow user to select either SAP GUI or SAP web interface allows the user to launch SAP transactions in both the GUI and web interface environments.
Use SAP transaction launcher allows the user to launch SAP transactions only in the SAP GUI.

Use SAP web interface allows the user to launch SAP transactions only in the SAP web-interface environment.

Action Manager allows users to manage users' actions.
Action Creator allows users to create actions.
Data Tables Manager allows users to create, delete and modify data table structures.
Rules Manager allows users to create, delete and modify highlight rules.
Storyboard Manager allows users create, delete, modify and publish storyboards.
Scorecard Manager allows users to create, delete and modify scorecards.
Scorecard Editor allows users to modify existing scorecard records.
Statement Set Manager allows users to create, delete and modify statement sets.
Account Manager allows users to create and manage non-administrator type user accounts.
Central Resource Manager allows users to manage the Central Resource Library. Users can add, delete and edit central resource values. By default these users can see all central resource rates.
See Central Cost allows users to see the cost rates of central resources.
Local Resource Manager allows users to create, edit and delete local map resources.
Report Manager allows users to create, edit and delete scheduled reports.

End Users

The following roles and settings are available for End Users in the Web Server:

Change Subscription allows users to subscribe and unsubscribe from diagrams and documents.
Access Logs allows users to view audit, acknowledgement and change logs.
Send Emails allows users to send emails to diagram owners and authors.
See Diagram Details allows users to view the details of diagrams.

Allow Access to Maps Page allows users to view the Maps page (requires Change Module).

The following settings allow you to define how SAP transactions are launched (**note:** SAP must be enabled and configured by an administrator):

Allow user to select either SAP GUI or SAP web interface allows the user to launch SAP transactions in both the GUI and web interface environments.
Use SAP transaction launcher allows the user to launch SAP transactions only in the SAP GUI.
Use SAP web interface allows the user to launch SAP transactions only in the SAP web-interface environment.

Action Manager allows users to manage users' actions requires (requires Action Module).
Action Creator allows users to create actions (requires Action Module).
See Central Cost allows users to see the cost rates of central resources (requires Change Module).

See Memos allows users to view all memos for process content that they have access to.
Add Memos allows users to add memos to process content.
See Change Requests allows users to view all change requests for process content that they have access to (requires Change Module).
Add Change Requests allows users to add change requests (requires Change Module).
See Drafts allows users to view draft diagrams.
See Scenarios allows users to view scenario diagrams (requires Change Module).
Change the Diagram Scale allows users to change the scale of diagrams.

Document Registry tab

The following rights are available for Process Authors and End Users in the Document Registry.

Access Rights defines the level of access the user has in the Document Registry:

Administrator provides full access and administrative rights to the Document Registry.
Default provides almost full access to the Document Registry with no administrative rights. These users cannot add files, import links from a map or change the Document Registry system default layout.
Read Only provides only read access to the Document Registry or map attachment links that relate to the Document Registry.
Access Denied restricts users from accessing the Document Registry. **Note:** For users to launch documents in process maps they must have the **Allow Launch** option enabled.

Allow Launch allows users to launch documents from process maps (this applies only if the user has not been granted access to the Document Registry).
Allow Delete allows users to delete documents that they have read/write access to in the Document Registry (requires Change Module).
Save Document Registry as HTML allows users to save the Document Registry as HTML (requires Change Module).

Membership tab

Group membership is selected here. For more information see About user groups.

To add the user to a group, select the group from the Available Groups list and click **Add user to group(s)** . Multiple groups can be selected by holding Ctrl.

Information

View information about the user. Click **Registered Devices** to view a list of the different devices that a user has downloaded storyboards to. You can remove a device from a user's account, for example if a user has a new PC. Select the device and from the **File** menu choose **Delete**.

Related topics

About Resources
About Roles

Replace a user account

The Search and Replace functionality allows you to search through a process repository and replace one user with another. For example, if an existing user leaves the company and a new user starts to replace that user, you might want to transfer access rights, roles, To-do items, etc, to the new user.

Available to administrators only

1. From the **Tools** menu choose **User** and then **User Accounts**.
2. In the User Accounts dialog, from the **Tools** menu choose **User Search and Replace Wizard**.

   The User Search and Replace Wizard is displayed.
3. Please read the information on the first step, then click **Next**.
4. Specify the target and source users, then click **Next**.

   Select the target user that you are replacing in the **Find** text box. Select the source user that you are replacing with in the **Replace** text box.

   Options for handling duplicate users allows you to specify what to do in the case of duplicate users being assigned to the same list, for example if both users are assigned as mandatory users for a particular diagram. Choose to remove the target where both users exist in the same list or to ignore it and leave both users assigned.
5. Select the process data to include in the operation, then click **Next**.

   Tell me more about the options (Online Help only)
6. Choose to run the operation now, or as part of the SSync process, then click **Finish**.

   Note: You will not be able to do anything in Control while the Search and Replace functionality is working. It is therefore recommended that you run the process as a batch job, i.e. out of hours, especially if there is a large amount of data in the process repository.

Viewing and Updating Batch Operations

If the operation has been run as part of the SSync process, i.e. as a batch operation, you can view past results and modify the options of any pending items - in the User Accounts window, from the **Tools** menu choose **Batch Operations**. A report-style window will be displayed.

To edit the options for a pending item, double-click the item. Pending items can also be deleted by selecting them and pressing **Delete**. To open the log file for a selected item, right-click the item and choose **View Log** (note that this option is only available for complete and failed items).

Logging

A log file is generated that logs the result of the operation (whether it has been run immediately or as a batch operation), including any issues found. The log file is stored in **...\Process Repository\System\Logs\User Search and Replace**.

Change a user account type

You can change a user's account type, for example you may want to upgrade an end user to a process author.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Select the user and from the **User** menu choose **Change to** and choose a user account type.

Related topics

[Changing settings for multiple users]

Update users' modules

You can enable or disable all modules, or individual modules, for selected end users. Please note that you must have sufficient licenses for specific account types to update users' modules.

1. From the **Tools** menu choose **Users**, then **User Accounts**.
2. Select the user(s) that you want to change modules for.
3. From the **User** menu choose **Change Module Settings**, then choose one of the following options:

 Enable Change Module enables the Change module for selected users.
 Enable Action Module enables the Action module for selected users.
 Enable Mobile Module enables the Mobile module for selected users.
 Disable Change Module disables the Change module for selected users.
 Disable Action Module disables the Action module for selected users.
 Disable Mobile Module disables the Mobile module for selected users.
 Enable All Modules enables all modules for selected users.
 Disable All Modules disables all modules for selected users.

Related topics

Changing settings for multiple users
Change a user account type

Import user accounts

User accounts can be imported if they are in .csv format. The format is:

Lastname,Firstname,Groups,Email,Account Name,Password,AccountType,PreferredServer,Change Module,Action Module,Mobile Module

For example:

Jones,Jack,Technical;Project Management;UK,jjones@email.com,Jack.Jones,******,End User,http://<Server>/Control/CtrlWebISAPI.dll,True,False,True

The following rules apply:

- The password field is optional. If it is left blank then the password will be 'changeme'.
- The groups field is optional. If used, one or more groups can be defined and separated by semi-colons and the user will become a member of those groups. If the group does not exist then the group will be created.
- The preferred server field is the user's preferred server URL, as defined in the ServerURL.dat file (set in the Details tab of users' account details). Either the full URL can be specified, or an integer value. This value is case-insensitive and if no match is found then the default preferred server will be used.
- The account type field can be either **Admin**, **Author**, or **End User**.
- The modules field can be **Change**, **Action** and/or **Mobile**.
- The first line in the CSV file is ignored as it will be assumed that this contains column header information.
- A log file is created in the root of the Process Repository, listing all users that have been imported.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. From the **File** menu choose **Import from CSV**.

3. Locate the CSV file and click **Open**.

Related topics

Creating user accounts

Editing user accounts

Importing user roles

Change settings for multiple users

You can change user settings and Document Registry access for users within the same group.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Select the users that you want to change settings for and from the **User** menu choose **Change Settings Across Multiple Users**.

   For information on user settings see User account details.

Related topics

Changing user account types

Reset a user's password

You can reset a specific user's password, for example if they have forgotten their password and have requested a new one. The new password will be sent via email and the user may change it once logged in. New passwords are randomly generated and the following rules apply:

- It must at least 8 characters in length, or the length specified as the Minimum password length if greater than 8, set in the system options.
- It must contain letters and numbers, or it must comply to the Minimum password complexity system option if this is set to 3.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Double-click the user that you want to reset the password for.
3. Click **Reset Password**.

Change passwords for multiple users

It may be necessary to reset multiple user's passwords to a single password. Any new password specified must adhere to the password complexity rules, as set out in the system options.

Note: This operation is available to Nimbus Control administrators only.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Select the users that you want to change the passwords for.
3. From the **User** menu choose **Change Password Across Multiple Users**.
4. Type a new password and click **OK**.

Delete a user

User accounts can be deleted.

1. From the **Tools** menu choose **User** and then **User Accounts**.
2. Select the user account and from the **Member** menu choose **Delete**.

To reinstate a user:

1. From the **Tools** menu choose **User Accounts**.
2. From the **Reports** menu choose **Deleted User List**.
3. Right-click the deleted user account and choose **Recreate User**.

To permanently delete a user:

1. From the **Tools** menu choose **User Accounts**.
2. From the **Reports** menu choose **Deleted User List**.
3. Right-click the user account and choose **Purge User**.

Reset a user's preferences

You can reset a user's preferences to the default settings again. This operation will also include any options the user has selected when using Nimbus Control, such as the default launch option for transaction links.

---

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Select the user group to display a list of associated users.
3. Right-click the user and choose **Reset User's Preferences**.
4. Click **Yes** to confirm the operation.

Resend acknoweldgement requests

When a user joins a new user group, you can resend them any previous acknowledgement requests that relate to their new group membership. This ensures that users are made aware of any new processes, documents and storyboards that relate to their new role.

This option is only available to Nimbus Control administrators.

Note: If the user has joined a group that is a member of other groups, i.e. the group is a sub-group of one or more parent groups, they will also receive any acknowledgement requests that exist for associated parent groups.

To resend acknowledgement requests:

1. In the User Accounts window, right-click the user and choose **Send Acknowledgements**.
2. Select the user group(s) that you want to send current acknowledgement requests for, i.e. select the group(s) that the user has recently joined, then click **Next**.
3. Define the reminder and escalation details and click **OK**.

User Groups

About user groups

Users can become members of a group, thereby providing them with a variety of group-specific permissions. Users will be members of one or more of the following system user groups (based on their account type):

Everyone

This group contains all users. Upon installation of Nimbus Control, the Everyone group will be assigned all permissions, i.e. every user will have full access to the system.

Administrators

These users can create and maintain user accounts and have access to all features within the client and web server. At least one administrator must exist in the system.

Authors

These users create, edit and manage the content held within the Process Repository.

End Users

These users have access to the Web Server only and have limited capabilities. Additional modules can be assigned to end users which provides greater access in Nimbus Control. See Summary of User Rights for more information on End Users.

Unassigned

These users do not have any access to either the client or web server. Users in this group may have been automatically added to the Process Repository following the unloading of a packaged map, for example.

Aside from the above system user groups, custom groups can be created. Users that are members of a custom group will inherit the group's permissions. Roles can also be associated with a group, thereby associating the role to its group members.

How do I view which custom groups users are members of?

You can view which custom groups users have been assigned to by including the **Groups** field in the **User Details List** report. This is also useful as it highlights any users that are not members of any custom groups. Note that this does not apply to the system default user groups (for example, administrators, process authors, change managers, etc).

From the **Reports** menu (in the User Accounts window), choose **User Details List**. To add the Group column to the report, from the **View** menu choose **Column Customizing**, then click and drag the Group column header onto the existing report headers.

Create a user group

A user group will provide members with specific permissions associated with the group. Groups allow user permission rights to be maintained easily without having to update individual user accounts.

Note: By default user groups are not managed by LDAP. If you want a user group to be managed by LDAP, you must enable it specifically for each user group.

1. From the Tools menu choose Users and then User Accounts.
2. From the Group menu choose New Group.

General

Name and Description is the name and description of the user group.

This group is managed via LDAP allows you to use LDAP to manage the user group. If selected you must enter the corresponding distinguished name as it appears in the directory service, for example:

CN=Sales,OU=Control_Groups,DC=Nimbus,DC=co,DC=uk

Membership

Groups can be members of other groups and will inherit any unique permissions from the other group(s). To add the group to another group, select the group from the Available Groups list and click Add group to group(s) . Multiple groups can be selected by holding Ctrl.

Permissions

Select or deselect specific group permissions. These permissions relate to functionality within the client, allowing you to grant or restrict access to specific functionality.

Related topics

Assigning roles

Group memberships

The following settings apply to user groups. Right-click a group in the User Accounts dialog and choose **Group Properties**.

General

Name and **Description** are the names and descriptions of the user group.

Membership

Groups can be members of other groups and will inherit any unique permissions from the other group(s). To add the group to another group, select the group from the Available Groups list and click Add group to group(s) . Multiple groups can be selected by holding Ctrl.

Permissions

Select or deselect specific group permissions. These permissions relate to areas of functionality that will permit or restrict users from accessing in the client. See Group permissions for more information.

Related topics

Group permissions

Group permissions

Nimbus Control comprises a number of areas of features and functionality and each area can be enabled or disabled on a user-group basis. Disabling certain features of functionalities for a user group will prevent users within a particular user group from accessing them. This is useful, for example, if you don't want certain users to access a particular area of functionality until they have been trained on it.

By default, the <Everyone> group allows all users to access all features and functionality of Nimbus Control. If you need to restrict access to a certain area of functionality or a particular function then you must disable that option in the <Everyone> group. By disabling a feature or area of functionality, the feature or functionality becomes controlled. You can then grant access to particular user groups by enabling the option in the properties of specific user groups.

Note: User group permissions work in conjunction with user settings, so a user must have both a user group permission and the associated user setting or role enabled for them to access a particular function. You can still assign a particular setting or role to a user, but if they are in a user group where the associated user group permission is turned off, then they will not be able to access that particular functionality, or perform a particular role. For example, if you assign the statement set manager role to a user, but the Statement Sets permission is disabled for their user group, then the user will not be able to perform the duties associated with a statement set manager as they will not have access to statement sets.

To disable features or functionality in the <Everyone> group:

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right-click the <Everyone> group and choose **Group Properties**.
3. Click the Permissions tab and deselect the options that you want to disable for all users.

   Note: Whilst administrators are included in the <Everyone> group, you cannot disable functionality for the Administrators group, i.e. administrators always have full access.

To enable or disable features or functionality for a specific user group:

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right-click the group and choose **Group Properties**.
3. Click the Permissions tab and select or deselect the options that you want to enable for those users within the user group.

   Note: If a user appears in two user groups, one with a particular feature disabled and one with it enabled, the user will have access to the feature.

Related topics

[Group memberships]
[User settings]

Categorise a user group

User groups can be categorized to allow for even more precise content targeting for users in the web server within their My Searches tab. For more information see Defining user group categories.

Assign a user to a user group

Users can be assigned to one or more user groups. Users within the user group will inherit all user group permissions and any specific access rights to diagrams, documents, storyboards, attachments, etc.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Click and drag the user onto the user group (in the left pane).

How do I view which custom groups users are members of?

You can view which custom groups users have been assigned to by including the **Groups** field in the **User Details List** report. This is also useful as it highlights any users that are not members of any custom groups. Note that this does not apply to the system default user groups (for example, administrators, process authors, change managers, etc).

From the **Reports** menu (in the User Accounts window), choose **User Details List**. To add the Group column to the report, from the **View** menu choose **Column Customizing**, then click and drag the Group column header onto the existing report headers.

Related topics

Creating user groups

Delete a user group

You can delete user groups. User accounts that exist within the user group will not be deleted.

1. From the **Tools** menu choose **User Accounts**.
2. Select the user group (on the left) and from the **Group** menu choose **Delete Group**.

Statement and Audit Managers

Assign statement and audit managers

See Assigning statement set managers, Assigning statement managers and Assigning audit managers for more information.

User Preferences

User Preferences

As a user you have a number of options that you can enable or disable depending upon your personal preferences.

1. From the **Tools** menu choose **Users** and then **Preferences**.

Display and Editing

Diagram access and display settings defines how maps are displayed when they are initially accessed.

Always reset zoom will display diagrams at 100% zoom.

Zoom to fit, only when larger than viewable area will shrink diagrams that are larger than the viewing area to fit on the screen.

Always zoom to fit will shrink large diagrams and expand small diagrams to fit on the screen.

Highlight parent when moving up a level will automatically highlight the parent activity when you navigate up a level.

Enter text immediately when new activity created will prompt you to enter text whenever a new activity is created.

Enter text immediately when new line created will prompt you to enter text whenever a new flow line is created.

Automatically switch back to select mode after drawing will automatically switch the mode back to Select and Edit following the creation of a new object.

Show process repository drive letter on caption bar will display the drive letter of the current process repository on the Windows caption bar.

Show release number on caption bar will display the current major release number of Nimbus Control.

Use classic toolbar button images will revert back to the old style toolbars.

Automatically generate input and output activities on new drill downs will automatically create the input and output activities, including flow lines, when a drill down is created. If deselected then the new diagram will contain only the input and output flow lines, i.e. no activities.

Default to additional language panel if regional settings match will place the cursor in the additional text entry field when defining the text for particular objects; however, there must be an additional language variant specified in Nimbus Control that matches the user's own regional language setting. If disabled, or if the regional language setting does not match an available language variant, the cursor will focus in the main default language text entry field.

Show all activities in the Activity Details Panel will display all activities in a diagram within the Activity Details Panel, otherwise only a selected activity will be displayed.

General

Spell Checking Dictionary allows you to select which default dictionary to use. The defaults are British, American and Italian. If you require a different dictionary then please see your system administrator.

Default Map Folder allows you to select to access a different process map folder upon startup. **Note:** Only sub-folders within the current process repository can be selected.

Links

Launching URLs determines how URLs are launched in Nimbus Control. The **Standard URL launching method** option will launch the URL normally. The **Non-standard URL launching method** will launch a web browser and pass URLs as parameters. This method is used if the Windows configuration is set up so that it prevents URLs from being launched properly.

Show diagram link redirection prompt will prompt you to choose whether to redirect diagram links when a diagram or map is copied, or to remain linked to the original diagram or map.

Show title prompt for new internal WP attachments will prompt you to enter the title of any WP documents that are created.

Remember selected choice of SAP environment will remember the choice of SAP environment to launch when a SAP transaction is launched in the Web Server. Deselect this option to prompt a choice every time (where applicable).

Default User Preferences

Default user preferences can be defined and these are automatically applied to new user accounts that are created. See User preferences for more information on specific options.

---

1. From the **Tools** menu choose **Users** and then **Default Preferences**.
2. Modify any settings and click **OK**. See User preferences for more information.

Switching User Accounts

Switch user accounts

Switching user accounts provides you with the ability to test diagram access rights on a map, for example, without having to log out and then in again as a different user. **Note:** The name of the logged-on user is always displayed in the title bar.

---

1. From the **Tools** menu choose **Users** and then **Switch User**.

User Group Favorites

Manage user group favorites

In the Web Server, administrators can associate particular favorite items (such as diagrams, documents, storyboards, metrics, reports) with specific user groups. Favorites appear on user's Home pages and administrators can manage group favorites through the client.

You can also easily add multiple maps and documents to user groups' favorites. See Add maps to users' favorites and Add files to users' favorites for more information.

---

1. From the **Administration** menu choose **Manage User Group Favorites**.
2. Do one of the following:

To copy a favorite item from one user group to another user group:

Right-click the favorite(s) and choose **Copy Favorites**. Search for the user group(s) that you want to copy to, select them and click **OK**.

Hint: To select multiple favorite items and user groups hold **Ctrl**.

To rename a favorite item:

Right-click the favorite item and choose **Properties**. Enter a new title and click **OK**.

To delete a favorite item:

Select the favorite item and press **Delete**.

Hint: To select multiple favorite items hold **Ctrl**.

To redirect a favorite item from draft to master, or vice-versa:

Metric and diagram favorite items point to either the draft or master version of a diagram. You can redirect any group metric or diagram links from either the master to draft, or vice-versa.

Select the favorite item(s) and from the **Tools** menu choose **Update Draft to Master** or **Update Master to Draft**.

Hint: To select multiple favorite items hold **Ctrl**.

Diagram Access Tracking

Diagram access tracking

Administrators can track diagram access and printing.

---

1. From the **Administration** menu choose **Administer Tracking Log**.

Tracking Log tab

This tab displays details of all diagrams that have been accessed and printed.

Criteria tab

This tab allows you to modify the report that is produced. Make any changes and the click the Tracking Log tab to see an updated report.

Hint: Diagram access tracking logs can be printed (from the **Tools** menu choose **Print**).

Attachment Unload Redirecting

Redirect Unloaded Attachments

When unloading packaged maps into a process repository, it is possible to redirect where attachments are saved to.

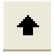
1. From the **Administration** menu choose **Attachment Unload Redirection**.
2. Click **Add**.
3. In the **File or filter** text box define a specific file or file type that you want to redirect.

   For example, *.doc will redirect all files with the .doc extension. You can also define a specific file, such as Sales2007.ppt, which will redirect only that specific file.
4. Click **Browse** to select a folder to use as the redirected attachment save folder.
5. Click **OK**.

Removing Rules

Select the rule from the list and click **Delete**, or double-click the rule and deselect **Redirect enabled**.

Reordering Rules

You can reorder the rules in order of precedence by selecting the rule and clicking Move Up  and Move Down . For example, if the first rule in the list redirects Document1.doc to Folder A and the second rule redirects general *.doc files to Folder B, if Document1.doc is unloaded it will be sent to Folder A as this is the first rule that applies in the list.

Related topics

Importing maps

Packaging maps

Chapter 4

Map Design

Map Design

Working with Templates

About templates

Templates provide the means to customize and standardize the look and feel of diagrams, for example to incorporate corporate colors, a logo, etc. You can also add navigation buttons or objects that link to particular diagrams or attachments within a map.

Templates can be applied to an individual diagram, a scope of diagrams and to an entire process map. Diagrams can also be protected to prevent them from having a template assigned to them.

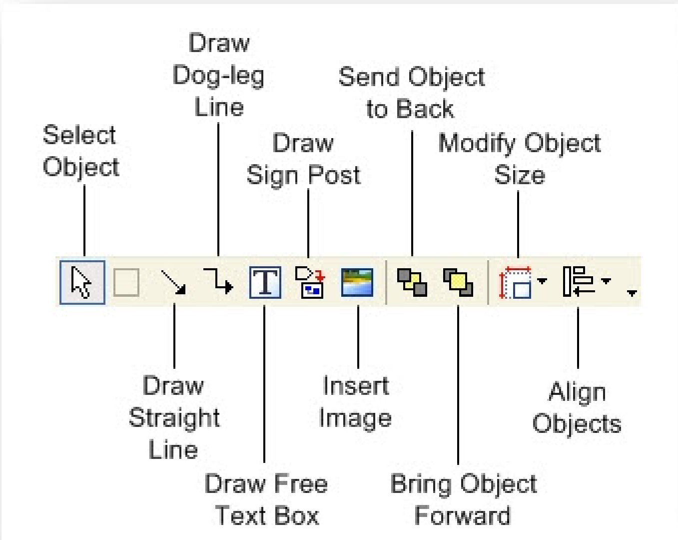
Note to Administrators: You can specify a default template to be assigned when new maps are created and you can assign templates to existing diagrams that do not already have a template. See System Options for more information.

Create a template

1. From the **Map** menu choose **Templates**, then click **New**.

2. Enter the name of the new template and click **OK**.

   You are now ready to design the template using the Drawing toolbar (from the **View** menu choose **Toolbars & Panels** and select the **Diagram Button Bar** checkbox if it is not displayed).



   Hint: Attachments and links can be added to free text and images.

3. From the **File** menu choose **Close** to save the template and exit the template designer.

   Hint: You should initially define the boundaries of your template by drawing a free text box. To show the border of the free text box, right-click the text box and from the **Color And Style** menu choose **Border Visible**. Good practice dictates that the width of the template should be equivalent to the width of your screen.

Automatic Fields

Automatic fields can be added to free text objects that will auto-populate with the respective data, including:

Author, Owner, Authorization Status, Authorization Date, Creation Date, Title, Last Review Date, Version, Percentage Completed, Promotion Status, Last Modified, Modified By, Map Type, User Fields, Creation Year, Level, Map, Authorizers, Number of Memos, Number of CRs and Number of Actions.

From the **Tools** menu in the free text edit box choose **Insert Field** and then choose an automatic field. Three user-definable template fields exist and are defined in the system options.

New in 7.0.2. - **Map, Previous Diagram List** allows users to navigate to a previously visited diagram.

Related topics

About templates

Page setup

Editing templates

Applying templates

Sharing templates

Edit a template

1. From the **Map** menu choose **Templates**.
2. Select the template and click **Edit**.

   Note: To rename a template, select the template and click **Rename**.
3. When you have finished making your edits, from the **File** menu choose **Close** to save the template and exit the template designer.

Related topics

About templates

Page setup

Creating templates

Applying templates

Sharing templates

Apply a template

1. From the **Map** menu choose **Templates**, select the template that you want to apply and click **Apply**.
2. Choose the scope that you want to apply the template to and click **OK**.

   Note: You can prevent a diagram from having a template applied to it by clicking **Mark as None** when in the Templates dialog of a particular diagram. To allow a template to be applied to the diagram, choose **Clear Template**.

Related topics

About templates

Creating templates

Editing templates

Sharing templates

Diagram scope list file

Package a template

Package a template to share with colleagues or you can transfer it to another process repository.

To package a template:

1. From the **Map** menu choose **Templates**.
2. Select the template that you want to package and from the **File** menu choose **Package**.

   Note: Once the template has been packaged you can choose to email the template by clicking **Next** and selecting the **Email the packaged templates to a colleague** option.

To import a packaged template:

1. From the **Map** menu choose **Templates.**
2. From the **File** menu choose **Unload Package**, locate the template file (.tpk) and click **Open**.

Related topics

About templates

Creating templates

Editing templates

Applying templates

Diagram scope list file

Define access rights

Access rights can be defined for templates to govern who can view, edit and apply a specific template.

More info on Access Rights...

1. With the template open, from the **Manage** menu choose **Template Access Rights**.
2. Select the default access rights for all users.

   Read and write allows users to view, edit and apply the template.
   Read only allows users to view and apply the template.
   Access Denied prevents users from viewing, editing and applying the template.

3. Click **Add**  to select a user or user group.

   Note: Users will be automatically granted read/write access to the template. To modify their access rights double-click the user or user group once added and reselect.

Related topics

About templates

Page setup

Template page setup options can be defined, including page scaling, orientation, print margins and header and footer font sizes and will define how diagrams are printed. Template page setup options can be overridden when printing a diagram or scope of diagrams.

1. With the template open, from the **File** menu choose **Page Setup**.
2. In the Print Scaling tab you can choose how to scale the diagrams.

Always scale diagram to fit page will scale diagrams up or down to fit the page.

Scale diagram to fit, only when larger than page will only scale down diagrams that are too large for the page. Diagrams that are smaller than the page will not be scaled up.

Scale diagram to fit user defined area allows you to define a printable area. If this option is selected then resizing handles will be present when you exit Page Setup for all diagrams within the specified scope that are too large to fit on the page. You can also enter specific dimensions for the print area by clicking **Adjust Manually**.

Note: The **Scale diagram to fit user defined area** option is pixel based and not true page size. Nimbus Control will compress or expand the diagram to fit the standard page size of the printer that it is being sent to. A4/A3, for example, is determined by your printer and what you see on the screen is literally what you get when the page is printed.

3. Click the Orientation and Size tab to change the print orientation, margins and header and footer font sizes.

   Note: The print margins define the distance from each edge of the printable area (the printable area is between the bottom of the title area at the top and the document control panel at the bottom). The Header And Footer panel allows you to change the font point sizes of the control panel and title.

Creating Diagrams

Adding and Editing Objects

Activities

Add an activity

An activity is an event in a process that is initiated by an input or output, usually described by a verb (action) + noun (person, place, thing, event, substance or quality).

Are you creating BPMN style diagrams?

---

1. Click **Draw Activity** ☐ on the Drawing toolbar.

   Note: To display the Drawing toolbar, from the **View** menu choose **Toolbars & Panels**. On the Toolbars tab select the **Diagram Button Bar** checkbox.

2. With the crosshairs as your cursor, click and drag an area on the map to create an activity box, then release the mouse button.

3. Enter the text for the activity in the text box and click **OK**.

Keywords

Selected text can be used to define and add keywords to the Keywords Library. Keywords created in this way will be automatically associated with the current diagram.

Highlight the text that you want to define as a keyword, right-click it and choose **Add as Keyword**.

See My Searches for more information on keywords.

Commentary Text

Commentary text provides additional information to users when they roll over an activity or flow line. To define commentary text, right-click the activity or flow line and choose **Commentary**. Commentary text can also be created for multiple language variants, as you can with activity text.

If you want to prevent the commentary text from appearing as hint text when users roll their mouse over an activity, right-click the activity and deselect **Show Commentary as Hint Text**. You can also enable or disable this option for multiple selected activities.

Hint: You can also define commentary text after defining the text for the activity. In the Text window, from the **File** menu choose **Save and Edit Commentary**.

Note: Right-click anywhere on the diagram after creating an activity to return to select mode.

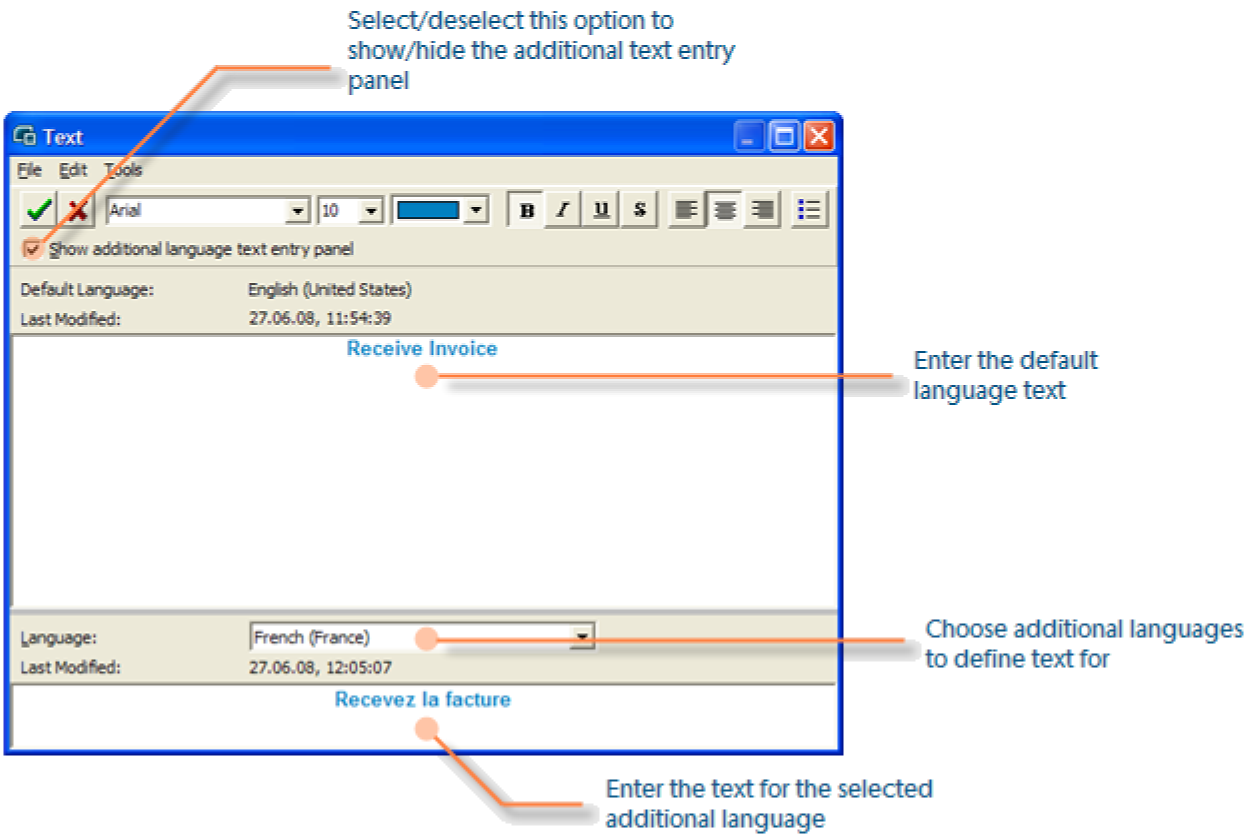
Support for multiple languages

Nimbus Control allows processes to be created to support multiple languages by allowing activity and commentary text to be defined in different languages (the available languages are set by an Administrator in the System Options). The text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object.

To specify text for an additional language select **Show additional language text entry panel**, then choose the language from the **Language** drop-down list and enter the text in the box below. Repeat this step for any other languages that you want to define.

Note: If a language appears in red then the language variant is not supported in the current process repository.

Hint: To test how a diagram looks in a different language, from the **View** menu choose **Switch Language** and then choose a language to display.



Drawing Tips

- To draw a square, hold Shift as you draw the activity box.
- You can automatically duplicate the last activity box that was created using a single click on the diagram when the Draw Activity button is enabled.
- To change the shape of an activity, right-click it and from the **Colors And Styles** menu choose **Change Shape**.
- If you don't want to enter text whenever you create an activity you can switch off automatic text entry. See User Preferences for more information.
- You can change the line and fill colors, line style and add object shadows.

Related topics

Adding auto-generated activities

Adding flow lines

[Creating drill downs]

[Adding resources]

[Adding attachments and links]

[Adding notes]

[Reassigning activity IDs]

[Moving objects]

[Locking objects]

[Cutting, copying and pasting objects]

[Deleting objects]

Add auto-generated activities

You can create a number of activities automatically and choose the layout.

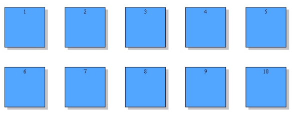
---

1. From the **Diagram** menu choose **Auto Generate Activities**.
2. Select the activity shape, the amount of activities required and the layout.
3. Click **OK**.

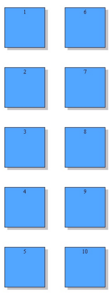
Examples:

The following examples use 10 rectangle activities (specified in the Options panel).

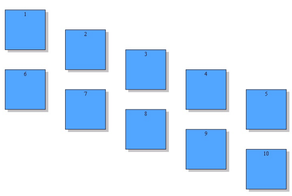
Row



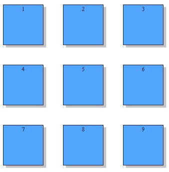
Column



Staggered



User Defined (3 x 3)



Related topics

[Adding activities](#)

Flow Lines

Add a flow line

A flow line forms the input and outputs of an activity. When an activity is moved within a diagram, the flow line will remain connected unless it is disconnected first. Straight flow lines are used to connect two parallel, i.e. aligned, activities and dog-leg flow lines are used to connect two activities that are not aligned.

1. Click either **Draw Straight Line** or **Draw Dog-leg Line** on the Drawing Toolbar.

   Note: To display the Drawing toolbar, from the **View** menu choose **Toolbars & Panels**. On the Toolbars tab select the **Diagram Button Bar** checkbox.

2. With the crosshairs as your cursor, click and drag a line from the start point to the end point.

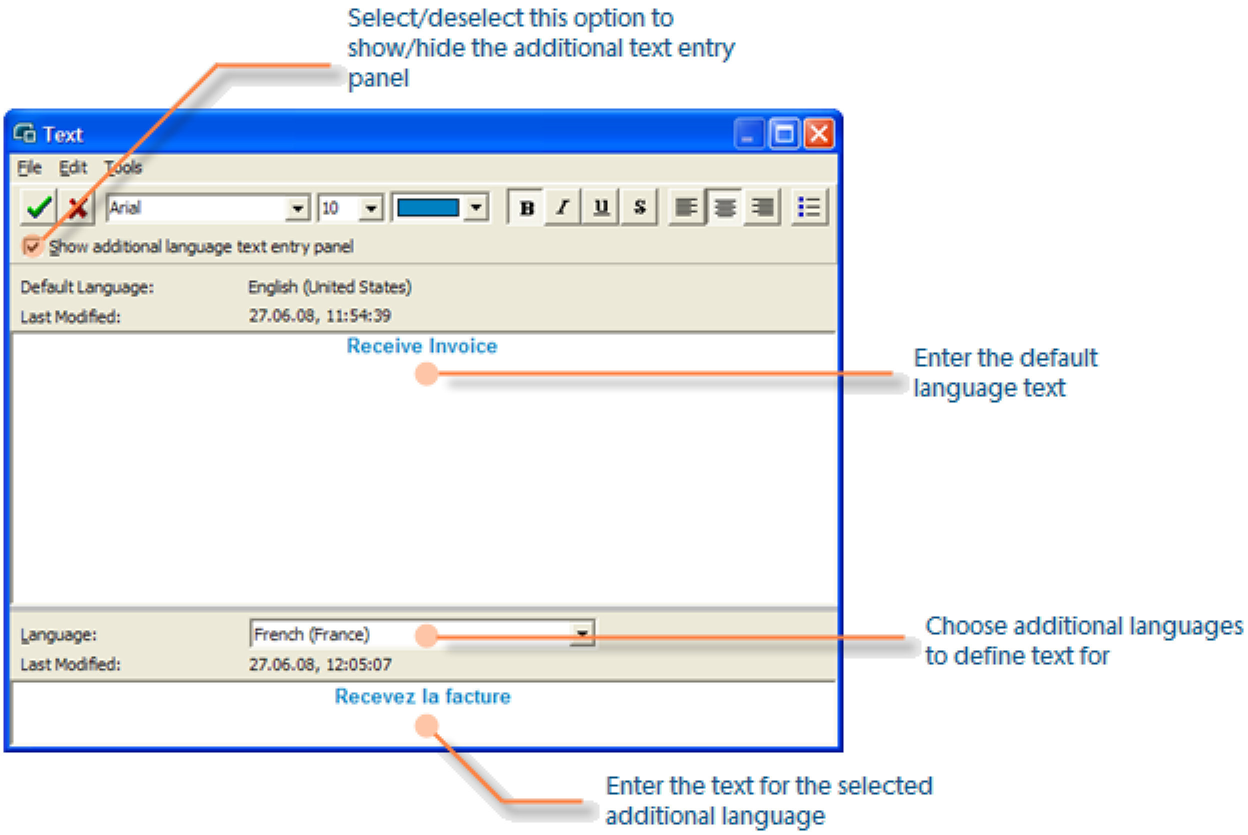
Support for multiple languages

Nimbus Control allows processes to be created to support multiple languages by allowing diagram object text to be defined in different languages (the available languages are set by an Administrator in the System Options). The object text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object.

To specify text for an additional language select **Show additional language text entry panel**, then choose the language from the **Language** drop-down list and enter the text in the box below. Repeat this step for any other languages that you want to define.

Note: If a language appears in red then the language variant is not supported in the current process repository.

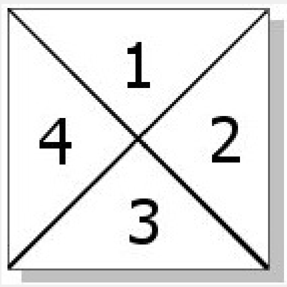
Hint: To test how a diagram looks in a different language, from the **View** menu choose **Switch Language** and then choose a language to display.



Flow Lines

Joining two activity boxes with a straight line
If you are joining two activity boxes, simply click and drag from the inside of one activity box to the inside of the other activity box.

Joining two activity boxes with a dog-leg line
An activity box has four sections when drawing a dog-leg flow line, allowing you to connect from the top, bottom, left or right of an activity. Click and drag from one section of one activity to another section of the other activity.



Related topics

Adding flow line text

Flow line links

Disconnecting flow lines

Disconnect a flow line

1. Click the flow line to select it, move the cursor to the end of the flow line end which you want to disconnect until a cross appears ( ), then drag the flow line out of the activity box.

   Note: If you cannot disconnect the flow line then it may be locked.

Related topics

Locking objects

Deleting objects

Add flow line text

Text can be added to flow lines and the input and output triggers of activities can be defined in this way. The text becomes associated with the flow line, therefore if the flow line is moved then the text is moved with it.

1. Double-click the flow line and enter the text.
2. Click **OK** .

   Note: To change the font, from the **Edit** menu choose **Font**.

Keywords

Selected text can be used to define and add keywords to the Keywords Library. Keywords created in this way will be automatically associated with the current diagram.

Highlight the text that you want to define as a keyword, right-click it and choose **Add as Keyword**.

See My Searches for more information on keywords.

Commentary Text

Commentary text provides additional information to users when they roll over an activity or flow line. To define commentary text, right-click the activity or flow line and choose **Commentary**. Commentary text can also be created for multiple language variants, as you can with activity text - see Support for multiple languages below.

If you want to prevent the commentary text from appearing as hint text when users roll their mouse over a flow line, right-click the flow line and deselect **Show Commentary as Hint Text**. You can also enable or disable this option for multiple selected flow lines.

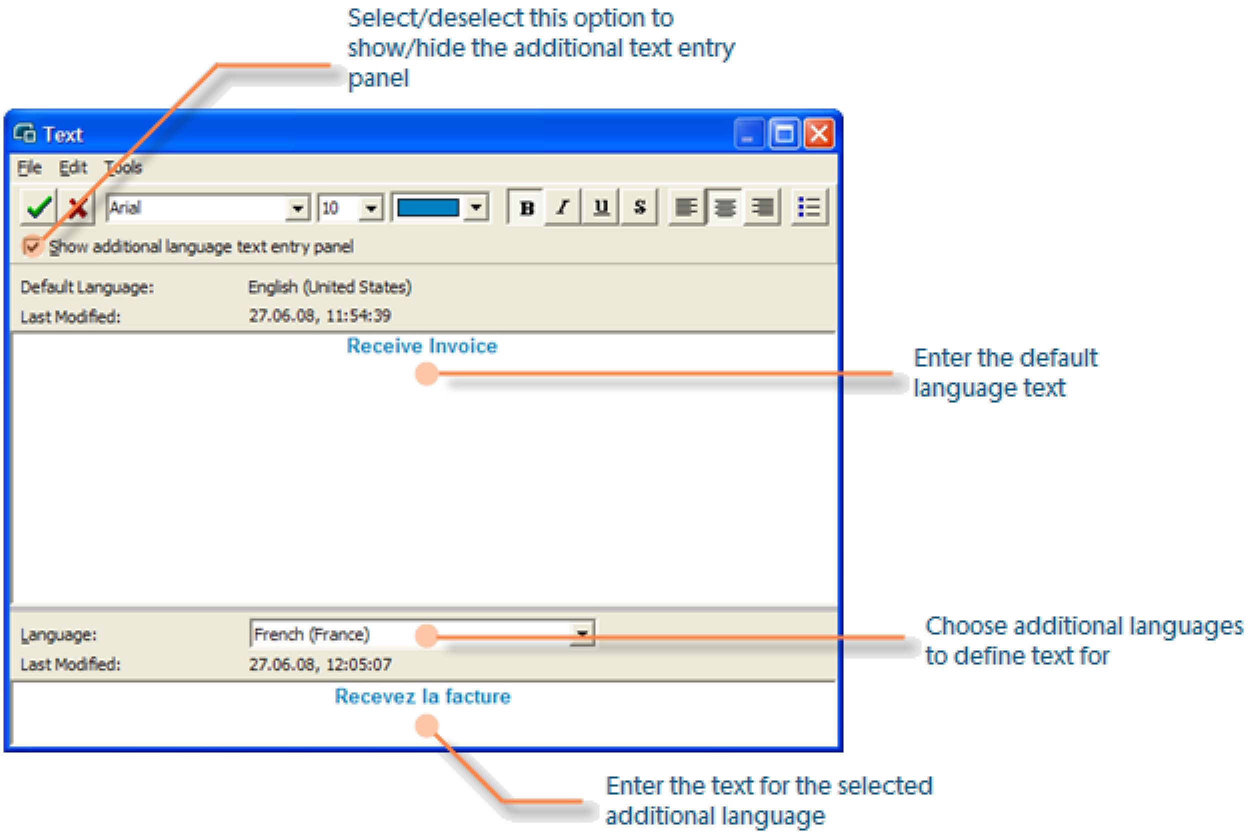
Hint: You can also define commentary text after defining the text for the flow line. In the Text window, from the **File** menu choose **Save and Edit Commentary**.

Support for multiple languages

Nimbus Control allows processes to be created to support multiple languages by allowing diagram object text to be defined in different languages (the available languages are set by an Administrator in the System Options). The object text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object.

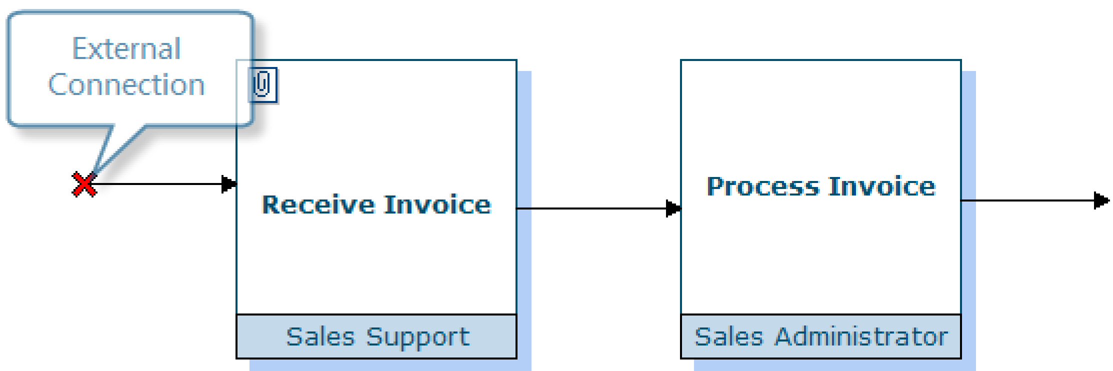
To specify text for an additional language select Show additional language text entry panel, then choose the language from the Language drop-down list and enter the text in the box below. Repeat this step for any other languages that you want to define.

Hint: To test how a diagram looks in a different language, from the View menu choose Switch Language and then choose a language to display.



Add an external connection

When a part of a process resides outside of the process that you are mapping and it cannot be mapped for whatever reason, for example if part of the process is the responsibility of a different company, you can mark an input or output flow line as 'externally connected' to indicate this. Hints can be added to provide users with an explanation.



1. Right-click the flow line and choose **Externally Connected**.

   Note: You can change the display of the icon by right-clicking it and choosing **Properties**. To add a hint, right-click the icon and choose **Hint Text**.

Images

Add an image

1. Click **New Image** on the Drawing Toolbar.

   Note: To display the Drawing toolbar, from the **View** menu choose **Toolbars & Panels**. On the Toolbars tab select the **Diagram Button Bar** checkbox.

2. With the crosshairs as your cursor, click and drag an area for your image to appear in.

3. Locate the image and choose **Open**.

> **Image Tips**
>
> Rescale an image by right-clicking on the image and choosing **Scale To**.
>
> Attachments and links can be added to images. See Creating Attachments and Links.
>
> Images can be made transparent, allowing some objects behind an image to be visible. Right-click the image and choose Transparent.

Related topics

Adding hints

Making images transparent

Replacing images

Resizing images

Deleting images

Moving objects

Locking objects

Cutting, copying and pasting objects

Resize an image

1. Right-click on the image and choose **Reset Size** to reset the size to its original size, or **Reset Width** or **Reset Height** to reset the width or height.

   Hint: Rescale an image by right-clicking on the image and choosing **Scale To**.

Related topics

Flipping images

Moving objects

Locking objects

Cutting, copying and pasting objects

Selecting objects

Flip an image

Images can be flipped vertically or horizontally.

1. Right-click the image and choose either **Flip Horizontally** or **Flip Vertically**.

Replace an image

1. Right-click the image and choose **Replace Image**.

Make an image transparent

Setting an image to transparent will make some areas of the image see thru, allowing parts of objects to be visible when the image is placed over them.

1. Right-click the image and choose **Transparent**.

   Hint: To make an image opaque, repeat this step and deselect **Transparent**.

Related topics

[Flipping images]

Delete an image

1. Click the image to select it and press **Delete**.

   Note: If the image has attachments or links associated with it, hold Shift when selecting the image to select it.

Free Text

Add free text

Free text allows you to add floating text to a diagram that is not attached to any objects.

1. Click **Draw Free Text** on the Drawing Toolbar.

   Note: To display the Drawing toolbar, from the **View** menu choose **Toolbars & Panels**. On the Toolbars tab check the **Diagram Button Bar** checkbox.

2. With the crosshairs as your cursor, click and drag an area for the free text to appear in.

3. Enter the text and click **OK** .

Keywords

Selected text can be used to define and add keywords to the Keywords Library. Keywords created in this way will be automatically associated with the current diagram.

Highlight the text that you want to define as a keyword, right-click it and choose **Add as Keyword**.

See My Searches for more information on keywords.

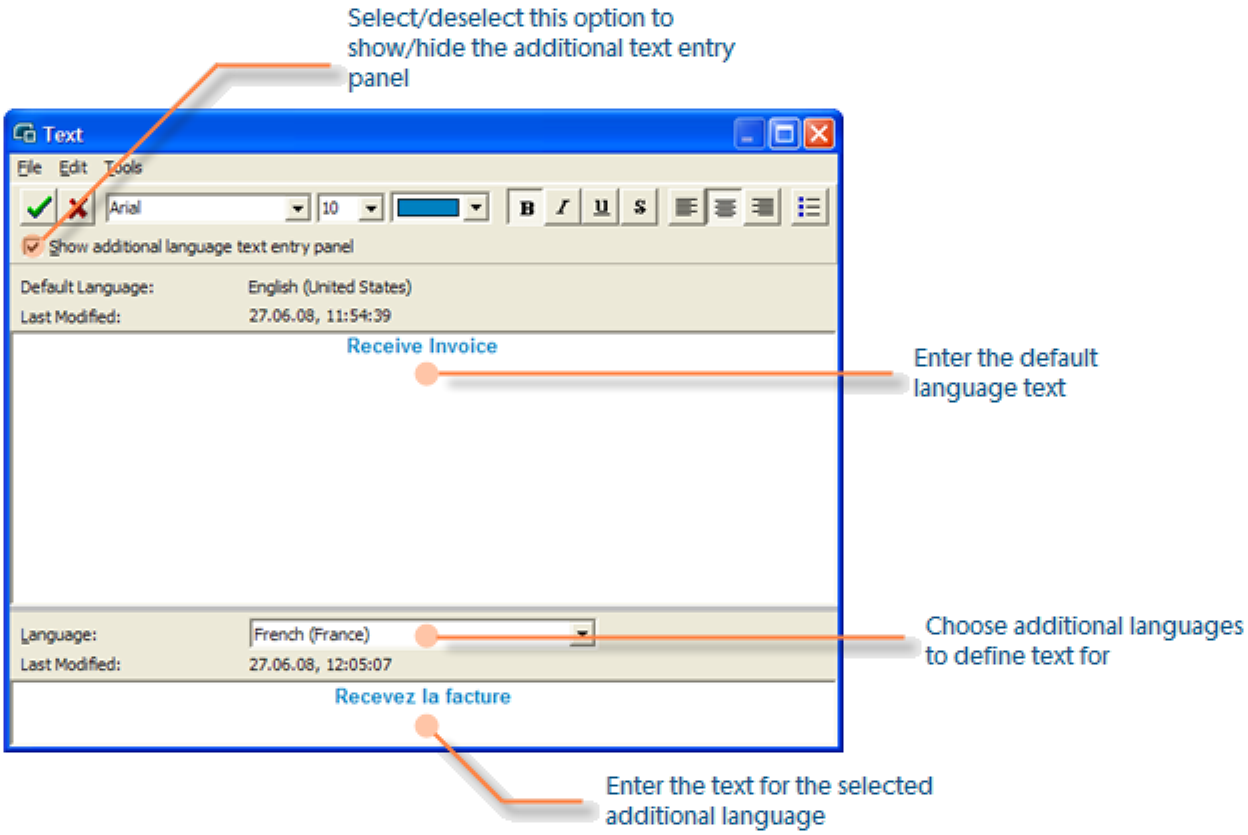
Support for multiple languages

Nimbus Control allows processes to be created to support multiple languages by allowing diagram object text to be defined in different languages (the available languages are set by an Administrator in the System Options). The object text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object.

To specify text for an additional language select **Show additional language text entry panel**, then choose the language from the **Language** drop-down list and enter the text in the box below. Repeat this step for any other languages that you want to define.

Note: If a language appears in red then the language variant is not supported in the current process repository.

Hint: To test how a diagram looks in a different language, from the **View** menu choose **Switch Language** and then choose a language to display.



Related topics

[Moving objects]

[Locking objects]

[Cutting, copying and pasting objects]

[Deleting objects]

Edit free text

1. Double-click the free text object.
2. Edit the text and click **OK** .

Note: To change the font, font color, font size, etc, of the existing text you must first highlight it.

Keywords

Selected text can be used to define and add keywords to the Keywords Library. Keywords created in this way will be automatically associated with the current diagram.

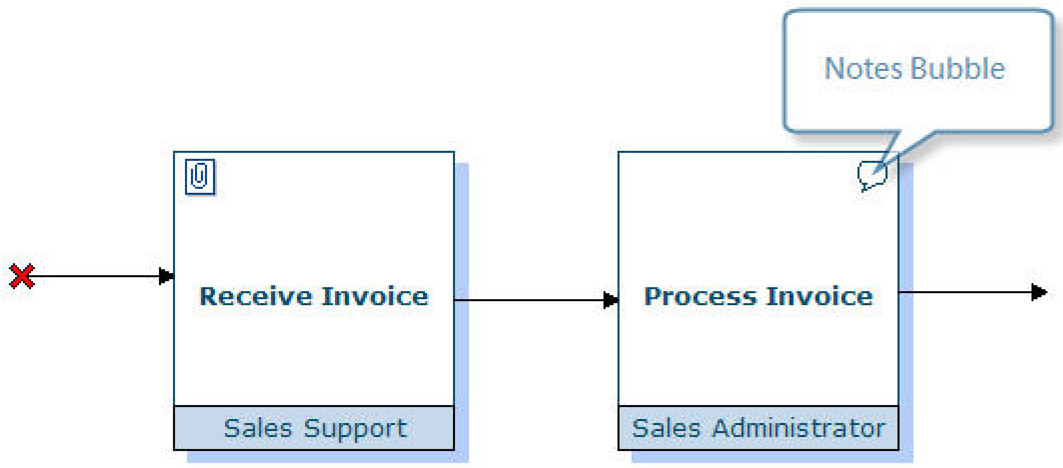
Highlight the text that you want to define as a keyword, right-click it and choose **Add as Keyword**.

See My Searches for more information on keywords.

Notes Bubbles

Add a note

Notes can be added to activities to provide additional information about an activity. Users can access the information contained within a notes bubble by clicking it.



1. Right-click the activity and choose **Notes Bubble**.

2. Enter the text for the note and click **OK** .

Keywords

Selected text can be used to define and add keywords to the Keywords Library. Keywords created in this way will be automatically associated with the current diagram.

Highlight the text that you want to define as a keyword, right-click it and choose **Add as Keyword**.

See My Searches for more information on keywords.

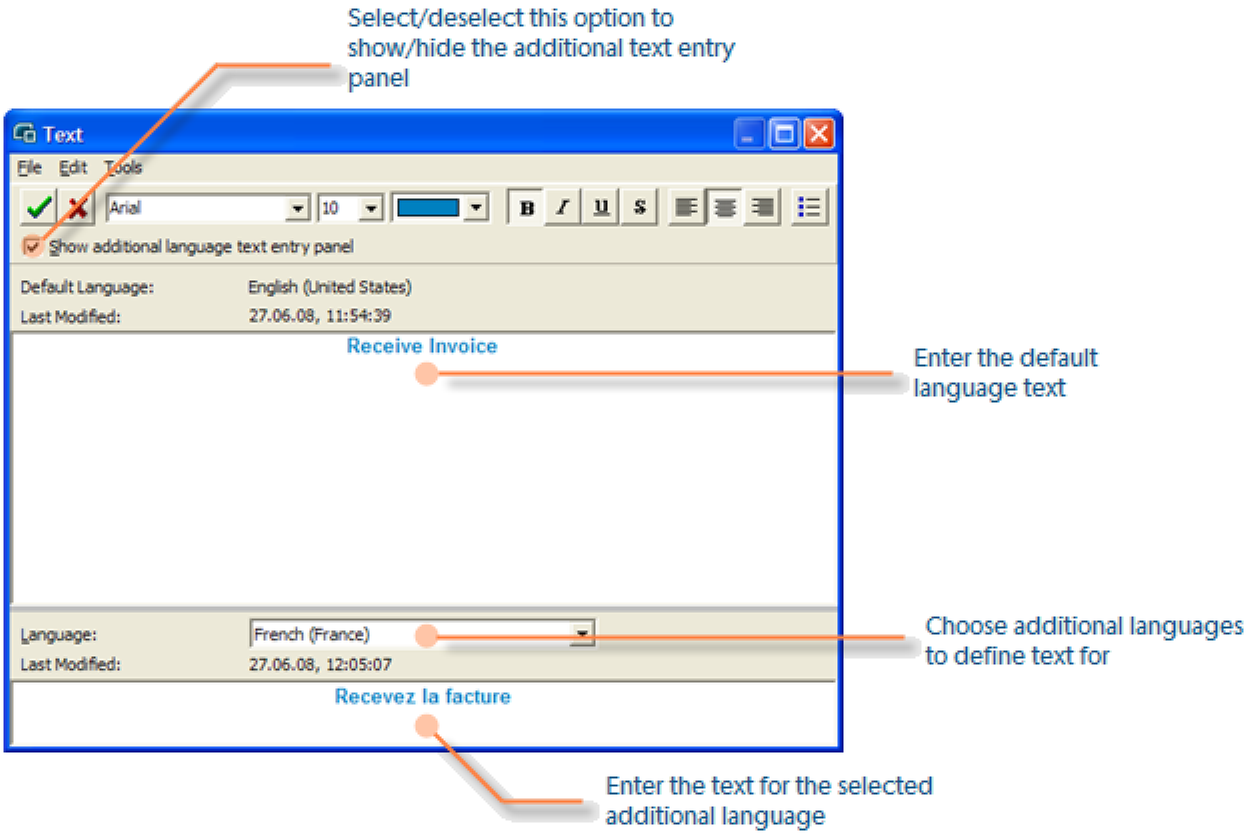
⊟ Support for multiple languages

Nimbus Control allows processes to be created to support multiple languages by allowing diagram object text to be defined in different languages (the available languages are set by an Administrator in the System Options). The object text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object.

To specify text for an additional language select **Show additional language text entry panel**, then choose the language from the **Language** drop-down list and enter the text in the box below. Repeat this step for any other languages that you want to define.

Note: If a language appears in red then the language variant is not supported in the current process repository.

Hint: To test how a diagram looks in a different language, from the **View** menu choose **Switch Language** and then choose a language to display.



Related topics

[Adding hints]

[Moving objects]

[Locking objects]

[Cutting, copying and pasting objects]

[Deleting objects]

Edit a note

1. Right-click the notes bubble and choose **Edit Bubble Text**.

2. Edit the text and click **OK** .

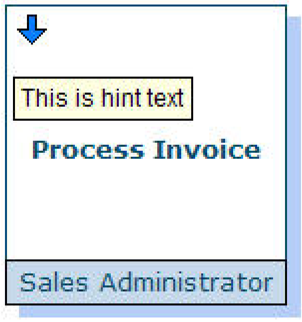
   Note: To change the font, font color, font size, etc, of the existing text you must first highlight it.

> ### Keywords
>
> Selected text can be used to define and add keywords to the Keywords Library. Keywords created in this way will be automatically associated with the current diagram.
>
> Highlight the text that you want to define as a keyword, right-click it and choose **Add as Keyword**.
>
> See My Searches for more information on keywords.

Hints

Add a hint

Hints can be added to free text, images, attachment logos, drill down icons and notes to provide extra information to users when they hover the mouse over specific object.



1. Right-click the object and choose **Hint Text**.

2. Enter the text for the hint and click **OK** .

   Note: If you do not want the hint to be displayed until a later date then uncheck the **Show Hint** checkbox.

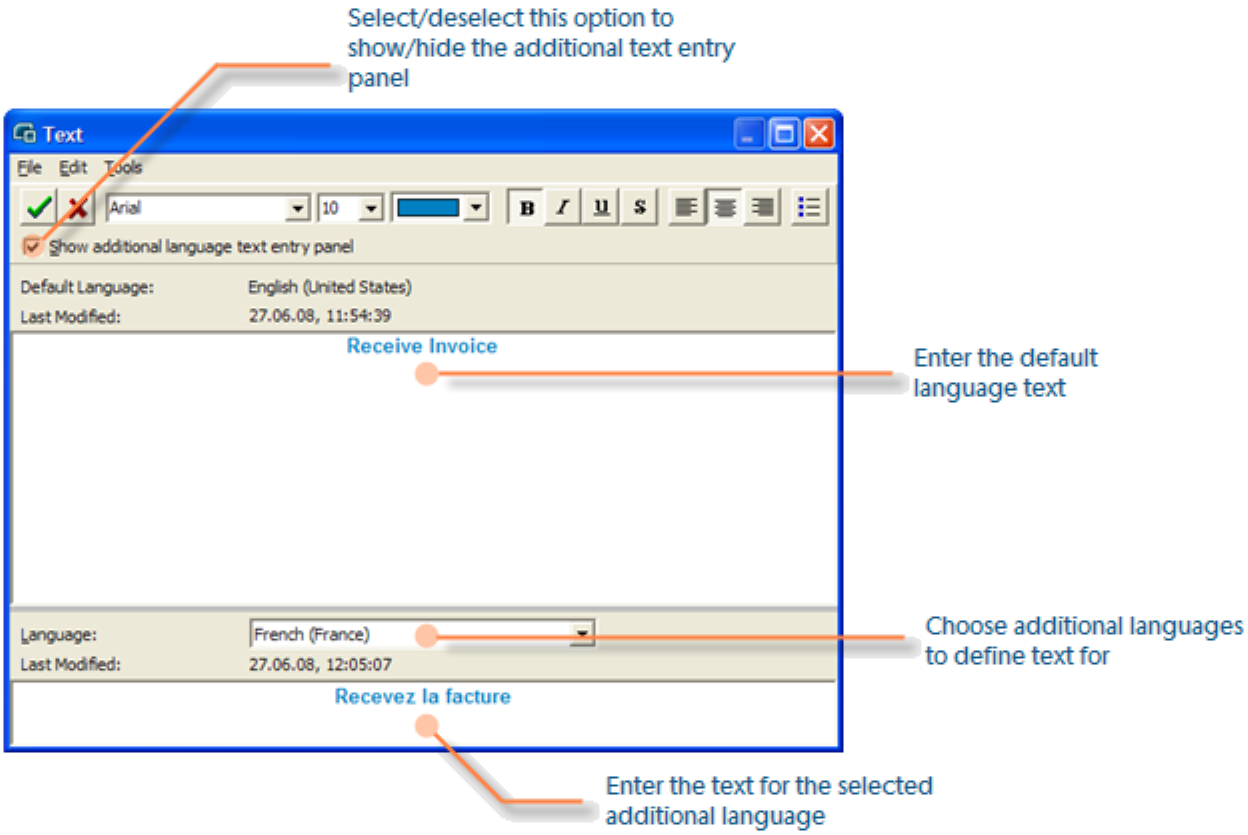
Support for multiple languages

Nimbus Control allows processes to be created to support multiple languages by allowing diagram hint text to be defined in different languages (the available languages are set by an Administrator in the System Options). The object text that is displayed will depend on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object.

To specify text for an additional language select **Show additional language text entry panel**, then choose the language from the **Language** drop-down list and enter the text in the box below. Repeat this step for any other languages that you want to define.

Note: If a language appears in red then the language variant is not supported in the current process repository.

Hint: To test how a diagram looks in a different language, from the **View** menu choose **Switch Language** and then choose a language to display.



Related topics

[Showing/hiding hints]

[Adding notes]

[Adding free text]

Edit a hint

1. Right-click the object and choose **Hint Text**.
2. Modify the hint text and click **OK** ✔.

   Note: To change the font, font color, font size, etc, of the existing text you must first highlight it.

Related topics

[Showing/hiding hints]

Show or hide a hint

Hints can be displayed or hidden.

1. Right-click the object that has the hint attached and select or deselect **Show Hint**.

Selecting Objects

Select an object

1. Ensure **Select**  is enabled on the toolbar.
2. Do one of the following:

   To select a single object click the object to select it.

   Note: If the object is linked, hold **Alt** when selecting it.

   To select multiple objects hold **Shift** and click each respective object.
   To select a group of objects click and drag a box around the group of objects and release the mouse button.
   To select all objects of a particular type use the following shortcuts:

Object	Shortcut
All Objects	Ctrl+A
Activities	Shift+Ctrl+A
Resources	Shift+Ctrl+R
Link Lines	Shift+Ctrl+L
Link Text	Shift+Ctrl+T
Free Text	Shift+Ctrl+F
Signposts	Shift+Ctrl+S
Activity Logos	Shift+Ctrl+G
Activity Notes	Shift+Ctrl+N
Drill Down Logos	Shift+Ctrl+D
Attachment Logos	Shift+Ctrl+H
Signpost Logos	Shift+Ctrl+P
Costing Boxes	Shift+Ctrl+C
Images	Shift+Ctrl+I

Related topics

[Moving objects]

[Locking objects]

[Cutting, copying and pasting objects]

[Deleting objects]

Aligning, Resizing and Positioning Objects

Align an object

Objects can be aligned with other objects.

1. Click the object that you want other objects to be aligned with to select it.
2. Hold Shift and select the objects that you want to align to the object selected in Step 1.
3. From the **Edit** menu choose **Align** and one of the following options:

Lefts aligns the objects vertically with the left-hand side of the first selected object
Rights aligns the objects vertically with the right-hand side of the first selected object
Space Apart Centers creates equal spaces between objects horizontally
Tops aligns the tops of the objects in line with the first selected object
Middles aligns the middles of the objects in line with the first selected object
Bottoms aligns the bottoms of the objects in line with the first selected object
Space Apart Middles creates equal spaces between objects vertically

Related topics

[Resizing objects]

[Aligning flow lines]

[Locking objects]

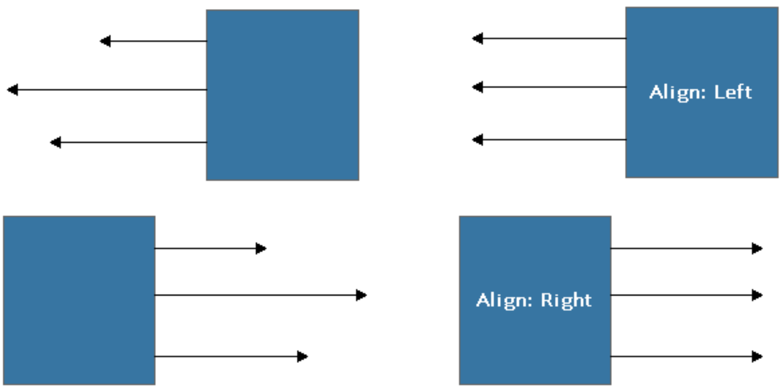
Align flow lines

Flow lines can be aligned and merged when tidying up your diagrams.

To align floating ends of flow lines:

You can align the floating ends of flow lines in the same way that you align objects.

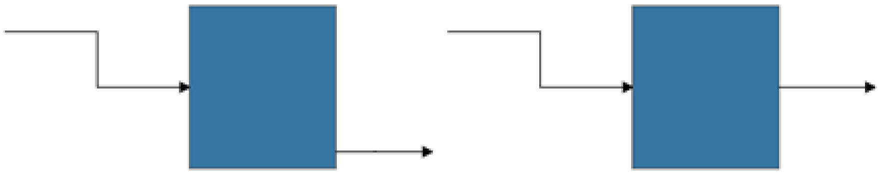
1. Select the flow line that you want to align against, then hold **Ctrl** and select the other flow lines that you are aligning it with.
2. From the **Edit** menu choose **Align** and then either **Lefts**, **Rights**, **Tops** or **Bottoms** (depending on which side of the activity the flow lines are).



To align input and output flow lines:

You can align the input line with an output line on the same activity.

1. Select the flow lines that you want to align.
2. Right-click the flow line that you want to align against, then choose **Align**, then **Align Selected Input/Outputs**.



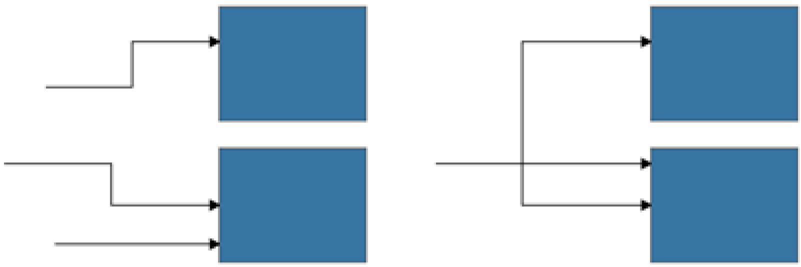
To merge the start or end points of floating flow lines:

You can merge the start or end points of floating lines.

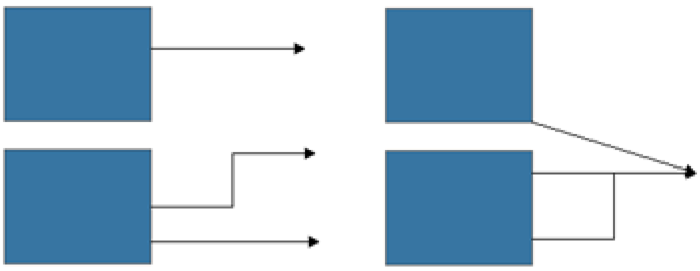
1. Select the flow lines that you want to merge.

2. Right-click the flow line that you want to merge the start or end points with and choose **Align**, then choose one of the following options:

    - **Merge Floating Start Points** will merge all the other floating start points with the start point of the clicked-on flow line
    - **Merge Floating End Points** will merge all the other floating end points with the end point of the clicked-on flow line



Merge floating start points



Merge Floating End Points

Related topics

[Aligning objects]

[Resizing objects]

[Locking objects]

Resize an object

Resize any object in a diagram. You can also resize objects in relation to a selected object.

To resize a single object:

1. Click the object to select it.

    Note: If an object is linked, for example a sign post, hold Shift when selecting it.

2. Move the cursor over one of the resizing handles, then click and drag the handle to a new position.

To resize objects in relation to a selected object:

1. Click the object that you want to resize against.

    Note: Hold Shift when selecting linked objects.

2. Hold Shift and select the objects that you want to resize against the object selected in Step 1.

3. From the **Edit** menu choose **Size** and then choose a sizing option.

Related topics

Aligning objects

Aligning flow lines

Locking objects

Lock an object's position

Locking an object to its position prevents the object from being moved. You can lock the position of any object in a diagram, including activity elements such as attachments, notes, etc.

1. Right-click the object and choose **Position Locked**.

   Note: To unlock an object, deselect **Position Locked**.

Related topics

Select an object

Moving objects

Cutting, copying and pasting objects

Deleting objects

Moving Objects

Move an object

Objects can be moved in a diagram. If an activity is moved then any notes, attachments, etc, and flow-line links to other activities will be maintained.

1. Click and drag the object to the desired location.

   Note: To move an object that is linked, including notes, or if the object is small, hold **Alt** as you click and drag it. You can also move activity elements, for example attachments or notes, from one activity to another using this method.

   If an object cannot be moved then it may be locked.

Related topics

Select an object

Locking objects

Cutting, copying and pasting objects

Deleting objects

Lock an object

Locking an object to its position prevents the object from being moved. You can lock the position of any object in a diagram, including activity elements such as attachments, notes, etc.

1. Right-click the object and choose **Position Locked**.

Related topics

Select an object

[Moving objects]

[Cutting, copying and pasting objects]

[Deleting objects]

Cut, copy and paste an object

Objects can be cut, copied and pasted within the same diagram or map, between maps or into applications that recognize enhanced metafile formats such as Microsoft's PowerPoint and Word applications. Drill downs cannot be cut however.

To copy or cut an object:

1. Select the object, then from the **Edit** menu choose **Cut** or **Copy**.

To paste copied or cut objects:

1. From the **Edit** menu choose **Paste**.

   Note: Activity-based objects, for example notes and attachments, can only be pasted onto other activities.

Related topics

[Selecting objects]

[Locking objects]

[Moving objects]

[Deleting objects]

Deleting Objects

Delete an object

Any objects can be deleted from a diagram (assuming you have the correct access rights).

1. Select the object and press **Delete**.

   Note: If the object is linked, for example a free text box might be hyperlinked, hold **Alt** when selecting the object.

   If you accidentally delete an object and want to restore it immediately, from the **Edit** menu choose **Undo**.

Related topics

[Select an object]

[Locking objects]

[Cutting, copying and pasting objects]

[Moving objects]

Creating Swimlane Diagrams

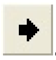
Create a swimlane diagram

Swimlane diagrams are used to organize activities into separate visual categories in order to illustrate different functional capabilities and responsibilities based on resources and resource groups. Activities are grouped by placing them in a lane, with one lane assigned per resource or resource group. Lanes can be arranged horizontally or vertically and are labeled with the resource or resource group name.

Note: Only administrators and authors with read/write access to the diagram can create swimlane diagrams. If the resource library is updated, for example resources or resource group names are changed, then swimlane diagrams will be updated automatically.

1. From the **Diagram** menu choose **Swimlane and Pool Properties**.
2. Select **Enable Swimlane Mode on this diagram**.

> ### Swimlane Pools
>
> A swimlane pools is simply a collection of swimlanes. For example, you may have a pool named 'Supplier', and within this pool are two swimlanes, 'Sales' and 'Distribution'. To create a new swimlane pool click **Add Pool**.
>
> To remove a swimlane pool, select the pool and click **Remove** (this will also remove any associated swimlanes).
>
> **Note:** <No Pool> is used for swimlane objects that do not belong to any pools. A single resource can only be associated with one pool.
>
> **Hint:** You can click and drag resources and resource groups between pools.

3. Click a pool to select it, or click <No Pool> if you do not want to associate a resource with a pool, then do one of the following:
   - Click **Add Resource**. Find and select the resource(s) that you want to add to the swimlane diagram and click **Add Resources To List** .
   - Click **Add Group**. Select the resource group and click **OK**.

   Note: To reorder the assigned resources and resource groups as they will appear in the swimlane pool, select the resource or resource group and click **Move Up** or **Move Down**.
4. Modify any display options as required. See Formatting swimlane diagrams for more information.
5. Click **OK**.

   You are now ready to design your swimlane diagram. If activities already exist then move the activities into the correct swimlanes. If you are creating new activities, note that when you assign a resource it will be automatically hidden.

> ### Assigning resources to activities in swimlanes
>
> When assigning resources to activities that lie within a particular swimlane, the Activity Resources dialog will automatically be filtered to display only the the resource associated with the swimlane. This is called the <SWIMLANE> resource group. To assign other resources you must choose another resource group from the **Group** drop-down list.
>
> If an activity that has been assigned a resource from the Swimlane group is moved to another swimlane then the resource will not be automatically updated. This must be done manually by right-clicking the activity and choosing **Resources**.
>
> ### Resizing swimlanes
>
> Width (or height for vertical swimlanes) - move the cursor to the end of the swimlanes until resizing handles appear, then click and drag the swimlanes.
>
> Height (or width for vertical swimlanes) - move the cursor to the edge of the title area until resizing handles appear, then click and drag the title areas. This will only resize one swimlane at a time. To resize the height of all swimlanes you must define the height in the swimlane properties.
>
> ### Integrity checking
>
> Running an integrity check will also report on any resource mismatches within swimlane diagrams. When an integrity report has been generated, click the Swimlane tab to check for problems.

Related topics

Formatting swimlane diagrams

Integrity checking

About resources

About resource libraries

Creating resources

Creating resource groups

Format a swimlane diagram

There are a range of formatting options that can be applied to swimlane diagrams to in order to enhance the appearance.

To format all swimlanes:

1. From the **Diagram** menu choose **Swimlane Properties**.

    Orientation
    Choose to display the swimlanes vertically or horizontally.

    Offset
    Define the left and top starting coordinates (in pixels) of the swimlanes to compensate for diagram objects such as templates.

    Size
    Define the length and height (or width for vertical orientations), in pixels, of the swimlanes.

    Title Area
    Define the width (or height for vertical orientations), in pixels, of the swimlane title areas. The Gap After Title Area option allows you to set a gap between the title area and the swimlanes. If you are using swimlane pools you can also define the width and the gap between the pools. The swimlane title(s) can be rotated to 90 or 270 degrees. You can also change the font, font size and font color.

    Appearance
    Modify the swimlane border widths, border colors and fill colors.

To format individual pools:

1. Right-click the pool and choose **Lane Properties**.
2. To change any of the pool properties, select the respective **Custom** radio button to unlock the property.

To format individual swimlanes:

1. Right-click the swimlane and choose **Lane Properties**.
2. To change any of the swimlane properties, select the respective **Custom** radio button to unlock the property.

Related topics

Creating swimlane diagrams

Creating BPMN Diagrams

Create a BPMN diagram

A BPMN diagram uses different symbols to represent objects within process diagrams, as defined by BPMN standards.

Note: You cannot switch to a BPMN diagram type if objects already exist in the diagram, i.e. you can only create BMPN diagrams from new.

To create a BPMN-style diagram:

1. From the **Diagram** menu choose **Diagram Type**, then choose **BPMN Diagram**.

When you switch to a BPMN diagram type the following toolbar buttons will be added to the Drawing toolbar:

Toolbar Icon	Description
	Activity
	Event
	Gateway
	Data Object
	Text Annotation
	Group Object

BPMN Diagram Creation Rules

Resources, drill downs, diagram sign post links, notes bubbles and statement links can only be added to activities. Attachments can only be associated with activities and data objects.

Activities

Symbols can be associated with activities. Right-click an activity and choose **BPMN Activity Properties**. Choose from the following symbols:

Loop

Multiple Instance

Compensation

Ad-Hoc

Activity Commentary Text

Commentary text provides additional information to users when they roll over an activity. To define commentary text, right-click the activity or flow line and choose **Commentary**. Commentary text can also be created for multiple language variants, as you can with activity text. You can also define commentary text after defining the text for the activity. In the Text window, from the **File** menu choose **Save and Edit Commentary**.

Events

The type of event and the associated symbol can be defined for events. Right-click an event and choose **BPMN Event Properties**.

Choose from the following event types:

Start

Intermediate

End

Choose from the following event symbols:

Message

Timer

Rule

Link

Multiple

Gateways

Symbols can be used to represent gateways. Right-click a gateway and choose **BPMN Gateway Properties.** Choose from the following symbols:

X Exclusive Merge (XOR) Data-Based

Exclusive Merge (XOR) Event-Based

Inclusive Merge (OR)

Complex Merge

+ Parallel Fork (AND)

Connections (flow lines)

The type and style of connecting lines can be modified. Right-click a connecting line and choose **BPMN Connections Properties**.

Choose from the following connection types:

Sequence Flow

Message Flow

Association

You can also change the notation of the connection.

Connection Commentary Text

Commentary text provides additional information to users when they roll over a connection. To define commentary text, right-click the connection and choose **Commentary**. Commentary text can also be created for multiple language variants, as you can with activity text. You can also define commentary text after defining the text for the connection. In the Text window, from the **File** menu choose **Save and Edit Commentary**.

Related topics

[Changing colors]

[Changing line styles]

[Creating style sheets]

Assigning Access Rights

Assign access rights

User access rights can be defined for individual diagrams, a diagram and all lower levels, the entire process map and a scope of diagrams. Note that default access rights are overwritten by any specific access rights that are assigned to any diagrams within the selected scope.

More info on Access Rights...

1. From the **Manage** menu choose **Diagram Access Rights**.
2. Select the default access rights for all users.

   Note: Specific access rights defined for users or user groups will override the default access rights.

   Read and write allows the core content to be modified.
   Read only allows only change management information (memos, change requests, etc) to be added but the core content cannot be modified.
   Access Denied prevents users from accessing the diagram(s).
3. Select the scope of diagrams to assign access rights to.

   Note: See Diagram scope list files for more information on diagram scope lists.
4. To define access for specific users or user groups, click **Add** ✚ and select a user or user group.

5. Click **OK**.

Related topics

[Specific Access Rights Advanced Wizard]

[Diagram scope lists]

[System Options (Access)]

Specific Access Rights Advanced Wizard

The Specific Access Rights Advanced Wizard allows diagram authors/owners and administrators to manage user access rights across a scope of diagrams. Note that any default or specific access rights that exist for any diagrams within the selected scope will not be overwritten.

Using the wizard you can:

- Copy access rights from one user or user group to another. This might be useful if a new user is temporarily taking over the work from another user, but you don't want to remove the settings from the existing user.
- Replace user and user group access rights with another. This is useful if a new user is permanently taking over the responsibilities of an existing user.
- Add and remove access rights for a suer or user group. Use this option to update specific access rights without overwriting the other access right settings that may have already been defined across the scope of diagrams.

More info on Access Rights...

---

1. From the **Manage** menu choose **Diagram Access Rights**.
2. Click **Advanced Wizard** .
3. Select one of the following options and click **Next**.

   Pick Up and Apply Specific Rights will copy the user rights of a user or user group for a scope of diagrams and copy them to another user or user group.
   Replace Specific User or User Group will replace a user or user group and apply their access rights for a scope of diagrams to another user or user group.
   Add Specific User or User Group will assign specific access rights to a user or user group for a scope of diagrams.
   Remove Specific User or User Group will remove specific access rights of a user or user group for a scope of diagrams.

4. Follow the steps in the wizard.

   Note: If you have selected to replace the specific user or user group (second option) you must first select the user or user group that you want to replace and then in the next step you then select the user or user group that you want to replace them with.

Related topics

[Assigning access rights]

[System Options (Access)]

Formatting Diagrams

Backgrounds

Change the color

The background color of diagrams can be changed.

---

1. From the **Map** menu choose **Backgrounds.**
2. In the Scope panel choose the scope that you want to apply the background color to.
3. In the Background Color panel click the color bar to access the color palette.

4. Choose a color and click **OK**.

5. Click **OK**.

   Note: You can define your own custom colors to apply to backgrounds. See Adding custom colors for more information.

Related topics

Adding background images

Add a background image

A background image can be added to diagrams.

1. From the **Map** menu choose **Backgrounds.**

2. In the Scope panel choose the scope that you want to apply the image to.

3. From the Image Display panel choose how the image will be displayed.

   Scale To Fit Window will scale the image to fit the diagram
   Tile will tile the image across the diagram (maintaining the dimensions)
   Align Left will scale the image to fit down the left-hand side of the diagram
   Center will display the image in the center of the diagram (maintaining dimensions)
   Align Right will scale the image to fit down the right-hand side of the diagram
   Tile Left will tile the image down the left-hand side of the diagram
   Tile Right will tile the image down the right-hand side of the diagram

   Note: You can change the background color when adding images.

Related topics

Remove background images

Remove an image

1. From the **Map** menu choose **Backgrounds.**

2. Choose **Clear Image**.

3. Click **OK**.

Styles and Colors

Change a color

You can change the line and fill colors of objects.

To change the line color of an object:

1. Right-click on the object and from the **Color And Style** options choose **Line Color**.

2. Choose a color and click OK.

3. Click OK.

To change the fill color of an object:

1. Right-click the object and from the **Color And Style** options choose **Fill Color**.

2. Choose a color and click OK.

3. Click OK.

   Note: If the color of an object does not change, right-click the object and from the **Color And Style** menu choose **Fill Settings** to ensure that the Fill Style is not set to Transparent.

> **Custom Colors**
>
> You can define your own custom colors to use. See Adding a custom color for more information.
>
> **Gradient Fills**
>
> A gradient can be applied to activity boxes, free text, flowchart shapes, BMPN shapes and signposts. In the Fill Settings dialog for a particular object, choose **Gradient** from the **Fill Style** drop-down list. Then select the fill color and style color and the gradient direction and click **OK**.

Related topics

Changing line styles

Modifying object shadows

Locking styles

Repositioning activity-associated logos

Change a line style

You can change the line style, thickness and color of objects.

1. Right-click on the object and from the **Color And Style** menu choose **Line Settings**.
2. Choose your line settings and click OK.

   Note: To choose a color, click the Line Color color band.

> **Custom Colors**
>
> You can define your own custom colors to use. See Adding a custom color for more information.

Related topics

Changing colors

Modifying object shadows

Locking styles

Repositioning activity-associated logos

Define a custom color

Up to 16 custom colors can be defined and added to the color palette, which can then be made available when formatting objects.

1. From the color palette click **Define Custom Colors**.

2. Click a color on the color spectrum to select it. You can modify the luminescence using the slider to the right of the color spectrum.

3. Click **Add to Custom Colors**.

Add object shadows

Shadows can be added to diagram objects and the settings can be modified, including the position and color.

To turn shadows on:

1. Right-click the object and from the **Color And Style** menu choose **Shadow Visible**.

   Note: To turn shadows off repeat this step.

To modify shadow settings:

1. Right-click the object and from the **Color And Style** menu choose **Shadow Settings**.

   Shadow Visible will display the shadow on the object if selected.

2. To change the shadow color click in the Fill box and select a color.
3. To change the shadow position click and drag the lightbulb in the Preview box to a new position.

Related topics

Adding custom colors

Lock a style

Object styles can be locked, thereby preventing a different style sheet being applied.

Important: If the object is selected as a business control and a style sheet is specified for the business control, the object's style will not change if the business control is breached **IF** the object's style is locked.

1. Right-click the object and choose **Style Locked**.

   Note: To unlock a style repeat this step.

Related topics

Changing colors

Changing line styles

Modifying object shadows

Repositioning activity-associated logos

Creating business controls

Modify an attachment logo

You can change the appearance of attachment and link logos. The default is .

1. Right-click the attachment logo and choose **Display Options**.
2. Choose the style and border as required.

   Note: If you choose Drawing Pin, you can rotate the image by dragging the rotate slider.

3. Choose the line style and fill color as required.

Related topics

[Repositioning activity-associated logos]

Reposition activity-associated logos

The position of activity logos, for example drill-downs, attachments, etc, can be positioned on the top (default) or the bottom of an activity.

1. Right-click the activity and from the **Color And Style** menu choose **Logos At Top** to toggle the position.

Related topics

[Changing colors]

[Changing line styles]

[Modifying object shadows]

[Locking styles]

[Modifying attachment logos]

Style Sheets

About style sheets

Style sheets allow you to apply a predefined styles (colors, fonts, attachment icon displays, free text styles, etc) to certain objects within a diagram or across a scope of diagrams. By default, all users with read-write access to a specific diagram can create a style sheet but only the user who created a style sheet can edit it (unless other users or groups are granted specific access to do so by an administrator or the creator of the style sheet).

Create a style sheet

Style sheets define the styles (colors, fonts, sizes, etc) of a number of diagram objects and can be applied to objects within a diagram or across a scope of diagrams.

1. From the **Map** menu choose **Style Sheets**.
2. Click **New** and enter a title for the style sheet.
3. Right-click the object and choose a style option to modify.

    Font allows you to change the font, font size and color of associated text
    Show Commentary as Hint Text displays or hides commentary text when users roll their mouse over (activities and flow lines only)
    Commentary Text Font allows you to change the font, font size and color of commentary text
    Apply Style applies the last style setting applied (where applicable)
    Border Visible displays a border around the object as defined by the line settings and line color
    Line Settings allows you to modify the color and width of borders
    Line Colors allows you to specify the border color
    Fill Settings allows you to specify the fill style and colors (for gradients choose the gradient fill style)
    Fill Colors allows you to specify a single fill color
    Shadow Visible displays a shadow on the object as defined by the shadow settings
    Shadow Settings allows you to set the direction of shadows
    Shadow Color allows you to modify the color of shadows
    Logos At Top allows you to toggle between displaying the logos (attachments and links, drill downs, notes, etc) on the top or bottom of an activity
    Logos Height allows you to set the size of logos (attachments and links, drill downs, notes, etc) displayed on activities
    Toggle ID will toggle the activity ID on or off
    Arrow Heads allows you to change the way flow line links are displayed
    Notation allows you to display crows feet arrows on the start and/or end of a flow line
    Display Options allows you to modify the appearance of the attachment/link icon

4. From the **File** menu choose **Save**.

> **Free Text Style Tags**
>
> Ten styles can be defined to apply to free text boxes (right-click a free text box and choose **Style Tag**). Right-click the free text style tag and modify any of the style options.
>
> The free text style tag names can be edited in the system options by administrators.

Related topics

Applying style sheets

Editing style sheets

Assigning access rights to style sheets

Defining pop-up menu styles

Applying free text styles

Apply a style sheet

Styles can be applied to objects within a diagram or across a scope of diagrams. An object's style may be locked, thereby preventing a style from being applied to a particular object.

To apply a style to an object within a diagram:

1. Right-click the object and from the Apply Style menu choose either Current, Default or Select.

   Current will apply the last used style.
   Default will apply the default style as defined by the administrator in the system options.
   Select will allow you to choose a style from the current process repository or create a new style sheet.

2. If you choose Select then choose a style sheet from the list of available style sheets and click OK.

To apply a style to objects across a scope of diagrams:

Note: You must be an administrator to apply a style sheet to a scope of diagrams.

1. From the Map menu choose Style Sheets.
2. Select the style sheet from the list of available style sheets.
3. From the Sheet menu choose Apply.
4. Choose the scope of diagrams that you want to apply the style sheet to.
5. Select which objects to apply the style sheet to from the Options panel.

   Update Version Numbers will update the version of all diagrams that the style sheet is applied to.

6. Click OK.

Related topics

Creating style sheets

Editing style sheets

Assigning access rights to style sheets

[Defining pop-up menu styles]

[Applying free text styles]

[Creating diagram scope lists]

Assign access rights

As an administrator or creator of a style sheet you can define the access rights of users.

1. From the **Map** menu choose **Style Sheets**.
2. Select the style sheet that you want to define access rights to from the list of available style sheets.
3. From the **Sheet** menu choose **Delegate Access Rights** .

   Default Access Rights
   This defines the level of access that all users have (unless specified otherwise within the Specific User Access Rights).

   Specific User Access Rights
   This defines the user access rights for specific users or groups.

5. Click **Add** **.**
6. Select **Search Users** to display all users or **Search Groups** to display all groups, then click **Find**.
7. Click the user or group that you want to define access rights for and click **Add**. You can add as many users and groups as you need to.
8. Click **OK**.

   Note: By default, the user or user group will be assigned Read/write access to the style sheet. To change the access rights double click the user or user group in the Style Sheet Access dialog.

   Read and write access allows users to apply the style sheet to objects and edit the style sheet.
   Read only allows users to apply the style sheet to objects but prevents them from editing it.
   Access Denied prevents users from viewing, editing and applying the style sheet.

Related topics

[Creating style sheets]

[Applying style sheets]

[Editing style sheets]

[Defining pop-up menu styles]

[Applying free text styles]

Edit a style sheet

Style sheets can be edited if you have been granted read/write access to a specific style sheet.

1. From the **Map** menu choose **Style Sheets**.
2. Select the style sheet that you want to edit from the list of available style sheets.
3. Right-click the object and choose a style option to modify.

   Font allows you to change the font, font size and color of associated text
   Commentary Text Font allows you to change the font, font size and color of commentary text
   Apply Style applies the last style setting applied (where applicable)
   Border Visible displays a border around the object as defined by the line settings and line color
   Line Settings allows you to modify the color and width of borders
   Line Colors allows you to specify the border color

Fill Settings allows you to specify the fill style and colors (for gradients choose the gradient fill style)

Fill Colors allows you to specify a single fill color

Shadow Visible displays a shadow on the object as defined by the shadow settings

Shadow Settings allows you to set the direction of shadows

Shadow Color allows you to modify the color of shadows

Logos At Top allows you to toggle between displaying the logos (attachments and links, drill downs, notes, etc) on the top or bottom of an activity

Logos Height allows you to set the size of logos (attachments and links, drill downs, notes, etc) displayed on activities

Toggle ID will toggle the activity ID on or off

Arrow Heads allows you to change the way flow line links are displayed

Notation allows you to display crows feet arrows on the start and/or end of a flow line

Display Options allows you to modify the appearance of the attachment/link icon

4. From the **File** menu choose **Save** to save the existing style sheet or **Save As** to create a new style sheet.

Related topics

Creating style sheets

Applying style sheets

Assigning access rights to style sheets

Defining pop-up menu styles

Applying free text styles

Package a style sheet

Style sheets can be packaged and unpackaged between process repositories.

To package a style sheet:

1. From the **Map** menu choose **Style Sheets**.
2. Select the style sheet that you want to package, and from the **File** menu choose **Package**.

To unpackage a style sheet:

1. From the **Map** menu choose **Style Sheets**.
2. From the **File** menu choose **Unpackage**.

Define pop-up menu styles

Style sheets can be added to the **Apply Style** pop-up menu for quick access when applying styles to objects. A maximum of five style sheets can be added at any one time.

1. From the **Map** menu choose **Style Sheets**.
2. From the **Tools** menu choose **Popup Menu Setup**.
3. Choose the style sheet to add to the popup menu and click **Add To List** .

   Note: Hold Ctrl to select multiple style sheets.

Related topics

Creating style sheets

Applying style sheets

Editing style sheets

Assigning access rights to style sheets

Applying free text styles

Apply a free text style

Ten styles can be defined and applied to free text boxes. See Creating style sheets for more information.

1. Right-click the free text box on the diagram and choose **Style Tag**.
2. Choose a free text style tag from the drop-down list and click **OK**.

   Note: The free text style tag names can be edited in the system options by administrators.

Related topics

Creating style sheets

Applying style sheets

Editing style sheets

Assigning access rights to style sheets

Defining pop-up menu styles

Text

Format text

The font, text size and text color of object text can be modified.

1. Right-click the object and choose Edit Text.
2. Highlight the text in the Text box.
3. Format the text as required.

   Note: The Tools menu contains tools to find and replace text, check the spelling and change the character case.

   Note: Style sheets can be created that include text formatting for certain objects, which can then be applied to an object or group of objects easily.

Related topics

Creating style sheets

Applying style sheets

Editing style sheets

Defining pop-up menu styles

Applying free text styles

Reassigning Activity IDs

Reassign activity IDs

Activity IDs can be automatically reassigned, for example if activities have been moved to a new position in the process or activities have been added or removed.

1. From the **Diagram** menu choose **Reset ID Numbers**.

2. From the Reset ID Numbers panel choose the direction of the resetting.

3. From the Scope panel choose the scope of diagrams to apply the ID resetting to.

Creating Diagram Levels

About drill downs

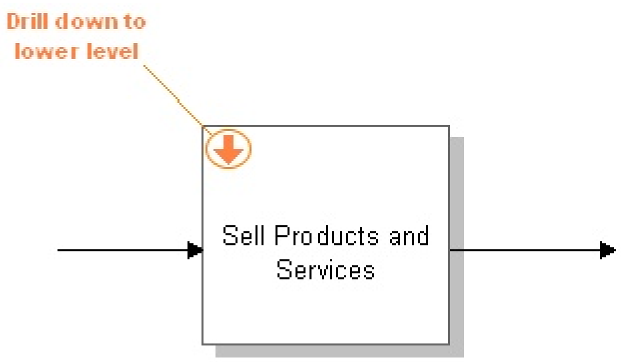
A drill down provides access from an activity to a lower-level diagram (also known as a child diagram).

A single activity may involve a number of activities in order for the activity to be performed. These activities are defined in a child diagram. Child diagrams provide a means of describing a process in as much detail as is necessary for a user to easily undertake a specific task with the minimum amount of ambiguity.

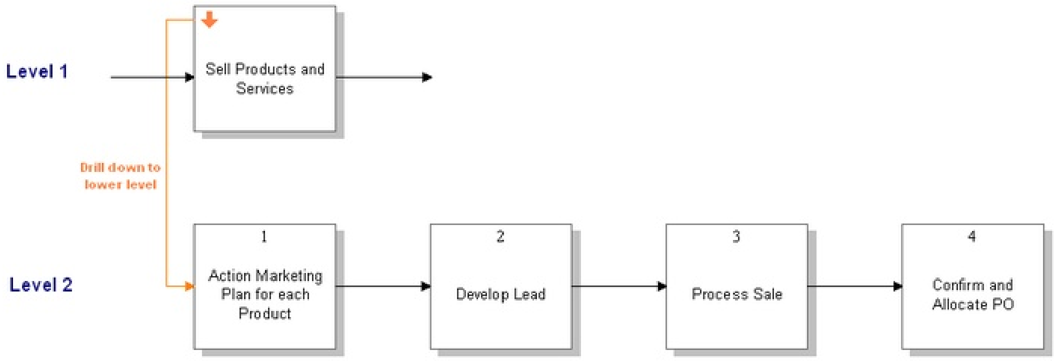
When a child diagram is created, all links are maintained within the parent and child relationship. If a child diagram is copied between diagrams or other process maps, all associated information and attachments are also maintained.

Diagrams are uniquely hierarchically numbered. The top-level diagram is level 1, the second-level diagram is 1.x, where x is the activity number that the drill down links parent to child diagram (for example, if a child diagram is accessed from activity 3 on the top-level diagram, the child diagram will be 1.3). The third-level diagrams are 1.x.x, and so on.

Drill downs to lower levels appear as arrows on an activity box, as shown below. When these arrows are clicked the user will be taken to the child diagram.



The example below demonstrates that in order to sell products and services there are four steps involved, which are outlined in a lower-level diagram. In fact, it is possible that any of the four steps may themselves drill-down to lower-level diagrams.



Create a drill down

A drill down provides a link to a lower level (child) diagram. The completion of an activity within a process may involve further steps (activities) so that the activity is described in more detail. Users can navigate to these via drill downs from an activity. See [About drill downs](#) for more information.

---

1. Right-click the activity and from the **Drill Down** menu choose **New**.

   A new diagram page will open, requiring you to define the child process for the activity. If input and output lines were associated with the activity then these will form the inputs and outputs of the child diagram.

Related topics

Refreshing diagram titles

Updating activity input/output text

Hiding drill downs

Importing and exporting drill downs

Sending activities down a level

Inserting diagrams

Deleting drill downs

Hide a drill down

You can hide drill downs. The drill downs are still present however and users can access the lower level by clicking the actual activity.

1. Right-click the activity and from the **Drill Down** menu choose **Invisible**.

   Note: To unhide the drill down deselect **Invisible**.

Related topics

Creating drill downs

Refreshing diagram titles

Updating activity input/output text

Importing and exporting drill downs

Sending activities down a level

Inserting diagrams

Deleting drill downs

Import or export a drill down

Drill downs can be exported and saved as a separate process map. Exported and packaged maps can be imported as drill downs on activities.

To export a drill down as a new map:

1. Right-click the drill down and choose **Export**.
2. Select the Process Repository or a folder within the Process Repository.
3. In the **Export Name** text box enter the name for the drill down export.

   Remove lower levels after export will delete the lower level diagrams from the map that you are exporting from (these can be restored using the Deletion Recover Manager if required).

4. Click **OK**.

To export a drill down as a packaged map:

1. Right-click the activity and from the **Drill Down** menu choose **Export as Package**.
2. In the **Export Name** text box enter the name for the packaged map.
3. Select any of the following options:

   Remove lower levels after export will delete the lower level diagrams from the map that you are exporting from (these can be restored using the Deletion Recover Manager if required).

Include Attachments will include all file and Document Registry links. **Note:** If there are many attachments, or the attachments are large, then this will slow down the process and will create a large packaged map.

4. Click **Next**.
5. Select the folder to save the packaged map to.

   Note: You can create a new folder. Select the folder to create it in and click **New Folder**.

6. Click **Next**.
7. If you have finished click **Close**. Otherwise, to view the location of the packaged map or to email it, click **Next**.

To import a process map as a drill down:

1. Right-click the activity and from the **Drill Down** menu choose **Import**.
2. Select the map that you want to import as a drill down and click **OK**.

To import a packaged map as a drill down:

1. Right-click the activity and from the **Drill Down** menu choose **Import From Package**.
2. Locate and select the packaged map and click **Open**.

Related topics

Creating drill downs

Refreshing diagram titles

Updating activity input/output text

Hiding drill downs

Sending activities down a level

Inserting diagrams

Deleting drill downs

Update activity input/output text

If the input or output flow-line text for a child or parent diagram is modified, you can automatically update any parent or child diagrams to match.

1. From the **Map** menu choose **Refresh Input/Output Text**.
2. Select the scope that you want to refresh from the **Select Scope** panel.

   Current Diagram from Parent will update the current diagram's input and output text based on the input and output text from the activity on the parent diagram.

   Parent Diagram from Current will update the parent diagram's input and output text based on the current diagram's input and output text.

   Current Diagram and Lower Levels will update the current diagram and all lower levels either from the lowest level(s) upwards or the current diagram downwards.

   Current Process Map will update the entire map from the lowest level(s) upwards or the top level(s) downwards.

3. If you have chosen to modify the current diagram and lower levels or the current process map then select the direction in which you wish to refresh from the **Hierarchical Direction** panel.
4. Click **OK**.

Related topics

Create a drill down

[Refresh diagram titles]

[Hiding drill downs]

[Importing and exporting drill downs]

[Sending activities down a level]

[Inserting diagrams]

[Deleting drill downs]

Send activities down a level

Selected activities can be sent down a level, i.e. they will form a lower level diagram. A single activity will replace the sent-down activities with an associated drill down to the lower level.

1. Select the activities that you want to send down a level.
2. From the **Edit** menu choose **Send To Child**.

   You can now design the lower-level diagram using the activities you selected to send down.

Related topics

[Create a drill down]

[Refresh diagram titles]

[Update activity input/output text]

[Hiding drill downs]

[Importing and exporting drill downs]

[Inserting diagrams]

[Deleting drill downs]

Insert a diagram

Inserting a diagram will send the current diagram down a level and replace it with a single activity that displays a drill down to the original diagram. For example, if you insert a diagram at level 1.3, the current diagram will be sent to level 1.3.1 and a new diagram will appear at level 1.3 with an activity that drill downs to level 1.3.1.

Important: This operation cannot be undone.

1. From the **Diagram** menu choose **Insert Diagram**.

Related topics

[Create a drill down]

[Refresh diagram titles]

[Update activity input/output text]

[Hiding drill downs]

[Importing and exporting drill downs]

[Sending activities down a level]

[Deleting drill downs]

Delete a drill down

Delete all lower level diagrams associated with a drill down.

1. Right-click the drill down and choose **Remove**.

Related topics

Create a drill down

Refresh diagram titles

Update activity input/output text

Hiding drill downs

Importing and exporting drill downs

Sending activities down a level

Inserting diagrams

Creating Attachments and Links

About attachments and links

Diagram objects (activities, free text, images and flow lines) can be linked to a variety of attachments and links, such as files (video clips, sound files, etc), applications (run macros in Word or Excel for example), menu functions within Nimbus Control, diagrams, metrics, etc. It is also possible to attach embedded documents and images, data tables and directories.

Note: You can change the appearance of attachment and link logos.

Language Variants

Multiple languages are supported which allows attachments and links to be available depending upon a user's locale. For example, you may have a document that is written in both English and French. You can attach both versions of the document but assign different languages to each one.

Viewing Access Rights

Default and specific viewing rights govern which users have access to a specific attachment or link. To modify the access rights of a particular attachment, select it from the object's list of attachments and click **Viewing Rights**.

More info on Access Rights...

Adding Links and Attachments

Attachments

Attach an internal word-processed document

An internal word-processed document is a document created through an internal word processor in Nimbus Control. It allows you to add textual notes, tables, images and OLE objects to an object and embed them into the map.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Internal WP Document**.
3. Enter a title for the document and click **OK**.

   From the **Insert** menu you can add OLE objects, text (.txt, .rtf) and images.

   To add a table, from the **Table** menu choose **Insert**.

   To spell check the document, from the **Tools** menu choose **Spell Check**.

4. Click **OK** ✔ when you have finished to save and attach the document to the object.

> **Modifying Document Information**
>
> You can change the title, owner, author and status of an internal WP document. You can also associate a particular language with the document (see below). In an object's list of attachments right-click the document and choose **Access**. In the document window, from the **File** menu choose **Document Information**.

⊟ Tagging attachments and links with a language

Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

Note: If a language appears in red then it is not supported in the current process repository.

Attach an image

Images can be attached to objects.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Internal Image**.
3. Enter a title for the image.

   You are presented with a drawing area to create the image in.

   To import an **image**, click , then drag the crosshairs to create an area to insert the image into.

   To insert **free text**, click T , then drag the crosshairs to create a text box to enter text into.

   To add a **free line** (arrow), click ↘, then drag the crosshairs to create the line.

4. Click **OK** ✔.

Attach a data table

A data table is a flexible way of capturing data significant to a process and within the context of activities, for example business requirements, system details used to perform activities, KPIs (Key Performance Indicators), audit results, RACI charting (Responsibility, Accountability, Consult, Inform), etc.

For more information on creating and using data tables, see Data Tables.

Links

About Links

You can link a number of objects in a diagram to files, documents, other diagrams, menu functions, Email links, metrics, scorecards and storyboards.

File and Application

Open any Windows file from an activity, flow line, image or free text using the Windows default application or a user-defined application. It is also possible to define parameters to run when the file is launched.

To link to a file from an object:

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **File/Application Link**.
3. In the File panel click **File Browse** and locate the file.
4. Edit the file title name if required.

   Note: This is the file name as it will appear in the list of attachments when the object is clicked **if** multiple links or attachments exist.

To specify a different application to launch the file:

1. Deselect the **Use Windows file association to determine application** checkbox.
2. Click **Application Browse** to locate the executable of the application.

   The following options are also available for launching a file:

   Parameters can be specified for the application that is launched when the file is accessed (assuming parameters are supported by the application). For example, Microsoft Word supports a number of command-line parameters, including the /mMacroName parameter used to automatically run a macro in a file. See the Hints below for additional Nimbus Control-specific Word and Excel macros.

   Global Options apply to all links from any diagram to the file.

   Protect against overwrite during unloading of packaged maps will prevent the file from being overwritten when a packaged map that contains the same file is unloaded.

   Deselect the **Include when packaging** option if you do not want to include the file when the map is packaged (this is useful for large files).

   Note: There is a system option that, if enabled, will override any application specified here with the default Windows application.

   Tagging attachments and links with a language

   Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

   Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

3. Click **OK**.

> **Macros**
>
> Nimbus Control provides two additional Microsoft Word parameters - **WordPage(x)** allows you to jump to a specific page in your document, where x is the page number. **WordMacro(x)** allows you to run a specify Word macro in your document, where x is the macro name.
>
> Nimbus Control provides an additional Microsoft Excel parameter - **ExcelMacro(x)** allows you to run a specific Excel macro in your spreadsheet, where x is the macro name.

Link to any file in the Document Registry.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Document Link**.
3. Find the document that you want to link to and click **Accept and Close** .

   Hint: To select multiple documents, hold **Ctrl**.

   Tagging attachments and links with a language

   Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

   Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

Menu Function

You can add a link that executes a Nimbus Control menu function. However, it should be noted that not all of these functions are available in the web server or HTML version of a map. Note that **Actions, New Action** function is available.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Menu Function Link**.
3. Choose the menu function from the **Function** drop-down list.
4. To restrict access to specific users or groups, click the **View Rights** tab to access it and then click **Add** to add users.

   Note: By default, the user or group is granted access to the menu link. To deny them access, double-click the user or group and select **Access Denied**. More info on Access Rights...
5. Click **OK**.

Web Link (URL)

Create a Web link (URL).

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Web Link (URL)**.
3. In the **Web address (URL)** text box enter the URL of the web page that you want to link to.
4. In the **Link Text** box enter a title for the link as it will appear to users.

   Web Server: Launch link in same browser window will launch the URL in the same browser window when users access the link in the Web Server.
5. To restrict access to specific users or groups, click the **View Rights** tab to access it and then click **Add** to add users.

   Note: By default, the user or group is granted access to the link. To deny them access, double-click the user or group and select **Access Denied**. More info on Access Rights...

   Tagging attachments and links with a language

   Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

6. Click **OK**.

Email

Create an email link and define the recipient (mandatory) and the subject and body (optional); when users access the link, an email will be created automatically to the defined email recipient.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Email Link**.
3. Enter the Email recipient in the **To:** field.
4. Enter the information for the other Email fields.

   Note: The Subject field is used as the title of the attachment link. If a subject is not defined then the email recipient is used.

5. To restrict access to specific users or groups, click the **View Rights** tab to access it and then click **Add** ✚ to add users.

   Note: By default, the user or group is granted access to the email link. To deny them access, double-click the user or group and select **Access Denied**. More info on Access Rights...

⊟ Tagging attachments and links with a language

Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

Metric

Metrics are a system of parameters or ways of quantitative and periodic assessment of a process that is to be measured. Metrics are used in business model, CMMI, ISM3 and knowledge management and metrics are used to track trends, productivity, resources and much more. Typically, the metrics tracked are key performance indicators (KPIs). Metrics are also important in IT Service Management (including ITIL) and they are used to measure the effectiveness of the various processes at delivering services to customers.

In Nimbus Control, metrics can be associated with activities, processes or viewed with related metric data. This allows CSFs (Critical Success Factors) and KPIs (Key Performance Indicators) to be displayed within the context of the process, or it allows simple variable data or information to be displayed and updated regularly.

Metric links can access data from a variety of sources, including:

- Microsoft Office Business Scorecard Manager
- Microsoft PerformancePoint
- Excel spreadsheets (via SQL queries)
- SQL databases
- Cognos Metrics Manager
- ActiveStrategy Enterprise Measures
- SAP BW
- SAP NetWeaver BI

You can also specify a target to launch when the metric link is clicked, including:

- A URL
- Nimbus Control scorecard

- Microsoft Office Business Scorecard
- Cognos Metrics Manager scorecard
- Cognos Metrics Manager metric (if the source is CMM)
- Cognos ReportNet report
- ActiveStrategy Scorecard
- ActiveStrategy Measure
- SAP BW report

Cognos Metrics Manager, ActiveStrategy, SAP NetWeaver BI and Microsoft Scorecard must be configured using the Admin Utility for Nimbus Control. For more information on configuring the above, please refer to the **Administration Guide** that is supplied on the CD.

Related topics

Adding metric links

Modifying metric links

Scorecards

Using SQL queries to extract data directly from an Excel spreadsheet has the following benefits:

- There are no performance overheads with continually communicating with Excel.
- If the Key Performance Indicator (KPI) is moved to another cell the link is maintained.
- If the Excel file is relocated, you only need to update the file location in the SQL Query as opposed to updating every metric link.

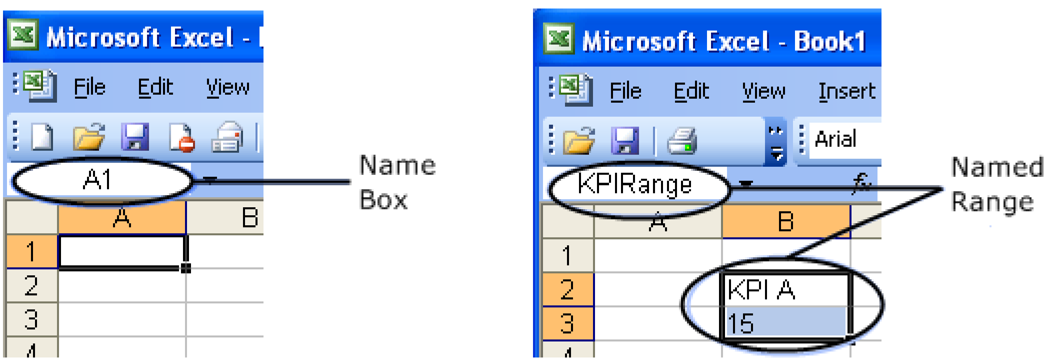
The first task is to name a range of cells in Excel which contains the metric data. The advantage of ranged cells is that even if they are moved, for example if a new column is added, the range is maintained. SQL queries can then be defined using the Nimbus Control AdminUtil.

To define an Excel range:

1. Open a spreadsheet in Excel.
2. Select the cell, range of cells or non-adjacent selections that you want to name.

   Note: There must be a cell that will be used as the field name. In the example below the cell that contains 'KPI' will be used as the field name.

3. Click in the Name Box and enter a name for the cells, then press **Enter**.



These ranges can then be referenced when creating SQL links in the AdminUtil. Refer to the **Administration Guide** (Accessing Excel Data via a SQL Query link under Metrics Support Tools) for more information.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Metric Link**.
3. Define the metric link in the following tabs:

   Type
   Additional
   Data
   Display
   Launch
   Notification (for SQL metric links only)
   View Rights
   Actions

Related topics

Modifying metric links

Scorecards

Select the type of metric link. Depending on how Nimbus Control is configured will depend on what metric link types are available.

General metrics:

Non Data Link does not constitute an actual metric but is used as a placeholder for a future metric link.

SQL Query will use a SQL query to retrieve data (SQL queries are created by an Administrator using the Admin Utility).

Fixed Value allows you to use a defined value as the metric data.

Data Table Field Value allows you to use a value from an associated data table as the metric data.

Costing Values allow you to use an associated costing-based value (duration, volume, delay, etc) as the metric data. See About Costing for more information on defining activity-based costs.

Other metric links include Active Strategy, SAP BW, SAP NetWeaver BI, Microsoft Scorecard Manager KPI, Microsoft PerformancePoint KPI and Cognos Metrics Manager. These must be set up by an Administrator using the Admin Utility. Please refer to the Administration Guide that is supplied on the CD.

Enter a description for the metric link as it will appear when a user hovers over it with the mouse. You can also specify a different owner.

To specify a different owner:

1. Do one of the following:
   - To select a user click **Select User** ... and find a user.
   - To use a predefined SQL query select the **Use SQL Query data for the metric link's owner** checkbox and choose a SQL query from the drop-down list.

To enter a description:

1. Do one of the following:
   - Click in the **Metric Definition** box and enter a description for the metric link.
   - To use a predefined SQL query select the **Use SQL Query data for the metric Overview field** checkbox and choose a SQL query from the drop-down list.

Tagging attachments and links with a language

Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

Choose source of data for the metric link.

Note: SQL queries must be defined by an administrator through the Admin Utility. See the Administration Guide for more details.

Configure how the metric link is displayed. You can choose how to display the link elements, position, whether to display certain elements, font, etc.

The first decision to make is how to display the metric link by choosing one of the following from the **Style** drop-down list:

Traffic Lights
Traffic Lights (from SQL Queries)
Gauge
As Per Data
Threshold List
Icon

Traffic Lights allow you to display different colors depending upon defined threshold values. Values that lie between the threshold values will appear as yellow. Values that lie outside of the threshold values will be displayed as green or red.

---

1. From the **Style** drop-down list choose **Traffic Lights**.
2. Enter or choose a value for the two threshold values.

   Note: You can define a low or high threshold value for green and a high or low threshold value for red, depending on what is being measured.

   If SQL statements exist for threshold values, choose **Traffic Lights (from SQL Queries)** from the **Style** drop-down list, then select the SQL query that will define the high and low thresholds in the Threshold Values panel.

   See an example

A gauge will show a progress bar as determined by a percentage. The percentage is calculated from the lower-based value of your data against a range, as determined by the start and end values.

Example 1

If the Excel data cell used for the metric link is 0.87 (or 87%), the start value is set to 0 and the end value is set to 1, the gauge will display 87%.

Example 2

If the Excel data cell is 0.87, the start value is 0.8 and the end value 1.0, the gauge will display 35%.

Note: Select or deselect **Display Percentage Value** to display or hide the actual percentage figure on the gauge.

The contents of the data will be displayed on the metric link. For example, if you are linking to an Excel cell, the value of the cell will be displayed.

This is an extension of the traffic lights style. It allows you to add as many thresholds as you need to and configure the colors and shapes accordingly.

---

1. From the **Style** drop-down list choose **Threshold List**, then click on the Thresholds tab.
2. Click **Add** to add a new threshold.
3. Enter a threshold value in the **Value** box.

   Example: If there are two threshold values defined, the first one is 0 and is set to green, the second is 10 and set to red.

If the data value from the metric link is between 0 and 9 then the link will be displayed as green. From 10 upwards the link will be displayed as red.

4. Choose a shape and color for the threshold value.

    Display cell data will display the actual data value on the metric link.
    Display text description will display the text that is defined in the **Text** box.

Display a custom field and a custom icon.

---

1. From the **Style** drop-down list choose **Icon**.
2. To change the icon, click **Load** in the Icon panel.

    Note: To display no icon choose **Clear**.

3. To display a custom field, select the **Include Custom field in display** checkbox.
4. Enter the custom field in the **Custom Display Field** text box.

    The following custom fields are available for use:

    <OWNER> Display the metric link owner
    <ACTUAL> Display the actual data value
    <TARGETn> Display a target value

SQL Queries

To use a predefined SQL query that has been created by an Administrator, select the **Use SQL Query data for the metric link's custom field** checkbox and choose a SQL query from the drop-down list.

See example

Allow users to access the source information for the metric link. For example, if a scorecard is used for the metric link then you can allow the user to view the scorecard when they click on the metric link, therefore making the metric link live.

Note: Certain options will only be available if they have been enabled and configured by an Administrator (please refer to the Administration Guide that is include on the CD for more information). Managed scorecards will only be available if they have been registered in Nimbus Control (for more information on scorecards click here).

For SQL-based metric links you can automatically Email or SMS the diagram owner, or selected users, when the defined threshold values are breached.

---

1. Select the Email and/or SMS checkboxes.

    Note: SMS and Email must be set up by an administrator for this function to work. Please refer to the Administration Guide supplied on the CD for more information.

2. Specify the minimum and maximum threshold values.

    Note: If traffic lights have been selected as the display type then those threshold values will be used.

3. Choose to notify users if the value crosses the threshold values ascending, descending or both.
4. In the **Notifications should be sent to** panel, choose to notify either the diagram owner or selected users when the threshold is breached.

    Note: If choosing **Select Users** then click **+ Users** (at the bottom of the window) to add users or user groups.

5. Add any relevant notes that will be added to the Email or SMS.

History

Click **History** to view the list of values stored by the BI server.

Restrict and grant access rights to individual users or user groups.

1. Choose the default access rights for all users.

   Note: If you want to provide access to a small number of users, or a user group, then you can deny access to all (default) users and grant access to specific users and user groups in the next step.

2. Click **Add** ✚ to add users.
3. Click **OK**.

Actions can be assigned to metric links. See Actions for more information.

1. Right-click the metric link and choose **Properties**.

Metric data retrieved from a SAP BW or SAP NetWeaver BI server and displayed on a flow line or activity as a metric link. You can specify a launch option that will launch a URL, managed scorecard or SAP BW report.

1. Right-click the flow line or activity and choose **Attachments/Links**.
2. Click **New** and select **Metric Link**.
3. In the Type tab, from the **Metric Link Type** drop-down list choose **SAP BW**. Enter a title and description (optional).

   Note: You can use a SQL query to display the title. These are defined by an administrator in the Admin Utility.

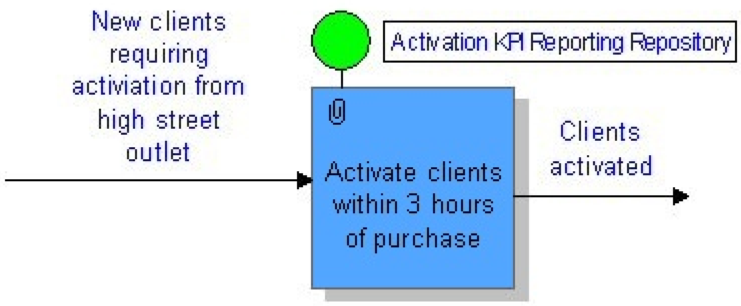
4. Click the Data tab to select it and from the **Stored SAP BW Queries** drop-down list choose a predefined SQL query.

Launching a Target
If you want to launch a URL, scorecard or SAP BW report when users click the metric link you must define the target in the Launch tab. **Note:** SAP Report links are defined by administrators in the Admin Utility.

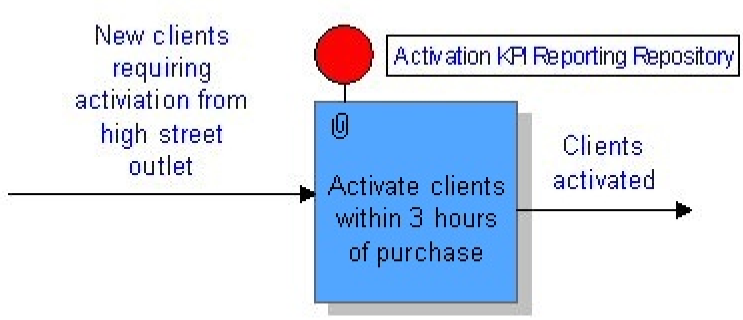
Access Rights
By default, all users with access to the diagram will have access to the SAP BW metric link. You can change the default access rights as well as assign specific access rights to users and user groups. To modify the access rights click the View Rights tab.

Example 1 Defining Traffic Lights Display Metric Links

In this example the upper threshold (yellow to green) is 95% and the lower threshold (yellow to red) is 92%.



The above figure shows that the performance of the new client acquisition process is good. However, in the figure below, the KPI has fallen below 92% of new clients being activated within 3 hours, therefore indicating a problem.



If a problem is being indicated, as demonstrated by a red traffic light, a user could drill down to review the process in greater detail and work out why it is under-performing before deciding how to move forward with addressing the issue.

For information on creating traffic light metric links see Traffic Lights Metric Link Display Type.

Example 2 Defining Icon Display Metric Links

Where n is the target. The <TARGETn> substitution field refers to any of the metric link's target values, which can depend on the metric link's display type selected. For example, for traffic light threshold values:

Target1 = Green to Yellow threshold value
Target2 = Yellow to Red threshold value

For example, a user may wish to specify the following custom display text string for their Metric Link:

A=<ACTUAL>, G=<TARGET1>, R=<TARGET2>

Which, when displayed on the diagram may equate to something like:

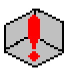
A=27%, G=20, R=30

Note: For more information on creating Icon Metric Links see Icon Metric Link Display Type.

Metric links that use the ▼ Icon display (Icon is a metric link display type that can be selected on the Display tab when defining a metric link)can be updated for a selection of objects, a diagram or a scope of diagrams. Two types of metric links exist; metric links that are associated with data and metric links that are not associated with data.

Note: Only diagrams that you have read/write access to can be updated.

Any image can be used as the Icon to display on metric links. The default images for the two different metric link types are:

 Metric link not associated with data

 Metric link associated with data

1. From the **Map** menu choose **Metrics**, then **Update Metric Icons**.
2. From the Metric Links to Update panel choose one of the following options:

   Update non-data metric links will update all metric links that are not associated with data.
   Update data metric links will update all metric links that are associated with data and which use the Icon display type.

3. From the Scope panel choose the scope to update the metric links for.

   Note: To update metric links for selected objects, you must first select the objects within the current diagram first.

4. In the Icon panel do one of the following:
   - To replace any icon-based metric link images with a different image, click **Load** and select the image that you want to use.
   - To replace any icon-based metric link images with the default image, select the **Use Default Image** checkbox.

Note: If you do not select the default image or a different image, any metric links that are changed in this process will be removed, although the metric link will still exist.

5. Click **OK**.

Metric data that is displayed in diagrams can be refreshed for all metric links in the current process map (assuming the source of data is available).

---

1. From the **Map** menu choose **Metrics**, then **Refresh Metric Links**.

Scorecard

For information on scorecards see About scorecards or Attaching a scorecard.

Storyboard

For information on storyboards see About storyboards or Linking to a storyboard.

SAP Transaction Link

Nimbus Control - Certified for SAP NetWeaver

Links can be created that allows users to launch into SAP transactions, both in the SAP GUI environment and the SAP web-based environment.

Note: SAP integration must be enabled and configured in the Admin Utility to allow SAP links to be linked to objects. Refer to the Administration Guide that is included on the CD for more information, or ask your administrator.

---

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **SAP Transaction Link**.
3. In the **SAP Transaction Link Title** box enter a title for the link.
4. In the **Transaction Code** box enter the SAP transaction code.

   Web Server: Launch link in the same browser - select this option to use the same browser to open web-based SAP transaction links when users access the link in the web browser. If this option is not selected then a new browser will be launched.

> **SAP Information Imported from ARIS or BPM-xchange**
>
> There are two fields of information in the Imported tab that relate to information that is imported from ARIS or BPM-xchange relating to the status of the transaction in the SAP environment and how often it is used.
>
> **Activated** is the status of the SAP transaction link in the SAP environment.
>
> **Frequency** is how often the transaction is used.

5. Click the Advanced tab to select it.
6. If Nimbus Control is configured to launch SAP transactions in a SAP web environment then you can choose a SAP base URL to launch from the **Base URL** drop-down list.

   Note: If a SAP base URL is not specified then the user's SAPLogon.ini file will be checked - if multiple URLs are defined in this file then the user will be prompted to select the URL to launch; if only one URL is defined then it will automatically launch the transaction in that web environment.
7. If Nimbus Control is configured to launch SAP transactions in a SAP GUI system then you can choose a SAP system to launch from the **SAP system** drop-down list, or enter the SAP system name in the **SAP system** text box (as it appears in

the SAPlogon.ini file, i.e. the system displayed in the SAP Client Logon window).

Note: If a SAP system is not specified then the user's SAPLogon.ini file will be checked - if multiple systems are defined in this file then the user will be prompted to select the system to launch; if only one system is defined then it will automatically launch the transaction in that system.

8. Click **OK** to finish.

User Settings and Access Rights

Access Rights

Access rights can be defined for all users and specific users and user groups. By default, all users will be able to launch the SAP transaction link. You can define the default access rights and also assign individual rights to users and user groups.

1. Click the View Rights tab.
2. Select the default access rights for all users.
3. To define specific user or user group access rights click **Add** ✚ to select a user or user group.

Note: Defining specific access rights will override the default access rights for those users or user groups specified. More info on Access Rights...

User Settings

SAP transactions can be launched in either the SAP GUI system, the SAP web interface, or both. If both environments are defined for a single SAP transaction then the user will be given a choice of which environment to launch when the link is accessed in the Web Server.

There are two user settings that affect the launching of SAP transactions. By default, all users can launch in both; however, individual user settings can be set to allow a user to launch in only one or the other - see User Account Details for more information.

There is user preference that will remember the last choice of SAP environment to launch in when a user launches a SAP transaction that has both environments defined for it. Individuals can specify this setting in their user preferences, or an administrator can enable or disable this option in the default user preferences.

SalesForce.com Link

Create a Salesforce.com link.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Salesforce.com Link**.
3. In the **Salesforce.com URL** text box enter the URL of the Salesforce.com page that you want to link to.
4. In the **Link Text** box enter a title for the link as it will appear to users.

   Web Server: Launch link in same browser window will launch the URL in the same browser window when users access the link in the Web Server.

5. To restrict access to specific users or groups, click the **View Rights** tab to access it and then click **Add** ✚ to add users. More info on Access Rights...

   Note: By default, the user or group is granted access to the link. To deny them access, double-click the user or group and select **Access Denied**.

   ⊟ Tagging attachments and links with a language

   Attachments and links can also be tagged for a specific language, which will make an attachment or link available in the attachment popup list only when a user is viewing a diagram in a particular language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

   Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

6. Click **OK**.

Removing Links and Attachments

Remove a link or attachment

1. Right-click the object and choose **Attachments/Links**.
2. Select the link or attachment, then click **Delete**.

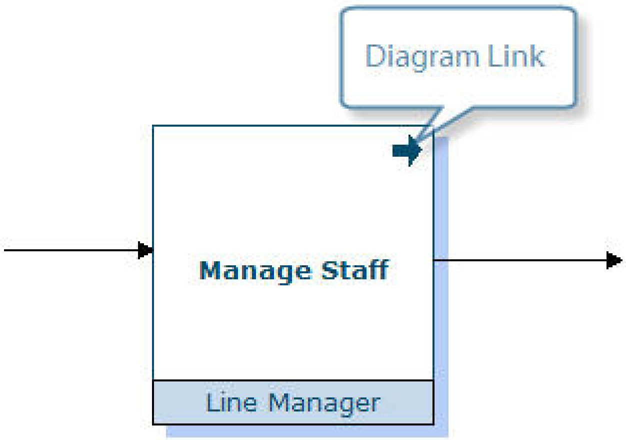
Linking Diagrams

About diagram links

A diagram link allows users to navigate to a diagram in the same map or in a different map. You can link from an activity, flow line, image or free text. You can also create a signpost or a flow-line link to other diagrams.

Link from an activity

Diagram links provide links from an activity to another diagram within the same process map or a different process map.



1. Right-click the activity and choose **Link Diagram**.
2. From the Process Maps panel choose the process map that holds the diagram that you want to link to.
3. From the Diagrams panel select the diagram that you want to link to.

   Note: Choose from drafts, masters or scenarios from the **Diagram** drop-down list.
4. Modify the text in the **Link Text** box, if required.

   Note: This is the text that will appear when users hover their mouse over the icon on the activity.
5. Click **OK**.

Linking Tips

In the Diagram Selector dialog you can jump to a specific level in a map by entering the level number in the **Level Select** box and clicking **Go**.

You can cut, copy and paste diagram links between objects, or drag the link into a space to create a signpost.

To add multiple diagram links, right-click the activity and choose **Attachments/Links**. Click **New** and choose **Diagram Link**.

Related topics

[Editing diagram links](#)

[Adding signposts](#)

[Redirecting diagram links](#)

Edit a diagram link

The diagrams that diagram links point to can be changed.

1. Right-click the diagram link and choose **Set Up Diagram**.
2. Select a diagram to link to and click **OK**.

Related topics

[Redirecting diagram links](#)

Add a signpost

Signposts are free-standing objects that provide visual links to other diagrams.

1. Click **Draw Sign Post**  on the Drawing toolbar.

   Note: To display the Drawing toolbar, from the **View** menu choose **Toolbars & Panels**. On the Toolbars tab check the **Diagram Button Bar** checkbox.

2. With the crosshairs as your cursor, click and drag an area on the map to create the signpost, then release the mouse button.
3. From the Process Maps panel choose the process map that holds the diagram that you want to link to.
4. From the Diagrams panel select the diagram that you want to link to.

   Note: Choose from drafts, masters or scenarios from the **Diagram** drop-down list.

5. Modify the text in the **Link Text** box, if required.

   Note: This is the text that will be displayed on the signpost.

6. Click **OK**.

Linking Tips

In the Diagram Selector dialog, jump to a specific level in a map by entering the level number in the **Level Select** box and clicking **Go**.

Change the direction of a signpost by right-clicking it and choosing **Direction Facing**.

Change the [color](#), [line style](#) or [shadow](#).

Related topics

[Link diagram from an activity](#)

[Redirect diagram links](#)

Redirect diagram links

When a diagram is moved within the hierarchy of a map, for example when a diagram is [sent to child](#), i.e. down a level, any links to that diagram from other diagrams will be updated to reflect the new position.

However, if a linked-to diagram is copied and pasted to another area of the map, the links will not be updated to the copied diagram but will remain with the original. There is a [user preference option](#) that will allow the redirection of any links in this situation. If prompted, choosing Yes will redirect any links to the new copy of the diagram or choosing No will maintain any links to the original diagram.

Flow-line Links

About flow-line links

Flow-line links link the output of one diagram to one or more inputs of other diagrams, thereby supporting the capture of end-to-end processes. If multiple diagram inputs are specified then users will be prompted to choose which process to follow when the link is accessed. User access rights can also be defined to grant or restrict access to the link.

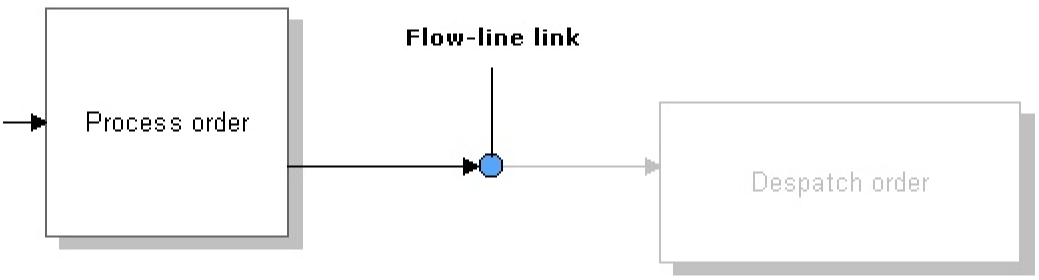


Fig. The above diagram shows a flow-line link. **Note:** A preview of the linked-to-diagram can be displayed, as shown in the above example where the activity of the next diagram is displayed in light grey. See [Modifying flow-line link properties](#) for more information.

Add a flow-line link

A link from the output of one diagram to one or more inputs of other diagrams, thereby supporting the capture of an end-to-end process. If multiple diagram inputs are specified then users will be prompted to choose which process to follow when the link is clicked.

---

1. Right-click the flow line that you want to link to another diagram and choose **Flow Line Connections**.
2. Click **New Link**.
3. From the Process Maps panel choose the process map that holds the diagram that you want to link to.
4. From the Diagrams panel select the diagram that you want to connect to, then select the respective flow line to connect to.

   Note: You can only connect to a flow line that is an input to an activity. Available flow lines are highlighted in light blue.

   Choose from drafts, masters or scenarios from the **Diagram** drop-down list.
5. Modify the text in the **Link Text** box, if required.

   Note: This is the text that will appear when users hover their mouse over the icon on the activity.
6. Click **OK**.

Related topics

[Modifying flow-line links](#)

[Modifying flow-line link properties](#)

[Building back links](#)

[Assigning flow-line link access rights](#)

[Removing flow-line links](#)

Modify a flow line link

You can add a new link or change an existing link.

---

1. Right-click the flow-line link and choose **Access/Modify.**
2. Click the flow-line link that you want to modify and click **Modify**.
3. If in single selection mode, select a different link to connect to and click **OK**, otherwise follow the steps in the wizard.

   This toggles between the wizard mode and single selection mode.

   Note: Choose to link to a master or draft diagram by choosing the relevant option from the **Diagrams** drop-down list.

   Note: You can navigate to a specific level in the diagram list by entering the number in the **Level Select** box and clicking **Go**.

Related topics

Adding flow-line links

Modifying flow-line link properties

Building back links

Assigning flow-line link access rights

Removing flow-line links

Modify flow line link properties

The display of flow-line links can be modified, for example you can modify the color, size, enable previews of the linked-to diagram, etc.

---

1. Right-click the flow-line link and choose **Properties**.
2. Make any changes in the following property tabs:

Display

Modify the fill and line color of the flow-line link. You can also change the size as it appears on the diagram.

Previewing

Choose to display a preview of the linked-to diagram from the following options:

Disable preview will not display a preview of the linked-to diagram.

Preview connected activity will display only the activity that the flow line is connected to in the linked-to diagram.

Preview entire diagram will display the whole linked-to diagram.

Note: If multiple diagrams have been linked to from a single flow-line link and you have selected to display a preview of either the activity or the entire diagram, you must choose which diagram link to preview from the **To Preview** drop-down list.

Advanced

You can build back links to target diagrams or maps if they have been deleted by another user. For more information see [Building back links](#).

Related topics

[Adding flow-line links](#)

[Modifying flow-line links](#)

[Building back links](#)

[Assigning flow-line link access rights](#)

[Removing flow-line links](#)

Build back links

If another user has deleted a flow line link connection on a diagram, it is possible to recreate the back link automatically.

Note: To recreate all back links in a scope of diagrams click [here](#).

---

1. Right-click the flow-line connection and choose **Properties**.
2. Click the **Advanced** tab.
3. Choose the link to restore from the **Select Link** drop-down list.
4. Click **Build Back Link**.
5. Click **OK**.

Related topics

[Adding flow-line links](#)

[Modifying flow-line links](#)

[Modifying flow-line link properties](#)

[Assigning flow-line link access rights](#)

[Removing flow-line links](#)

Assign Access Rights

Grant or restrict user access to a flow-line link.

---

1. Right-click the flow-line link and choose **Access/Modify**.

   Note: The color of the flow-line link may vary. See [Modifying flow line link properties](#) for more information.

2. Select the flow-line link that you want to define access rights on and click **View Rights**.

   Note: If you want to restrict access to **all** links then this is done in the next step.

3. Choose the scope of the access rights that you want to define.

   Current Selected Attachment/Link in the List is the flow-line link that was highlighted when **View Rights** was selected.

   All Attachment Links in the List will modify the access rights of every attachment and link associated with the object.

4. Choose the default access rights for all users.

   Note: If you want to provide access to a small number of users, or a user group, then you can deny access to all (default) users and grant access to specific users and user groups.

5. Click **Add** to add users.

6. Click **OK**.

   Note: By default, the user or user group is granted access to the flow-line link. To deny them access, double-click the user or group and select **Access Denied**.

Related topics

[Adding flow-line links]

[Modifying flow-line links]

[Modifying flow-line link properties]

[Building back links]

[Removing flow-line links]

Remove a flow line link

Removing a flow-line link will not remove the flow-line link that it links to and flow-line links can be rebuilt.

1. Right-click the flow-line link and choose **Access/Modify**.
2. Select the link that you want to delete and click **Delete**.

Related topics

[Adding flow-line links]

[Modifying flow-line links]

[Modifying flow-line link properties]

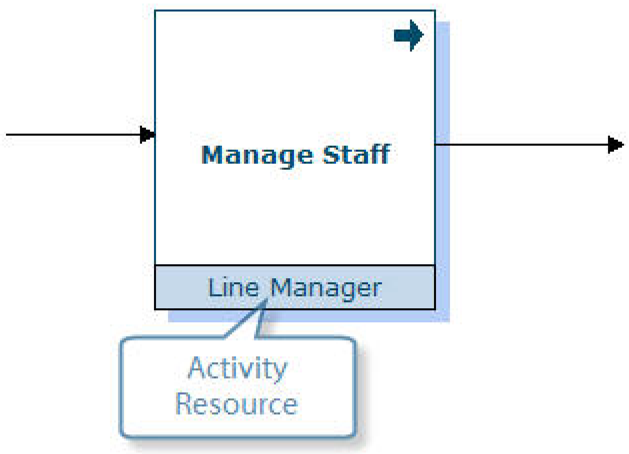
[Building back links]

[Assigning flow-line link access rights]

Assigning Resources

Assign a resource

A resource is an individual, identified by their job title, or a machine or system, that is responsible for a particular activity within a process. See About resources for more information.



1. Right-click the activity and choose **Resources**.

2. Select the user to add as a resource.

3. Select or deselect the following options:

   Show will display the resource on the diagram.

   Costed will take the cost of the resource into account if costing is calculated. A resource that is responsible for a particular activity but does not perform the activity might be a resource that is no costed, for example. Resources that are not costed appear with an asterisk on the diagram.

   Percentage is the percentage of time that a resource is dedicated to a particular activity and is taken into account when calculating process costs.

Reordering Resources

You can change the order of assigned resources as they are displayed on the activity by selecting an assigned resource and clicking **Move Up** or **Move Down** .

Resource Tips

To create a new local resource click **Add Local Resource**.

Resources can be copied from one activity to another. Simply click the resource to select it, press **Ctrl**+**C** to copy it, select the activity that you want to copy it to and press **Ctrl**+**V**. Alternatively, hold **Ctrl**, then click and drag the resource from one activity to another.

Related topics

Resources

Costing

Removing resources

Reporting

Remove a resource

1. Right-click the activity and choose **Resources**.
2. Choose the resource from the list of associated resources and click **Remove Resources From List**. Hold Ctrl to select multiple resources to add.

Display or hide a resource

Assigned resources can be displayed or hidden for a particular diagram or across a scope of diagrams.

1. From the **Tools** menu choose **Resources** and then **Show/Hide**.
2. In the **Resource Name** text box enter the name of the resource and click **Find**.

   Note: To display all central resources and local resources for the current process you can click **Find** without specifying a resource name.

   You can also specify part of a resource name in the **Resource Name** text box. For example, entering 'ad' will return all resources with 'ad' in the name, such as Administrator, Admin Clerk, etc.
3. Select the resource(s) and click **Add Resources To List** .
4. Choose the scope of diagrams that you want the resource to be displayed or hidden for.
5. Select or deselect the checkbox in the Show column, as required.
6. Click **OK**.

Assigning resource hints

Hint text can be added to individual resources so that when users hover their mouse over a resource in the client or web server a hint will be displayed.

1. Right-click the activity resource and choose **Hint Text**.
2. Select an appropriate option:

   Show resource hint text as per system option will display either info field 1, info field 2 or the custom hint text (which must be defined) as the hint text. See System Options (Display) for more information.

   Show resource info field 1 as hint text will display the resource's info field 1 as the hint text.

   Show resource info field 2 as hint text will display the resource's info field 2 as the hint text.

   Show custom hint text will display the text that you define in the **Hint Text** text box.

3. Click **OK**.

Hiding Resource Hint Text

To hide a resource's hint text, right-click the resource and deselect **Show Hint**.

Related topics

Creating resources

Creating Data Tables

About data tables

A data table is a flexible way of capturing data significant to a process and within the context of activities, for example business requirements, system details used to perform activities, KPIs (Key Performance Indicators), audit results, RACI charting (Responsibility, Accountability, Consult, Inform), etc. Values within data tables can also be used to define business control points and data tables can also be used to provide additional information for action items.

Create a data table

See About data tables.

Note: Any changes to a data table definition are recorded in the Data Table audit log.

1. From the **Tools** menu choose **Data Tables** then **Data Tables**.
2. Click **Add**.
3. Enter a name for the table and a comment to describe it.
4. To enter a data table field click **Add** .
5. Enter a name for the field and choose a data type, then click **OK**.

   The data type is the format of the data that users can enter for a particular field.

Data Formats

The following data formats are available:

Alpha is any format.
Calculated displays a calculation between the values of two specified data table fields (integer, decimal or other calculated field) within the same data table (see below for more details).
Date allows date values to be entered (see below for more details).
Decimal allows numerical values to be entered (see below for more details).
Integer allows whole numbers to be entered.

On or Off allows On or Off values to be selected.
Popup List allows a value from a predefined list to be selected.
Resource allows central resources to be selected.
Resource Group allows resource groups to be selected.
Short Alpha allows up to 50 character strings to be entered.
Time allows time values to be entered.
True or False allows True or False to be selected.
URL web address allows URLs, i.e. web addresses, to be entered.
User allows user accounts to be selected (see below for more details).
User Group allows user groups to be selected.
Yes or No allows Yes or No to be selected.

Decimals and integers require you to specify a unit and the position of the unit (for example, a £ integer should appear on the left of the value, whereas a % should appear on the right). You can also enter your own unit symbol by typing in the **Units Of** drop-down list.

For **calculated data types** you can set the unit of measurement and which side of the value to display the unit on, as well as the number of decimal places to display. The expression box is where you define the value that you want to obtain. Arithmetic operators that can be used are Add (+), Subtract (-), Multiply (*) and Divide (/). For example, <Field A> + <Field B> or <Field C> * <Field D> or <Field E> / <Field F>. A number of Jscript functions/methods can also be used to build expressions. In the Field To Insert box you can select an existing data table field (only integers, decimals and other calculated fields will be displayed) to add to the expression - place the cursor in the position of the expression where you want to add the field, then click a field from the **Field To Insert** list to select it and click **Insert**.

Date fields can be set to automatically populate with the current date when users add a data table attachment record in the Client or Web Server (**Default to Current Date**).

User fields can be set to automatically populate with the current user when users add a data table attachment record in the Client and Web Server (**Default to Current User**).

Mandatory Field requires users to enter data for the data field when data is added to the table. If a data table is displayed on a diagram then checking the **Visible In Display Box** checkbox will display the data field.

Resource fields can only be made mandatory fields when at least one central resource exists in the process repository. The same applies for resource group fields.

Popup Lists are predefined lists. See defining popup lists for more information.

Related topics

Defining popup lists

Attaching data tables to diagrams

Entering data in to a data table

Displaying data tables on diagrams

Defining data table access rights

Popup Lists

Define a popup list

This is a data table field type that allows users to select a value from a predefined list. Nested popup lists can be created, for example, you might have a parent data field listing the different departments within an organization, then a second child data field listing the different roles within each department.

Note: Data table managers and administrators can add items to a popup list when adding data table records to a data table.

1. From the **Tools** menu choose **Data Tables**, then **Data Tables**.
2. From the **File** menu choose **Popup List Overviews**.
3. Click **Add New List** and enter a name for the list.

Note: To define a child popup list you must have the parent list highlighted when you click **Add New List**. Then select the **Depends on Parent** checkbox.

4. Click **Add Item** to add items to the popup list.
5. Enter a value for the item and click **OK**.
6. Repeat steps 4-5 for each item that you want to add.

> **Popup List Tips**
>
> If the list is long, consider sorting it to allow users to find items more easily.
>
> Click **Sort** to toggle the list.
>
> You can import a popup list (.csv or .txt) by clicking **Import Popup List** .

Related topics

[About data tables]

[Creating data tables]

[Creating data table records]

[Editing popup lists]

[Deleting popup lists]

Edit a popup list

1. From the **Tools** menu choose **Data Tables**, then **Data Tables**.
2. From the **File** menu choose **Popup List Overviews**.
3. You can edit the following:
   - To rename the popup list click the list to select it and click **Edit**.
   - To add an item select it and click **Add Item**.
   - To remove an item select it and click **Remove Item**.

   Note: Data table managers and administrators can add items to a popup list when adding data table records to a data table.

Related topics

[Deleting popup lists]

[Creating data tables]

Delete a popup list

1. From the **Tools** menu choose **Data Tables**, then **Data Tables**.
2. From the **File** menu choose **Popup List Overviews**.
3. Select the popup list and click **Delete**.

Attach a data table to a diagram

Attach a data table to an activity, for example, to allow users to record captured data associated with a particular activity.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Data Table**.
3. Choose the data table from the **Data Tables** drop-down list and click **OK**.
4. If appropriate, enter data into the data table. See Create a data table record for more information.
5. Click **Close**.

Related topics

About data tables

Creating data table records

Copying data table records

Displaying data tables on diagrams

Assigning data table access rights

Add or edit a data table record

Data table records can be added and edited in the client and web server, in both draft and master diagrams.

> **!** If all records in the data table are marked with a **!** then the data table has been removed from the draft version and will therefore be deleted upon promotion. Adding or editing records in the master version will reattach the data table in the draft version, therefore please contact the process author before adding or editing records.

1. Right-click the object and choose **Attachments/Links**
2. Double-click the data table to access it.
3. Either click **Add** to add a new record, or double-click an existing record to edit it.

   Show record information

   To view who created the data table record, and who last modified it, click **Show record information** (Process Authors only).

4. Enter or modify any of the fields, as required.

   Display this record when table is shown on the diagram will display the first field's data, or as much as possible, if the data table is selected to be displayed on the diagram. See Displaying a data table on a diagram for more information.

5. Click **Save & Close**, **Save & Copy** or **Save & New**.

   The order of records can be altered by selecting a record and clicking ⬆ or ⬇.

   Mandatory fields are denoted by * following the field name. These fields must be completed.

> **Adding Popup Items 'On The Fly'**
>
> Data table managers and administrators can add and remove items in popup lists when entering data into a data table, i.e. without having to edit the data table directly.
>
> 1. When creating a data table record (as above), in the Data Entry dialog click ....
> 2. Select the popup list that you want to edit from the Popup Lists.

3. Do one of the following:

   - Click **Add Item** ✚ to add an item to the popup list.
   - Select an item and click **Remove Item** ━ to remove an item from the popup list.

Related topics

[About data tables]

[Attaching data tables to diagrams]

[Copying data table records]

[Displaying data tables on diagrams]

Copy data table records

Data table records can be copied and pasted between data table attachments on different objects.

Note: The data table that you are copying to must contain the same data table field that you are copying from.

1. Right-click the attachment/link icon and choose **Access/Modify**.
2. Select the data table attachment and click **Access**.
3. Right-click the data table record that you want to copy and choose **Copy**.
4. Access the data table attachment for the data table that you want to paste the record into.
5. Right-click in the data table attachment and choose **Paste**.

Related topics

[About data tables]

[Creating data tables]

[Attaching data tables]

[Displaying data tables]

[Assigning data table access rights]

Display a data table on a diagram

The data from the first data field of a data table can be displayed on a diagram.

1. Right-click the object and choose **Attachments/Links**
2. Double-click the data table to access it.
3. From the **Options** menu choose **Display on Diagram**.

   Note: Only one data table can be displayed at any one time.

Related topics

[About data tables]

[Creating data tables]

[Attaching data tables to diagrams]

[Creating data table records]

[Copying data table records](#)

[Assigning data table access rights](#)

Assign access rights

Control access to a data table by granting or restricting read access to specific users or groups. Administrators and process authors have read/write access that allows them to update data tables and all other users have read only.

1. Right-click the object and choose **Access/Modify**.

2. Select the data table that you want to define access rights on and click **View Rights**.

3. Choose the scope of the access rights that you want to define.

   Current Selected Attachment/Link in the List will modify the data table, or other attachment or link, that was highlighted when **View Rights** was clicked.
   All Attachment Links in the List will modify the access rights of every attachment and link associated with the object.

4. Choose the default access rights for all users.

   Note: If you choose to restrict access to all users by default then you can grant access to specific users in the next step.

5. Click **Add** to select a user or user group.

   Note: By default, the user or user group is granted access to the data table. To deny access, double-click the user or user group and select **Access Denied**.

   More info on Access Rights...

Related topics

[About data tables](#)

[Attaching data tables to diagrams](#)

Display or hide a data table

A specific data table can be displayed or hidden in a scope of diagrams.

1. From the **Tools** menu choose **Data Tables**, then choose **Show/Hide**.
2. From the **Data Tables** drop-down list choose a data table.
3. Choose a scope of diagrams to show or hide the data table for.
4. Choose **Show** or **Hide**, then click **OK**.

View the data table audit log

Each time a data table is created and modified, these changes will be recorded in a data table audit log.

1. From the **Tools** menu choose **Data Tables** then **Data Tables**.

2. From the **Tools** menu choose **Audit Log**.

Creating Business Controls

About business controls

Business controls are used to provide visual awareness of specific activities within a process that, if they fail or are not undertaken, will result in compliance failure and will be highlighted as non-conforming activities, usually with respect to corporate governance and compliance. This permits an organization to comply with legislations such as financial, for example Sarbanes Oxley (SOX), Base II, audit points. They can also be used for operational activities, for example schedules of authorizations to sign off on contracts, expense vouchers, etc, or they can also be used for compliance, for example import/export trade agreements, health and safety, environmental.

Note: Business controls can only be created by administrators. Authorized users can be attach business controls to activities, flow lines and free text boxes. Style sheets can created and used to highlight data tables or statement links that breach a specific business control value.

Related topics

Style sheets

Reporting

Create a business control

See About business controls for more information.

Note: Only administrators can create business controls.

1. From the **Tools** menu choose **Business Controls**.
2. From the **File** menu choose **Add**.
3. Enter a name for the business control.
4. Choose a business control type from the following:

   Field value in a Data Table attachment will be based on a field value in a selected data table attached to the object.

   Statement Link will be based on a field value of a specific statement that is attached to the object.

   Field value in a Statement's Link data table will be based on a field value defined in a statement link's data table (this option requires knowledge of the statement set's functionality) **Note:** The statement set must be defined to include additional custom fields for the statement link records (see Customizing a statement for more information).

   Field value in a Statement's data table will be based on a field value held within the additional data of a statement record that is linked to the object (this option requires knowledge of the statement set's functionality) **Note:** The statement set must be defined to include additional custom fields for the statement set records (see Customizing a statement for more information).

5. In the Settings panel select any options that you want to apply from the following:

   Retain style during storyboard playback will ensure that the business control is identified by overriding the storyboard style during playback of a storyboard.

   Show data entry window on creation will display the business control's data entry window whenever it is added to an object.

   Preserve style locked objects will not update an object's style when the business control is applied for objects that have their style locked.

   Allow business control field to be modified will allow users to change the business control data table field value when attaching the business control to an object.

6. Click **Next**.
7. Do one of the following, depending upon your choice in step 4.
   - If you selected **Field value in a Data Table attachment**, choose the data table and data table field that you want to apply the business control point to, then enter a data table value that will be used to identify the object as a control point.
   - If you selected **Statement Link**, choose a statement set and then select a statement.
   - If you selected **Field value in a Statement's Link data table** or **Field value in a Statement's data table**, choose a statement set and a data table field, then enter a data table value that will be used to identify the object as a control point.
8. Click **Next**.
9. From the **Style Sheet** drop-down list, choose a style to apply to the object if the business control is breached.

Style Sheets

A style sheet should be created that is used solely for business controls. For more information see Creating style sheets.

An object's style may be locked, thereby preventing a style sheet being applied to it if the business control is breached.

10. To display an image if the business control is breached, click **Select Image**. Locate the image and click **Open**.

    Note: To remove the image click **Clear**.

11. Click **Finish**.

Related topics

Attaching business controls

Assigning business control access rights

Editing business controls

Removing business controls

Style sheets

Reporting

Attach a business control

A business control data table attachment acts in the same manner as a normal data table attachment, except that one particular field is locked with a set value, as set in the business control properties, and this value defines the business control point. See About business controls for more information.

Note: Business controls can only be attached to activities, flow lines and free text boxes.

1. Right-click the object and from the **Business Controls** menu choose **Add Business Control**.
2. Select the business control and click **OK**.
3. If the business control references a data table attachment you can add information to the available data table fields. Click **OK** when you have finished.

    Note: The business control data table field value may be locked to prevent you from editing it. For more information see Creating a business control or see your administrator.

Related topics

Attaching business controls

Assigning business control access rights

Editing business controls

Removing business controls

Style sheets

Reporting

Assign access rights

Business controls, by default, are viewable by all users. It is possible to assign specific access rights to a business control, allowing you to grant and restrict access to certain users. See About business controls for more information.

1. Right-click the attachment/link icon and choose **Access/Modify**.
2. Select the business control and click **View Rights**.
3. Choose the default access rights for all users.

    Note: If you choose to deny access rights to all users you can assign specific viewing rights in the next step.

4. Click **Add** to add users and/or user groups.

The user or user group will be granted access to the business control. To restrict access, double-click the user or user group once added and select **Access Denied**.

More info on Access Rights...

Related topics

Attaching business controls

Assigning business control access rights

Editing business controls

Removing business controls

Style sheets

Reporting

Edit a business control

Business controls can be edited.

Note: Editing a business control will not update any business controls that are already attached to objects. Only administrators can edit a business control.

1. From the **Tools** menu choose **Business Controls**.
2. Select the business control and from the **File** menu choose **Edit**.
3. Click **Next** to step through the wizard, editing any options that are required, then click **Finish** on the last step.

Related topics

Attaching business controls

Assigning business control access rights

Editing business controls

Removing business controls

Style sheets

Reporting

Remove a business control

1. Right-click the attachment/link icon and choose **Access/Modify**.
2. Select the business control and click **Delete**.

Related topics

Attaching business controls

Assigning business control access rights

Editing business controls

Removing business controls

Style sheets

Reporting

Creating Language Variants

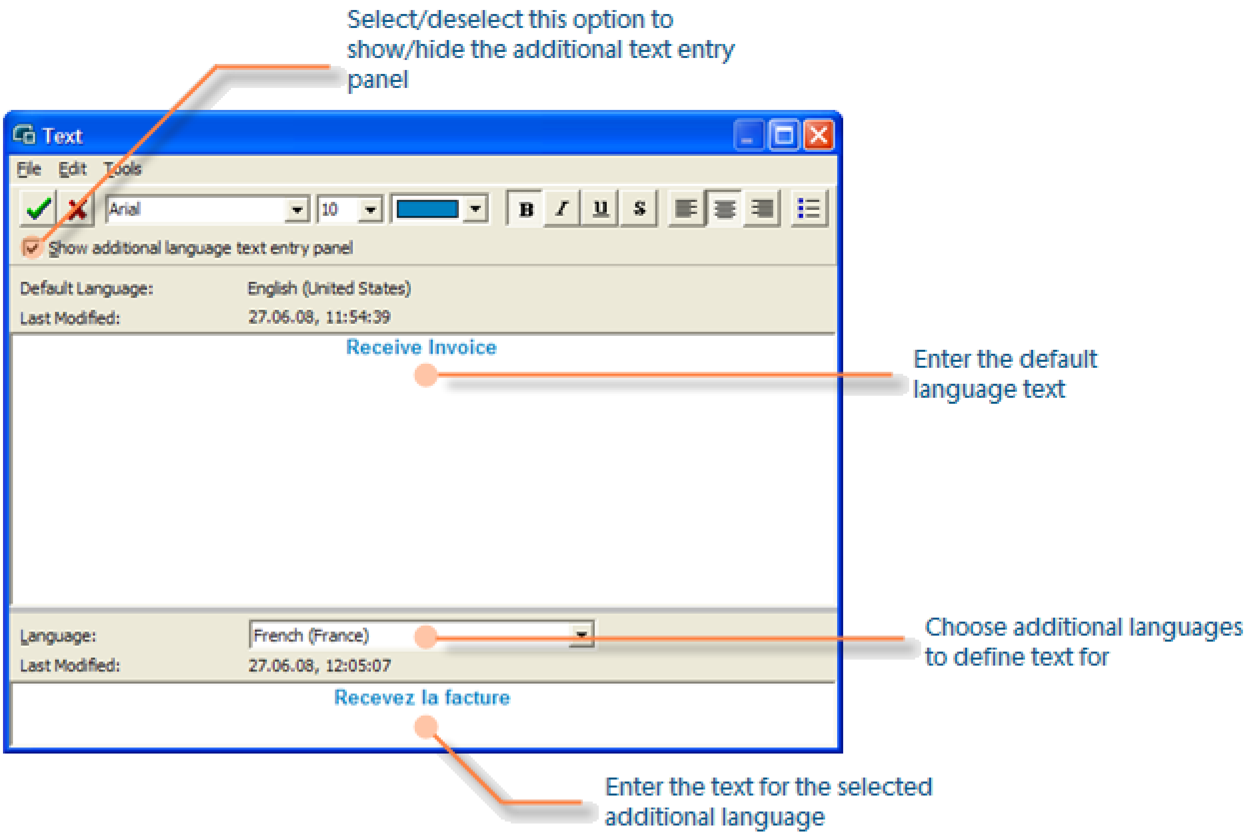
Creating Language Variants

Nimbus Control allows process maps to be created in different languages. Specifically, diagram object text can be defined in multiple languages. The object text that is displayed is dependent on the user's PC locale; the default language will be displayed if a user's PC locale is set to a language that has not been defined for a particular object. Some attachments and links can also be tagged for a particular language, for example you might have two versions of the same document that are written in different languages, so you would tag each document with the respective language and the version of the document that is made available to the user will depend on their locale setting.

Note: The available languages are set by an administrator in the System Options. If a language appears in red for a particular object then it is not supported in the current process repository.

To define a language variant for an object:

1. Double-click the object to open the text editor for the object.
2. Select **Show additional language text entry panel**.
3. Choose the language that you want to define from the **Language** drop-down list.
4. In the bottom text box enter the text for the selected language.
5. Repeat steps 3 and 4 for other languages that you want to define.
6. Click **OK**.



To tag attachments and links with a language:

1. When adding an attachment or link, click the Advanced tab and from the **Language Tag** drop-down list choose a language.

⊟ To tag an existing attachment or link

Right-click the object that has the attachment or link associated with it and choose **Attachments/Links**. Right-click the attachment or link and choose **Modify**, then click the Advanced tab.

Related topics

[Translating languages]

Translating Languages

There is an option to export diagram object text to a CSV file in order to allow external translators to translate the text into other languages. The translated object text can then be imported back into Nimbus Control.

Note: You must be an administrator or map administrator to export and import object text and only draft diagrams can be modified, i.e. you cannot update master and scenario diagrams. Also, the import routine will only update diagrams that the user has read/write access to.

Logs: A log file records who performed an export or import and what changes were made. This log file can be found in <Installation directory>\Nimbus Control\Process Repository\System\Logs\Translations.

Stage 1 - Exporting object text to file

1. From the **Tools** menu choose **Reports**.
2. In the Categories column select **Diagrams**.
3. In the Reports column select **Object Language Text Variants**.
4. In the Scope column select the scope of diagrams to export.
5. Click **OK**.

   An Object Language Text Variants report will be displayed.
6. From the **File** menu choose **Translators Export**.
7. From the **Language** drop-down list choose the language that you want to export.

   Note: The available languages are set by an administrator in the [System Options].
8. Click **Browse** and either select an existing CSV file, or enter a new file name to create a new file.
9. Click **OK**.
10. Click **OK**.

Stage 2 - Modifying object text

The exported translation file can be edited in any external CSV editor, however Excel is the recommended editor. The format of the CSV file is as follows:

<Unique object ID>,<Default object text>,<Translated object text>,<Last modified>

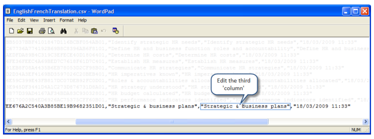
Note: If an object has not been previously translated, the last two columns will be blank (e.g. <Unique object ID>,<Default object text>,,)

Translating object text in Excel

1. Run Excel.
2. Choose **Open** and select **Text Files** as the File Type, then select the translation file to open.

   The Text Import Wizard dialog opens.
3. In Step 1, choose **Delimited**, then click **Next**.
4. In Step 2, select **Comma** in the **Delimiters** panel, then click **Finish**.
5. Enter the translated text in the third column.
6. Save the file as type **XML Spreadsheet 2003 (*.xml)**.

   For external CVS editors, such as WordPad, open the file and edit the third 'column'. Click the image below for an example.



Stage 3 - Importing object text into Nimbus Control:

1. From the **Tools** menu choose **Reports**.
2. In the Categories column select **Diagrams**.
3. In the Reports column select **Object Language Text Variants**.
4. In the Scope column select the scope of diagrams to import text for.
5. Click **OK**.

   An Object Language Text Variants report will be displayed.

6. From the **File** menu choose **Translators Import**.
7. From the **Language** drop-down list choose the language of the translated text that you are importing.
8. Click **Browse** to select and open the file you want to import.

   Note: Depending on the format of the file that you are importing, choose either **CSV files** or **XML Spreadsheet 2003** from the File Type options in the Open dialog.

9. Do one of the following:

   - Select the row of object text that you want to add or update and click **Apply**.

     Hint: Hold Ctrl to select multiple rows.

   OR

   - To apply all changes click **Apply All**.

   The Result status will change to OK for any object text that has been updated.

Related topics

[Creating Language Variants]

Chapter 5

Document Registry

Document Registry

About the Document Registry

The Document Registry is a document management system that allows the control and management of external files, such as MS Office files, drawings, multimedia files, etc, that support your organization's processes. Documents are accessible in both the client and the web server.

For information on Document Registry administration (for administrators and Registry administrators) see About Document Registry Administration.

Access the Document Registry

For information about the Document Registry see About the Document Registry.

1. From the **Documents** menu choose **Document Registry**.

Related topics

Registering files

Registering files in a folder

Registering web links

Finding files

Opening files

Editing file details

Changing file access rights

Withdrawing files

Deleting files

Finding Files

Find a file

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Select any filters that you want to search by and click **Search**. For more information see Searching and filtering files.

   Show withdrawn items will also retrieve any files that have been withdrawn.

   Preview Field allows one field to be displayed in between each row of the report. Choose a field from the **Preview Field** drop-down list (located on the right of the toolbar). To toggle the preview field on/off, from the **View** menu choose **Preview**.

   Note: Leaving the search filters empty will return all documents in the Document Registry. This may take a considerable amount of time if there are lots of files in the Document Registry.

   You can enter the full title of the file or part of the title in the **Title must include** text box.

   You can reorder columns by clicking and dragging a column header to a new position (indicated by green arrows).

Related topics

[Opening files](#)

[Editing file details](#)

[Searching and filtering files](#)

[Customizing the Document Registry view](#)

Search and filter files

You can search for and filter on Document Registry files. Filters can also be saved.

Note: The Display Filter Options panel can be toggled on or off by clicking **Filter Panel** .

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

To search or filter files:

1. From the filter drop-down boxes, select the checkboxes of the options that you want to search against. If multiple options are selected then files with any of the associated categories will be returned.

To save a filter:

1. Once the filters have been selected click the Filter Panel drop-down arrow and choose **Save Current Filter Settings**.

To manage filters:

1. Click the Filter Panel drop-down arrow and choose **Manage Saved Filters**.

Related topics

[Customizing the Document Registry view](#)

[Exporting the Document Registry](#)

Launch a file

How to access the Document Registry

From the **Documents** menu choose **The Document Registry**, or click .

---

1. [Find the file](#) that you want to open.
2. Right-click the file and choose either **Launch Master** or **Launch Draft**.

   Note: If you know the Document Registry document number you can open the file directly. From the **Documents** menu choose **GoTo Document Number**.

Related topics

[Editing file details](#)

[Updating file categories](#)

[Changing file access rights](#)

Customizing the View

About Document Registry customization

The Document Registry view can be customized with respect to what data is displayed and how it is displayed.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

Add and remove columns

Columns can be added, removed and reordered.

1. From the **View** menu choose **Column Customizing**.
2. Do one of the following:
   - Click and drag columns from the Customize window into a position in the Document Registry.
   - To remove a column from the Document Registry, click and drag the column header from the Document Registry into the Customize window.
   - To reorder columns in the Document Registry, click and drag the column header to a new position.

   Note: Green arrows will appear to indicate where a column can be added.

Related topics

Filtering column data

Sorting column data

Grouping data

Saving and applying layouts

Filter column data

Data within columns can be filtered.

Note: The cached record mode must be enabled to filter column data. From the **View** menu choose **Cache All Records Mode**.

1. Click the respective filter button for the column that you want to filter and choose a filter option.

   Note: The Custom option allows you to define an And or Or filter.

Related topics

Adding and remove columns

Sorting column data

Grouping data

Saving and applying layouts

Sort column data

Data within columns can be sorted alphabetically.

Note: The cached record mode must be enabled to sort column data. From the **View** menu choose **Cache All Records Mode**.

1. Click the column header that you want to sort to toggle sorting.

Related topics

[Adding and remove columns]()

[Filtering column data]()

[Grouping data]()

[Saving and applying layouts]()

Group data

Grouping provides a way of hierarchically structuring the display of Document Registry files in the list.

Note: The cached record mode must be enabled to group data. From the **View** menu choose **Cache All Records Mode**.

1. Drag the column header into the grouping panel area.

   To turn the grouping panel on, from the **View** menu choose **Grouping Panel**. The grouping panel is indicated by the grey area above the column headers that states 'Drag a column header here to group by that column'.

   You can group by multiple columns by repeating step 1 and the order of the columns determines which columns are grouped first.

   Grouped columns can also be sorted by clicking the column header to toggle the sort direction.

   Grouped nodes can be expanded by clicking + adjacent to the group that you want to expand.

   To expand or collapse all group nodes click one of the toolbar buttons .

Related topics

[Adding and remove columns]()

[Filtering column data]()

[Sorting column data]()

[Saving and applying layouts]()

Save and apply a layout

Once you have configured the view of the Document Registry you can save it as either the system default layout or a personal layout.

Note: Only administrators can save the system default layout.

To apply a layout:

1. From the **View** menu choose **Layouts**, then **Apply Personal Default Layout** or **Apply System Default Layout**.

To save a layout:

1. From the **View** menu choose **Layouts**, then **Save Personal Default Layout** or **Save System Default Layout**.

Related topics

[Adding and remove columns]

[Filtering column data]

[Sorting column data]

[Grouping data]

Adding Files

Register a file

Depending upon the Document Registry system options, registering a file will either leave the file where it is and link to it, make a copy of the file in the Document Registry or move the file into the Document Registry.

Note: A Document Registry system option allows default draft promoters to be automatically assigned when files are registered.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. From the **File** menu choose **Add Single File**.
2. Locate the file and click **Open**.
3. In the Details tab provide any related information.

   Note: The seven category drop-down fields are defined by an administrator. For more information see Defining category drop downs.

Uploading a file to a SharePoint document library

If Nimbus Control is configured to integrate with one or more SharePoint document libraries, you can upload the document into SharePoint upon registration.

In the File panel (adjacent to the file name) click **Upload**. Expand the SharePoint site, select the document library that you want to upload to, then click **OK**.

Note: If the Upload button is greyed out then the file has already been automatically uploaded to a default SharePoint document library.

The following document registration tabs are also available:

Controlled Copyholders

Users who have controlled copies of the document should be listed here. To add a copyholder click **Add New Copyholder** . Then click **Select User** to add a user.

To remove a controlled copyholder, select the user and click **Remove Copyholder(s)** .

Related Documentation

Related files that exist in the Document Registry should be listed here. To add a file click **Add Related Document** . Search for the file(s) in the Document Registry and click **Accept and Close** .

Usage

All maps that link to the Document Registry file are listed here.

Related topics

Acknowledging files

Reviewing files

Authorizing files

Promoting files

Registering files in a folder

Registering web links

Uploading a document to SharePoint

Changing file access rights

Editing file details

Withdrawing files

Deleting files

Register files in a folder

Depending upon the Document Registry system options, registering files will either leave the files where they are and link to them, make a copy of the files in the Document Registry or move the files into the Document Registry.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. From the **File** menu choose **Add Files From Folder**.
2. Locate the folder and click **OK**.
3. Enter the file details. The details specified will be used for all files in the folder.

   Note: The category drop downs are defined by an administrator. For more information see Defining category drop downs.

Related topics

Editing file details

Acknowledging files

Reviewing files

Authorizing files

Promoting files

Registering files

Registering web links

Changing file access rights

Withdrawing files

Deleting files

Register a web link

Web links can be registered in the Document Registry; links are saved as CWL files.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

Note: You can also import multiple web links from a CSV file - see Importing web links for more information.

1. From the **File** menu choose **Create and Add Web Link**.
2. Enter the URL for the web link.

   Note: Ensure the URL is preceded by http://, for example http://www.nimbuspartners.com.
3. In the **File Name** box enter a name for the file.
4. Click **Save**.

Related topics

Editing file details

Acknowledging files

Reviewing files

Authorizing files

Promoting files

Registering files

Registering files in a folder

Changing file access rights

Withdrawing files

Deleting files

Upload a document to SharePoint

Documents that are registered in Nimbus Control's Document Registry can also be uploaded to a SharePoint document library; this applies to draft documents only and it is only available if Nimbus Control has been integrated with one or more SharePoint document libraries.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Right-click the document and choose **Details**.
2. Click **Upload** (found in the File panel, adjacent to the File Name field).

   Note: If the Upload button is greyed out it means that the file has been automatically uploaded to SharePoint.
3. Expand the SharePoint site, then select the folder in which you want to upload the document to.
4. Click **OK** to upload the document.

Related topics

Editing file details

Acknowledging files

Reviewing files

Authorizing files

Promoting files

Registering files

Registering files in a folder

Changing file access rights

Withdrawing files

Deleting files

Change a draft file

It is possible to change a draft file once it has been registered and before it has been promoted to a master version. For example, if a user rejects a document in an authorization cycle, you can edit the document externally, change the draft file and resubmit it for authorization.

Note: If the document is a SharePoint document then the new file will be uploaded to the associated SharePoint Document Library.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to edit.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Change Draft File Not Details**.
5. Locate the file that you want to replace the existing document with.
6. Select the document and click **Open**.
7. Click **Close**.

Modify file access rights

User access to files in the Document Registry can be modified for draft and master versions of a document. By default, when a file is registered, all users will have read-only access.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Find the file that you want to redefine access rights for.
2. Right-click the file and choose **Details**.
3. Select either the draft or master tab, if appropriate.
4. From the **Manage** menu choose either **Change Master file access rights** or **Change Draft file access rights**.
5. If appropriate, reselect the default access rights. This setting applies to all users not defined in the next step.
6. To define specific user access rights, click **Add** to add a user or user group.

   More info on Access Rights...

Editing Files

Edit a file's details

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Find the file that you want to edit.
2. Right-click the file and choose **Details**.

Viewing and Editing a document's details in SharePoint

If the document is stored in SharePoint, you can view and edit the document's details, for example to modify the user access rights to the document in SharePoint. When viewing the details of the document, from the **File** menu choose **Launch into SharePoint Document Details**.

Related topics

Opening files

Updating file categories

Changing file access rights

Update a file's categories

Document categories can be updated. You can choose to update the categories of selected files or all files in the Document Registry.

Note: You must have the relevant access rights to update a file's categories.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Right-click the file and choose **Update Categorizations**.
2. Select the drop-down checkboxes for the categories that you want to update.
3. Choose a new category from the associated drop-down list.
4. Choose the scope of the operation.

   Selected Documents will re-categorize the files that have been highlighted.
   All Documents will re-categorize all documents in the Document Registry.

6. Click **OK**.

Related topics

Defining document category drop down lists

Changing file access rights

Removing Files

Withdraw a file

File authors, file owners and administrators can withdraw a file from the Document Registry. Withdrawn files are not removed from the Document Registry and can still be searched for, however withdrawn files cannot be accessed. Files will be withdrawn from the date that is specified, so for example you can mark a file to be withdrawn in a week.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Find the file that you want to withdraw.
2. Right-click the file and choose **Details**.
3. Select a date in the **Withdrawn** drop-down calendar. Click here to locate the Withdrawn drop-down calendar.

Note: To reinstate a withdrawn file you must clear the withdrawn field.

Related topics

Delete a file

Delete a file

There are two stages when deleting a document. Deleting a document for the first time will grey it out and prevent access to it, although it will still be visible in searches. Note that these files can be undeleted. Deleting a file for the second time will permanently remove the document link. It is also possible to delete the file document link and the actual file itself.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

To delete a document link:

1. Find the file that you want to delete.
2. Right-click the file and choose **Delete Document Link**.

   Note: Hold Ctrl to select multiple files.

   To permanently delete the document link (if the Keep deleted records system option is enabled), repeat this process.

To delete a document link and the actual document:

1. Find the file that you want to delete.
2. Right-click the file and choose **Delete Document Link and File(s)**.

   Note: Hold Ctrl to select multiple files.

   Deleted files will be moved to one of the following Process Repository folders:

   - **Master files** ...\Process Repository\Deleted\Registry Documents
   - **Draft files** ...\Process Repository\Deleted\Registry Documents\Draft

   Note: If the document is a SharePoint file then it will be removed from the respective Document Library in SharePoint.

To restore a document link:

1. Find the file that you want to undelete.
2. Right-click the file and choose **Undelete**.

Related topics

Withdraw a file

Importing and Exporting Files

About importing and exporting from the Document Registry

You can import files that are used in maps but have not yet been registered in the Document Registry yet. A list of all files in the Document Registry can be exported as TXT, XLS, HTML and XML formats.

Import links from a map

Documents that are linked to maps but are not in the Document Registry can be imported and automatically registered.

1. From the **File** menu choose **Import Links from Map**.
2. Select the map that you want to import files into the Document Registry from and click **OK**.

   Note: Once all files have been imported you should then consider editing the files' details.

Importing web links

You can import web links (URLs) from a CSV file. The format of the CSV file must be:

URL,**Title**

For example, http://www.nimbuspartners.com,Nimbus Partners

Note: The title is the title of the web link as it appears in the Document Registry. If the title is left blank for a particular URL then the actual URL will be used.

Available to administrators only

1. In the Document Registry, from the **File** menu choose **Administration**, then **Import Web Links**.
2. Find and select the CSV file, then click **Open**.

Export the Document Registry

You can export a list of documents in the Document Registry to either TXT, XLS, HTML and XML format.

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Search and filter to display the documents that you want to export.

   Note: If you want to export the whole Document Registry then click Search without applying any filters.

3. From the **File** menu choose **Export Grid As Shown To** and then select a format.
4. Specify a location to save the exported file in and click **Save.**

HTML Exporting

If you are exporting the Document Registry as HTML, the actual documents can be exported along with a HTML file that links to the location of the exported files. The following options are available when exporting as HTML:

Master documents only will export the master files with the HTML record. If a master file does not exist then nothing will be exported.

Master and draft documents will export both master and draft files with the HTML record.

Copy files for HTML version will export the actual file(s) into the specified directory.

All rows from current list will export all documents in the current list.

Selected rows only will export only files that are selected.

Adding Files to User's Favorites

Add files to users' favorites

You can add a selection of files to one or more user groups' Web favorites though the Document Registry.

Administrators only

How to access the Document Registry

From the **Documents** menu choose **Document Registry**, or click .

1. Conduct a search in the Document Registry to display the documents that you want to add to user groups' favorites.
2. Select the desired documents, then right-click one of the selected documents and choose **Add to User Group Favorites**.
3. Select the user group(s), then click **OK**.

Chapter 6

Statement Sets

Statement Sets

About statement sets

Statement sets are a hierarchical set of regulatory and auditable statements that, if followed, ensure compliance to specific business and legal requirements, such as ISO 9000/14001/17799, CMMi, internal company policies, etc. Individual statements can be linked to related activities and reports can be run that identify which processes relate to which statements.

Compliance relates to a company being able to demonstrate that documented processes and procedures support the statements and that the processes are followed. Statement sets allow companies to demonstrate what they do to support a particular statement as well as allowing companies to discover if changing a process breaks a specific compliance.

Using Nimbus Control you can:

- Link any statement to any activity on a process diagram (and maintain the link the other way)
- Link statements to other statements
- Support user-definable fields
- Maintain audit records (with user-definable fields) on the statements and the links
- Provide reports on the link relationships, etc.
- Specify the status of a statement / statement set
- Create statement sets in a hierarchy relevant to your business.

Statement Set Roles

Assign a statement set manager

Statement set managers can assign statement managers for specific statement sets, as well as being able to create statement sets and associated statements.

Note: Only process authors can be statement set managers and this role can only be assigned by administrators.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Double-click the user.
3. In the Settings tab select the **Statement Set Manager** checkbox.

Related topics

User Accounts

Assign an audit manager

Audit managers can create, modify and delete audit records within a statement set.

Note: Only process authors can be assigned as audit managers and this role can only be assigned by statement set managers and administrators.

1. From the **Tools** menu choose **Statement Sets**.
2. From the **Tools** menu choose **Audit Managers**.
3. Click **Add** to select a user.

Related topics

User Accounts

Assign a statement manager

Statement managers can create, delete and modify statements for statement sets that they are assigned to as statement managers. Statement managers can also create, view, edit and delete activity statement links for statements within the statement sets that they are statement managers.

Note: Statement managers can only be assigned to process authors by administrators and statement set managers.

---

1. From the **Tools** menu choose **Statement Sets**.
2. Right-click the statement set where you want to assign a statement manager and choose **Statement Managers**.
3. Click **Add** to select a user.

   Note: To remove a user as a statement manager, select the user and click **Remove**.

Related topics

User Accounts

Creating Statement Sets and Statements

Create a statement set

See About statement sets for information.

Note: Only administrators and statement set managers can create statement sets.

---

1. From the **Tools** menu choose **Statement Sets**.
2. From the **File** menu choose **New**.
3. Enter a name and description for the statement set.

   Include Risk Items allows you to assign a risk factor to a particular statement within a statement set.

   Allow statement-links to be added via web allows users to add statements to the statement set in the web server and link them to activities.

   Show statement level numbers will display the number, hierarchically ordered, of each statement when the statement set is viewed.

   Allow statement attachments to be accessible from Activities will allow statement attachments to be directly accessible as an attachment/link when a statement set is associated with an activity.

   Include statement set name in SAP transaction link titles on diagrams will automatically append the statement set name onto transaction link titles for statement attachments that are accessible from activities. For example, 'Statement Set *x* - Create Sales Order (VA03)'. **Note:** The **Allow statement attachments to be accessible from Activities** option must be enabled.

   Auto select child statements when adding a statement link will automatically select any associated child statements that exist for particular statements when linking statements with activities.

Data Tables

You can allow users to add extra information to statement records by associating statement sets with data tables. For more information see Storing additional information for statement records.

Advanced

Automatically create activity statement links based on associated statements will automatically add any linked statements to an activity when creating a statement link. More... For more information on linking statement records see Link a statement to another statement.

The **Linked Statements vs. Activity Links** report displays the difference between activity statement links and the other statements from associated statement sets. See Generating a report for more information.

Show statement's parent structure in details window will display a statement's parent statements in the Statement Properties window (Author Client) and the Statement Details page (Web Server). Users can click a parent statement to navigate to a particular statement.

Related topics

[Creating statements]

[Creating statement statuses]

[Creating statement links]

[Data tables]

Create a statement

See About statement sets for information.

Note: Only administrators, statement set managers, statement managers and audit managers have rights to create statements.

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that you want to add a statement to.

   Note: If you are adding a child statement to an existing statement then you must select the parent statement.
3. From the **File** menu choose **Add**.
4. Enter a name for the statement.
5. Choose a status and style for the statement.

   Note: You can create a new status or style for a particular statement.
6. Enter a description for the statement.
7. Select a risk factor if appropriate.

   Note: Risk factors will only be available if the statement set was set up to include risk factors.

To add additional information:

8. Select the Additional tab and enter any additional information that defines the statement.

   Note: Additional information refers to a data table that was associated with the particular statement set when it was created. If a data table was not associated then this tab will be blank.

To add attachments:

9. Select the Attachments tab and click **New**, then choose to attach a file or application, document link, web link, email link or SAP R/3 transaction link.
   Note: You can define viewing rights for statement attachments. Select the attachment in the Attachments tab and click **Set View Rights**. The Scope panel allows you to define viewing rights for the selected attachment only or all attachments associated with the statement. Click **Add** to add users.

   More info on Access Rights...

To link statements:

10. Select the Linked Statements tab and click **Add a linked statement**.
11. Select the statement set on the left, then select the checkboxes of the statements that you want to link to.

    Note: To unlink statements, select the statement(s) and click **Remove selected links**.

Related topics

Creating statement sets

Creating statement styles

Creating statement statuses

Automatically linking SAP transaction links

Defining statement managers

Linking statements to other statements

Deleting statements and statement sets

Customizing and editing statements

Searching for statements

Adding statement change logs

Adding statement audit records

Adding statement link audit records

Copy a statement between statement sets

A statement can be copied to another statement within the same statement set or between statement sets. When a statement is copied to another statement it will become a sub-statement of the target statement, i.e. a level down.

---

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that includes the statement that you want to copy.
3. Select the statement and from the **Tools** menu choose **Duplicate**.
4. Select the statement set and the statement that you want to copy the statement to.
5. Click **OK**.

Delete a statement or statement set

To delete a statement set:

1. From the **Tools** menu choose **Statement Sets**.
2. Right-click the statement set and choose **Delete**.

To delete a statement:

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that includes the statement that you want to delete.
3. Right-click the statement and choose **Delete**.

Create a statement status

You can apply a status to statements within a statement set, for example Active, In Progress, Ignore, Complies, etc.

---

1. From the **Tools** menu choose **Statement Sets**.
2. Select the statement set that you want to define a status for and from the **Tools** menu choose **Statement Statuses**.
3. From the **File** menu choose **New** and enter the status name.

Related topics

Creating statement styles

Defining Statement Styles

Create a statement style

Different styles can be used to differentiate statements within a statement set, for example you may want to underline the more important statements or highlight them in a different color.

1. From the **Tools** menu choose **Statement Sets**.
2. From the **Tools** menu choose **Styles**.
3. From the **File** menu choose **New**.
4. Enter a name to describe the style.
5. Choose any effects that you want to define the text by from bold, italic, underline or strike-through.
6. Choose a color from the color palette.

Related topics

Creating statement statuses

Defining custom colors

Defining statement style rules

Define statement style rules

Style rules can be defined for specific statement sets that will automatically apply a particular style to a statement based on a statement's status or an associated data table field value. Statement style rules will override existing statement styles that have been applied.

Note: Only administrators, statement set managers and statement managers (of a particular statement set) can define and edit statement style rules.

1. From the **Tools** menu choose **Statement Sets**.
2. Select the statement set that you want to define a style rule for.
3. From the **Tools** menu choose **Style Rules**.
4. From the **File** menu choose **New**.
5. Enter a name to describe the statement style rule.

    Active will make the statement style rule active. Deselect this checkbox to prevent the rule from being applied, i.e. to render it inactive.

6. Choose a style from the **Style** drop-down list.

    Note: See Creating statement styles for more information on creating statement styles.

7. Enter a description for the style rule, if required.
8. Click the Filter tab.
9. From the **Criteria** drop-down list choose an operator.
10. From the Value panel select either **Status** or **Data Table Field**.
11. From the respective drop-down list (for the option selected above) choose a status value or data table field.

    Note: If you are using a data table field then choose a value, date or enter a value (in the box below the drop-down list) that will define the style rule.

12. Click **OK**.

To disable a statement style rule:

1. From the **Tools** menu choose **Statement Sets**.
2. Select the statement set that you want to disable the style rule for.
3. From the **Tools** menu choose **Style Rules**.
4. Right-click the statement style rule that you want to disable and choose **Properties**.
5. Deselect the **Active** checkbox.
6. Click **OK**.

To delete a statement style rule:

1. From the **Tools** menu choose **Statement Sets**.
2. Select the statement set that you want to delete the style rule for.
3. From the **Tools** menu choose **Style Rules**.
4. Right-click the statement style rule that you want to delete and choose **Delete**.

   Hint: To delete multiple style rules, hold **Ctrl** and select the style rules, then from the **File** menu choose **Delete**.

Related topics

Creating statement statuses

Creating statement styles

Defining custom colors

Linking Statements

Create a statement link

Statements can be associated with activities by administrators, statement set managers and statement managers. Process authors can also add statements to activities in the web server to activities that are currently unlinked to any statements (see Linking To Statements In The Web Server below).

Note: If an activity is copied that has is linked to a statement, the statement link is also copied. However, associated audit records are not copied as they are only valid in the original context in which they were created.

1. Right-click the activity and choose **Statement Links**.
2. From the **File** menu choose **New**.
3. Select the statement set (on the left).
4. Select the checkboxes for the statements that you want to link the activity to.

   Note: You can only add statements from a single statement set at a time. If a statement record is linked to another statement record in a different statement set, and the option **Automatically create activity statement links based on associated statements** is enabled for the statement set, then an activity statement link will be automatically created for the linked statement.
5. Click **OK**.

Statement Link Properties

If you have linked a single statement then the Statement Link Properties dialog is displayed. If you have selected multiple statements then you will return to the Statement Links dialog - to access the properties of a statement link, right-click the statement and choose **Properties**.

The Additional tab allows you to provide additional information relating to the statement link. **Note:** A data table must be associated with the statement set in order to allow additional information to be added to the statement link.

When viewing the properties of a statement link, you can view the details of the statement by clicking **Statement Details** .

Statement Linking Tips

You can open and edit a statement set by selecting the statement and clicking **Statements**.

Create a new statement in a statement set by selecting the statement set and clicking **Add**.

Statement links can be copied from one activity to another. Hold Alt and select the statement link, then press Ctrl-C to copy it to your clipboard. Then, select the activity that you want to copy it to and press Ctrl-V to paste it.

Click **Find** to find a specific statement within a statement set.

Linking to Statements in the Web Server

Administrators and process authors (who are either statement set managers or statement managers) can add statements to activities in the web server, even if there are no existing statement links for a particular activity.

The user group permission **Statement Link Indicators (Author)** must be enabled for a specific user group in order for members to use this functionality. See Group Permissions for information on enabling user group permissions.

Related topics

Linking statements to other statements

Automatically linking SAP transaction links

Remove a statement link

Statements can be be unlinked from activities by administrators, statement set managers and statement managers.

1. Right-click the activity and choose **Statement Links**.
2. Right-click the statement that you want to remove and choose **Delete**.

Link a statement to another statement

Statements can be linked to other statements in the same statement set or a different statement set. These links work bi-directionally, i.e. when you link Statement A to Statement B, Statement B also becomes linked to Statement A. If the option **Automatically create activity statement links based on associated statements** is enabled for a particular statement set, when a statement is linked to an activity, any linked statements will also be linked to the activity automatically. See Create a statement set for more information.

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that includes the statement that you want to link to another statement.
3. Right-click the statement and choose **Properties**.
4. Click the Linked Statements tab to select it.
5. Click **Add a linked statement** 🗋.
6. Select the statement set on the left, then select the checkbox(es) of the statement(s) that you want to link to.
7. Click **OK**.

   Note: To find a specific statement click **Find**. You can also add a new statement to a statement set by selecting the statement set and clicking **Add**.

Removing Statement Links

In the Linked Statements tab, select the statement and click **Remove Statement** ✕.

Related topics

Creating statement links

Automatically link SAP transaction links

Statements can be automatically linked to SAP transaction links. This supports, for example, the use of implementing a 'SAP Business Process Master List' statement set within a process. If the statement set has the **Allow statement attachments to be accessible from Activities** option enabled then SAP transaction links will be associated with activities as attachments when statements are linked to activities, thereby providing users with direct access to the SAP transaction links.

Note: SAP R/3 integration must be enabled to create SAP transaction links. Refer to the Administration Guide that is included on the CD for more information.

Prerequisites:

1. A data table must exist which contains a data table field that allows the input of a transaction code. See Creating a data table for more information.
2. A statement set must exist that is linked to the data table that includes a transaction code field (as defined above). The data table is selected from the **Statement** drop-down list in the Data Table properties of the statement set. See Customizing or editing statements for more information.

---

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that you want to automatically associate SAP transaction links with.
3. Double-click a statement that you want to associate with SAP transaction links.
4. Click the Additional tab and enter a transaction code in the relevant field.
5. Click **OK** and repeat for all statements that you want to associate with SAP transaction links.
6. From the **Tools** menu choose **Build Transaction Links**.
7. Choose the data table field that contains the specified transaction links and click **OK**.

Related topics

Creating a data table

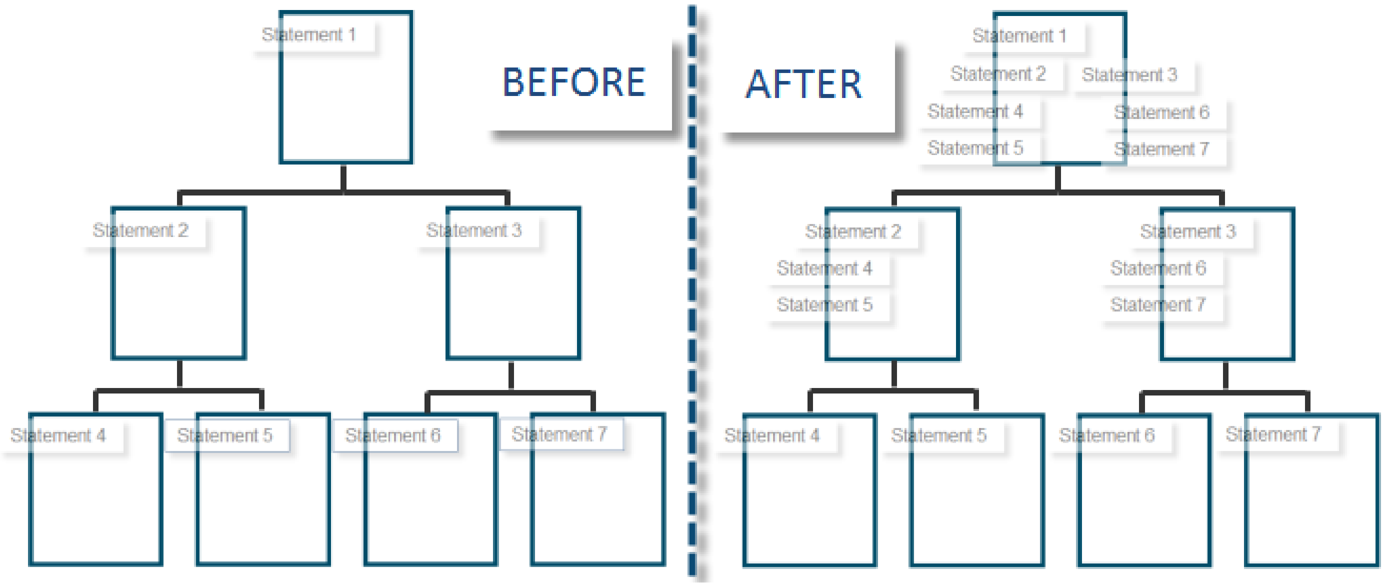
Creating a statement set

Creating statement links

Rolling up statement links

Activity statement links can be automatically rolled up and copied to all parent activities from child activities.

Note: This operation cannot be undone once completed.



1. From the **Tools** menu choose **Statement Links**, then **Rollup Statement Links**.
2. Select one of the following options:
   - **Rollup to the current diagram**
     This will copy all statement links from child activities to all parent activities up to the diagram that you are currently viewing.
   - **Rollup to the level 1 diagram**
     This will copy all statement links from child activities to all parent activities up to the level 1 diagram.
3. Click **OK**.

Running the process from the command line

The process can be run from the command line through the use of a Control Script File (.csf). **Note:** This method will always roll up statements to the level 1 diagram. Any issues will be reported in a log file, which is created in the same location as the CSF file.

Example

```
C:\Nimbus Control\Client\Ctrl.exe "E:\Nimbus Control\Process Repository"
"C:\StatementRollup.csf"
```

What is a Control Script File?

This file defines the parameters to automate a task using Nimbus Control. To create a CSF, you must create a new text file and change the file extension to .csf, for example StatementRollup.csf.

Then include the following line in the file:

ROLLUP_STMT_LINKS "<relative map path>"

For example:

ROLLUP_STMT_LINKS "C:\Nimbus Control\Process Repository\MY PROCESSES.MAP"

Related topics

[Creating statement links]

Associating Data Tables with Statement Records

Store additional information for statement records

Statement sets can be customized to allow additional information to be stored against any of the four main aspects of a statement set framework, i.e. additional fields can be added to statements, statement links and associated audit records for both statements and statement links. Linking to existing data tables allows the storage of a considerable amount of extra information, ensuring that statement sets are relative within the context of the business.

Note: Only administrators and statement set managers can create or customize statement sets.

1. From the **Tools** menu choose **Statement Sets**.
2. Right-click a statement set and choose **Properties**.
3. Click the Data Tables tab.
4. Choose a data table for the required statement set functions from the respective drop-down lists.

   Statement allows additional information to be added to statements.
   Statement audit allows additional information to be added to statement audit records.
   Link allows additional information to be added to statements when linked to an activity.
   Link audit allows additional information to be added to statement links' audit records.

Related topics

Deleting statements and statement sets

Creating statement styles

Linking Statement Records with Actions

Link a statement record with an action

Actions can be linked to statement records (statements, statement links, statement audits and statement link audits). Recurring actions templates can also be created; these will generate an action at defined intervals and assign the action to the nominated assignees.

Create an action or action template for:

Statements
Statement Links
Statement Audits
Statement Link Audits

To create and link an action to a statement:

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set to open it.
3. Right-click the statement and choose **Properties**.
4. Click the Actions tab, then click **New Action**.
5. Progress through the wizard to define the action (see below for details of the various steps).

   Recurring Action Templates

   To create a recurring action, i.e. an action that is automatically generated at regular intervals, click the Recurring Actions tab and click **New Action**. For information on editing and deleting recurring action templates click here.

To create and link an action to a statement link:

1. Right-click the activity statement link and choose **Access/Modify**.
2. Double-click the linked statement to open it.
3. Click the Actions tab, then click **New Action**.
4. Progress through the wizard to define the action (see below for details of the various steps).

Recurring Action Templates

To create a recurring action, i.e. an action that is automatically generated at regular intervals, click the Recurring Actions tab and click **New Action**. For information on editing and deleting recurring action templates click here.

To create and link an action to a statement audit record:

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set to open it.
3. Right-click the statement and choose **Audits**.
4. Double-click the statement audit record.
5. Click the Actions tab, then click **New Action**.
6. Progress through the wizard to define the action (see below for details of the various steps).

Recurring Action Templates

To create a recurring action, i.e. an action that is automatically generated at regular intervals, click the Recurring Actions tab and click **New Action**. For information on editing and deleting recurring action templates click here.

To create and link an action to a statement link audit record:

Note: Statement link audit records can only be accessed in master diagrams.

1. Right-click the activity statement link and choose **Access/Modify**.
2. Select the statement link and from the **Tools** menu choose **Audits**.
3. Double-click the statement link audit record.
4. Click the Actions tab, then click **New Action**.
5. Progress through the wizard to define the action (see below for details of the various steps).

Recurring Action Templates

To create a recurring action, i.e. an action that is automatically generated at regular intervals, click the Recurring Actions tab and click **New Action**. For information on editing and deleting recurring action templates click here.

Hint: You can also access statement link audit records from reports that display statement audit links for a statement set, for example the Activity Statement Link Audits report. Right-click an activity statement link audit record and choose **Open Audit Record**.

Properties
Enter the details of the action, including subject, owner, due date and associated categories.

Recurrence
Enter the details of how frequently the action should recur. **Note:** This applies only if you are creating a recurring action.

Assignees
Add users and user groups to complete the action.

Only require 1 assignee to complete action will allow the action owner to close the action after only one of the assignees has completed it.

Editors
Add users that are able to modify the action (editors cannot complete the action unless they are an assignee).

Viewers
Add users that are able to view the action (by default all users can view the action through Action Registry).

Description

Add any information about the action, such as the reason for carrying out the action.

Attachments

Add any attachments to further support the action, if applicable. Attachments can be file links, application links, email links, SAP transaction links, document links, storyboard links and URL links. Click **New** to add an attachment. To modify the access rights for a particular action, select the attachment and click **Set View Rights** .

Reminders and Escalation

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue action. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

Enable email reminders will send reminder emails to users until they have completed the action.

Enable SMS reminders will send reminder SMS messages to assigned reviewers until they have completed the action.

Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

Related topics

Creating and managing recurring actions

Searching for Statements

Search for a statement

Search within a statement set for statements based on a word or phrase within the statement title, description and associated data fields. This allows you to search across all statement sets for a particular term before adding a statement link to an activity, for example.

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that you want to search.
3. From the **Tools** menu choose **Find**.
4. Enter the search term or phrase.

   Note: Check the **Whole words only** checkbox to ensure that only exact matches are searched for.

Comparing Statement Sets and Statements

Compare statement sets

Statement sets can be compared for differences. This is particularly useful for statement sets imported from SAP Solution Manager, for example, as it allows you to view the differences between a current project structure and the original blueprint structure.

Statement names are compared by default and the following criteria can be compared:

- Statement Descriptions
- Statement Attachments
- Statement Statuses
- Statement Styles

To compare two statement sets:

1. From the **Tools** menu choose **Statement Sets**.
2. Select the statement set that you want to compare, then from the **Tools** menu choose **Compare**.
3. Ensure that **Compare Statement Sets** is selected.
4. Click **Select** ... for the Target Statement Set.
5. Click the Criteria tab and select or deselect any of the statement set criteria to compare.
6. Click **OK**.

To compare two statements:

1. From the **Tools** menu choose **Statement Sets**.
2. From the **Tools** menu choose **Compare**.
3. Select **Compare Individual Statements**.
4. Click **Select** ... and select the source and target statements from the relevant statement sets.
5. Click **OK**.

Comparison Report

A report is generated that displays any differences between the two statement sets. Right-click any row to view a difference log, the properties of the source or target statement, or to expand or collapse any child statements belonging to a particular parent statement.

Color codes

No change
Changed
Target/source statement not found

Related topics

Copying statement links between statement sets

Importing statement sets from SAP Solution Manager

Importing statement sets from CSV

Importing statements sets from BPM-Xchange

Copying Statement Links

Copy statement links between statement sets

Following a statement set comparison, statement links can be copied from one statement set to the other. As an organization, you may have multiple hierarchical project structures within Solution Manager, all of which can be imported into Nimbus Control as separate statement sets. Nimbus Control allows you to copy activity statement links between the various projects.

Note: Activity statement links will only be copied between matching statements in the source and target statement sets. Data table field values are also copied, but only if the source and target statement sets are linked to the same data table definition.

1. Generate a comparison report between the two statement sets that you want to copy the activity links between.
2. In the Statement Comparison window, from the **Tools** menu choose either **Copy Activity Links (Source to Target)** or **Copy Activity Links (Target to Source)**.

Related topics

[Comparing statement sets]

[Importing statement sets from SAP Solution Manager]

[Importing statement sets from CSV]

[Importing statements sets from BPM-Xchange]

Copying Statement Link Data to Activities

Copy statement link data to activities

Data table values from statement links (for a nominated statement set) can be copied to all linked activities across a specified scope of diagrams. New data table attachments are created on any activities related to the statement links.

Note: This operation is only available to administrators and statement set managers.

1. From the **Tools** menu choose **Statement Links**, then **Copy Statement Link Data to Activities**.
2. Choose the statement set to copy data from.
3. Choose the scope of diagrams for the operation.
4. Click **OK**.

Related topics

[Copy statement links]
[Store additional information with statement records]

Statement Audit Records and Change Logs

Add a statement change log

Statements are tracked using change logs. Statement managers and administrators can also manually add, delete and modify manual change log records. Records are automatically created for the following actions:

- Statement creations
- Statement name changes
- Statement status changes
- Data table field value changes

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the relevant statement set, then select the statement that you want to create a log against.
3. From the **Tools** menu choose **Change Log**.
4. Click **Add**.
5. Enter the details of the change and click **OK**.

Add a statement audit record

Audit records can be associated with statements to track information relating to compliance audits. Only administrators and statement set managers can add statement audit records.

Two types of audit records exist:

- Statement audit records (these relate directly to a statement)
- Activity/statement link audit records (these relate to the activity in which a statement is linked

1. From the Tools menu choose **Statement Sets**.
2. Double-click the relevant statement set, then select the statement that you want to create an audit record for.
3. From the **Tools** menu choose **Audits**.

4. Click **New statement audit** .
5. In the General tab choose a status and enter a description for the statement audit.
6. In the Additional tab enter, or select, any further information relating to the audit record.
7. In the Attachments tab attach any documents that provide further information relating to the audit record.
8. Click **OK**.

Audit Logs

When any field in an audit record is changed, an audit log is automatically generated. Audit logs cannot be modified by any user and logs will store the date, time and description of the change. To view the audit log for a particular statement audit record, right-click the statement link audit record and choose **Properties**, then click the Audit Log tab.

Add a statement link audit record

Audit records can be added to statement links to ensure that all related information is stored in the context of the statement link.

Important Note: You can only add audit records to statement links in master maps.

1. Right-click the statement link on the activity and choose **Access/Modify**.
2. Select the statement link and from the **Tools** menu choose **Audits**.
3. From the **File** menu choose **New**.
4. Choose an audit status from the **Status** drop-down list.
5. Enter any details of the audit record in the **Description** text box.

Accessing statement link audit records

Audit records can be quickly accessed from reports that display statement audit links for a particular statement set, for example the Activity Statement Link Audits report. After generating the report, right-click an activity statement link audit record and choose **Open Audit Record**.

Audit Logs

When any field in an audit record is changed, an audit log is automatically generated. Audit logs cannot be modified by any user and logs will store the date, time and description of the change. To view the audit log for a particular statement link audit record, right-click the statement link audit record and choose **Properties**, then click the Audit Log tab.

Create an audit status

You can apply a status to statement audit records and statement link audit records.

1. From the **Tools** menu choose **Statement Sets**.
2. From the **Tools** menu choose **Audit Statuses**.
3. From the **File** menu choose **New**.
4. Enter a name for the audit status and click **OK**.

Related topics

Adding statement link audit records

Adding statement audit records

Creating statement statuses

Viewing audit records

A quick way to view statement audit records and activity statement link audit records is through the Statement Compliance Report and the Statement Link Audits reports.

1. Run a Statement Compliance Report or a Statement Link Audits report.

   See Generating a report for more information.

2. Do one of the following:

   - If you ran a Statement Compliance Report, right-click a statement and choose **Statement Audits**.

   OR

   - If you ran a Statement Link Audits report, right-click an activity statement link record and choose **Open Audit Record**.

Related topics

Adding statement link audit records

Adding statement audit records

Generating a report

Packaging Statement Sets

Package a statement set

Statement sets can be packaged to include all statement records, file attachments, data table records and statement style rules and then transferred to another process repository. If you want to transfer a process map and its linked statements then you first have to transfer the appropriate statement sets before transferring the process map (i.e. unpack the statement sets before unpacking the process map).

1. From the **Tools** menu choose **Statement Sets**.
2. Click the statement set to highlight it.
3. From the **File** menu choose **Package**.

Related topics

Unpacking statement sets

Unpack a statement set

Statement sets can be packaged to include all statement records, file attachments and data table records and then transferred to another process repository. If you want to transfer a process map and its linked statements then you first have to transfer the appropriate statement sets before transferring the process map (i.e. unpack the statement sets before unpacking the process map).

Note: Linked file attachments are stored in the Process RespositoryATTACH folder.

1. From the **Tools** menu choose **Statement Sets**.
2. Click the statement set to highlight it.
3. From the **File** menu choose **Unpack**.

Related topics

Package a statement set

Comparing statement sets

Importing Statement Sets

Import a statement set from CSV

Existing statement sets in CSV format can be imported into Nimbus Control in order to centralize all compliance records and link them directly to the business processes. See the examples below for information on how the CSV file should be structured.

1. From the **Tools** menu choose **Statement Sets**.
2. Click the statement set to highlight it.
3. From the **File** menu choose **Import from CSV file**.
4. Click **File Browse** and locate the file.
5. Specify the maximum number of levels in the statement set.
6. Select the following options, if appropriate:

   Populate each statement record's data table will create an associated data table containing the additional data (Data1, Data2 and Data3 in Example 1 below) for each statement record generated in the statement set.

   Include statement descriptions will import any statement descriptions that are defined in the imported CSV file (see Example 2 below for information on how to include statement descriptions).

Example 1 - Importing statement sets without statement information

The format of a 3-tier statement set is:

Level 1,Level 2,Level 3,Data 1,Data 2,...,Data n.

The first row of the file constitutes the names of the statements and data columns within the statement. Proceeding rows are treated as the actual statement names and corresponding data.

The following is an example of the structure of a CSV file relating to a statement set:

```
Level1,Level2,Level3,Data1,Data2,Data3
Example1,,,r1 d1,r1 d2,r1 d3
,Example1.1,,r1.1 d1,r1.1 d2,r1.1 d3
,,Example1.1.1,r1.1.1 d1,r1.1.1 d2,r1.1.1 d3
,Example1.2,,r1.2 d1,r1.2 d2,r1.2 d3
Example2,,,r2 d1,r2 d2,r2 d3
,Example2.1,,r2.1 d1,r2.1 d2,r2.1 d3
,,Example2.1.1,r2.1.1 d1,r2.1.1 d2,r2.1.1 d3
,Example2.2,,r2.2 d1,r2.2 d2,r2.2 d3
,Example2.3,,r2.3 d1,r2.3 d2,r2.3 d3
,,Example2.3.1,r2.3.1 d1,r2.3.1 d2,r2.3.1 d3
```

Example 2 - Importing statement sets with statement information

It is possible to specify descriptions of statements and when imported, this information will be included in an associated data table, with each statement record having

The format of a 3-tier statement set is:

Level1,Level1Description,Level2,Level2Description,Level3,Level3Description,Data1,Data2,Data3

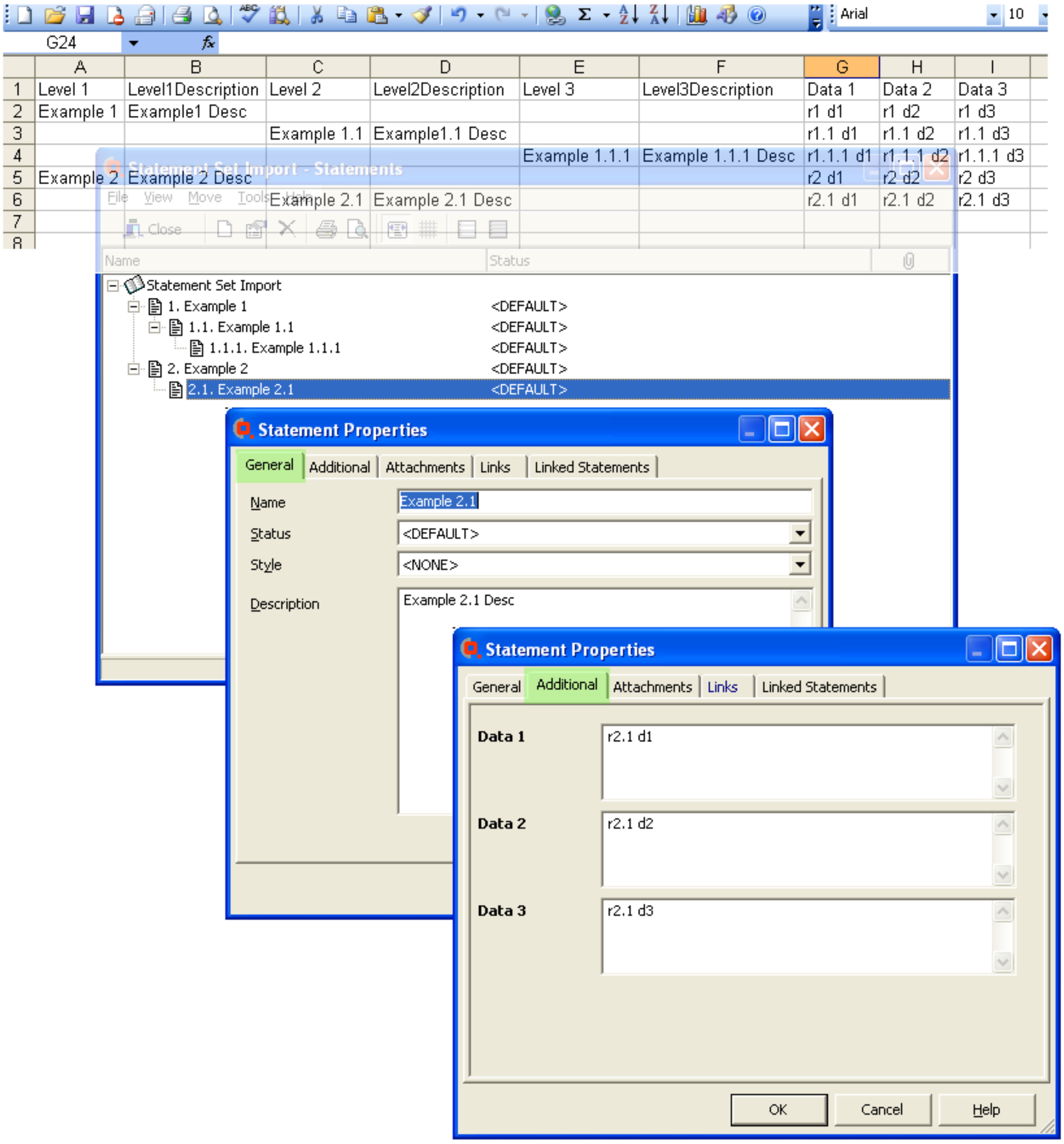
The following is an example of the structure of a CSV file relating to a statement set that incorporates information about the statements:

Level1,Level1Description,Level2,Level2Description,Level3,Level3Description,Data1,Data2,Data3
Example1,**Example1 Statement Description**,,,,,r1 d1,r1 d2,r1 d3

,,Example1.1,**Example1.1 Statement Description**,,,r1.1 d1,r1.1 d2,r1.1 d3
,,,,Example1.1.1,**Example1.1.1 Statement Description**,r1.1.1 d1,r1.1.1 d2,r1.1.1 d3
,,Example1.2,**Example1.2 Statement Description**,,,r1.2 d1,r1.2 d2,r1.3 d3
Example2,**Example2 Statement Description**,,,,,r2 d1,r2 d2,r2 d3
,,Example2.1,**Example2.1 Statement Description**,,,r2.1 d1,r2.1 d2,r2.1 d3

.....and so on

Click the image below to see an example



Import a statement set from BPM-Xchange

Statement sets can be imported and updated from BPM-Xchange (XML) files that have been exported from other applications. Any associated properties will be imported as data table fields and connections will be imported as statement links.

Note: This option is only available to administrators and statement set managers.

1. From the **Tools** menu choose **Statement Sets**.
2. From the **File** menu choose **Import from BPM-Xchange**.

3. Click **Browse** to locate the XML file that you want to import as a statement set.

4. Select one of the following options:

   Import Diagram Structure from XML file will use the diagram structure IDs as the statement names.
   Import Folder Structure from XML file will use the folder structure IDs as the statement names.

5. Select **Create new statement set** or **Update existing statement set**.

Updating Statement Sets

If you are updating an existing statement set then choose the statement set to update from the **Statement Set** drop-down list. If statements exist in the current statement set that you are updating but do not exist in the XML file, you can choose to keep these statements by selecting **Keep statements that don't exist in the XML file**. If this option is deselected then any extra statements in the statement set will be deleted.

Advanced Options

Click the Advanced tab to access more options. In the Advanced tab you can specify a different property to be used for the statement names (the default is PT_NAME) and specify a different default language.

Name Property allows you to change the property that is used for the statement names.

Default Language allows you to specify a different default language.

Read statement descriptions from the Property elements allows you to populate the statement description field with the information from a specified property.

6. Click **OK**.

Import a statement set from SAP Solution Manager

Importing statement sets from SAP Solution Manager can be run as both a scheduled operation and manually by users with the appropriate access rights. When updating an existing statement set, an XML file will be created that can contain URL links back to any master and/or draft diagrams that are linked to any of the statements. When this file is read back into SAP Solution Manager the URL links are added to the respective nodes. You can choose whether to export diagram URLs to either the Project Documentation tab, the General Documentation tab or both the Project and General Documentation tabs in SAP Solution Manager.

Styles applied to SAP Transaction Type Nodes

A statement set style - **SAP Transaction Nodes** - will be created and applied to all SAP Transaction type nodes upon import. By default, SAP Transaction type nodes will be highlighted in green, however this can be modified by editing the style (in the Statement Sets window, from the Tools menu choose Styles, then double-click the SAP Transaction Nodes style).

Nimbus Control administrators and **statement set managers** only.

Reports based on SAP transaction links

Reports can be run to show which SAP systems and transactions are based on business processes, and which are not. You can also identify areas of the business processes that are not covered by any installed SAP systems and transactions. See Generating reports for more information.

Comparing statement sets

Two statement sets can be compared in Nimbus Control. This is useful if you want to view the changes that have occurred in specific project structures when compared against the original business blueprint structure. See Comparing statement sets for more information.

To create a new statement set:

1. From the **Tools** menu choose **Statement Sets**.

2. From the **File** menu choose **Import from SAP Solution Manager**.

3. Click **Browse** to locate the XML file that you want to import as a statement set.

4. In the Options panel, click in the **Statement Set Name** text box and enter a name for the statement set.

Include statement set name in SAP transaction link titles on diagrams will automatically append the statement set name onto transaction link titles for statement attachments that are accessible from activities. For example, 'Statement Set *x* - Create Sales Order (VA03)'. **Note:** The **Allow statement attachments to be accessible from Activities** option must be enabled for a specific statement set - see Automatically linking SAP transaction links for more information.

Create / Update Solution Manager End User Roles will create a statement set called SAP End User Roles statement set (assuming the Organizational Unit information is available). This is essentially a list of user names with links to the SAP Solution Manager-type statement set nodes.

5. Click **OK**.

To update an existing statement set:

Existing statement sets can be updated. **Note:** Existing documents and URLs will be overwritten. If a document or URL attachment exists in Nimbus Control but not in the XML import file then it will be removed.

1. From the **Tools** menu choose **Statement Sets**.
2. From the **File** menu choose **Import from SAP Solution Manager**.
3. Click **Browse** to locate the XML file that you want to import as a statement set.
4. In the Options panel, select **Update an existing statement set** and choose a statement set from the **Statement Set** drop-down list.

Keep a copy of the existing version will create a backup of the existing statement set before applying the changes.

Include statement set name in SAP transaction link titles on diagrams will automatically append the statement set name onto transaction link titles for statement attachments that are accessible from activities. For example, 'Statement Set *x* - Create Sales Order (VA03)'. **Note:** The **Allow statement attachments to be accessible from Activities** option must be enabled for a specific statement set - see Automatically linking SAP transaction links for more information.

Create / Update Solution Manager End User Roles will create or update the 'SAP End User Roles' statement set (assuming the Organizational Unit information is available). This is essentially a list of user names with links to the SAP Solution Manager-type statement set nodes.

Export Options

These options allow you to create a XML file that can be imported back into SAP Solution Manager in order to update diagram (URL) links.

Select **Export usage data to XML file** and click **Browse** to select the XML file to update.

Activity Statement Links allows you to choose to export activity statement links from either master diagrams, draft diagrams or both master and draft diagrams.

Solution Manager Tab allows you to choose whether to export diagram URLs to either the Project Documentation tab, the General Documentation tab or both the Project and General Documentation tabs in SAP Solution Manager.

5. Click the Advanced tab and define viewing rights for document, transaction and blueprint links.

Document View Rights apply to all imported document and URL link attachments.

Transaction View Rights apply to all imported transaction link attachments.

Blueprint View Rights apply to blueprint-style SAP transaction links (these are automatically generated during the Solution Manager Statement Set import routine).

6. Click the Defaults tab and specify the default Base URLs and SAP Systems for the SAP transaction links and SAP blueprint transaction links, if appropriate.

Note: These will apply to all SAP transaction links that are automatically created during the SAP Solution Manager import routine. If no values are specified then the settings defined in individual users' SAPLogon.ini files will be used to launch related transaction links.

7. Click **OK**.

To schedule importing from SAP Solution Manager:

The import routine can be run as a Windows scheduled task, such as overnight or once a week, following the completion of the export from SAP Solution Manager.

In the Statement Sets dialog, from the **File** menu choose **Scheduled Import from SAP Solution Manager**. Click **New**

Schedule . Define the scheduled task from the following:

Scheduled Item includes the details of the import task. You can either define a scheduled task for creating a new statement set or updating an existing one (see above).

Scheduled Item Name is the name as it appears in the Scheduled Tasks Manager.

Send Notification To allows you to define a user or user group to notify upon completion or failure of the scheduled task. Click **Select** to find a user.

Schedule Information requires you to define the schedule details, such as start time, occurrence, etc. Click **Configure** to define the import schedule.

Import Logs

An import log is generated and stored in ...Process Repository\System\Logs folder. This will report on any issues with an import or export.

Related topics

Automatically linking SAP transaction links to statements

Comparing statement sets

Importing SAP Usage Data

Importing SAP Usage Data

Import SAP usage data

SAP Solution Manager-based statement sets can be updated with information on SAP transaction usage by users. This information can be captured from a SAP profiling service and used to supplement an existing SAP Solution Manager statement set. Two fields will be added to the statement set's associated data table - **Used** (indicates whether or not a SAP transaction has been used) and **Monthly Frequency** (displays the total monthly usage across all instances of the SAP transaction).

Note: The SAP profiling service is provided by Nimbus' partners ECL and HRW. Profiling involves analyzing the SAP system audit trail data and generating reports to meet customers' needs. A data file can also be generated and imported into Nimbus Control.

SAP End User Roles (Actual) Statement Set

When SAP usage data is first imported, an additional statement set will be created - 'SAP End User Roles (Actual) - <*Statement Set*>. This statement set is essentially a list of SAP user names derived from the import file. The statements will be linked to the appropriate SAP transaction-type statements in the specified SAP Solution Manager-type statement set. For subsequent data imports, the statement set will be updated.

Reporting

A report is available which is based on activity statement links to the selected SAP Solution Manager-type statement set, including any linked statements, i.e. the SAP End User Roles (Actual) - <*Statement Set*> statements. When viewing the SAP Solution Manager-type statement set, from the **Tools** menu choose **Reports**, then choose **SAP End User Roles (Actual)**.

---

1. In the Statement Sets dialog, from the **File** menu choose **Import from SAP Usage**.
2. Click **Browse** to select the data file to import.
3. Choose the SAP Solution Manager statement set to apply the SAP usage data to.
4. Click **OK**.

Creating Maps from Statements Sets

Create a map from a statement set

Maps can be created from all statements in a statement set or from a subset of statements. Activity statement links, flow lines between activities and activity data table attachments can be included in the generated map. First-level statements will form the first-level map and sub-statements will create child diagrams from the respective activities.

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that you want to create a map from.
3. From the **Tools** menu choose **Build Map**.
4. Select the options on the General tab that are to be included in the map.

   Create statement links on each activity links each activity directly to the corresponding statement in the map (use the Additional tab to set the initial values for the statement link data fields).

   Create flow lines between activities will link all activities with flow lines in the order that they appear in the list.

   Create a data table attachment on each activity will create data table attachments on each activity for any data tables associated with statements.

   Create SAP transaction links for transaction nodes will convert transaction node statements into transaction links on the parent activity. If this option is disabled then transaction node statements will be created as individual activities in lower-level diagrams.

5. Choose the scope of statements to create the map from.

   All child statements of selected statement will create a map from the child diagrams of the statement that was highlighted when the Build Map option was selected (but does not include the actual highlighted statement).

   All statements will create a map from all statements in the statement set.

6. From the Style panel, choose the style sheet and template to apply to the map. **Note:** These are optional.
7. If you have chosen to create statement links on each activity then you can set the values for the statement link data fields in the Additional tab.

Related topics

Creating a statement set from a map

Creating Statement Sets from Maps

Creating Statement Sets from Maps

Statement sets can be created and updated from process maps.

Business Rules:

- You must have a map open at the top-level source diagram (i.e. the diagram that will be level 1 of the statement set)
- When creating a new statement set, activities in child diagrams will be created as child nodes in the statement set (for example, the first activity in the child diagram to the current top-level diagram will be statement number 1.1)
- Statement names must be unique, therefore if duplicate text exists on activities, incremental numbers are appended onto duplicate statement names
- The activity's list of resources and information in any notes bubbles are imported into the statement's descriptions
- When updating a statement set, all existing imported attachments will be removed in the statement set and replaced by the attachments in the map
- A backup of the existing statement set is taken and stored in ...\System\Statements\Backup\

To create a new statement set from a map:

1. From the **Tools** menu choose **Statement Sets**.
2. From the **File** menu choose **Import from Map**.

3. Click in the **Statement Set Name** text box and enter a name for the statement set that you are creating.
4. Select or deselect the following options:

    Copy attachments from Activities to Statements will copy attachments from the activities in the map to the related statements ▸More info...

    Create statement links on imported activities will create statement links between the imported activities and their corresponding statement nodes

5. Choose the scope of diagrams to create a statement from, then click **OK** ▸More info...

To update an existing statement set from a map:

1. In the Statement Sets window, from the **File** menu choose **Import from Map**.
2. Select **Update existing statement set**.
3. From the **Statement Set** drop-down list choose the statement set that you want to update.
4. Select or deselect the following options:

    Keep deleted statements will keep any statements in the existing statement set that don't correspond to an activity in the map

    Keep a copy of the existing statement set will make a backup of the existing statement set before updating it ▸ More info...

    Copy attachments from Activities to Statements will copy attachments from the activities in the map to the related statements ▸More info...

    Create statement links on imported activities will create statement links between the imported activities and their corresponding statement nodes

5. Choose the scope of diagrams to update the statement set from, then click **OK** ▸More info...

Related topics

Creating a map from a statement set

Deleting Statement Sets and Statements

Delete a statement set

Administrators and statement set managers can delete a statement set and all associated statements will be deleted. Any activity statement links related to the statement set will be removed.

1. From the **Tools** menu choose **Statement Sets**.
2. Right-click the statement set that you want to delete and choose **Delete**.

Delete a statement

Administrators, statement set managers and statement managers can delete a statement . Any activity statement links relating to a deleted statement will be removed.

1. From the **Tools** menu choose **Statement Sets**.
2. Right-click the statement set that you want to delete and choose **Delete**.

Related topics

Purging statement records (based on data table field data)

Purge statement records

Administrators and statement set managers can delete statements from a statement set based on defined data table values that are associated with statements.

Method

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click the statement set that you want to purge statements from.
3. From the **Tools** menu choose **Purge**.
4. Choose the field, criteria and enter a value from the respective fields.

   Note: Nimbus Control will create a backup of the statement set prior to purging by default. Before committing the purge you will be asked where to save the backup. If you need to retrieve the backup then you can do so by unpacking it. If you are certain of your action then deselect **Backup statement set before purge**.

5. Click **OK**.

Related topics

Delete a statement

Reporting on Statement Sets

Run a statement set report

There are a number of reports that can be run against a particular statement set.

To run a statement set report:

1. From the **Tools** menu choose **Statement Sets**.
2. Double-click a statement set to open it.
3. Do one of the following:
   - If you are reporting on all statements in the statement set, from the **Tools** menu choose **Reports**.
   - If you are reporting on a single statement, or a statement and associated child statements, first click the statement to select it, then from the **Tools** menu choose **Reports**.
4. Select the report criteria from the following:

   Report requires you to select the report type to run (**Hint:** click a report type to display a description of the report in the Report Description field below).

   Status allows you to specify a particular statement style to report on, i.e. only statements with a selected statement will be returned in the report.

   Scope allows you to report on all statements in the statement set, a selected statement or a selected statement and associated child statements (**Note:** If you did not select a statement in Step 3, you can only report on all statements within the statement set).

5. Click **OK** to run the report.

   Note: If the statement set is associated with one or more data tables, a Data Report Wizard dialog will be displayed. This allows you to filter any of the data table fields in the generated report. Double-click a field that you want to filter, then choose a filter operator and enter a filter value. Click **OK** to apply the filter. Repeat this process for other fields, as required, then click **Generate Report**.

Statement and Statement Link Audit Records

You can view all audit records for a particular statement from certain reports by right-clicking the statement and choosing **Statement Audits**. For reports that include information about audit records, such as the Statement Audits report, you can open and edit an audit record by double-clicking it.

Chapter 7

Storyboards

Storyboards

About storyboards

Storyboards provide a means of guiding users through series of activities that constitute end-to-end processes.

Storyboards are useful for:

- System implementation support testing
- Training aids
- Highlighting process changes
- Highlighting relevant areas to users within a large process.

Storyboard Roles

Assign a storyboard manager

The role of storyboard manager allows process authors to create, delete and modify storyboards. Administrators are storyboard managers by default.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Double-click the user.
3. In the Settings tab select the **Storyboard Manager** checkbox.

Related topics

About storyboards

Creating Storyboards

Create a storyboard

Storyboards provide a means of guiding users through series of activities that constitute end-to-end processes. **Note:** Only administrators and storyboard managers can create storyboards.

1. From the **Tools** menu choose **Storyboards**.
2. From the **Edit** menu choose **New**.
3. Define the storyboard through the following tabs:

Properties

Title is the name of the storyboard.
Owner is the user that is responsible for maintaining the storyboard. To change the owner click **Select User** ... .
Expiry Period if Downloaded (in weeks) is the number of weeks that the storyboard is available for download. After this time the storyboard will expire. Users will be required to download the storyboard again once it has expired. To disable the expiry period, enter **0** as the value.

Access

Here you can define the default user access rights and specific user and user group rights. To add a specific user or user group click ✚. Once assigned, double-click the user or user group to change the access rights if necessary.

Read and write allows users to view and edit a storyboard.
Read only allows users to view but not edit a storyboard.
Access Denied prevents users from viewing and editing a storyboard.

Change Log

Any change to the owner of a storyboard will be automatically logged in the change log. If you want to add a change log, for example if a step has been added or removed, click **Add** and enter the details.

Acknowledgements

Acknowledgement of a storyboard can be requested for assigned users (mandatory users). The item will appear in users' To-do lists.

First you must assign mandatory users. Click **Mandatory Users** to select the users that you want to assign. Once the mandatory users are assigned you can send the acknowledgement request by clicking **Request Acknowledgement**.

Note: You cannot assign mandatory users until the storyboard has been saved for the first time. Once the storyboard has been saved, in the Storyboard Management dialog right-click the storyboard and choose **Properties**, then click the Acknowledgements tab.

See About managing storyboards for more information.

Cover Image

Change the storyboard cover image that appears in users' mobile players.

tibbr Integration

Create a tibbr subject based on the storyboard title. Select **Create tibbr subject for this storyboard**. The subject text will be automatically generated based on the title of the storyboard. This can be edited in the **Name of tibbr subject to be created** field if required.

4. Click **OK**.
5. From the **Action** menu choose **Record**.

   You are now in record mode.

   Note: To show only the action toolbar, from the **View** menu choose **Hide List When Recording**.
6. Click each activity that you want to appear in the storyboard.

   Each activity will be sequentially recorded, i.e. the first activity you select will be step number 1 and so on. You can navigate to other diagrams in the current map or to diagrams in other maps within the current process repository.
7. From the **Action** menu choose **Stop**.

   Storyboards can be edited. For example, commentary text can be added to specific steps, steps can be reordered, added or removed, etc. For more information see Editing a storyboard.

> **Configuring the Look and Feel of Storyboards**
>
> The look and feel of storyboards can be modified using the Web Color Configuration tool (found in the Utilities folder on the installation CD). For more information see the Classic Web Server Branding PDF that is included in the Documents folder on the installation CD.

Related topics

About storyboards

About My Searches

Editing storyboards

Storyboard preferences

Redirecting storyboard steps

Linking a storyboard to an object

Linking two storyboards

Performing an integrity check

Assigning roles to storyboards

Importing and exporting storyboards

Create a storyboard folder

Storyboard folders can be created and used to organize storyboards. **Note:** Only administrators and storyboard managers can create storyboard folders.

1. From the **Tools** menu choose **Storyboards**.
2. From the **Edit** menu choose **Create Folder**.
3. In the Folder Name box enter the name of the folder.

Folder Access

This tab allows you to define the default user access rights and specific user and user group rights of a storyboard folder. To add a specific user or user group click . Once assigned, double-click the user or user group to change the access rights if necessary.

Read and write allows users to view and edit a storyboard folder.
Read only allows users to view but not edit a storyboard folder.
Access Denied prevents users from viewing and editing a storyboard folder.

Hint: Storyboards can be dragged and dropped between storyboard folders.

Related topics

About storyboards

Creating storyboards

Storyboard preferences

Defining Access Rights

Define Access Rights

You can define default and specific access rights for storyboards.

More info on Access Rights...

1. From the **Tools** menu choose **Storyboards**.
2. Right-click the storyboard and choose **Properties**.
3. Click the Access tab.
4. Select the default access rights.
5. Click **Add** to select a user or user group.

Read and write allows users to view and edit a storyboard.
Read only allows users to view but not edit a storyboard.
Access Denied prevents users from viewing and editing a storyboard.

Storyboard Preferences

Storyboard preferences

Storyboard viewing preferences can be set to define how the storyboard appears when it is played.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **File** menu choose **Preferences**.

Options

Interval is the pause, in seconds, between each step when the storyboard is played.

Always reset notes for each step will only display the notes window for steps that have associated notes. If this option is not selected then the notes window will remain visible for all steps, even if they do not have associated steps.

Include diagram steps when recording will include all navigation steps in the recording of a storyboard, for example steps that relate to accessing a lower level. If this option is not selected then only steps involving activities will be included.

Colors

The colors tab allows you to change the playback and step commentary colors.

Click **Select color** for each respective option that you want to modify.

Related topics

About storyboards

Creating storyboards

Creating storyboard folders

Editing Storyboards

Edit a storyboard

Storyboards can be edited, for example to add, remove or reorder steps, add step commentary, define key steps, etc. **Note:** Users must have the correct access rights in order to edit a particular storyboard.

To access the storyboard edit dialog:

To access the storyboard edit dialog:

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Edit**.

To add step commentary text:

Step commentary text provide context to a step in order to assist users in completing an activity.

1. Right-click the step and choose **Step Commentary Text**.
2. Select one of the following options:

   Use activity commentary text as step commentary displays the commentary text from the activity.

   Reuse existing step commentary already defined on the activity allows you to use the commentary text from any step that references the same activity, either in the same storyboard or in another storyboard. Select a storyboard step from the drop-down list.

Override activity commentary text and enter custom step commentary allows you to define and display custom step commentary text. Click in the text box below this option and enter the commentary text.

3. Click **OK** .

   Note: To spell check, from the **Tool** menu choose **Check Spelling**.

To define key steps:

Indicating that a step is a key step will highlight the step when users play the storyboard in the web server.

1. Right-click the step and choose **Key Step**.

To reorder steps:

Steps can be reordered in a storyboard.

1. Select a step and from the **Edit** menu choose **Move Up** or **Move Down**.

Related topics

About storyboards

Storyboard Preferences

Copying storyboards

Deleting storyboards

Add a change log

When making edits to a storyboard, change logs can be manually added for audit purposes.

1. From the **Tools** menu choose **Storyboards**.
2. Right-click the storyboard and choose **Properties**.
3. Click the Change Log tab to access it.
4. Click **Add**.

Publishing Storyboards

Publish storyboards

To allow users to download storyboards to their mobile devices, such as their Nimbus Control Desktop Storyboard Player or their iPhone/iPod, storyboards must be published.

Note: Only Administrators and Storyboard Managers can publish storyboards. When publishing a storyboard, users must have at least **Read** access to all of the diagrams in a storyboard in order to publish it.

1. From the **Tools** menu choose **Storyboards**.
2. Hold **Ctrl** and select the storyboards that you want to publish.

   Note: If you want to publish all storyboards then you only need to select one storyboard.
3. From the **File** menu choose **Publish For Player**.
4. Select the scope of storyboards to publish.
5. In the Devices section choose the devices that you want to make the storyboards available for.
6. In the Language variants section select one or more languages to publish the storyboards in.

   Note: If a user's PC is not configured for any of the available languages, the default language will be displayed in the storyboards.

7. Click **OK**.

   All users that have at least **Read** access to the storyboards and all diagrams within the storyboards will now be able to download the storyboards to the selected published devices.

Attachments in Storyboards

The following Nimbus Control attachment types are supported in the storyboard players:

- Web Links (URLs)
- Salesforce.com Links
- Email Links
- Internal Word Processed Documents
- Internal Images
- Data Tables
- File Links
- Document Links

The following file types are supported in the iPhone player for File/Document Link attachments:

- .MP3
- .MP4
- .BMP (Bitmap image)
- .JPG (JPEG image)
- .PNG (PNG image)
- .GIF (GIF image)
- .DOCX (Microsoft Word 2007+ file)
- .DOC (Microsoft Word 97-2003 file)
- .XLSX (Microsoft Excel 2007+ file)
- .XLS (Microsoft Excel 97-2003 file)
- .PDF (PDF document)

The Desktop Storyboard Player supports all file types for File/Document Link attachments, assuming the user's PC has the relevant software installed (for example, for a user to open a Word document, they must have Microsoft Word installed).

Expiration of Storyboards

Storyboards can be set to expire after a number of weeks, after which time users will not be able to view the storyboard in their chosen mobile device. This option is set in a storyboard's properties (right-click a storyboard in the Storyboard Management window and choose **Properties**). Users will be required to download a storyboard again, once it's expired. If the expiry period is set to '0', the storyboard will never expire.

Logging of Published and Downloaded Storyboards

An audit log is available that lists publishing and downloading operations on a user basis. In the Storyboard Management window, from the **Tools** menu choose **Publishing and Downloads Log**.

Linking Storyboards

Link a storyboard to an object

You can link an object to a storyboard so that when a user accesses the link the storyboard will run. You can also specify a storyboard step for the storyboard to start at.

1. Right-click the object and choose **Attachments/Links**.
2. Click **New** and choose **Storyboard Link**.
3. Click **Select** to choose the storyboard to link to.
4. From the **Step** drop-down list choose a storyboard step to begin at.

   Note: This step is optional. You can also click **Select** to view more details and select storyboard steps.
5. Enter a title for the storyboard link.

> **User Viewing Rights**
>
> You can define who has access to the storyboard link. Click the **View Rights** tab. Define the default user access rights. To add specific users or user groups click **Add** + and then select a user or user group.

Associate an attachment or link with a particular language

By associating an attachment or link to a particular language, you can direct different attachments and links to different users based on language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

Related topics

About storyboards

Linking two storyboards

Associating keywords

Creating storyboards

Link two storyboards

Storyboards can be incorporated into other storyboards and this operation will copy all steps from one storyboard to another.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Edit**.
3. Right-click the step at the point where you want to import the storyboard steps into and choose **Insert Storyboard Link**.
4. Select the storyboard that you want to insert and click **OK**.

Related topics

About storyboards

Linking a storyboard to an object

Associating keywords

Assigning Roles to Storyboards

Assign a role to a storyboard

Roles can be associated with storyboards. This will allow users to search for storyboards related to specific roles in the web server.

1. From the **Tools** menu choose **Storyboards**.
2. Right-click the storyboard and choose **Properties**.
3. Click **Roles**.
4. In the Select Roles dialog find the resource that you want to add.

   Note: You can enter the resource name directly if you know it. You can also filter the search to the Central Resource Library or to a specific local resource library. If you want to retrieve all resources within the Process Repository then ensure the <ALL CENTRAL> group is selected and click **Find**.
5. Select a role and click **Add Resources To List** .

   Note: Select multiple roles by holding Ctrl.
6. Click **OK**.

To remove roles from storyboards:

Select the role from the list of associated roles (on the right) and click **Remove Resources From List** .

Related topics

About storyboards

About roles

Associating Keywords

Associate keywords

Keywords allow users to search for storyboards in the web server that are associated with specific keywords.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Edit**.
3. From the **Edit** menu choose **Add Keywords to Storyboard**.
4. Select the keyword and click **Add Keyword** .

   Note: Select multiple keywords by holding Ctrl.

To remove keywords:

Select the associated keywords from the right-hand pane and click **Remove Keyword** .

Related topics

About storyboards

My Searches

Assigning roles to storyboards

Copying keywords

Creating tibbr Subjects

Creating tibbr Subjects

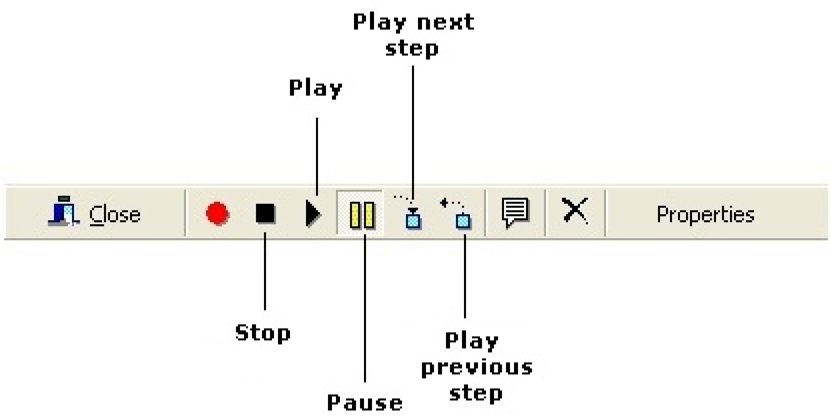
You can automatically create tibbr subjects from selected storyboard titles.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboards that you want to create tibbr subjects from.
3. Right-click a selected storyboard and choose **Add subject(s) to tibbr**.

Playing Storyboards

Play a storyboard

Storyboards can be played back in the client. There are two playback modes - manual and automatic. Manual playback requires a user to manually step through the storyboard. Automatic playback will automatically proceed to the next step after a specified time interval.



To automatically play a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. Double-click the storyboard to open it.
3. Click **Play**.

To manually play a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. Double-click the storyboard to open it.
3. Click **Play next step** to step through the storyboard.

   Note: To hide the list of steps when playing a storyboard, from the **View** menu choose **Hide List When Playing**.

Related topics

About storyboards

Displaying swimlane views

Displaying Swimlane Views

Display a swimlane view

Swimlanes provide a graphical representation of a storyboard, either in the context of workflow responsibilities, i.e. assigned resources, or by selected highlight rules. Each resource or highlight rule will be presented in a separate 'lane'. Associated notes, attachments and links can be accessed as normal in the web server.

To display swimlanes for a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard from the list of storyboards.

3. From the **Tools** menu choose **Swimlane View**.

4. Select one of the following options:

   Based on the various resources used on the activities displays the activity resources in swimlanes.

   Based on a selection of highlight rules displays selected highlight rules in swimlanes. **Note:** If an activity complies with more than one highlight rule then it will be displayed in all of the highlight-based swimlanes that it complies with.

5. If you selected to generate the swimlanes based on highlight rules, select the highlight rule(s) from the list and click **Add Rule to Apply List** , otherwise proceed to Step 6.

   Note: Hold **Ctrl** to select multiple highlight rules.

   To reorder the highlight rules as they will appear in the swimlane view, select a highlight rule from the applied rules and click **Move Up** or **Move Down** .

6. Select or deselect any of the following options:

   Include the activity resources with the activities will display the activity resources in the swimlane view.

   Include the notes bubbles with the activities will display, and allow users to access, any associated activity notes in the swimlane view.

   Hide metric links will hide any associated metric links from the swimlane view. **Note:** Metric links cannot be accessed from a swimlane view.

7. Click **OK**.

   Note: The Other swimlane holds activities that do not have resources assigned to them or that do not fulfill the criteria of a highlight rule.

To configure the swimlane view:

The **View** menu allows you to modify the swimlane caption font, color and divider. You also have a number of zoom options.

To print the swimlane view:

1. From the **File** menu choose **Print**.

Related topics

About storyboards

Playing storyboards

Importing and Exporting Storyboards

Import or export a storyboard

Storyboards can be exported and then imported into a different process repository and storyboards can also be exported to XML to be used in other applications.

To package a storyboard to use in another Process Repository:

1. From the **Tools** menu choose **Storyboards**.

2. Select the storyboard and from the **File** menu choose **Package Storyboard**.

3. Choose a location to save the storyboard to and click **OK**.

   Note: You can email the storyboard to a colleague by clicking **Next** and then selecting **Email the packaged storyboards to a colleague**.

To export a storyboard to XML:

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the File menu choose **Export Storyboard to XML**.
3. Browse to a location to save the storyboard to and click **Save**.

To export costing-based data:

For more information see Export costing as CSV.

To import a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. From the **File** menu choose **Unpackage Storyboard**.

Related topics

About storyboards

Redirecting Storyboard Steps

Redirect storyboard steps

Storyboard steps can be redirected to a different master map. For example, if a map is copied and the steps need to point to the new map.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Edit**.
3. From the **Edit** menu choose **Redirect Storyboard Steps**.
4. For the Old Map Path click **Select Path Name To Search** and locate the source map.
5. For the New Map Path click **Select Path Name For Replace** and locate the destination map.
6. Click **OK**.

Related topics

About storyboards

Performing an integrity check

Performing Integrity Checks

Perform an integrity check

An integrity check will highlight any issues arising from a change to a particular map that a storyboard references, for example if an activity has been removed.

1. From the **Tools** menu choose **Storyboards**.
2. Do one of the following:
   - To run an integrity check on selected storyboards, hold **Ctrl** and select the storyboards. From the **Tools** menu choose **Check Integrity**, select **Selected Storyboards** and click **OK**.

   OR
   - To run an integrity check on ALL storyboards, from the **Tools** menu choose **Check Integrity**, select **All Storyboards** and click **OK**.

Any steps that are invalid will be reported in the Storyboard Integrity Check window. Invalid steps can be removed by selecting the step and choosing **Remove Steps From Storyboard** from the **Edit** menu (hold **Ctrl** to select multiple steps).

Related topics

About storyboards

Copying Storyboards

Copy a storyboard

Storyboards can be copied. This is useful if you want to create a variant of an existing storyboard without having to create it from scratch.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Copy**.
3. To rename the storyboard, right-click it and choose **Properties**.

Related topics

About storyboards

Deleting Storyboards

Delete a storyboard

Deleting a storyboard will permanently remove it from the Process Repository.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Delete**.

Related topics

About storyboards

Reporting on Storyboards

Storyboard usage report

This report will inform you of any storyboards that the current storyboard is linked to from. For example, you might run a usage report on storyboard B and find that storyboard D links to it. This information is useful if you want to know what other storyboards will be affected before making any changes to a storyboard.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Tools** menu choose **Usage Report**.

Related topics

About storyboards

Storyboard statements report

This report will list all statements that are linked to activities in a scope of storyboards.

1. From the **Tools** menu choose **Storyboards**.

   Note: If you want to report on a selection of storyboards then select the storyboards before proceeding to the next step.
2. From the **Tools** menu choose **Statements Report**.
3. Select the scope of storyboards to report on, then click **OK**.

Related topics

About storyboards

Exporting Cost Data

Export cost data

Costing-based data can be exported as a CSV file from a storyboard. The data can then be imported into MS Excel, for example, in order to generate and calculate costs for end-to-end processes. See Exporting costing data for more information.

Printing Storyboards

Print a storyboard

Individual storyboards can be printed, including a screenshot of each activity with the accompanying commentary.

1. In the Storyboard Management dialog (in the main client interface, from the Tools menu choose Storyboards) , select the storyboard that you want to print and from the **File** menu choose **Print Storyboard**.
2. Change any of the print settings, as required, then click **OK**.

Storyboard printing options

The font of the header, footer and step details can be modified when storyboards are printed. In the Storyboard Management dialog, from the **File** menu choose **Administration** and then **Storyboard Print Settings**.

Chapter 8

Scorecards

Scorecards

About scorecards

Scorecards provide cost-effective business insights that empower employees to make more efficient decisions, such as communicating strategic objectives through Key Performance Indicators (KPIs). Scorecards in Nimbus Control are used to bridge processes with measures and drive the understanding of respective metrics, both in terms of the operational process and to sanity check the metrics in context of the end-to-end processes.

Scorecards are registered in Nimbus Control and can be Microsoft Excel file formats (xls, xlt, xlsx, xlsm, xlsb, xltx, xltm), Microsoft Office Business Scorecard scorecards, Salesforce.com Dashboard scorecards or web archive files (mht) that can be viewed and utilized through the Nimbus Control web environment. Attachments can also be added to a scorecard to provide supporting information.

To utilize the full potential of scorecards in Nimbus Control it is recommended that you contact your Nimbus account manager to arrange training.

Scorecard Roles

Assign a scorecard manager

The scorecard manager role is available to process authors only and provides them with full scorecard administrative rights. Scorecard managers can modify scorecard system options, create, edit and delete scorecard folders, register and create new scorecards, edit and delete existing scorecards and launch scorecards.

Note: Administrators are scorecard managers by default.

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1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Double-click the user.
3. In the Settings tab select the **Scorecard Manager** checkbox.

Related topics

About scorecards

Assigning scorecard editors

Assign a scorecard editor

The scorecard editor role is available to process authors and the role is assigned to these users by default. Scorecard editors can edit and launch existing scorecards but cannot create or edit scorecard folders.

Note: Administrators are scorecard editors by default.

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1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Double-click the user.
3. In the Settings tab select the **Scorecard Editor** checkbox.

Related topics

About scorecards

Assigning scorecard managers

Modifying Scorecard Options

Modify scorecard system options

By default, Nimbus Control uses a Scorecard Repository folder, located in the same location as the Process Repository. The Scorecard Systems Options allows you to change the location of the Scorecard Repository and define the file types of scorecards that can be registered. Scorecard templates can also be specified. Nimbus Control uses a simple .xlt file as the default template for creating new scorecards.

Note: Only administrators and scorecard managers can modify the scorecard system options.

1. From the **Tools** menu choose **Scorecards**.
2. From the **File** menu choose **Administration** and then **Scorecard System Options**.

General Tab

You can change the folder where scorecards are stored. If any scorecards exist in the current folder then these should be manually copied to the new folder to allow you to link to them in Nimbus Control. To change the scorecard folder click **Browse Folder** .

The file types that users can select as scorecards can be added to or removed. Click **Add** to add a new file type or to remove an existing file type select it from the list and click **Remove** .

Automatically display file selector when adding a new scorecard will force users to select the scorecard file before they can define any scorecard properties when new scorecards are added. If this option is not selected then the user will be taken directly to the scorecard properties dialog.

New Files Tab

Scorecard templates are used to create new scorecards. Templates are simply Excel spreadsheets or templates that are designed in Excel. To add a template click **Add** and to remove an existing template, select the template and click **Remove**.

Related topics

About scorecards

Creating Scorecards

Register a scorecard

You can register Excel files, URLs and Microsoft scorecards in Nimbus Control.

To register an Excel-based scorecard:

1. From the **Tools** menu choose **Scorecards**.
2. From the **Edit** menu choose **Register Existing File**.
3. Click **Browse** to locate the file.

File Types

Files that can be used are Excel spreadsheets (.xls, .xlsx, .xlsm) Excel templates (.xlt, .xltx, xltm) and MIMI HTML (.mht) files. The default file type is XLS when searching. To select other file types, choose the file type from the **Files of type** drop-down list.

Nimbus Control requires the file to be placed in the scorecard repository. You will be prompted to move the file from its current location to the scorecard repository, or to make a copy of it.

4. Choose the sheet if you are creating a scorecard from an Excel file.
5. Modify the details (title and owner), if required.
6. Enter a description for the scorecard.
7. To modify the access rights or add attachments, see below.
8. Click **OK**.

To register a URL as a scorecard:

1. From the **Tools** menu choose **Scorecards**.
2. From the **Edit** menu choose **Register URL**.
3. Enter the URL.
4. Modify the details (title and owner) if required.
5. Enter a description for the scorecard.
6. To modify the access rights or add attachments, see below.
7. Click **OK**.

To register a Salesforce.com Dashboard as a scorecard:

1. From the **Tools** menu choose **Scorecards**.
2. From the **Edit** menu choose **Register Salesforce.com Dashboard**.
3. Click in the **Dashboard URL** text box and enter the URL of the Salesforce.com Dashboard.

   Note: The URL must be preceded by either HTTP:// or HTTPS://.
4. In the Details panel, specify a title for the scorecard and the owner.
5. Enter a description for the scorecard (this step is optional).
6. To modify the access rights or add attachments, see below.
7. Click **OK**.

To register a Microsoft scorecard:

Note: You must have Microsoft Scorecard installed and configured by an administrator for this option to be available.

1. From the **Tools** menu choose **Scorecards**
2. From the **Edit** menu choose **Register Microsoft Scorecard**.
3. Select the scorecard that you want to register and click **OK**.

To modify access rights:

1. Click the Access tab
2. Choose the default access rights for all users.

   Note: If you choose to restrict access to all users by default then you can grant access to specific users and user groups in the next steps.
3. Click **Add** + to select a user or user group.

   Note: By default, the user or user group is granted access to the scorecard. To deny access, double-click the user or user group and select **Access Denied**.

To add attachments:

1. Click the Attachments tab, then click **New** .

   Note: For more information on attachments see About attachments and links.

Related topics

About scorecards

Creating scorecard folders

Modifying scorecard system options

Create a scorecard

If you don't have a scorecard to register you can create a new one based on a scorecard template.

1. From the **Tools** menu choose **Scorecards**.
2. From the **Edit** menu choose **Create New File**.
3. Choose the scorecard template.

   Note: See Modifying scorecard system options for information on adding new templates.
4. Enter a title for the file.
5. Modify the details (title and owner) if required.
6. Enter a description for the scorecard.
7. To modify access rights or add attachments, see below.

To modify access rights:

1. Click the Access tab
2. Choose the default access rights for all users.

   Note: If you choose to restrict access to all users by default then you can grant access to specific users and user groups in the next steps.
3. Click **Add** to select a user or user group.

   Note: By default, the user or user group is granted access to the scorecard. To deny access, double-click the user or user group and select **Access Denied**.

To add attachments:

1. Click the Attachments tab, then click **New** .

   Note: For more information on attachments see About attachments and links.

Related topics

About scorecards

Registering scorecards

Creating scorecard folders

Modifying scorecard system options

Create a scorecard folder

Scorecard folders are used to organize scorecards and folder access rights can be set up to control the scorecards contained within them.

Note: When a new scorecard folder is created, it inherits the access rights of the parent folder.

1. From the **Tools** menu choose **Scorecards**.
2. From the **Edit** menu choose **Create Folder**.
3. Enter a name for the folder.

To assign access rights to the folder:

1. Click the Folder Access tab.
2. Choose the default access rights for all users.

   Read and write allows users to create scorecards within the folder (assuming they are scorecard editors or scorecard managers).
   Read only allows users to view the folder and the scorecards within it.
   Access Denied prevents users from viewing the folder and any scorecards contained within it.

3. Click **Add** ✚ to select a user or user group.

   Note: By default, the user or group is granted access to the scorecard. To deny access, double-click the user or group and select **Access Denied**.

Related topics

About scorecards

Creating scorecards

Assigning scorecard managers

Assigning scorecard editors

Defining scorecard access rights

Defining Access Rights

Define scorecard access rights

Access to a scorecard can be defined to grant or deny access to users and user groups.

More info on Access Rights...

1. From the **Tools** menu choose **Scorecards**.
2. Right-click the scorecard that you want to assign access rights for and choose **Edit**.
3. Click the Access tab.
4. Select the default access rights.
5. Click **Add** ✚ to select a user or user group.

   Note: By default, the user or group is granted read/write access to the scorecard. To deny or grant read-only access, double-click the user or group and select **Access Denied** or **Read Only**.

Related topics

[About scorecards]

[Creating scorecards]

[Registering scorecards]

[Creating scorecard folders]

Attaching Scorecards

Attach a scorecard

You can link an object to a scorecard in order to provide access to users.

1. Right-click the object and choose **Attachment/Links**.
2. Click **New** and choose **Scorecard Link**.
3. Select the scorecard that you want to link to and click **OK**.
4. Modify the scorecard's link title if required.

To assign access rights to the folder:

1. Click the View Rights tab.
2. Choose the default access rights for all users.
3. Click **Add** ✚ to select a user or user group.

   Note: By default, the user or group is granted access to the scorecard. To deny access, double-click the user or group and select **Access Denied**. More info on Access Rights...

   You can change the appearance of a scorecard link by right-clicking the icon and choosing **Display Options**.

⊟ Associate an attachment or link with a particular language

By associating an attachment or link to a particular language, you can direct different attachments and links to different users based on language. For example, you may have a document written in two languages; in this instance you would add the document twice and associate the respective language to each document. If an attachment or link does not exist for a particular users' locale then the default attachment or link will be made available.

Click the Advanced tab and from the **Language Tag** drop-down list choose a language to associate with the attachment/link.

Related topics

[About scorecards]

[Removing scorecards]

[Launching scorecards]

Remove a scorecard from a diagram

1. Right-click the attachment/link icon and choose **Access/Modify**.
2. Select the scorecard attachment and click **Delete**.

Launching Scorecards

Launch a scorecard

Launching a scorecard will launch the scorecard in the default Windows application (URLs will launch in a web browser for example and Excel scorecards in Excel).

1. From the **Tools** menu choose **Scorecards**.
2. Select the scorecard and from the **Edit** menu choose **Launch Scorecard**.

Related topics

About scorecards

Editing Scorecards

Edit a scorecard

You can edit the properties of a scorecard, for example to change the owner or change the reference sheet (for Excel-based scorecards).

1. From the **Tools** menu choose **Scorecards**.
2. Select the scorecard and from the **Edit** menu choose **Edit**.

Related topics

Deleting scorecards

Defining scorecard access rights

Deleting Scorecards

Delete a scorecard

Deleting a scorecard will remove it from the scorecard repository.

Note: Deleted scorecards cannot be retrieved.

1. From the **Tools** menu choose **Scorecards**.
2. Select the scorecard and from the **Edit** menu choose **Delete**.

Chapter 9

My Searches (Keywords)

My Searches (Keywords)

About My Searches

What is My Searches

My Searches is a powerful search facility in the Web that allows users to retrieve information (diagrams, documents and storyboards) that is relevant to their roles. In turn, this assists process adoption throughout an organization. This is achieved by associating keywords and additional filter groups with process content.

Note: Only master versions of diagrams and documents can be retrieved.

Keywords - What are they?

Keywords are used to drive search optimization in Nimbus Control, and they are the foundation of the functionality within My Searches. Keywords are not limited to single words, however, and a more accurate terminology would be 'key phrases'. Therefore whenever we refer to 'keywords', we also mean 'key phrases'.

Keyword Taxonomy

You do not need a complex taxonomy (categorization) for keywords, and a few simple rules will help you when deciding how to create and group keywords.

1. **Create unique keywords that represent the key questions that users may ask**

   For example, a user might ask 'How do I raise a purchase order?'. It is recommended that you remove the 'How do I' element to the phrase, since it adds no value to the keyword. In this example then, you might create a keyword 'Raise a purchase order', or 'Raising a purchase order'. You may also decide to simplify it to 'Purchase order'. It all depends on the amount of content and how much granularity you want to create. Whatever method you use, it needs to be consistent when creating keywords.

2. **Use multiple keywords for the same topic if the subject has different labels within different areas**

   If the company is multi-national, you may need to create multiple versions of keywords and attach them to specific content. For example, 'Holiday' and 'Leave' will cater for the differences between British and US English.

3. **Consider reverse cataloging so that similar items are grouped together in the drop-down displays**

   It's useful to group similar items. For example, 'Leave - sick', 'Leave - parental', 'Leave - compassionate'. However, do not use prefixes to denote groups of keywords, as that's what keyword groups are for. The 'Leave' options in these examples are HR processes and would ideally be grouped under the 'HR Operational Processes' keyword group.

Keyword Groups

A keyword group is a set of keywords where the topics are related. They key differentiation is that keyword groups are **topically** related, not organizationally. Keyword groups are associated with user groups, and it is user groups where organizational relationships are created.

If you sort your keywords alphabetically, the keyword groups will emerge from the keywords. For example, in a typical end-to-end process such as Lead to Cash, there may be topics related to Leads, Opportunities, Quotes, Contract, Order Submission, Fulfilment, Billing and Collection. If you then have multiple keywords for each of these Lead to Cash phrases, then they will be good keyword groups. However, if you only have single keywords for each one then Lead to Cash becomes your keyword group, since there is no value in one-to-one groups and keywords.

User Groups

User groups contain users, and by associating user groups with keyword groups, you can then expose relevant content to the appropriate users. If you associate all keyword groups with the <Everyone> system user group, then all users will see all keyword groups. However, My Searches already contains a feature that allows all users to expand a search to include everything. Searches should be constrained to users' job roles to provide quicker and easier searching within My Searches.

You may have one-to-one relationships between user groups and keyword groups, for example user group 'Sales' and keyword group 'Sales. This is a valid user group to keyword group relationship, although you may also want to work at a greater level of granularity. In the Lead to Cash example, you might associate keyword groups 'Leads', 'Opportunities', 'Quotes', 'Contract' and 'Order Submission' with the user group 'Sales'. Then you might associate the user group 'Back Office' with the keyword groups 'Order Submission', 'Fulfilment' and 'Billing and Collection'. Note that the keyword group 'Order Submission' is associated with both user groups, as it represents a hand-off point between the two user groups and therefore both groups will be interested in the same process.

Additional Filter Groups

This optional feature can be used to further refine search results, whilst also keeping your list of keywords as short as possible. Imagine you have a generic question 'How do I prepare a quote?', but the content that you want to deliver back varies according to a user's country. In this instance you would create an additional filter group called 'Country'. Users and content are then tagged with this additional filter group to indicate which country they belong to (which could be more than one additional filter group if necessary). Then, when a user selects the keyword 'Preparing a Quote', the system will filter the results to match the user and content profiles, thereby delivering only relevant content to the user.

In the absence of additional filter groups you would have to present a user with all results and hope that they select the correct content, or you would need multiple keywords, for example 'Preparing a Quote - US', 'Preparing a Quote - UK', 'Preparing a Quite - DE', and so forth. Using additional filter groups reduces the possibility of users selecting the wrong content by some simple tagging, thereby creating predictability in your company's operation. Note that if content is not tagged with an additional filter group then it will be available to all users, so it then becomes universally available.

Related topics

My Searches System Options

Keywords

Creating Keywords and Keyword Groups

Create keywords

Keywords can be created and grouped. For more information see About My Searches.

To create a keyword:

1. From the **Search** menu choose **Keywords Library**.
2. Click **Add**.

   Note: To add a keyword directly to a keyword group, first select the keyword group.
3. Enter the keyword and click **OK**.

   Create tibbr subject for this keyword will create a tibbr subject based on the new keyword. The tibbr subject text will be automatically generated from the keyword name but you can manually edit this if required. Existing keywords can also be used to create tibbr subjects by right-clicking a keyword and choosing **Add Subject(s) to tibbr**. Note that these options may not be available.
4. Click **OK**.

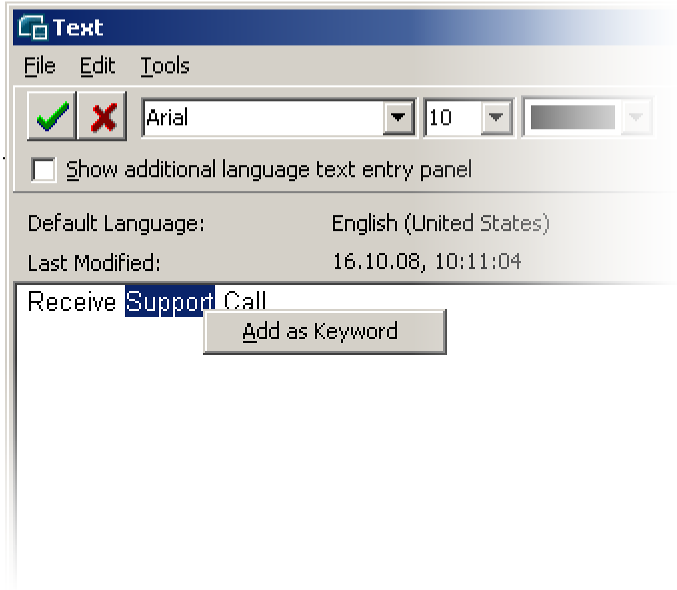
Creating Keywords From Text

You can also add keywords to the Keywords library when defining the text for an object - highlight the text that you want to add, right-click it and choose **Add as Keyword**. The keyword will also be automatically assigned to the diagram.

Note: The Text dialog is the dialog that allows you to define text for activities, flow lines, free text and notes.

⊟ Show example

The example below will add the word 'Support' to the keywords library and assign it to the diagram.



To create a keyword group:

1. From the **Search** menu choose **Keywords Library**.
2. Right-click in the left pane and choose **Create Group**.
3. Enter the group name and, if appropriate, a description of the group.
4. Click **OK**.

To add a keyword to a keyword group:

When a keyword is added to a keyword group it is copied, therefore keywords can exist in multiple keyword groups.

1. Click and drag the keyword from the right pane onto the keyword group in the left pane.

To edit or delete keywords and keyword groups:

1. Right-click the keyword or keyword group and choose either **Edit** or **Delete**.

To create tibbr subjects from keywords:

1. Right-click selected keywords and choose **Add Subject(s) to TIBBR**.

Import keywords

Keywords can be imported from a CSV file. Nimbus Control also includes a predefined set of keywords, based on the APQC (American Productivity and Quality Center) process classification framework, which can be imported into the Keyword Library.

Note: The predefined keywords set may have been automatically imported as part of the installation process.

To import keywords from a CSV file:

Keywords can be imported into the main Keywords Library, or into keyword groups. If a single column exists then the data will be imported into the Keyword Library as keywords. For example:

Keyword 1
Keyword 2
Keyword 3
etc...

If two columns of data exist, the first column is assumed to be the keyword group and the second column the actual keyword. For example:

Group 1,Keyword 1
Group 1,Keyword 2
Group 2,Keyword 3
etc...

Any subsequent columns of data will be ignored. If a keyword group does not exist then it will be created, otherwise an existing keyword group will be updated. Keywords that already exist in the system will not be duplicated.

1. From the **Search** menu choose **Keywords Library**.
2. From the **File** menu choose **Import** and then **Import from CSV File**.
3. Browse and select the CSV file to import, then click **Open**.

To import the predefined set of keywords:

1. From the **Search** menu choose **Keywords Library**.
2. From the **File** menu choose **Import** and then **Import Predefined Keywords**.
3. Click **Yes** to confirm.

Related topics

About My Searches

Copy keywords

Keywords can be copied across diagrams, documents and storyboards.

To copy keywords from a diagram:

1. From the **Search** menu choose **Keywords** and then **Add Keywords To Diagram**.
2. Select the keywords from the associated keywords.
3. Right-click in the Diagram Keywords panel and choose **Pickup Keywords**.
4. Open the Keywords dialog for the document or storyboard where you want to apply them.
5. Right-click in the associated keywords panel on the right and choose **Apply Keywords**.

To copy keywords from a document:

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to add a keyword to.
3. Right-click the document and choose **Details**.
4. From the **Search** menu choose **Add Keywords to Documents**.
5. Right-click in the Document's Keywords panel and choose **Pickup Keywords**.
6. Open the Keywords dialog for the diagram or storyboard where you want to apply them.
7. Right-click in the associated keywords panel on the right and choose **Apply Keywords**.

To copy keywords from a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Edit**.
3. From the **Search** menu choose **Add Keywords to Storyboard**.
4. Right-click in the Storyboard's Keywords panel and choose **Pickup Keywords**.
5. Open the Keywords dialog for the diagram or document where you want to apply them.
6. Right-click in the associated keywords panel on the right and choose **Apply Keywords**.

Related topics

About My Searches

Searching for keywords

Search for keywords

You can view which keywords are associated with which diagrams and documents. Alternatively, you can use the My Searches Console.

1. From the **Search** menu choose **Keyword Search**.
2. Choose the keyword group from the **Keyword Groups** drop-down list.

   Note: You can filter the keywords by keyword group by choosing the keyword group from the **Keywords Group** drop-down list.

3. In the Options panel select **Diagram Search** and/or **Document Search**.
4. If you are searching diagrams then select the scope of diagrams to search for in the Scope panel.
5. Click **OK**.

   Note: You can navigate to the diagram or open the document by double-clicking it in the list. You can also change the display of results - by default the results are grouped by Type. To group by a column header, click and drag the column header onto the area above the column headers (to ungroup a column header click and drag it from the groupings back onto the column headers).

Related topics

About My Searches

Copying keywords

Adding Keywords to Content

Add keywords to single diagrams, documents and storyboards

Keywords can be associated with diagrams, documents and storyboards. Note that you must have right access to the content that you are adding storyboards to.

Diagrams

To add keywords to a single diagram:

1. From the **Search** menu choose **Add Keywords to Diagram**.
2. To add a keyword, select the keyword from the list of available keywords and click **Add Keyword** .

   Note: You can select multiple keywords by holding Ctrl when selecting the keywords. You can also filter the keywords by choosing a keyword group from the group drop-down list.

   To remove a keyword, select the associated keyword in the right-hand pane and click **Remove Keyword** .

   To add/remove keywords to a scope of diagrams see My Searches Advanced Wizard.

To add keywords to a scope of diagrams:

See My Searches Advanced Wizard.

Documents

To add keywords to a single document:

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to add a keyword to.
3. Right-click the document and choose **Details**.
4. From the **Search** menu choose **Add Keywords to Document**.
5. Select the keyword from the list and click **Add** .

   Note: You can select multiple keywords by holding **Ctrl** when selecting the keywords. You can also filter the keywords by choosing a keyword group from the group drop-down list.

To remove a keyword, select the associated keyword in the right-hand pane and click **Remove Keyword** .

Automatically associating keywords when documents are registered

Keywords can be associated with specific category items so that when a file is registered and categorized in the Document Registry, any associated keywords will be automatically associated with the file.

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Administration** and then choose a filter category.
3. From the **File** menu choose **Properties**.
4. Click the Keywords tab to select it.
5. Select the keyword from the list and click **Add** .
   Note: You can select multiple keywords by holding **Ctrl** when selecting the keywords. To add all keywords click **Add All** .

To add keywords to a scope of documents:

See My Searches Advanced Wizard.

Storyboards

To assign keywords to a single storyboard:

Keywords can be associated with storyboards, allowing users to search for storyboards in the web server with respect to specific keywords.

Note: Only administrators and process authors with write access can associate keywords with storyboards.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard and from the **Edit** menu choose **Edit**.
3. From the **Search** menu choose **Add Keywords to Storyboard**.
4. Select the keyword from the list and click **Add** .

   Note: You can select multiple keywords by holding Ctrl when selecting the keywords. You can also filter the keywords by choosing a keyword group from the group drop-down list.

   To remove a keyword, select the associated keyword in the right-hand pane and click **Remove Keyword** .

Add keywords to multiple diagrams and documents

The My Searches wizard provides a quick and easy method to add and remove keywords and additional filter groups for a scope of diagrams or documents in one operation.

To add/remove keywords for a scope of diagrams:

1. From the **Search** menu choose **Diagram's My Searches Wizard**.
2. Select either **Add Keywords** or **Remove Keywords**, then click **Next**.
3. Select the keywords from the list and click **Add** or **Remove** .

   Note: Hold Ctrl to select multiple keywords.
4. Click **Next**.
5. Choose the scope of diagrams to assign the keywords to.

   Current Diagram is the current diagram only
   Current Diagram And Lower Levels is the current diagram and all lower levels

Current Process Map includes all diagrams in the current process map
Diagram Scope List File includes diagrams within a diagram scope list (DSL) file

6. Click **Finish**.

To add/remove keywords for a scope of documents:

1. From the **Documents** menu choose **Document Registry**.
2. Search for the documents.
3. Select the documents that you want to add or remove keywords or user groups.

   Note: Hold Ctrl to select multiple documents.
4. From the **Search** menu choose **My Searches Wizard**.
5. Select either **Add Keywords** or **Remove Keywords**, then click **Next**.
6. Select the keywords from the list and click **Add** or **Remove** .

   Note: Hold Ctrl to select multiple keywords.
7. Select **Selected Documents** and click **Finish**.

Related topics

About My Searches

Diagram's My Searches Settings

Document's My Searches Settings

Associating Keywords with Users

Add keywords to users

Associating keywords with users is achieved by associating keyword groups with user groups. Users within a specific user group will then be able to filter their searches using associated keywords.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right-click the group (left panel) and choose **Associated Keyword Groups**.
3. Select the keyword group from the All Keyword Groups panel and click **Add Keyword Group** .
   Note: To remove an associated keyword group, click the keyword from the User Group's Associated Keyword Groups and click **Remove Keyword Group** .

Related topics

About My Searches

Check a user's associated keywords

You can check what keywords are associated with a user's account.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. Right-click the user and choose **Properties**.
3. Click **Check this user's associated keywords** .

Related topics

[About My Searches]

[Associating user groups with keyword groups]

[Defining user group categories]

Additional Filter Groups

Define additional filter groups

Additional filter groups provides additional filtering in My Searches and allows you to further direct content to relevant users. For more information see About My Searches.

Note: Up to five levels of categorization can be defined and a user group can only be assigned to one additional filter group.

1. From the **Tools** menu choose **Users** and then **User Accounts**.
2. From the **Group** menu choose **Additional Filter Groups**.
3. Select the checkboxes for the additional filter groups that you want to enable.
4. Rename each user group category, as required.

   Note: If you want to allow users to filter by additional filter groups in the **Fewer Options** panel in My Searches (as they can in the More Options panel), select **Include in 'Fewer Options' panel** for the filter groups that you want to include. Note that additional filters are only displayed to users that are members of the associated groups (as defined in step 6).

   Enforce selection of Additional Filter Groups in the 'Fewer Options' panel will require users to select additional filters when searching using the Fewer Options panel.

5. Click **Edit Items**.
6. Click and drag the user group that you want to associate on to the additional filter group.
7. Repeat Step 6 for all user groups that you want to categorize.

Related topics

About My Searches

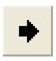
Associate diagrams, documents and storyboards with additional filter groups

Associate diagrams, documents and storyboards with additional filter groups

The My Searches wizard provides a quick and easy method to add and remove keywords and additional filter groups for a scope of diagrams or documents in one operation.

Diagrams

To add/remove additional filter groups from a scope of diagrams:

1. From the **Search** menu choose **Diagram's My Searches Wizard**.
2. Select either **Add Additional Filter Groups** or **Remove Additional Filter Groups**, then click **Next**.
3. Select the additional filter groups from the list and click **Add**  or **Remove** .

   Note: Hold Ctrl to select multiple additional filter groups.

4. Click **Next**.
5. Choose the scope of diagrams to associate the additional filter groups with.

   Current Diagram is the current diagram only
   Current Diagram And Lower Levels is the current diagram and all lower levels
   Current Process Map includes all diagrams in the current process map
   Diagram Scope List File includes diagrams within a diagram scope list (DSL) file

6. Click **Finish**.

Documents

To add/remove additional filter groups from a scope of documents:

1. From the **Documents** menu choose **Document Registry**.
2. Search for the documents.
3. Select the documents that you want to associate with additional filter groups.

   Note: Hold Ctrl to select multiple documents.
4. From the **Search** menu choose **My Searches Wizard**.
5. Select either **Add Additional Filter Groups** or **Remove Additional Filter Groups**, then click **Next**.
6. Select the additional filter groups from the list and click **Add** or **Remove** .

   Note: Hold Ctrl to select multiple additional filter groups.
7. Select **Selected Documents** and click **Finish**.

Storyboards

To add/remove additional filter groups from a storyboard:

1. From the **Tools** menu choose **Storyboards**.
2. Double-click the storyboard to open it.
3. From the **Search** menu choose **Add Keywords to Storyboard**.
4. Select the additional filter groups in the bottom-left hand panel and click **Add** or **Remove** .
   Note: Hold **Ctrl** to select multiple additional filter groups.
5. Click **OK**.

My Searches Console

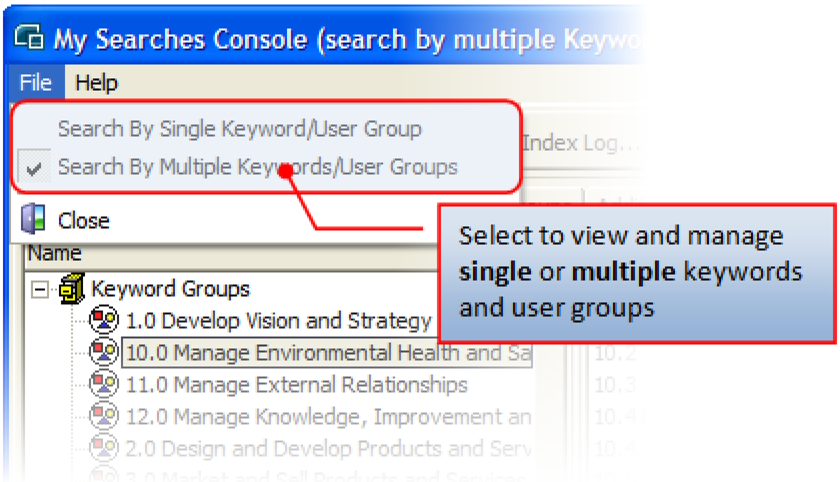
My Searches Console

The My Searches Console provides administrators and authors with the ability to view and modify current My Searches configuration settings. For more information see About My Searches.

To access the My Searches Console:

1. From the **Search** menu choose **My Searches Console**.

   Note: To view and manage single keywords and user groups, ensure **Search By Single Keyword/User Group** is selected in the **File** menu. Alternatively, to allow you to select multiple keywords and user groups to view and manage, select **Search By Multiple Keywords/User Groups**.

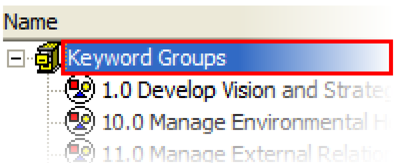


Keywords and Keyword Groups

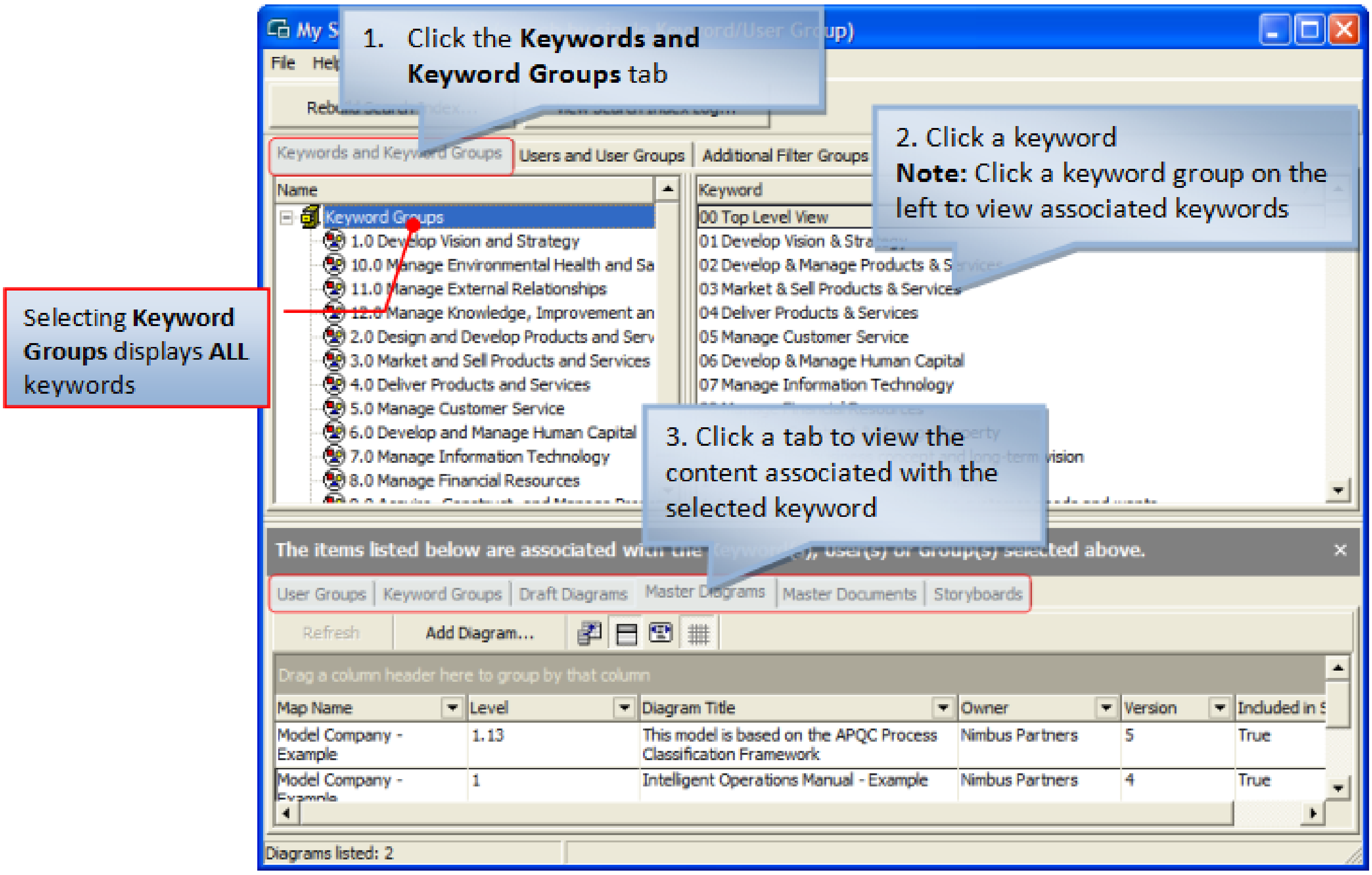
To view what content is associated with single keywords:

1. From the **File** menu select **Search By Single Keyword/User Group**.
2. In the top panel click the **Keywords and Keyword Groups** tab.
3. Select the keyword in the right-hand panel that you want to analyze.

   Note: To view all keywords in the Keyword Library, select **Keyword Groups** (as shown below), or select a keyword group to filter the list by keyword group.



4. In the bottom panel click one of the content-based tabs - **User Groups, Keyword Groups, Draft Diagrams, Master Diagrams, Master Documents** or **Storyboards**.



To view what content is associated with multiple keywords:

1. From the **File** menu choose **Search By Multiple Keywords/User Groups**.
2. In the top panel click the **Keywords and Keyword Groups** tab.
3. Hold **Ctrl** and select the keywords that you want to analyze.
4. In the bottom panel click one of the content-based tabs - **User Groups, Keyword Groups, Draft Diagrams, Master Diagrams, Master Documents** or **Storyboards**.

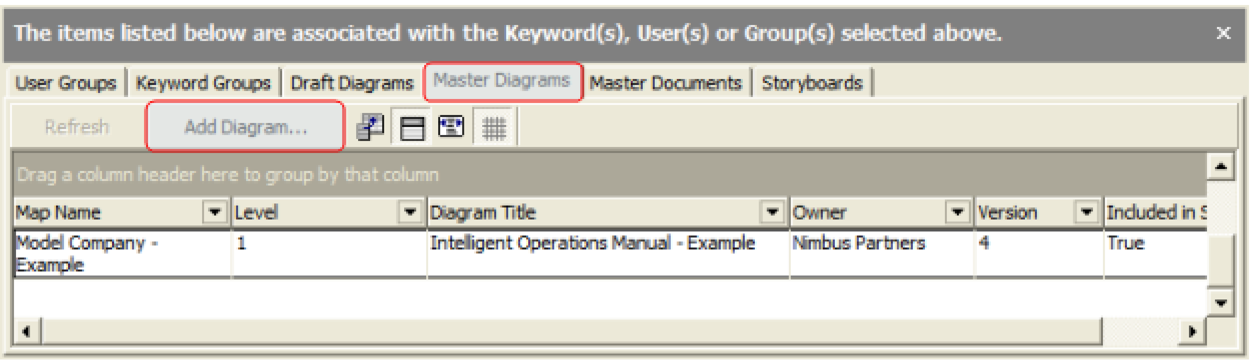
   Note: When reselecting keywords, click **Refresh** to update the associated items list in the bottom panel.

To add keywords to a diagram, document or storyboard:

1. Select the keyword that you want to add.

   Note: To add multiple keywords ensure **Search By Multiple Keywords/User Groups** is selected in the **File** menu, then hold **Ctrl** to select multiple keywords.

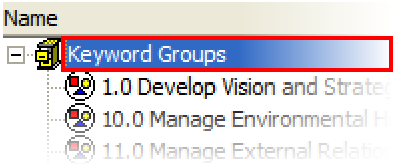
2. Select the respective content tab in the bottom panel - **Master Diagrams**, **Master Documents** or **Storyboards**.
3. Click one of the following buttons (depending on the content tab you are viewing) - **Add Diagram**, **Add Document** or **Add Storyboard**.



To create a keyword:

1. Select the **Keyword Groups** root (shown below) in the left-hand panel, then right-click in the right-hand panel and

choose **New**.



To edit or delete a keyword:

1. Select the **Keyword Groups** root in the left-hand panel, then right-click the keyword in the right-hand panel and choose either **Edit** or **Delete**.

   Note: To delete multiple keywords ensure **Search By Multiple Keywords/User Groups** is selected, then hold **Ctrl** to select multiple keywords.

To create a keyword group:

1. Right-click anywhere in the left-hand panel and choose **Create Group**.

To edit or delete a keyword group:

2. Right-click the keyword group in the left-hand panel and choose either **Edit Group** or **Delete Group**.

To add a keyword to a keyword group:

1. Select the keyword group from the left-hand panel.
2. Select the keyword in the right-hand panel.

   Note: To add multiple keywords ensure **Search By Multiple Keywords/User Groups** is selected in the **File** menu, then hold **Ctrl** to select multiple keywords.

3. Right-click a selected keyword in the right-hand panel and choose **Add to Group**.
4. In the **Enter keyword** text box, either choose an existing keyword or type a new keyword.

   Note: You can also click and drag selected keywords from the **Keyword Groups** root or any keyword group to another keyword group. This operation will copy the keywords to the new group.

To remove a keyword from a keyword group:

1. Select the keyword group from the left-hand panel.

   Note: To remove multiple keywords ensure **Search By Multiple Keywords/User Groups** is selected in the **File** menu, then hold **Ctrl** to select multiple keywords.

2. Right-click the selected keyword(s) in the right-hand panel and choose **Remove from Group**.

Users and User Groups

To view what content is associated with single user groups:

1. In the top panel click the **Users and User Groups** tab.
2. In the left panel select the user group that you want to analyze.
3. In the bottom panel click one of the content-based tabs - **User Groups, Keyword Groups, Draft Diagrams, Master Diagrams, Master Documents** or **Storyboards**.

To view what content is associated with multiple user groups:

1. From the **File** menu choose **Search By Multiple Keywords/User Groups**.
2. In the top panel click the **User and User Groups** tab.
3. In the left panel, hold **Ctrl** and select the user groups that you want to analyze.
4. In the bottom panel click one of the content-based tabs - **User Groups, Keyword Groups, Draft Diagrams, Master Diagrams, Master Documents** or **Storyboards**.

   Note: When reselecting user groups, click **Refresh** to update the associated items list in the bottom panel.

Additional Filter Groups

To view what content is associated with additional filter groups:

1. In the top panel click the **Additional Filter Groups** tab.
2. Select the user group that you want to analyze in the Additional Filter Groups panel on the right.
3. In the bottom panel click one of the content-based tabs - **User Groups, Keyword Groups, Draft Diagrams, Master Diagrams, Master Documents** or **Storyboards**.

To associate additional filter groups with a diagram, document or storyboard:

1. Select the user group in the Additional Filter Groups panel that you want to add.
2. Select the respective content tab in the bottom panel - **Master Diagrams**, **Master Documents** or **Storyboards**.
3. Click one of the following buttons (depending on the content tab you are viewing) - **Add Diagram**, **Add Document** or **Add Storyboard**.

To add a user group to an additional filter group:

1. Click and drag the user group from the left panel on to an additional filter group in the right panel.

   Note: You can also right-click the user group and choose **Pickup**, then right-click the additional filter group and choose **Apply**.

To remove a user group from an additional filter group:

1. Right-click the user group in the Additional Filter Groups panel and choose **Remove**.

Chapter 10

Content Management

Content Management

Map Management

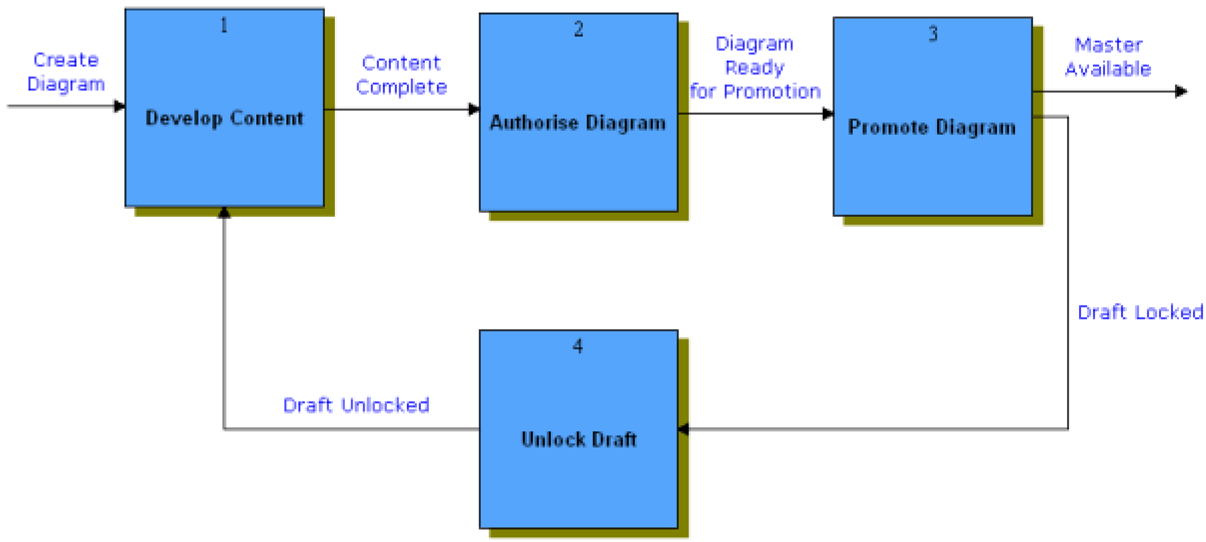
About map management

A map is a collection of diagrams that is stored in a process repository. A working map consists of at least one draft copy, a master copy, which is a promoted draft, and possibly a number of scenario copies. Maps are created by process authors with each map having at least one administrator that manages the general map properties.

A key element of Nimbus Control is the ability to manage the process by which maps are created and developed. The software provides a built-in work-flow environment for controlling the creation, authorization and ongoing development of the content with full auditing capability.

Work-flow Principles

Every diagram has two components; a draft version and a published master version. When a new map is created the initial work will done on the draft copy. For users to be able to view and use the map it must be promoted to a master version through an authorization process. The master version is read only and any amendments to a map, once it has been promoted, must be done on the draft copy.



As diagrams are part of a hierarchy that make up a map, the whole authorization and promotion to master manages the integrity of the map and ensures that promotion can only occur when the structure is in the correct state.

For traceability and audit purposes you can set an option to archive a current map in its entirety as diagrams are promoted. Each diagram also has a number of additional items of information that are used in the management of its life-cycle.

Users involved in the authorization work-flow

Authorizers
These assigned users are responsible for authorizing particular diagrams and documents

Draft Promoters
These assigned users are responsible for promoting particular diagrams and documents

Mandatory Users
These assigned users can be requested to acknowledge particular diagrams and documents.

Reviewers
These assigned users are responsible for reviewing particular diagrams and documents.

Authorizing Diagrams

About diagram authorization

Draft diagrams need to be authorized before they can be promoted to master copies and made available to users in the web server. Authorizers are assigned to specific diagrams and every authorizer must review a particular diagram before it can be promoted to a master version.

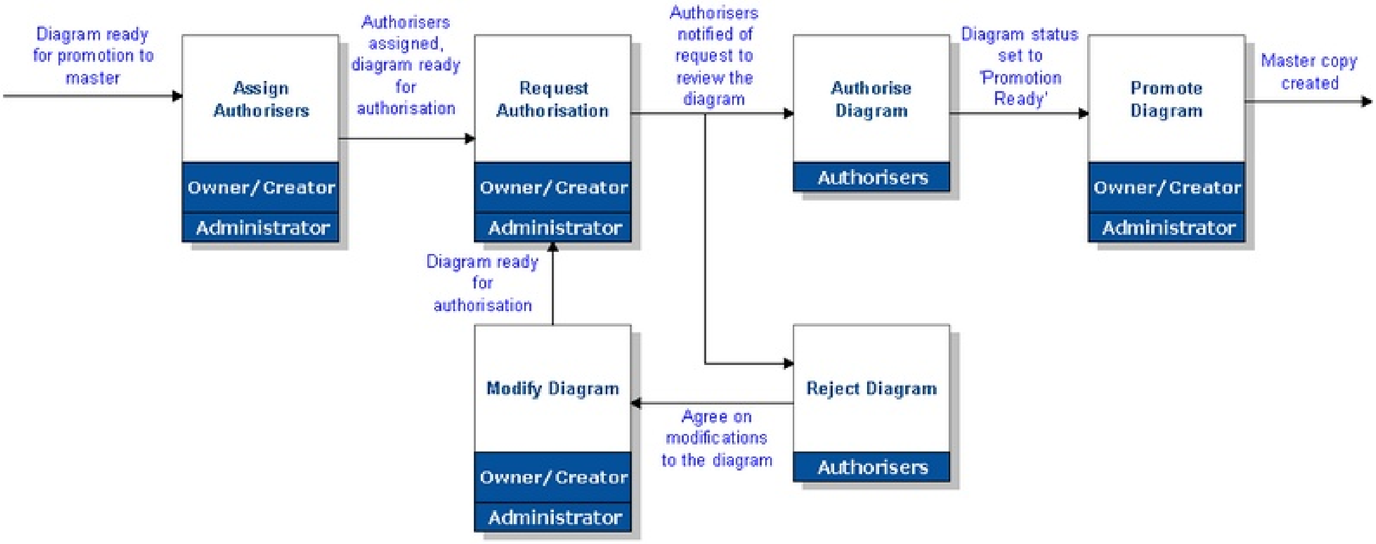


Fig. A simplified authorization process

Assign authorizers

A diagram's author, owner or an administrator can assign authorizers. For a draft diagram to be promoted to a master copy, the diagram must be authorized by all assigned authorizers.

Note: If one or more users do not have access to any of the diagrams that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of authorizers, or seek to provide access for these users.

---

1. From the **Manage** menu choose **Authorization** and then **Authorizers**.
2. Select the scope of the diagrams that you want to add authorizers to and click **OK**.

   Current Diagram adds authorizers to the current diagram only.
   Current Diagram and Lower Levels adds authorizers to the current diagram and all lower-level diagrams.
   Current Process Map adds authorizers to all diagrams in the current process map.
   Diagram Scope List File adds authorizers to all diagrams in a diagram scope list file.

3. Click ✚ **User** or ✚ **Resource** to find and add users, user groups or resources.
4. Click **OK**.

> **Sequence of authorizers**
>
> You can change the sequence of authorizers once assigned. For example, you may want one group to authorize the diagram first before sending it to the next group. All users defined as sequence number 1 must authorize the diagram before a request is sent to users defined as sequence 2.
>
> To change the sequence number of an existing authorizer, double-click the user or user group.
>
> **Removing authorizers**
>
> Select the user or user group and click **Remove** ━.

Related topics

About authorizing diagrams

Requesting authorization

Authorizing and rejecting diagrams

Cancelling authorization

About promoting diagrams

System Options (Access)

System Options (Document Control)

Diagram scope lists

Request authorization

When a diagram is ready to be authorized, an authorization request is sent to the assigned authorizers. Authorizers will be notified by Email, in order of sequence. When a diagram has been signed off by every assigned authorizer then it can be promoted to a master copy and released to end users.

Note: If one or more users do not have access to any of the diagrams that you are requesting an authorization for, you will not be able to proceed. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of authorizers, or seek to provide access for these users.

---

1. From the **Manage** menu choose **Authorization** and then **Request**.
2. Specify the following options:

   Date to be authorized by is the date in which the authorization should be completed by.

   Scope is the scope of diagrams to request authorization for.

   - **Current Diagram** requests authorization for the current diagram only.
   - **Current Diagram and Lower Levels** requests authorization for the current diagram and all lower-level diagrams.
   - **Current Process Map** requests authorization for all diagrams in the current process map.
   - **Diagram Scope List File** requests authorization for all diagrams in a diagram scope list file.

   Additional Notes allows any supporting notes to be added to the request, which will appear in the email that is sent to the authorizers.

3. Click **Next** to continue.

   Reminders and escalation options

   Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

4. Specify any of the following options (if available):

   Enable email reminders will send reminder emails to assigned authorizers until they have signed the diagram(s) off.

   Enable SMS reminders will send reminder SMS messages to assigned authorizers until they have signed the diagram(s) off.

   Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

   Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

   Enable escalations will escalate an overdue request by notifying users' line managers by email.

   Escalate after is the number of days after the due date has passed before notifying users' line managers.

5. Click **OK**.

Related topics

[About authorizing diagrams]

[Assigning authorizers]

[Authorizing and rejecting diagrams]

[Cancelling authorization]

[About promoting diagrams]

[System Options (Access)]

[System Options (Document Control)]

[Diagram scope lists]

Authorize or reject a diagram

Once a diagram is ready to be authorized, a request for authorization will notify the assigned authorizers and an entry will appear in their Authorization To Do list. When all authorizers have authorized a diagram it is ready to be promoted to a master copy.

Rejecting a diagram will Email the author, who will then decide whether to cancel the authorization request or agree on a resolution with the authorizer. A diagram cannot be promoted until it has been authorized by all assigned authorizers.

---

1. From the **Manage** menu choose **Authorization** and then **To Do List**.

   The Authorization To Do List dialog displays all diagrams and files that you have been requested to authorize. Holding Ctrl will allow you to select and authorize multiple diagrams and files.

2. Right-click the diagram and choose **Authorize** or **Reject**.

   You can navigate to the diagram by double-clicking it. You can also right-click the diagram in order to view the request notes, change log and associated memos.

Related topics

[About authorizing diagrams]

[Assigning authorizers]

[Requesting authorization]

[Cancelling authorization]

[About promoting diagrams]

[System Options (Document Control)]

Cancel authorization

Cancelling an authorization request will inform assigned authorizers and remove the request to authorize from their authorization To-do list.

---

1. From the **Manage** menu choose **Authorization** and then **Cancel Authorization**.

Related topics

[About authorizing diagrams]

[Assigning authorizers]

[Requesting authorization]

[Authorizing and rejecting diagrams]

[About promoting diagrams]

Track authorization progress

You can view the authorization progress of a diagram or scope of diagrams.

1. From the **Manage** menu choose **Authorization** and then **Progress Tracking**.
2. Select the scope of diagrams that you want to view authorization for and click **OK**.

   Note: Diagrams can be navigated to by double-clicking the diagram in the list. If a diagram has been rejected you can view the reason why it was rejected by right-clicking the diagram in the list and choosing **Rejection Notes**.

Related topics

About authorizing diagrams

Assigning authorizers

Requesting authorization

Authorizing and rejecting diagrams

About promoting diagrams

Override an authorization cycle

Administrators can override an authorization cycle part-way through and authorize a scope of draft diagrams or a process map. This is useful in cases where an authorizer is removed from an authorization cycle before they have authorized it, thereby holding up the promotion of a diagram or map, for example if an authorizer is on holiday or on sick leave.

Note: This option is only available to administrators.

1. From the **Manage** menu choose **Authorization** and then **Override Authorization**.
2. Enter your password and provide a reason for overriding the authorization cycle.
3. Select the scope of diagrams to override.

   A Diagram Scope List is a user-defined list of diagrams within a process map or between process maps that can be used when performing a number of operations. See Creating diagram scope lists.
4. Click **OK**.

Related topics

About authorizing diagrams

Assigning authorizers

Requesting authorization

Authorizing and rejecting diagrams

About promoting diagrams

Tracking authorization

Cancelling authorization

Promoting Diagrams

About diagram promotion

Promoting a diagram will create a master copy of the diagram. Only authorized diagrams can be promoted and once promoted, the draft copy is locked to prevent further editing. Only draft promoters can promote drafts and they come in two forms; map draft promoters can promote an entire map whilst diagram draft promoters can promote a specific diagram and all lower levels.

By default, a diagram and all child diagrams need to be promoted in one operation since the diagram is a hierarchical structure and the child diagrams define the parent diagram. However, it is possible to promote only the parent diagram without the child diagrams.

The top-level diagram of a promotion operation has to have a corresponding diagram in the master with the same underlying ID in order to undertake the promotion (except in the case of the level 1 diagram for the first time where the master does not exist). If the IDs do not match then it means a fundamental restructuring of the draft diagrams has occurred since the last promotion. In this case a promotion should be performed from a higher level. However, it is possible to resynchronize the IDs in the draft map to match the IDs in the master, which can be useful if new sections of the map have been imported.

The draft promotion process will begin at the current diagram and include all lower level diagrams. If the entire map is ready to be promoted then the process must be initiated at level 1. All promoted diagrams will then be locked in draft mode and must be unlocked to make any edits. Placeholders will be created in the master for any child diagrams that are not being promoted, therefore when the child diagrams are promoted the relationship between parent and child diagrams will be restored.

Assign draft promoters

Only assigned draft promoters can promote a draft to a master copy. There are two draft promoter accounts that can be assigned to users; a map draft promoter is able to promote an entire map whereas a diagram draft promoter can only promote a particular diagram and all associated lower level diagrams.

To assign a draft map promoter:

This will assign draft promoters to all diagrams within the process map.

1. From the **Map** menu choose **Map Properties**.
2. Click the Draft Promoters tab to select it.
3. Click **Add Promoter** ✚ to add a user or group.

To assign a draft diagram promoter:

This will assign draft promoters to the current diagram level and all lower level diagrams.

1. From the **Manage** menu choose **Diagram Information**.
2. Click on the Promoters tab.
3. Click **Add** to add a user or group.

Related topics

About promoting diagrams

Assigning draft promoters

Selecting diagram placeholders

Resynchronising diagram IDs

Promote a draft

Promoting a draft will create a master copy which then becomes accessible to authorized end-users. A diagram can only be promoted if the diagram has been authorized and is ready for promotion, i.e., it has the status 'Promotion Ready'. Also, the parent diagram must exist in the master (unless this is the first time you are promoting the map).

1. From the **Manage** menu choose **Authorization** and then **Promote Draft Copy**.

2. Enter your password and click **OK**.

Overriding Promotion

If there are some diagrams in a map that are not ready for promotion then the Promotion Results dialog will be displayed, listing all diagrams in the current map. You can promote parent diagrams if any child diagrams are not ready for promotion - select the diagrams that you want to promote (and that have the status Promotion Ready), then from the **Override** menu choose **Promote Diagram(s)**.

Unlocking Drafts

A draft can be unlocked if it is required to be edited again. See Unlocking drafts for more information.

Integrity Checking

Consider running an integrity check before promoting a diagram to ensure that the diagram adheres to best-practice mapping principles.

Related topics

About promoting diagrams

Assigning draft promoters

Selecting diagram placeholders

Resynchronizing diagram IDs

System Options (Document Control)

Promoting multiple maps (administrators only)

Select a diagram placeholder

Where a draft diagram is promoted to a master diagram but a child diagram is not promoted, a diagram placeholder will replace any non-promoted child diagrams. All drill downs will exist and be accessible to users in the master and users will see the diagram placeholder as opposed to the child diagram. A Nimbus Control administrator can take a snapshot of a current diagram (without dill-downs or data table links) to use as the placeholder. Having placeholders also facilitates toggling between master and draft.

1. Right-click in a space on the diagram that you want to use as the master placeholder and choose **Select Current Diagram as Placeholder**.

Related topics

About promoting diagrams

Assigning draft promoters

Selecting diagram placeholders

Resynchronising diagram IDs

Resynchronize diagram IDs

Resynchronizing diagram IDs will synchronize, i.e. match up, the master and draft diagram IDs. This option is only available to Administrators and diagram owners and authors and in most cases should never be required to be manually performed as Nimbus Control manages the draft and master diagram IDs automatically.

1. From the **Manage** menu choose **Authorization** and then **Resynch Diagram IDS**.

Related topics

About promoting diagrams

Assigning draft promoters

[Selecting diagram placeholders]

[Resynchronising diagram IDs]

Updating diagrams

Unlock a draft

A draft becomes locked following its promotion to a master copy. This means that no editing can be undertaken whilst locked. To make any edits the draft must first be unlocked. By default, map owners, map authors, map administrators and administrators can unlock a draft.

Note: There is a system option that will allow all process authors to unlock drafts and a system option that automatically unlocks drafts following promotion.

---

1. Select the draft version of the map (choose Draft from the drop-down on the Scenario toolbar).
2. From the **Manage** menu choose **Authorization** and then **Unlock Draft.**
3. Select the scope of the diagrams that you want to unlock and click **OK**.

    Current Diagram unlocks the current diagram only.
    Current Diagram and Lower Levels unlocks the current diagram and all lower-level diagrams.
    Current Process Map unlocks all diagrams in the current process map.
    Diagram Scope List File unlocks the diagrams defined in a diagram scope list file.

Related topics

Promoting diagrams

System Options (Document Control)

System Options (Advanced)

Updating Diagram Information

Update information for a single diagram

You can change the title, owner, etc and add promoters (users authorized to promote a draft to a master) of a single diagram, as well as being able to define the current diagram status.

Note: Modifying certain diagram information will create a change log.

---

1. From the **Manage** menu choose **Diagram Information**.
2. Modify any diagram details, as required.

Display diagram titles in multiple languages

Diagram titles can be displayed in a number of different languages (depending upon which languages have been specified by an administrator in the system options). The language that the title is displayed in will depend on the locale of the user's machine; if a user's locale does not match any of the language variants then it will display the default language (highlighted

On the Details tab, next to the **Title** field, click **Edit Language Variants** . Click in a text box for any of the language variants listed and enter the diagram title or edit the existing text.

Assigning Draft Promoters

In the Diagram Information dialog you can also add draft promoters. Click the Promoters tab. In the Set Promoters sub-tab click **Add** to select users or user groups. See Assigning draft promoters for more information.

Related topics

[Updating information across a scope of diagrams]

[Replacing authors and owners across diagrams]

[Viewing diagram changes]

Update information across diagrams

Basic diagram information such as version number, date, author and owner can be updated across a scope of diagrams. When the owner or author is changed then a history audit log entry is automatically generated to record the change.

Note: Only the owner can be updated in master diagrams.

---

1. From the **File** menu choose **Version Manager**.
2. From the Update panel select the checkboxes of the updates that you want to make.
3. Choose the scope of diagrams to make the changes to.

   Current Diagram allows you to change information for the current diagram only.
   Current Diagram and Lower Levels allows you to change information for all lower-level diagrams.
   Current Process Map allows you to change information for all diagrams in the current process map.
   Diagram Scope List File allows you to change information for all diagrams in a diagram scope list file.

   Include Internal WP Attachments and **Include Internal Image Attachments** will apply the changes to any internal word-processed documents and images within the specified diagram scope.

4. Change any diagram information in the New Information panel.

   Increment version number will automatically update the version number.
   Set version number will allow you to define a version number manually.

5. Click **OK**.

   Note: To replace owners and authors across a scope of diagrams click Advanced.

Related topics

[Updating information for a single diagram]

[Replacing authors and owners across diagrams]

[Viewing diagram changes]

Replace authors and owners across diagrams

The advanced options of the version manager allows you to replace specific authors and owners across a scope of diagrams.

Note: Change requests assigned to any diagrams that are updated with respect to the author and/or owner are also updated.

---

1. From the **File** menu choose **Version Manager**.
2. Click **Advanced**.

To replace authors across a scope of diagrams:

1. Select the **Search and Replace on Authors** checkbox.
2. In the **Find** text box, click **Select User** ....
3. Search for the user that you want to replace.
4. Repeat steps 2-3 for the user that you want to replace with in the **Replace** text box.

   Note: Click **Me** if the existing or new author is you.

5. Select the scope of diagrams that you want to make the changes across.

   Include Internal WP Attachments and **Include Internal Image Attachments** will replace the authors on associated internal word-processed attachments and internal image attachments within the specified diagram scope.

To replace owners across a scope of diagrams:

1. Select the **Search and Replace on Owners** checkbox.
2. In the **Find** text box, click **Select User** ... .
3. Search for the user that you want to replace.
4. Repeat steps 2-3 for the user that you want to replace with in the **Replace** text box.

   Note: Click **Me** if the existing or new owner is you.
5. Select the scope of diagrams that you want to make the changes across.

   Include Internal WP Attachments and **Include Internal Image Attachments** will replace the owners on associated internal word-processed attachments and internal image attachments within the specified diagram scope.

Related topics

Updating information for a single diagram

Updating information across a scope of diagrams

Viewing diagram changes

View diagram changes

It is possible to view all diagram changes for a particular diagram. You can also edit a specific change log if you have the appropriate rights.

---

1. From the **Manage** menu choose **Diagram Change Log**.

To add a new change log:

1. Click **Add**.
2. Select the date and update the version number, if required.

   Note: You can manually enter a version number by clicking in the box.

To edit an existing change log:

1. Select the change log and click **Edit**.

To delete a change log:

1. Select a change log and click **Delete**.

Related topics

Updating information for a single diagram

Updating information across a scope of diagrams

Replacing authors and owners across diagrams

Map Versions

Diagram authorization audit trail

The Diagram Audit Trail records any changes that are made relating to the authorization of a diagram, for example when drafts have been promoted, if an author has changed, etc.

1. From the **Manage** menu choose **Authorization** and then **Diagram Audit Trail**.

   The Current tab displays the current authorization status of the diagram.

   Note: Click the History Audit Log to view any authorization logs, then double-click a log entry to view the details.

   #### Customizing Columns

   Columns can be added and removed from the report view. From the **View** menu choose **Column Customizing**. A list of available columns will be displayed in the Customize dialog.

   To add a column, click drag a column header from the Customize dialog into position on the report (green arrows indicate a position in which the column can be added). To remove a column, click and drag the column header from the report into the Customize dialog.

Map Archives

Manage map archives

The Archive Manager is used to create and manage your map archives. A map archive is a compressed copy of a map, including its associated attachments. If set in the system options, maps can be archived automatically upon promotion.

Nimbus Control Archive Utility

The Archive Utility, which can be run by administrators only, compresses archived maps into archived packages (.art) and stores them in a specified location. Old archives can also be either moved or permanently deleted after a certain time. For information on the Archive Utility see the Administration Guide - **Maintenance/Archiving Maps**.

Archiving System Options

To archive the current map:

1. From the **File** menu choose **Archive Manager**.
2. From the **File** menu choose **Archive Current Map**.

To restore an archived map:

1. From the **File** menu choose **Archive Manager**.
2. Select the maps that you want to restore and click **Restore**.

To open an archived map:

1. From the **File** menu choose **Archive Manager**.
2. Select the map that you want to open and from the **File** menu choose **Open Archive**.

To rebuild an archived map:

Rebuilding a map archive will replace an existing map archive (.map) with the archived package (.arc). This option is only available if an archived package of the map archive exists.

1. From the **File** menu choose **Archive Manager**.
2. Select the map that you want to rebuild and from the **File** menu choose **Open Archive**.

To delete an archived map:

1. From the **File** menu choose **Archive Manager**.

2. Select the archived map that you want to permanently delete and click **Delete**.

Contacting Users

Contacting users

You can contact the owner, author, mandatory users, authorizers and subscribers of a diagram.

---

1. From the **Diagram** menu choose **Send Message To**, then select an option.

Audit Trails

View diagram audit trails

The audit trail lists the current authorization state for diagrams and a history of changes to the authorization.

Note: Audit records are read-only.

---

1. From the **Manage** menu choose **Authorization** and then **Diagram Audit Trail**.

   There are two tabs; Current Progress and History Audit Log.

   Note: To view the details of an audit record double-click a record in the History Audit Log tab.

Change Logs

View the change log

When updating a diagram you can add a note to describe the change. These are recorded in the change log for a specific diagram and can be viewed by users that have access to the diagram.

Note: Only file owners, authors, creators, administrators and map administrators can add, edit and delete change log entries.

---

1. From the **Manage** menu choose **Diagram Change Log**.

Adding, editing and deleting change logs

To add a new change log entry click **Add**. To edit an existing change log entry, select the change log entry and click **Edit**. To delete an existing change log entry, select the change log entry and click **Delete**.

Viewing changes for a scope of diagrams

You can view all change log entries for a diagram, scope of diagrams or a selection of process maps. From the **Manage** menu choose **List Changes**.

Diagram Scope Lists

Create a diagram scope list

A diagram scope list is a user-defined list of diagrams within a process map or between process maps that can be used when performing a number of operations within Nimbus Control, including:

- Assigning diagram access rights
- Setting authorizers
- Setting reviewers
- Setting mandatory users
- Creating subscriptions
- Requesting authorization

- Requesting acknowledgement
- Unlocking draft/cancelling authorization
- Applying a template
- Refreshing titles
- Updating diagram information in Version Manager
- Scheduling a review
- Running a report
- Running an integrity check

1. From the **View** menu choose **Diagram List**.
2. Select a scope of diagrams.

   Note: If you are unsure choose **Current Process Map**.
3. Hold **Ctrl** and select the diagrams that you want to add to the list, then right-click and choose **Save Selected As Scope List**.

   Note: You can then view a diagram scope list from the Diagram List dialog.

Related topics

Managing diagram scope lists

Manage a diagram scope list

Diagrams can be added or removed from existing diagram scope lists.

To add a diagram to a scope list file:

1. From the **Tools** menu choose **Diagram Scope Lists**.
2. Click **Open** and locate the diagram scope list file (.dsl).
3. Click **Add**.
4. Select the process map in the left panel.
5. Click a diagram to select it and click **OK**.

To remove a diagram from a scope list file:

1. Highlight the diagram that you want to remove.

   Note: Hold Ctrl to select multiple diagrams.
2. Click **Delete**.

Related topics

Creating diagram scope lists

Document Management

About document management

The Document Registry is a lightweight document management system, used to store or reference external documents and files (Microsoft Office-based files, multimedia images, drawings, etc). A variety of information can be stored against each file (division, department, document type, level of confidentiality, etc), providing users with an advanced search facility for files and documents in both the client and web server. Management of documents and files includes version control, authorization, sign-offs, creation and management of drafts, archiving and automatic notification to subscribers and responsible parties. Access rights are used to govern who has access to particular files.

Users involved in the authorization workflow

Authorizers
These assigned users are responsible for authorizing particular diagrams and documents

Draft Promoters
These assigned users are responsible for promoting particular diagrams and documents

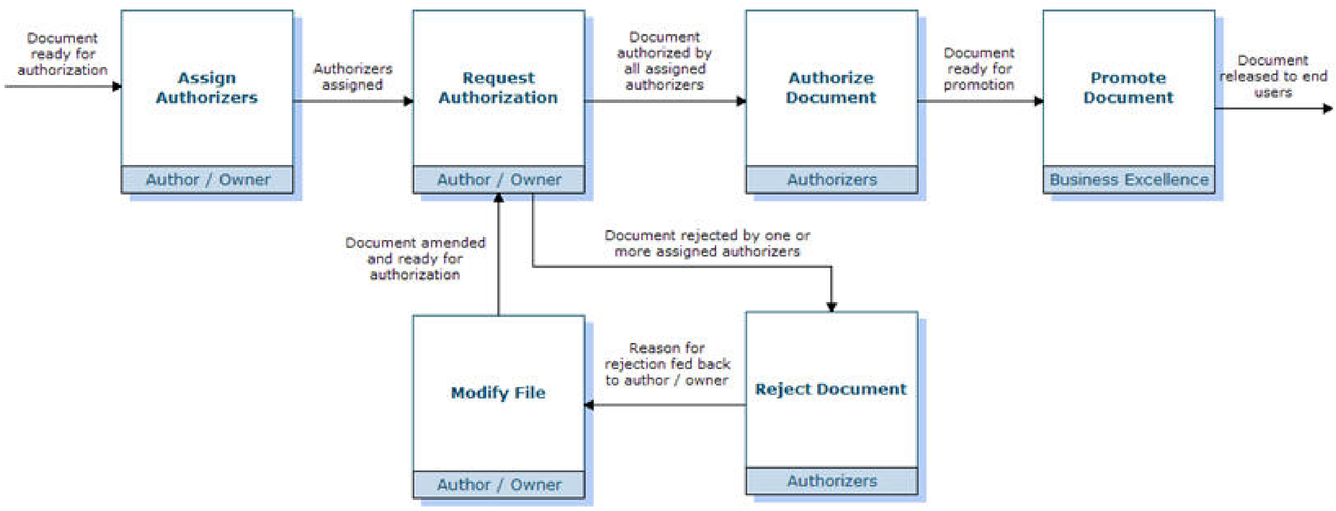
Mandatory Users
These assigned users can be requested to acknowledge particular diagrams and documents.

Reviewers
These assigned users are responsible for reviewing particular diagrams and documents.

Authorizing Documents

About authorizing files

Draft files need to be authorized before they can be promoted to master copies. Authorizers are defined for specific files and every authorizer must review a particular file before it can be promoted to a master copy.



Assign authorizers

A document's author, owner or an administrator can assign authorizers. For a draft file to be promoted to a master copy, the document must be authorized by all assigned authorizers.

Note: If one or more users do not have access to any of the documents that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which documents; you can either remove them from the list of authorizers, or seek to provide access for these users.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to assign authorizers for.
3. Select the file and from the **Manage** menu choose **Authorization** and then **Authorizers**.
4. Choose the scope of documents (files) to assign authorizers to.

   Selected Documents will assign authorizers to the selected files.
   All Documents will assign authorizers to all files in the Document Registry.
5. Click **User** or **Resource** to find and add users, user groups or resources.
6. Click **OK**.

Sequence of authorizers

You can change the sequence of authorizers once assigned. For example, you may want one group to authorize the file first before sending it to the next group. All users defined as sequence number 1 must authorize the file before a request is sent to users defined as sequence 2.

To change the sequence number of an existing authorizer, double-click the user or user group.

Removing authorizers

Select the user or user group and click **Remove** ━.

Related topics

Requesting authorization

Authorizing and rejecting files

Cancelling authorization

Request authorization

When a document is ready to be authorized, an authorization request is sent to the assigned authorizers. Authorizers will be notified by Email, in order of sequence. When a document has been signed off by every assigned authorizer then it can be promoted to a master copy and released to end users.

Note: If one or more users do not have access to any of the documents that you are requesting authorization for, you will not be able to proceed. A dialog will list which users do not have access to which documents; you can either remove them from the list of authorizers, or seek to provide access for these users.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to request authorization for.
3. Select the file(s) and from the **Manage** menu choose **Authorization** and then **Request**.
4. Specify the following options:

    Date to be authorized by is the date in which the authorization should be completed by.

    Scope is the scope of documents to request authorization for.

    Selected Documents will request authorization for files that you have selected, which are highlighted.
    All Documents will request authorization for all documents in the Document Registry (assuming a file has at least one assigned authorizer).

    Additional Notes allows any supporting notes to be added to the request, which will appear in the email that is sent to the authorizers.

5. Click **Next** to continue.

Reminders and escalation options

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

6. Specify any of the following options (if available):

    Enable email reminders will send reminder emails to assigned authorizers until they have signed the document(s) off.

    Enable SMS reminders will send reminder SMS messages to assigned authorizers until they have signed the document(s) off.

    Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

    Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

    Enable escalations will escalate an overdue request by notifying users' line managers by email.

    Escalate after is the number of days after the due date has passed before notifying users' line managers.

7. Click **OK**.

Related topics

[Assigning authorizers]

[Authorizing and rejecting files]

[Cancelling authorization]

Authorize or reject a file

Once a file is ready to be authorized, a request for authorization will notify the assigned authorizers and an entry will appear in their Authorization To Do list.

Rejecting a file will Email the author, who will then decide whether to cancel the authorization request or agree on a resolution with the authorizer. A file cannot be promoted until it has been authorized by all assigned authorizers.

---

1. From the **Documents** menu choose **Document Registry**.
2. From the **Manage** menu choose **Authorization** and then **To Do List**.
3. Right-click the file and choose **Authorize** or **Reject**.

   Note: Double-click the file to launch it.

Related topics

Assigning authorizers

Requesting authorization

Cancelling authorization

Promoting files

Creating change requests

Edit a draft document

Once a file has been submitted for authorization, you can change the draft file. For example, if a user rejects a document that you have submitted, you can edit the document outside of Control and resubmit it for authorization.

Note: This option is not available for documents that are currently promoted and locked.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to edit.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Change Draft File Not Details**.
5. Locate the file that you want to replace the existing document with.
6. Select the document and click **Open**.
7. Click **Close**.

Cancel authorization

Cancelling an authorization request will inform the assigned authorizers and remove the request to authorize the file from their Authorization To Do list.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to cancel authorization for.

3. Right-click the file and choose **Details**.
4. From the **Manage** menu choose **Authorization** and then **Unlock Draft**.

Related topics

Assigning authorizers

Requesting authorization

Authorizing and rejecting files

Override an authorization cycle

It is possible for administrators to override an authorization cycle part-way through and authorize selected documents or all documents in the Document Registry. This is useful in cases where an authorizer is removed from an authorization cycle before they have authorized it, thereby holding up the promotion of a document or set of documents, for example if an authorizer is on holiday or on sick leave.

Note: This option is only available to administrators.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to override the authorization.
3. Click the document(s) to select it.
4. From the **Manage** menu choose **Authorization** and then **Override Authorization**.
5. Enter your password and provide a reason for overriding the authorization cycle.
6. Select the scope of documents to authorize.

   All Documents will override all documents in the Document Registry (if they are awaiting authorization).
7. Click **OK**.

Related topics

Assigning authorizers

Requesting authorization

Cancelling authorization

Promoting files

Promoting Documents

About promoting files

Promoting a file will create a master copy of the file. Only authorized files can be promoted and once promoted, the draft copy becomes locked to prevent further editing. Draft promoters are responsible for promoting a draft file and only administrators and Document Registry administrators can assign draft promoters.

Note: A Document Registry system option allows a default draft promoter to be automatically assigned when documents are registered.

Assign draft promoters

Only assigned draft promoters can promote a draft to a master copy. A Document Registry system option allows a default user to be automatically assigned as the draft promoter upon registration of files in the Document Registry.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to assign draft promoters for.
3. Select the file and from the **Manage** menu choose **Authorization** and then **Draft Promoters**.

4. Click **Add** ✚ to add a user or user group.

5. Select the scope of files that the users will be draft promoters of.

   Selected Documents includes only files that you have selected in the Document Registry.
   All Documents includes all files in the Document Registry.

Related topics

Promoting draft files

Promote a draft

Promoting a draft will create a master copy of the file. A file can only be promoted if the file has been authorized and is ready for promotion, i.e. it has the status Promotion Ready. When a file has been promoted, the Details page for the file will display two tabs, one for the master and one for the draft. If a master version of a file already exists then any subsequent promotions will archive the current master files.

Note: A system option can automatically promote a draft following authorization.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to promote.
3. Right-click the file and choose **Details**.
4. From the **Manage** menu choose **Authorization** and then **Promote Draft Copy**.

Promoting Multiple Documents

Multiple files/documents can be promoted in one operation if they are ready to be promoted.

1. From the **Documents** menu choose **Document Registry**.
2. Find the documents that you want to promote.
3. Select the files (hold Ctrl to select multiple documents) and from the **Manage** menu choose **Authorization** and then **Promote Draft Copy**.
4. Select the scope of documents to promote.

   Note: You may be required to specify the location to save the master copies in.
5. Click **OK**.
6. Select the documents that you want to promote (documents that are ready for promotion will have a value of 'YES' in the OK column). Hold Ctrl to select multiple documents to promote.
7. Click **Continue**.

Unlocking Drafts

Once a document has been promoted, if any edits are required the draft document must be unlocked. See Unlocking drafts for more information.

Quick Promotion Of Documents

Administrators and Registry administrators can promote registered documents without putting them through an authorization cycle.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to promote.
3. Select the document and from the **File** menu choose **Administration** and then **Quick Promotion**.

Related topics

[Assigning draft promoters]

[Authorizing files]

Updating Drafts

Unlock a draft

A draft becomes locked following its promotion to a master copy and further editing is prevented. To update a promoted file the draft must be unlocked. By default only authors, owners and administrators can unlock a draft.

Note: A system option will automatically unlock drafts upon promotion.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to unlock.
3. Select the file and from the **Manage** menu choose **Authorization** and then **Unlock Draft**.

Managing Document Versions

Document authorization audit trail

The Documentation Authorization Audit Trail records any changes to a file with respect to the authorization cycle, for example if the list of authorizers change, if an authorization has been accepted or rejected, etc.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to view the authorization audit trail for.
3. Select the file and from the **View** menu choose **Details**.
4. From the **Manage** menu choose **Authorization** and then **Authorization Report**.

   The Current Process tab displays the authorizers of the file and their current status. The History Audit Log tab displays all changes made to the file with respect to its authorization.

   Double-click a log entry to view the details.

   Note: You can view the authorization audit trail for multiple documents by selecting the documents in the Document Registry, then from the **Manage** menu choose **Authorization** and then **Authorization Report**.

Update information across documents

Basic file information such as version number, date, author and owner can be updated across a scope of files. When the owner or author is changed then a history audit log entry is automatically generated to record the change.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the documents that you want to update.
3. Select the documents that you want to update, if updating a selection.
4. From the **Manage** menu choose **Version Manager**.
5. From the Update panel select the checkboxes of the updates that you want to make.
6. From the Scope panel choose the scope of files to make the changes to.
7. Change any diagram information in the New Information panel.

   Increment version number will update the version number to the next version number (e.g. version 1.2 will become version 1.3).

   Set version number will allow you to manually define a version number.

Replacing document authors and owners

To search and replace on authors and owners for selected files or all files within the Document Registry, click **Advanced**.

Document Archives

About archiving files

Files are archived automatically when a draft or master copy is overwritten with a new version. Archived files can be restored in the Document Registry Archive Manager.

Restore archived files

Files are archived automatically when a draft or master copy is overwritten with a new version. It is possible to restore archived files.

1. From the **Documents** menu choose **Document Registry**.
2. From the **File** menu choose **Archive Manager**.
3. Select the document that you want to restore and from the **File** menu choose **Restore File**.
4. Choose a location to save the file in and click **Save**.

Audit Trails

View document audit trails

The audit trail lists the current authorization state for documents and a history of changes to the authorization, including any updates to a document's categories.

Note: Audit records are read-only.

1. In the Document Registry, right-click the document and choose **Details**.
2. From the **Manage** menu choose **Authorization**, then **Authorization Report**.

   There are two tabs; Current Progress and History Audit Log.

   Note: To view the details of an audit record double-click the record in the History Audit Log tab.

Viewing the audit trail for multiple documents

To view the audit trail of multiple documents at once, search and retrieve the documents that you want to view, then from the **Manage** menu choose **Reports** and then **Audit Trail List**.

Change Logs

View and add change log records

Changes to documents are recorded in the change log for a specific file. Change logs can be viewed by users that have access to the diagram.

Note: Only file owners, authors, creators, administrators and Registry administrators can add, edit and delete change log entries.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to add a change log entry to.
3. Right-click the file and choose **Details**.
4. From the **Manage** menu choose **Change Log**.

Adding, editing and deleting change logs

To add a new change log entry click **Add**. To edit an existing change log entry, select the change log entry and click **Edit**. To delete an existing change log entry, select the change log entry and click **Delete**.

Chapter 11

Content Collaboration

Content Collaboration

About Collaboration

Collaboration allows users to assist in the promotion of change management and the continuous improvement of processes. This in turn empowers employees and promotes the adoption of business processes within an organization.

Memos

Memos allow users to provide feedback on diagrams and documents. Users can submit memos to a diagram and document, and also view existing memos from other users. This facilitates collaboration as it allows issues to be discussed openly. Users can also reply to existing memos which allows issues to be discussed concurrently.

Reviews

Users can be requested to review diagrams and documents. Two types of review can be requested; ad hoc and recurring reviews. Ad hoc reviews involved one review cycle and recurring reviews are set up for diagrams that require periodic reviews.

Actions

Actions provide the capability to enforce and measure a business' adoption of operational practices captured. Actions are particularly relevant to self assessing a control structure against the risks and processes, as well as providing a more granular checklist capability for more regular use. Actions can be created for diagrams and documents (and also storyboards, metric links or actions not associated with content) and assigned to specific users to undertake.

Acknowledgements

Users can be requested to formally acknowledge diagrams, documents and storyboards. This is useful, for example, when changes are made to content and you need to prove that users have read and accepted the changes, and users are required to enter their passwords when signing off an acknowledgement request. **Administrators** can view the status of all acknowledgement requests in the process repository - from the **Manage** menu choose **Acknowledgement Console**.

The Collaboration Console

The Collaboration Console allows administrators, owners and authors to view and manage memos, reviews, actions and acknowledgement requests for diagrams, documents and storyboards.

Acknowledgement Console

Administrators can view the status of all acknowledgement requests in the process repository - from the **Manage** menu choose **Acknowledgement Console**. In the console, click a hyperlinked number to view the respective requests.

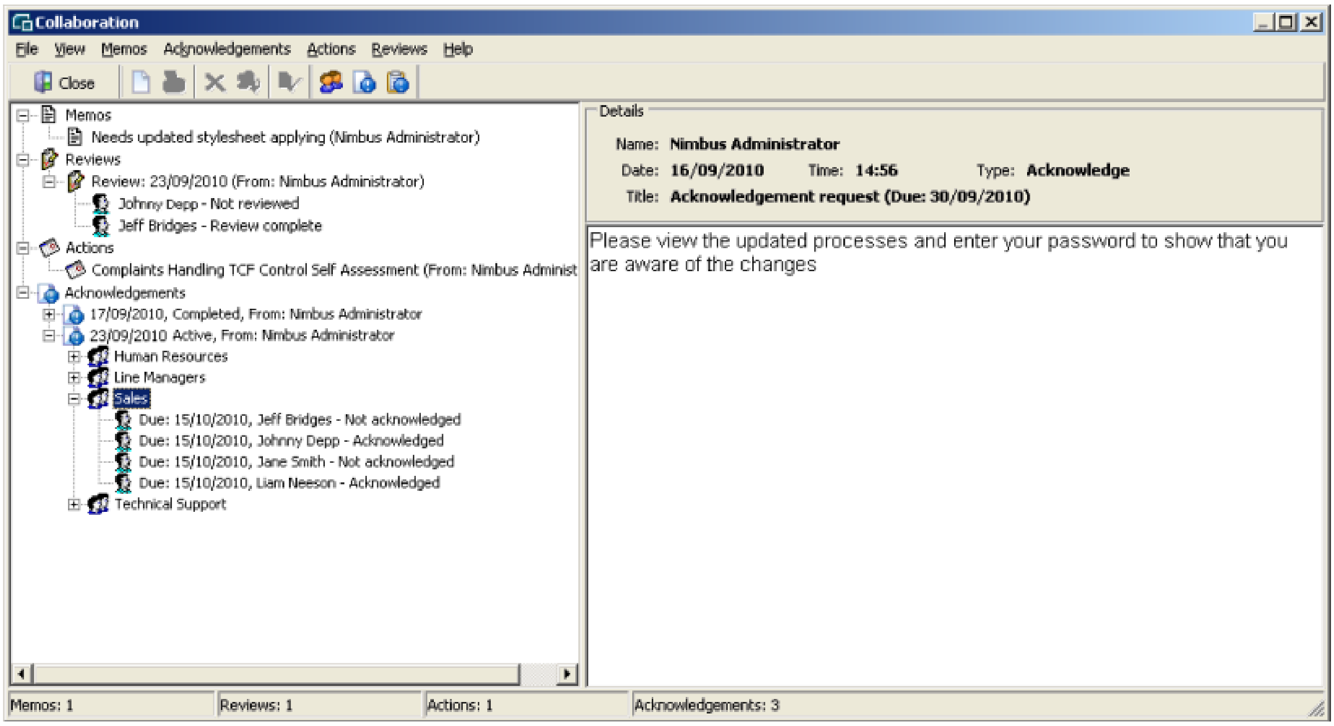
To access the Collaboration Console:

1. To access the Collaboration Console for a **diagram or document**, when viewing the diagram or the document details, from the **Manage** menu choose **Collaboration**, or click on the Diagram Control or Document Control toolbar.

   Note: To access the Document Details window, right-click the document and choose **Details**.

   To access the Collaboration Console for a **storyboard**, in the Storyboard Edit window, from the **File** menu choose **Collaboration**.

   Note: To access the Storyboard Edit window, right-click the storyboard and choose **Edit**. Only acknowledgements and actions apply to storyboards.



Memos		
Create New Topics	Create a new memo topic.	From the **Memos** menu choose **Start New Topic** .
Reply to Topics	Reply to an existing memo topic.	Select the topic that you want to reply to and from the **Memos** menu choose **Reply To Topic**.
Delete Topics	Delete a selected memo topic.	Select the topic that you want to delete and from the **Memos** menu choose **Delete**.
Delete All Topics	Delete all memo topics for a diagram or document.	Select the parent Memos node, or any topic, and from the **Memos** menu choose **Delete All**.
Create a Change Request from a Topic	Create a change request from a memo topic and all sub-memos.	Select the topic and from the **Memos** menu choose **Submit Memo as Change Request**.
Print a Memo Topic	Print a selected memo topic.	From the **Memos** menu choose **Print Memo**.
Print All Memo Topics	Print all memo topics.	From the **Memos** menu choose **Print All Memos** .
Reviews		
Assign Reviewers	Assign reviewers to a scope of diagrams or a document.	From the **Reviews** menu choose **Assign Reviewers**.
Schedule a Review	Schedule an *ad hoc* review for a scope of diagrams or a document.	From the **Reviews** menu choose **Schedule Review**.
Sign Off a Review	Sign off a review request. Note that you can only sign off your own review requests.	Right-click the review and choose **Sign Off Review**.
Actions		
Create an Action	Create a new action for a diagram, document or storyboard. More info...	From the **Actions** menu choose **New Action for Diagram/Document**.
Update an Action	Update the status of an action. Note that you can only update an action that is assigned to you. More info...	Right-click the action and choose **Update Action**.
Acknowledgements		
Assign Mandatory Users	Assign mandatory users to a scope of diagrams, a document or a storyboard.	From the **Acknowledgements** menu choose **Mandatory Users**.
Request Acknowledgem	Request acknowledgement for a scope of diagrams, a document or a storyboard.	From the **Acknowledgements** menu choose **Request Acknowledgement**.

ent		
View the Acknowledgement Log	View the acknowledgement log for a diagram, document or storyboard.	From the **Acknowledgements** menu choose **Acknowledgement Log**.
Reactivate Last Request	Reactivate the last acknowledgement request and set its status to 'Active'. Note that this applies only if the last acknowledgement request has been completed or cancelled.	From the **Acknowledgements** menu choose **Activate Last Request**, or right-click the last acknowledgement request in the list and choose **Set as Active**.
Sign Off Request	Acknowledge a scope of diagrams, a document or a storyboard. Note that you can only sign off a request that is assigned to you.	Right-click the acknowledgement request and choose **Sign Off Acknowledgement**.
Complete Active Request	Complete an acknowledgement group request. Note that this will remove any outstanding requests from users' To-Do lists.	From the **Acknowledgements** menu choose **Complete active request**, or right-click the active acknowledgement request and choose **Set as Complete**.
Cancel Active Request	Cancel an active acknowledgement group request, available to administrators, map administrators, storyboard managers, owners and authors. Note that this will remove any outstanding requests from users' To-Do lists.	From the **Acknowledgements** menu choose **Cancel active request**, or right-click the active acknowledgement request and choose **Cancel Acknowledgement Request**.
Recreate To-Do	Recreate an acknowledgement To-Do item in users' To-Do lists. This is used when new mandatory users are assigned. Note that this only applies to active requests and for users that have not yet acknowledged.	Right-click the user or user group and choose **Recreate To-Do**. To recreate a To-Do item for all users that have not yet acknowledged an active request, right-click the parent acknowledgement node and choose **Recreate To-Do**.
Resend Acknowledgement Request	Resend an acknowledgement request notification to users. This is used when new mandatory users are assigned. Note that this only applies to active requests and for users that have not yet acknowledged.	Right-click the user or user group and choose **Resend Acknowledgement Request**. To resend the request to all users that have not yet acknowledged an active request, right-click the parent acknowledgement node and choose **Resend Acknowledgement Request**.
Change Due Date	Change the due date for all users or individual users of an active request. Note that this only applies to users that have not yet acknowledged.	Right-click the active acknowledgement request, or an individual user or user group, and choose **Change Due Date**. To change the due date for all users that have not yet acknowledged an active request, right-click the actual acknowledgement request node and choose **Change Due Date**.
Add Mandatory Users	Add mandatory users to an existing acknowledgement request. Note that his option only applies to active requests. A different due date can be specified for new mandatory users added in this way. Users will be automatically notified and a new request will appear in their To-Do lists.	Right-click the active acknowledgement request and choose **Add Mandatory Users**.
Remove a Mandatory User	Remove a selected mandatory user from a diagram, document or storyboard. Note that this only applies to active requests and for users that have not yet acknowledged.	Right-click the user and choose **Remove Mandatory User**.

Map Collaboration

Acknowledgements

Assign acknowledgers

Mandatory users are users or user groups that are required to acknowledge a diagram. When an author requests acknowledgement for a diagram, mandatory users will receive an Email and their To-do list will be updated in the Web Server.

Note: Mandatory users can only be assigned by administrators, diagram authors and diagram owners. If one or more users do not have access to any of the diagrams that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of mandatory users, or seek to provide access for these users.

---

1. From the **Manage** menu choose **Mandatory Users**.

2. Select the scope of the diagrams that you want to assign users to.

   Current Diagram displays the current diagram only.
   Current Diagram and Lower Levels displays the current diagram and all lower-level diagrams.
   Current Process Map displays all diagrams in the current process map.
   Diagram Scope List File displays all diagrams in a diagram scope list file.

3. Click **User** to add users and user groups, or **Resource** to add resources.

   Note: To dynamically assign the diagram's activity resources as the acknowledgers, click **Dynamic** and choose **<Based on Resources>**.

   Removing users
   Select the user, user group or resource that you want to remove, then click **Remove** .

Resending Acknowledgement Requests to New Mandatory Users

If an acknowledgement request has been sent out for a scope of diagrams and new mandatory users are assigned, you can resend the acknowledgement request to these new users. See Requesting acknowledgement for further information.

Related topics

About acknowledgement

Request acknowledgement

Acknowledging diagrams

Viewing the acknowledgement log

Request acknowledgement

Following the promotion of a diagram, selected users can be requested to acknowledge the new content. An acknowledgement request will appear in their To-dos and they will be notified by email.

Note: If one or more users do not have access to any of the diagrams that you are requesting an acknowledgement for, you will not be able to proceed. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of mandatory users, or seek to provide access for these users.

Acknowledgement Reports

A number of acknowledgement-based reports are available. See Generating reports for more information.

Acknowledgements displays a list of users that have acknowledged a scope of diagrams.

Acknowledgement Progress displays the acknowledgement progress for a scope of diagrams.

Acknowledgement Requests displays a list of acknowledgement requests for a scope of diagrams, including status and the percentage complete.

Acknowledgement Summary displays a high-level overview of the acknowledgement progress for a selected scope of diagrams. Double-click a row to view the Acknowledgement Progress report for a specific diagram.

---

1. From the **Manage** menu choose **Request Acknowledgement**.
2. In the Acknowledgement Type options choose the type of acknowledgement that you want to create.

   Standard allows you to create a single acknowledgement request for a scope of diagrams that must be completed by a specific date. Once all mandatory users have acknowledged then the status of the request will be set to Complete. Note that if new mandatory users are added at a later date then they will be assigned the same date, which may lead to past due (overdue) requests being assigned to new mandatory users.

   Continuous allows you to create an open acknowledgement request for a scope of diagrams, which is open indefinitely, and allows users to be added at any time. When a new acknowledgement request is sent out, new mandatory users will be assigned a due date in advance of the date the new request is sent, thereby ensuring that they do not receive past due (overdue) requests.

3. Select either the Date to be acknowledged by or the Acknowledgement request due dates to (depending on what you selected in the previous step).
   Note: The **Acknowledgement request due dates to** setting (for continuous acknowledgement requests) will automatically create due dates from the date a new mandatory user is assigned. For example, if you set 2 weeks as the value and a new mandatory user is added on the 1st January, then the due date for that user to acknowledge the content by will be the 15th January.
4. Choose the scope of diagrams to request acknowledgement for.

Current Diagram requests acknowledgement for the current diagram only.

Current Diagram and Lower Levels requests acknowledgement for the current diagram and all lower-level diagrams.

Current Process Map requests acknowledgement for all diagrams in the current process map.

Diagram Scope List File requests acknowledgement for all diagrams in a diagram scope list file.

5. Enter any additional notes that may be useful for a user when acknowledging the content.
6. Click **Next** to define the reminder and escalation options.

Reminders and escalation options

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

Enable email reminders will send reminder emails to assigned mandatory users until they have signed the diagram(s) off.

Enable SMS reminders will send reminder SMS messages to assigned mandatory users until they have signed the diagram(s) off.

Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

7. Click **OK** to finish.

Resending Acknowledgement Requests to New Mandatory Users

If an acknowledgement request has already been submitted for a selected scope of diagrams and new mandatory users are assigned, you can resend the acknowledgement request to these new users. This ensures that a user is made aware of any new processes that relate to their new group membership.

In the mandatory users list for a particular diagram, choose the scope of diagrams to resend any acknowledgement requests for, then select the new users in the list (hold **Ctrl** to select multiple users). Right-click a selected user and choose **Send Current Request**. In the Request Acknowledgement dialog that opens you can deselect any users, if required, then click **OK** to send the request(s).

See Assigning acknowledgers for further information.

Resending Acknowledgement Requests to New Group Members

When a user joins a new user group, you can resend them any previous acknowledgement requests that relate to their new group membership. This ensures that users are made aware of any new processes, documents and storyboards that relate to their new roles.

 This option is only available to Nimbus Control administrators.

Note: If the user has joined a group that is a member of other groups, i.e. the group is a sub-group of one or more parent groups, they will also receive any acknowledgement requests that exist for associated parent groups.

In the User Accounts window, right-click the user and choose **Send Acknowledgements**. Select the user group(s) that you want to send current acknowledgement requests for, i.e. select the group(s) that the user has recently joined. **Automatically reactivate completed acknowledgements** will reactivate the last completed acknowledgement request (i.e. set it to 'active) and send it to the user. If this option is not selected then only active requests will be sent to the user. Click **Next** to define the reminder and escalation details (see above for information) and click **OK**.

Related topics

About acknowledgement

Assigning acknowledgers

Acknowledging diagrams

Viewing the acknowledgement log

Action Lists

System Options (Document Control)

Cancel and complete acknowledgement requests

Cancelling and completing acknowledgement requests can achieved through the Collaboration Console.

Acknowledge a diagram

Mandatory users may be requested to formally acknowledge updates to a diagram. All acknowledgements are recorded in the acknowledgement log to show that the changes have been reviewed and accepted.

If you do not understand what changes have been made or disagree with them, contact the requester. In a quality system it is imperative that you understand any changes being made before acknowledging them.

1. From the **Manage** menu choose **Acknowledge Diagram(s)**.
2. Choose the scope of diagrams that you want to acknowledge.

   Current Diagram will acknowledge the diagram that you are currently viewing.

   Current Diagram And Lower Levels will acknowledge the diagram that you are currently viewing and any lower level diagrams that require your acknowledgement.

   Current Process Map will acknowledge all diagrams in the current process map that require your acknowledgement.

3. Enter your password and click **OK**.

> **My Actions**
> Your current acknowledgement requests are also listed in your My Actions in the Author Client. From the **Actions** menu choose **My Actions**. To acknowledge a diagram double-click the acknowledgement request.

Related topics

About acknowledgement

Assigning acknowledgers

Request acknowledgement

Viewing the acknowledgement log

System Options (Document Control)

Action Lists

View the acknowledgement log

All acknowledgements made against a diagram are stored in a log and a separate log is created for each diagram.

1. From the **Manage** menu choose **Acknowledgement Log**.

Related topics

About acknowledgement
Assigning acknowledgers
Request acknowledgement
Acknowledging diagrams

Memos

Add a memo

1. From the **Diagram** menu choose **Memos**.
2. Right-click Memos (on the left) and choose **Start New Topic**.
3. Enter a title, reference (optional) and subject (optional).
4. Click **OK**  .

   Hint: To spell check the memo before submitting it, from the **Tools** menu choose **Check Spelling**.

Related topics

About memos

Replying to memos

Editing memos

Deleting memos

Printing memos

Reply to a memo

1. From the **Diagram** menu choose **Memos**.
2. Right-click the memo that you want to reply to and choose **Reply To Topic**.
3. Enter a title, reference (optional) and subject (optional).
4. Click **OK**  .

   Hint: To spell check the memo before submitting it, from the **Tools** menu choose **Check Spelling**.

Related topics

About memos

Adding memos

Editing memos

Deleting memos

Printing memos

Edit a memo

1. From the **Diagram** menu choose **Memos**.
2. Right-click the memo and choose **Edit**.

   Note: You can only edit your own memos.

Related topics

About memos

Adding memos

Replying to memos

Deleting memos

Printing memos

Delete a memo

1. From the **Diagram** menu choose **Memos**.
2. Right-click the memo and choose **Delete**.

   Note: You can only delete your own memos. Administrators can delete all memos associated with a diagram. From the **File** menu choose **Delete All**.

Related topics

About memos

Adding memos

Replying to memos

Editing memos

Printing memos

Print a memo

1. From the **Diagram** menu choose **Memos**.
2. Select the memo that you want to print and from the **File** menu choose **Print Memo**.

   Note: You can print all memos associated with a diagram. From the **File** menu choose **Print All Memos**.

Related topics

About memos

Adding memos

Replying to memos

Editing memos

Deleting memos

Reviews

Assign reviewers

Reviewers are users that are assigned to review diagrams by authors, owners or administrators.

Note: If one or more users do not have access to any of the diagrams that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of reviewers, or seek to provide access for these users.

1. From the **Actions** menu choose **Diagram Reviewers**.
2. Select the scope of diagrams to assign the diagram reviewers to.

Current Diagram is the current diagram only.
Current Diagram and Lower Levels is the current diagram and all lower-level diagrams.
Current Process Map are all diagrams in the current process map.
Diagram Scope List File are all diagrams in a diagram scope list file.

3. Click **Add** ✚ to add users.

   Note: To add owner(s) of the diagrams as reviewers, from the **Dynamic** drop-down options choose **<Owner>**. If this option is selected, when a review request is sent out the current owner(s) of the diagram(s) will be sent a review request.

Related topics

About reviewing diagrams

Requesting reviews

Creating recurring reviews

Editing recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Tracking the authorization process

Request a review

From time to time you may want to have a diagram reviewed by certain users (reviewers). Reviewers will be notified by email and a new action will appear in their To-dos.

Note: If one or more users do not have access to any of the diagrams that you are requesting a review for, you will not be able to proceed. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of reviewers, or seek to provide access for these users.

---

1. From the **Actions** menu choose **Schedule Diagram Review**.
2. Enter a user reference, if appropriate, and a note. Click **Next** to continue.
3. Choose the date that want the review to be completed by and the priority, then click **Next**.

Reminders and escalation options

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

4. Specify any of the following options (if available):

   Enable email reminders will send reminder emails to assigned reviewers until they have signed the diagram(s) off.

   Enable SMS reminders will send reminder SMS messages to assigned reviewers until they have signed the diagram(s) off.

   Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

   Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

   Enable escalations will escalate an overdue request by notifying users' line managers by email.

   Escalate after is the number of days after the due date has passed before notifying users' line managers.

5. Click **Next**.
6. To add an attachment click **New** 🗋 and choose an attachment type.
7. Click **Next** and select the scope of diagrams that you want to request a review for.
8. Click **Next**, enter your password and then click **Finish**.

Related topics

About reviewing diagrams

Assigning reviews

Creating recurring reviews

Editing recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Tracking the authorization process

Diagram scope lists

Create a recurring review

Recurring reviews will automatically request a review of a diagram at specified time intervals.

Note: Recurring reviewers must be set up separately to ad hoc reviewers, i.e. assigned ad hoc reviewers will not be automatically defined as recurring reviewers. See Creating a recurring file review for further information. If one or more users that you assign do not have access to any of the diagrams then you will not be able to create a recurring review. A dialog will list which users do not have access to which diagrams; you can either remove them from the list of reviewers, or seek to provide access for these users.

1. From the **Actions** menu choose **New Recurring Review**.
2. Choose the first review date from the **First Review** date selector.
3. Define the recurrence of the review, i.e. the time delay between reviews.
4. Define the notification period, i.e. the time period that users will be reminded to review the diagram before the actual review is due, then click **Next**.

   The next step allows you to specify the users to send the recurring review to. If reviewers have already been assigned to the diagram (on an *ad hoc* basis) then they will be automatically assigned as reviewers to the recurring review. You can add new users and remove existing users if required.
5. Click **Add** to add users and/or user groups who you want to review the file, then click **Next**.

   Note: To add the owner of the diagram as a reviewer, from the **Dynamic** drop-down options choose **<Owner>**. When this option is selected, any review requests sent out will also be sent to the current owner to review the content.
6. Enter some optional notes about the recurring review, e.g. the reason for the review, then click **Next**.
7. Enter your password and click **OK**.

Related topics

About reviewing diagrams

Assigning reviews

Requesting reviews

Editing recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Tracking the authorization process

Edit a recurring review

Recurring reviews will automatically request a review of a diagram at specified time intervals. Recurring reviews can be edited, for example to change the recurrence, notification or add/remove users.

Note: Recurring reviews have separate reviewers assigned to each recurring review.

1. From the **Actions** menu choose **View Recurring Review**.
2. Choose the scope of diagrams to view recurring reviews for.

   Current Diagram is the current diagram only.
   Current Diagram and Lower Levels is the current diagram and all lower-level diagrams.
   Current Process Map are all diagrams in the current process map.
   Diagram Scope List File are all diagrams in a diagram scope list file.
   Map Selection allows you to select multiple diagrams from any maps within the process repository.

3. Right-click the recurring review and choose **Edit**.
4. Make any changes to the review settings, if required, then click **Next**.
5. Click **Add** to assign new users to the review or select users that you want to remove and click **Remove**.
6. Click **Next** and edit the note, if required.
7. Click **Next**, enter your password and click **Finish**.

Related topics

About reviewing diagrams

Assigning reviews

Requesting reviews

Creating recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Tracking the authorization process

Remove a recurring review

Recurring reviews will automatically request a review of a diagram at specified time intervals.

1. From the **Actions** menu choose **View Recurring Reviews**.
2. Choose the scope of diagrams to view recurring reviews for and click **OK**.
3. Select the recurring review and from the **File** menu choose **Delete**.

Related topics

About reviewing diagrams

Assigning reviews

Requesting reviews

Creating recurring reviews

Editing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Tracking the authorization process

Diagram scope lists

Manually trigger a recurring review

The next review in a recurring review cycle can be manually triggered. All reviewers of the recurring review will be notified and requested to review the diagram.

1. From the **Actions** menu choose **View Recurring Reviews**.
2. Select the scope of diagrams to view recurring reviews for.
3. Right-click the recurring review and choose **Manually Trigger Next Cycle**.

Related topics

About reviewing diagrams

Assigning reviews

Requesting reviews

Creating recurring reviews

Editing recurring reviews

Removing recurring reviews

Signing off reviews

Tracking the authorization process

Diagram scope lists

Sign off a review

If you have been requested to review a diagram then it will appear in your Action List from where you can sign it off.

1. From the **Actions** menu choose **Action List**.
2. Right-click the review item and choose **Sign off**.
3. Enter your password and a note, if appropriate, then click **OK**.

Related topics

About reviewing diagrams

Assigning reviews

Requesting reviews

Creating recurring reviews

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Tracking the authorization process

Actions

Create an action

Actions can be assigned to a diagram. For information on actions please refer to the Action Management section.

1. From the **Action** menu choose **New Action**, then **Action for Diagram**.

   Follow the wizard to create the action and assign it to users. For more information on the action fields see Creating actions (under Action Management).

Change Requests

About change requests

As part of a quality management system, change requests can be raised against diagrams. When a change request is created the map diagram owner will be notified with a request to review it. Following successful authorization by the owner, the diagram author will then be requested to review it.

Create a change request

Changes can be requested for diagrams in the form of change requests. New change requests will automatically notify the Primary Email Contact (set as the diagram owner or author), who will decide to either progress the change, request more information, or reject it.

1. From the **Manage** menu choose **New Change Request**.
2. Enter the relevant information for each stage, pressing **Next** to proceed to the next step.

Related topics

About change requests

Reviewing change requests

Completing change requests

Viewing change requests

Viewing change request logs

Changing the originator, owner or author

System Options (Document Control)

Review a change request

Following the submission of a change request, the primary email contact will be automatically notified with a request to review it before it is passed on to the diagram author to review and complete. As the initial reviewer, you can choose to accept or reject the change, or you can request further information from the originator, or request that the diagram undergoes an impact assessment. Once the review stage has been confirmed then a notification message is sent to the specified implementer and a To-Do is assigned them. If a change request is rejected, or further information requested, then the change request is returned back to the originator, who can then cancel it or resubmit the request with additional information.

Note: The owner may not necessarily be the diagram owner as in some cases the originator may have specified a different user.

1. From the **Manage** menu choose **View Change Requests**.
2. Choose the scope of diagrams that you want to view any change requests for.

   Current Diagram includes the current diagram only.
   Current Diagram and Lower Levels includes the current diagram and all lower-level diagrams.
   Current Process Map includes all diagrams in the current process map.
   Diagram Scope List File includes all diagrams in a diagram scope list file.

Map Selection includes all diagrams in the current process map repository.

3. Click the change request from the list that you want to review to display it.
4. Click on the yellow box that states Owner.

   Note: If you are not the owner or the change request is not in the review stage then you cannot review it.

5. Select an option and click **Next**.

   Allocate Request will accept the change request and send it to the author to action (this option is not available if the change request has already been approved and sent to the author but then returned for more information).

   Need More Information will return the change request to the originator with a request to provide more information.

   Reject Request will return the change request to the originator as rejected.

   Impact Assessment will hold the change request to allow the impact on the diagram to be assessed.

6. Enter the relevant information relating to the option you have chosen. For example, why the change request is being rejected, what kind of information you require from the originator, etc.

   Note: You can find any change requests that await your input in your Action List.

Related topics

About change requests

Creating change requests

Completing change requests

Viewing change requests

Viewing change request logs

Changing the originator, owner or author

Complete a change request

When a change request has been approved by the owner, the author is requested to action the change request. Once the change request has been actioned the author is required to set the status to complete. The author can also request further information from the owner or originator to provide clarification of the change request if required.

Note: The author may not necessarily be the diagram author as a different user may have been specified to action the change request.

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1. From the **Manage** menu choose **View Change Requests**.
2. Choose the scope of diagrams that you want to view any change requests for.

   Current Diagram includes the current diagram only.

   Current Diagram and Lower Levels includes the current diagram and all lower-level diagrams.

   Current Process Map includes all diagrams in the current process map.

   Diagram Scope List File includes all diagrams in a diagram scope list file.

   Map Selection includes all diagrams in the current process map repository.

3. Click the change request from the list that you want to review to display it.
4. Click on the yellow box that states Author.

   Note: If you are not the author or the change request is not in the completion stage then you cannot complete it.

5. Select an option and click **Next**.

   Need More Information (From The Originator) will return the change request to the originator with a request to provide more information.

   Confirm Completion states that the change request has been fulfilled and sets the status to complete.

   Need More Information (From The Owner) will return the change request to the owner with a request to provide more information.

6. Enter the relevant information relating to the option you have chosen. For example, what kind of information you require

from the originator or owner, etc.

Note: You can find any change requests that are assigned to you and that await your input in your Action List.

Related topics

About change requests

Creating change requests

Reviewing change requests

Viewing change requests

Viewing change request logs

Changing the originator, owner or author

View change requests

The Change Requests dialog lists all change requests for a selected scope of diagrams or documents. When a change request is highlighted in the list the stage at which the change request is at will be highlighted in yellow. The appropriate user can then click on the stage that they're associated with to complete it and progress the change request to the next stage.

1. From the **Manage** menu choose **View Change Requests**.
2. Choose the diagram scope that you want to view the change requests for.

   Current Diagram includes the current diagram only.
   Current Diagram and Lower Levels includes the current diagram and all lower-level diagrams.
   Current Process Map includes all diagrams in the current process map.
   Diagram Scope List File includes all diagrams in a diagram scope list file.
   Map Selection includes all diagrams in the current process map repository.

3. Click the change request from the list to view the route map.

   Hint: You can group columns by dragging a column header onto the grey area just above the list of change requests.

Related topics

About change requests

Creating change requests

Reviewing change requests

Completing change requests

Viewing change request logs

Changing the originator, owner or author

View change request log

A log of all notes is kept with the change request, allowing any interested users to collaborate by adding new topics or replying to existing topics.

1. From the **Manage** menu choose **View Change Requests**.
2. Choose the diagram scope that you want to view the change requests for.

   Current Diagram includes the current diagram only.
   Current Diagram and Lower Levels includes the current diagram and all lower-level diagrams.
   Current Process Map includes all diagrams in the current process map.
   Diagram Scope List File includes all diagrams in a diagram scope list file.
   Map Selection includes all diagrams in the current process map repository.

3. Right-click the change request from the list and choose **Change Log/Notes**.
4. To add a note do one of the following:
    - From the **File** menu choose **Start New Topic**.
    - Right-click an existing note and choose **Reply To Topic**.

Related topics

[About change requests]
[Creating change requests]
[Reviewing change requests]
[Completing change requests]
[Viewing change requests]
[Changing the originator, owner or author]

Change the originator, owner or author

By default the change request originator is the user that creates the change request and the owner and author is the diagram owner and author. It is possible to specify different users as the originator, owner and author.

Note: Change request owners and authors are automatically updated when diagram owners and/or authors are changed.

1. From the **Manage** menu choose **View Change Requests**.
2. Choose the diagram scope that you want to view the change requests for.

    Current Diagram includes the current diagram only.
    Current Diagram and Lower Levels includes the current diagram and all lower-level diagrams.
    Current Process Map includes all diagrams in the current process map.
    Diagram Scope List File includes all diagrams in a diagram scope list file.
    Map Selection includes all diagrams in the current process map repository.

3. Right-click the change request from the list and choose either **Change Owner**, **Change Author** or **Change Originator**.
4. Click **Select user**  to specify a user, or click **Me** if you want to assign yourself.
5. Click **OK.**

Related topics

[About change requests]
[Creating change requests]
[Reviewing change requests]
[Completing change requests]
[Viewing change requests]
[Viewing change request logs]

Subscriptions

About subscriptions

Subscriptions are used to notify subscribed users via Email of any changes to diagram and document versions. Users can subscribe themselves to diagrams and documents, and subscribe other users. A system option can force diagram and document version numbers to increment automatically upon promotion from a draft to a master. Alternatively, users can manually increment a version number.

For diagrams, a different set of subscribers can be defined for the draft and master versions. Subscribed users will not be copied over when a draft diagram is promoted. However, when assigning subscribers to a document, both draft and master versions will contain the same subscription list. If you remove a subscribed user from the draft version then they will also be removed from the master version, and vice-versa.

Note: End users cannot add or remove other users from a subscription list, however they can add or remove themselves (if they have the Change Subscription user account setting enabled).

Add a subscription

1. From the **Diagram** menu choose **Subscriptions**.
2. Click **Add Subscriptions**.
3. Select a user or user group.

   Note: To remove a user once assigned, select the user and click **Remove** .
4. Click **Next**.
5. Select the scope of diagrams to apply the subscriptions to.

   Diagram Scope List Files

   A diagram scope list file is a list of diagrams within a process map, or across multiple process maps. See Creating diagram scope lists for more information.
6. Click **Next**.
7. Click **Apply**.

Related topics

Removing subscriptions

Replacing subscriptions

Remove a subscription

1. From the **Diagram** menu choose **Subscriptions**.
2. Select the user or user group and click **Remove Subscriptions**.

   Note: Hold **Ctrl** to select multiple users and user groups.

   If the list of subscribers is long and you know the user(s) and/or user group(s) that you want to unsubscribe, don't select any user or user group and click **Remove Subscriptions**. Click **Add** to find the user or user group that you want to unsubscribe.
3. Click **Next**.
4. Select the scope of diagrams to remove the user(s) or user group(s) from.

   Diagram Scope List Files

   A diagram scope list file is a list of diagrams within a process map, or across multiple process maps. See Creating diagram scope lists for more information.

5. Click **Next**.
6. Click **Apply**.

Related topics

[Adding subscriptions]

[Replacing subscriptions]

Replace subscriptions

You can replace subscriptions for a diagram or across a scope of diagrams.

1. From the **Diagram** menu choose **Subscriptions**.
2. From the **File** menu choose **Replace**.
3. In the Search For panel do one of the following:
   - Select the **User** option and click ... to select a user.
   - Select the **Group** option and choose a group from the drop-down list.
4. In the Replace With panel do one of the following:
   - Select the **User** option and click ... to select a user.
   - Select the **Group** option and choose a group from the drop-down list.
5. Choose the scope of diagrams to replace the subscriptions for.

   Diagram Scope List Files

   A diagram scope list file is a list of diagrams within a process map, or across multiple process maps. See Creating diagram scope lists for more information.
6. Click **OK**.

Related topics

Adding subscriptions

Removing subscriptions

Document Collaboration

Acknowledgements

Assign acknowledgers

Mandatory users are users that are requested to acknowledge changes to files, or new content relevant to their role.

Note: If one or more users do not have access to any of the documents that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which documents; you can either remove them from the list of mandatory users, or seek to provide access for these users.

1. From the **Documents** menu choose **Document Registry**.
2. Find the file(s) and select it.
3. From the **Manage** menu choose **Mandatory Users**.

4. Select the scope of diagrams to add mandatory users to.

   All Documents will assign mandatory users to all files within the Document Registry.

5. Click ✚ **User** or ✚ **Resource** to find and add users, user groups or resources.
6. Click **OK**.

Resending Acknowledgement Requests to New Mandatory Users

If an acknowledgement request has been sent out for a scope of documents and new mandatory users are assigned, you can resend the acknowledgement request to these new users. See Requesting acknowledgement for further information.

Related topics

Request acknowledgement

Acknowledge a file

View the acknowledgement log

Request acknowledgement

Following the promotion of a document, selected users can be requested to acknowledge the new content. An acknowledgement request will appear in their To-dos and they will be notified by email.

Note: If one or more users do not have access to any of the documents that you are requesting acknowledgement for, you will not be able to proceed. A dialog will list which users do not have access to which documents; you can either remove them from the list of mandatory users, or seek to provide access for these users.

Reporting

A number of acknowledgement-based reports are available. In the Document Registry, from the **Manage** menu choose **Reports**, and then one of the following: See Generate a report for more information.

Acknowledgement Log List displays a list of users that have acknowledged a scope of documents.

Acknowledgement Progress displays the acknowledgement progress for a scope of documents.

Acknowledgement Requests List displays a list of acknowledgement requests for a scope of documents, including status and the percentage complete.
Acknowledgement Summary displays a high-level overview of the acknowledgement progress for a selected scope of documents. Double-click a row to view the Acknowledgement Progress report for a specific document.

---

1. In the Document Registry, right-click the file(s) that you want to request acknowledgement for and choose **Details**.
2. From the **Manage** menu choose **Request Acknowledgement**.
3. In the Acknowledgement Type options choose the type of acknowledgement that you want to create.

   Standard allows you to create a single acknowledgement request for a scope of documents that must be completed by a specific date. Once all mandatory users have acknowledged then the status of the request will be set to Complete. Note that if new mandatory users are added at a later date then they will be assigned the same date, which may lead to past due (overdue) requests being assigned to new mandatory users.

   Continuous allows you to create an open acknowledgement request for a scope of documents which is open indefinitely. When a new acknowledgement request is sent out, new mandatory users will be assigned a due date in advance of the date the new request is sent, thereby ensuring that they do not receive past due (overdue) requests.

4. Select either the **Date to be acknowledged by** or the **Acknowledgement request due dates to** (depending on what you selected in the previous step).

   Note: The **Acknowledgement request due dates to** setting (for continuous acknowledgement requests) will automatically create due dates from the date a new mandatory user is assigned. For example, if you set 2 weeks as the value and a new mandatory user is added on the 1st January, then the due date for that user to acknowledge the content by will be the 15th January.

5. Choose the scope of documents to request acknowledgement for.

   Selected Documents will request acknowledgement for files that you have selected, which are highlighted.

   All Documents will request acknowledgement for all files in the Document Registry (assuming a file has at least one assigned mandatory user).

6. Enter any additional notes that may be useful for a user when acknowledging the content.
7. Click **Next** to define the reminder and escalation options.

Reminders and escalation options

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

Enable email reminders will send reminder emails to assigned mandatory users until they have signed the document(s) off.

Enable SMS reminders will send reminder SMS messages to assigned mandatory users until they have signed the document(s) off.

Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

8. Click **OK** to finish.

Resending Acknowledgement Requests to New Mandatory Users

If an acknowledgement request has already been submitted for a selected scope of documents and new mandatory users are assigned, you can resend an acknowledgement request to these new users.

In the mandatory users list for a particular document, choose the scope of documents to resend any acknowledgement requests for, then select the new users in the list (hold **Ctrl** to select multiple users). Right-click a selected user and choose **Send Current Request**. In the Request Acknowledgement dialog that opens you can deselect any users, if required, then click **OK** to send the request(s).

See Assigning acknowledgers for further information.

Resending Acknowledgement Requests to New Group Members

When a user joins a new user group, you can resend them any previous acknowledgement requests that relate to their new group membership. This ensures that users are made aware of any new processes, documents and storyboards that relate to their new roles.

This option is only available to Nimbus Control administrators.

Note: If the user has joined a group that is a member of other groups, i.e. the group is a sub-group of one or more parent groups, they will also receive any acknowledgement requests that exist for associated parent groups.

In the User Accounts window, right-click the user and choose **Send Acknowledgements**. Select the user group(s) that you want to send current acknowledgement requests for, i.e. select the group(s) that the user has recently joined. **Automatically reactivate completed acknowledgements** will reactivate the last completed acknowledgement request (i.e. set it to 'active') and send it to the user. If this option is not selected then only active requests will be sent to the user. Click **Next** to define the reminder and escalation details (see above for information) and click **OK**.

Related topics

Assigning acknowledgers

Acknowledge a file

View the acknowledgement log

Cancel and complete acknowledgement requests

Cancelling and completing acknowledgement requests can achieved through the Collaboration Console.

Acknowledge a document

If a file has changed and you are an assigned mandatory user for the file, you will receive a request to acknowledge the change. Acknowledgement requests will appear in your Email and in your action list.

1. In the Document Details window for the document, from the **Manage** menu choose **Acknowledge File**.
2. Right-click the acknowledgement request entry and choose **Sign Off**.
3. Enter your password and click **OK**.

> **My Actions**
> Your current acknowledgement requests are also listed in your My Actions in the Author Client. From the **Actions** menu choose **My Actions**. To acknowledge a document double-click the acknowledgement request.

Related topics

Assigning acknowledgers

Request acknowledgement

View the acknowledgement log

Action lists

View the acknowledgement log

All acknowledgements made against a Document Registry file are stored in a log, with a separate log created for each file.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document, right-click it and choose **Details**.
3. From the **Manage** menu choose **Acknowledgement Log**.

Memos

Add a memo

When a new memo is submitted the Primary Email Contact for the diagram will be notified.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to add a memo to.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Memos**.
5. Right-click Memos (on the left) and choose **Start New Topic**.
6. Enter a title, reference (optional) and subject (optional).
7. Click **OK** .

   Hint: To spell check the memo before submitting it, from the **Tools** menu choose **Check Spelling**.

Related topics

Replying to memos

Editing memos

Deleting memos

Printing memos

Subscriptions

Reply to a memo

1. From the **Documents** menu choose **Document Registry**.
2. Find the document.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Memos**.
5. Right-click the memo that you want to reply to and choose **Reply To Topic**.
6. Enter a title, reference (optional) and subject (optional).
7. Click **OK** .

   Hint: To spell check the memo before submitting it, from the **Tools** menu choose **Check Spelling**.

Related topics

Adding memos

Editing memos

Deleting memos

Printing memos

Subscriptions

Edit a memo

1. From the **Documents** menu choose **Document Registry**.
2. Find the document.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Memos**.
5. Right-click the menu and choose **Edit**.

   Note: You can only edit your own memos.

Related topics

Adding memos

Replying to memos

Deleting memos

Printing memos

Subscriptions

Delete a memo

1. From the **Documents** menu choose **Document Registry**.
2. Find the document.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Memos**.
5. Right-click the menu and choose **Delete**.

   Note: You can only delete your own memos. Administrators can delete all memos associated with a document. From the **File** menu choose **Delete All**.

Related topics

Adding memos

Replying to memos

Editing memos

Printing memos

Print a memo

1. From the **Documents** menu choose **Document Registry**.
2. Find the document.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Memos**.
5. Select the memo and from the **File** menu choose **Print Memo**.

   Note: You can print all memos associated with a document. From the **File** menu choose **Print All Memos**.

Related topics

Adding memos

Replying to memos

Editing memos

Deleting memos

Reviews

Assign reviewers

Reviewers must be defined for a review cycle to be undertaken. When a review is initiated for a particular file, the assigned reviewers will be notified and an action will appear in their action list.

Note: If one or more users do not have access to any of the documents that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which documents; you can either remove them from the list of reviewers, or seek to provide access for these users.

To assign reviewers to selected files:

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to assign reviewers to.

3. Select the file(s) and from the **Manage** menu choose **Reviewers**.
4. Select **Selected Documents** as the scope.
5. Click **Add** to add users.

   Note: To add the owner of the document as a reviewer, from the **Dynamic** drop-down options choose **<Owner>**. If this option is selected, when a review request is sent out the current owner of the document will be sent a review request.
6. Click **OK**.

To assign reviewers to all documents:

1. From the **Documents** menu choose **Document Registry**.
2. Search for a file.

   Note: Since you are assigning reviewers to all documents it does not matter which file you retrieve.
3. From the **Manage** menu choose **Reviewers**.
4. Select **All Documents** as the scope.
5. Click **Add** to add users.

   Note: To add the owners of the documents as reviewers, from the **Dynamic** drop-down options choose **<Owner>**. If this option is selected, when a review request is sent out for any of the selected documents, the current owners will be sent review requests.
6. Click **OK**.

Related topics

Requesting reviews

Creating recurring reviews

Signing off reviews

Request a review

From time to time you may want to have a document reviewed by certain users (reviewers). Reviewers will be notified by email and a new action will appear in their To-dos.

Note: If one or more users do not have access to any of the documents that you are requesting a review for, you will not be able to proceed. A dialog will list which users do not have access to which documents; you can either remove them from the list of reviewers, or seek to provide access for these users.

---

1. From the **Documents** menu choose **Document Registry**.
2. Find the document(s) that you want to request a review for.

   Note: If you want to request a review for multiple documents, hold Ctrl to select each file.
3. From the **Manage** menu choose **Schedule Review**.
4. Enter a user reference, if appropriate, and a note. Click **Next** to continue.
5. Choose the date that you want the review to be completed by and the priority, then click **Next**.

   ### Reminders and escalation options

   Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.
6. Specify any of the following options (if available):

Enable email reminders will send reminder emails to assigned reviewers until they have signed the document(s) off.

Enable SMS reminders will send reminder SMS messages to assigned reviewers until they have signed the document(s) off.

Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

7. Click **Next**.
8. To add an attachment click **New** and choose an attachment type.
9. Click **Next** and select the scope of diagrams that you want to request a review for.
10. Click **Next**, enter your password and then click **Finish**.

Related topics

Assigning reviewers

Creating recurring reviews

Manually triggering recurring reviews

Signing off reviews

Create a recurring review

Recurring reviews will automatically request a review of a file at specified time intervals.

Note: When a recurring review is set up you must specify separate reviewers than those that may be already assigned as ad hoc reviewers. If one or more users that you assign do not have access to any of the documents then you will not be able to create a recurring review. A dialog will list which users do not have access to which documents; you can either remove them from the list of reviewers, or seek to provide access for these users.

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1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to create a recurring review for.
3. Right-click the file and choose **Details**.
4. From the **Manage** menu choose **New Recurring Review**.
5. Choose the first review date from the **First Review** date selector.
6. Define the recurrence of the review, i.e. the time delay between reviews.
7. Define the notification period, i.e. the time period that users will be reminded to review the file before the actual review is due, then click **Next**.

   The next step allows you to specify the users to send the recurring review to. If reviewers have already been assigned to the document (on an *ad hoc* basis) then they will be automatically assigned as reviewers to the recurring review. You can add new users and remove existing users if required.
8. Click **Add** to add users and/or user groups who you want to review the file, then click **Next**.

   Note: To add the owner of the document as a reviewer, from the **Dynamic** drop-down options choose **<Owner>**. When this option is selected, any review requests sent out will also be sent to the current owner to review the content.
9. Enter some optional notes about the recurring review, e.g. the reason for the review, then click **Next**.
10. Enter your password and click **Finish**.

Related topics

Assigning reviewers

Editing recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Edit a recurring review

Recurring reviews will automatically request a review of a file at specified time intervals. Recurring reviews can be edited, for example to change the recurrence, notification or add/remove users.

Note: Recurring reviews have separate reviewers assigned to each recurring review.

---

1. From the **Documents** menu choose **Document Registry**.
2. From the **Manage** menu choose **View Recurring Reviews**.

   Note: If you want to edit the recurring review of a specific file or files then they must be selected before following step 2.
3. Choose the scope of files to view.

   Selected Documents will display the recurring reviews for the selected files only (if a recurring review exists).
   All Documents will display the recurring reviews for all documents with an assigned recurring review within the Document Registry.
4. Right-click the recurring review and choose **Edit**.
5. Make any changes to the review settings, if required, then click **Next**.
6. Click **Add** to assign new users to the review or select users that you want to remove and click **Remove**.
7. Click **Next** and edit the note, if required.
8. Click **Next**, enter your password and click **Finish**.

Related topics

Assigning reviewers

Creating recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Remove a recurring review

Recurring reviews will automatically request a review of a file at specified time intervals.

---

1. From the **Documents** menu choose **Document Registry**.
2. From the **Manage** menu choose **View Recurring Reviews**.
3. Choose the scope of files to view recurring reviews for.

   Selected Documents will display recurring reviews for only the selected documents.
   All Documents will display recurring reviews for all files within the Document Registry.
4. Select the recurring review and from the **File** menu choose **Delete**.

Related topics

Assigning reviewers

Creating recurring reviews

Editing recurring reviews

Manually triggering recurring reviews

Signing off reviews

Manually trigger a recurring review

The next review in a recurring review cycle can be manually triggered. All reviewers of the recurring review will be notified and requested to review the diagram.

1. From the **Documents** menu choose **Document Registry**.
2. From the **Manage** menu choose **View Recurring Reviews**.
3. Select the scope of documents to view recurring reviews for and click **OK**.
4. Right-click the recurring review and choose **Manually Trigger Next Cycle**.

Related topics

Assigning reviewers

Creating recurring reviews

Editing recurring reviews

Removing recurring reviews

Signing off reviews

Sign off a review

If you have been requested to review a file then it will appear in your action list from where you can sign it off.

1. From the **Tools** menu choose **Actions** and then **Action List**.
2. Select the review item and from the **File** menu choose **Sign off**.
3. Enter your password and a note, if appropriate, then click **OK**.

Related topics

Assigning reviewers

Creating recurring reviews

Editing recurring reviews

Removing recurring reviews

Manually triggering recurring reviews

Actions

Create an action

Actions can be assigned to a document. For information on actions please refer to the Action Management section.

1. When viewing the Document Details, from the **Manage** menu choose **New Action for Document**.

   Follow the wizard to create the action and assign it to users. For more information on the action fields see Creating actions (under Action Management).

Change Requests

About change requests

As part of a quality management system, change requests can be raised against Document Registry. When a change request is raised, the document owner will be notified with a request to review it. Following successful authorization by the owner, the document author will then be requested to review it.

Create a change request

You can submit a change for a document at any point in its authorization cycle. For more information see About change requests.

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to create a change request for.
3. Right-click the file and choose **Details**.
4. From the **Manage** menu choose **New Change Request**.
5. Enter the relevant information for each stage and press **Next** to proceed.

Related topics

Reviewing change requests

Completing change requests

Viewing change requests

Viewing the change request log

Changing the originator, owner or author of change requests

Review a change request

Following the submission of a change request, the owner is notified with a request to review it before it is passed on to the document author to review and complete. As a reviewer you can accept or reject the change request, or you can request further information from the originator or request that the document undergoes an impact assessment. Once the review stage has been confirmed then a notification message is sent to the specified implementer and an action is created in their action list. If a change request is rejected, or further information requested, then the change request is returned back to the originator, who can then cancel it or resubmit the request with additional information.

Note: The owner may not necessarily be the document owner as in some cases the originator may have specified a different user.

1. From the **Documents** menu choose **Document Registry**.
2. From the **Manage** menu choose **View Change Requests**.
3. Click the document that you want to view the change request for in the list of change requests.
4. Click on the yellow box that states Owner.

   Note: If you are not the owner or the change request is not in the review stage then you cannot review it.
5. Select the relevant option and click **Next**.

   Allocate Request will accept the change request and send it to the author to action (this option is not available if the change request has already been approved and sent to the author but then returned for more information).
   Need More Information will return the change request to the originator with a request to provide more information.
   Reject Request will return the change request to the originator as rejected.
   Impact Assessment will hold the change request to allow the impact on the document to be assessed.
6. Enter the relevant information relating to the option that you have chosen. For example, why the change request is being rejected, what kind of information you require from the originator, etc.

> **Change Request Notes** will allow you to view existing notes in the Memos dialog that have been submitted against the change request. You can also add notes from here.
>
> You can find any change requests that await your input in your Action List.

Related topics

Creating change requests

Completing change requests

Viewing change requests

Viewing the change request log

Changing the originator, owner or author of change requests

Complete a change request

When a change request has been approved by the owner, the author is requested to action the change request. Once the change request has been fulfilled the author will then complete it. The author can also request further information from the owner or originator to provide clarification of the change request if required.

Note: The author may not necessarily be the document author as a different user may have been specified to action the change request.

---

1. From the **Documents** menu choose **Document Registry**.
2. From the **Manage** menu choose **View Change Requests**.
3. Click the document that you want to view the change request for in the list of change requests.
4. Click on the yellow box that states Author.

   Note: If you are not the author or the change request is not in the completion stage then you cannot review it.
5. Select the relevant option and click **Next**.

   Need More Information (From The Originator) will return the change request to the originator with a request to provide more information.
   Confirm Completion states that the change request has been fulfilled and sets the status to complete.
   Need More Information (From The Owner) will return the change request to the owner with a request to provide more information.
6. Enter the relevant information relating to the option you have chosen. For example, what kind of information you require from the originator or owner if you are requesting further information.

   Note: You can find any change requests that await your input in your Action List.

Related topics

Creating change requests

Reviewing change requests

Viewing change requests

Viewing the change request log

Changing the originator, owner or author of change requests

View change requests

The Change Requests dialog lists all change requests that exist for documents in the Document Registry. When a change request is highlighted in the list, the stage at which the change request is at will be highlighted in yellow. The appropriate user can then click on the stage that they're associated with to complete it and progress the change request to the next stage.

---

1. From the **Documents** menu choose **Document Registry**.

2. From the **Manage** menu choose **View Change Requests**.

3. Click the document that you want to view the change request for in the list of change requests.

   Note: You can group columns by dragging a column header onto the grey area just above the list of change requests.

Related topics

[Creating change requests]

[Reviewing change requests]

[Completing change requests]

[Viewing the change request log]

[Changing the originator, owner or author of change requests]

View change request log

A log of all notes is stored with the change request, allowing any interested users to collaborate by adding new topics or replying to existing topics.

---

1. From the **Documents** menu choose **Document Registry**.

2. From the **Manage** menu choose **View Change Requests**.

3. Right-click the change request from the list and choose **Change Log/Notes**.

4. To add a note do one of the following:

   - From the **File** menu choose **Start New Topic**.

   - Right-click an existing note and choose **Reply To Topic**.

Related topics

[Creating change requests]

[Reviewing change requests]

[Completing change requests]

[Viewing change requests]

[Changing the originator, owner or author of change requests]

Change the originator, owner or author

By default the change request originator is the user that creates the change request and the owner and author is the document owner and author. You can specify a different originator, owner and author of a document.

Note: Change request owners and authors are automatically updated when document owners and/or authors are changed.

---

1. From the **Documents** menu choose **Document Registry**.

2. From the **Manage** menu choose **View Change Requests**.

3. Right-click the change request from the list and choose either **Change Owner**, **Change Author** or **Change Originator**.

4. Click **Select user** ... to assign a new user.

Related topics

[Creating change requests]

[Reviewing change requests]

Completing change requests

Viewing change requests

Viewing the change request log

Subscriptions

About subscriptions

Subscriptions are used to notify subscribed users via Email of any changes to a document version. Users can subscribe themselves to documents and users can subscribe other users. A system option can force the version number to increment automatically upon promotion from a draft to a master. Alternatively, users can manually increment a version number.

For diagrams, a different set of subscribers can be defined for the draft and master versions. Subscribed users will not be copied over when a draft diagram is promoted. However, when assigning subscribers to a document, both draft and master versions will contain the same subscription list. If you remove a subscribed user from the draft version then it will also be removed from the master version, and vice-versa.

Note: End users cannot add or remove other users from a subscription list, however they can add or remove themselves (if they have the Change Subscription user account setting enabled).

Add a subscription

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to add a memo to.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Subscriptions**.
5. Click **Add Subscriptions**.
6. Select a user or user group.

   Note: To remove a user once assigned, select the user and click **Remove** ▬.
7. Click **Next**.
8. Select the scope of files to assign the users as subscribers.
9. Click **Next**.
10. Click **Apply**.

Related topics

Removing subscriptions

Memos

Remove a subscription

1. From the **Documents** menu choose **Document Registry**.
2. Find the document that you want to add a memo to.
3. Right-click the file and choose **Details**.
4. From the **File** menu choose **Subscriptions**.
5. Select the user or user group and click **Remove Subscriptions**.

   Note: Hold **Ctrl** to select multiple users and user groups.

   If the list of subscribers is long and you know the user(s) and/or user group(s) that you want to unsubscribe, do not select any user or user group before clicking **Remove Subscriptions**. Click **Add** ✚ to find the user or user group that you want to unsubscribe.

6. Click **Next**.
7. Click **Apply**.

Storyboard Collaboration

Acknowledgements

Assign acknowledgers

Mandatory users are users that are assigned to storyboards in order to request their acknowledgement of a storyboard in the Web Server.

Note: When creating a new storyboard, the storyboard must first be saved before mandatory users can be assigned. If one or more users do not have access to any of the storyboards that you are assigning them to then you will not be able to proceed. A dialog will list which users do not have access to which storyboards; you can either remove them from the list of mandatory users, or seek to provide access for these users.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard(s) that you want to assign mandatory users to.

   Hint: Hold **Ctrl** to select multiple storyboards.
3. From the **Manage** menu choose **Mandatory Users**.
4. Select the scope of storyboards to assign mandatory users to.
5. Click ✚ **User** or ✚ **Resource** to add users, user groups or resources.
6. Search for the user, user group or resource that you want to add.
7. Click **OK**.

To remove mandatory users:
Click the user(s) or user group(s) to select them and click ━ **Remove**.

Resending Acknowledgement Requests to New Mandatory Users

If an acknowledgement request has been sent out for a scope of storyboards and new mandatory users are assigned, you can resend the acknowledgement request to these new users. See Requesting acknowledgement for further information.

Related topics

About managing storyboards

Editing the acknowledgement sign-off text

Requesting acknowledgement

Edit the acknowledgement sign-off text

The acknowledgement sign-off request text can be modified for specific storyboards, i.e. the text that is displayed to users when they are prompted to acknowledge a storyboard.

1. From the **Tools** menu choose **Storyboards**.
2. Right-click the storyboard and choose **Properties**.
3. Click the Acknowledgements tab.
4. Click **Edit Text**.

5. Make any edits to the text, then click **OK** ✔.
6. Click **OK**.

Related topics

About managing storyboards

Assign acknowledgers (mandatory users)

Activating storyboard acknowledgement requests

Request acknowledgement

Users can be requested to acknowledge a storyboard following its creation. An acknowledgement request will appear in their To-dos and they will be notified by email.

Note: To request acknowledgement for a particular storyboard, it must have at least one assigned mandatory user. If one or more users do not have access to any of the storyboards that you are requesting acknowledgement for, you will not be able to proceed. A dialog will list which users do not have access to which storyboards; you can either remove them from the list of mandatory users, or seek to provide access for these users.

Reporting

A number of acknowledgement-based reports are available from the **Tools** menu in the Storyboard Management window.

Acknowledgement Log Report displays a list of users that have acknowledged a scope of storyboards.

Acknowledgement Progress Report displays the acknowledgement progress for a scope of storyboards.

Acknowledgement Requests Report displays a list of acknowledgement requests for a scope of storyboards, including status and the percentage complete.
Acknowledgement Summary Report displays a high-level overview of the acknowledgement progress for a selected scope of storyboards. Double-click a row to view the Acknowledgement Progress Report for a specific storyboard.

---

1. In the Storyboard Management window, select the storyboards that you want to request acknowledgement for.
2. From the **Manage** menu choose **Request Acknowledgement**.
3. In the Acknowledgement Type options choose the type of acknowledgement that you want to create.

    Standard allows you to create a single acknowledgement request for a scope of storyboards that must be completed by a specific date. Once all mandatory users have acknowledged then the status of the request will be set to Complete. Note that if new mandatory users are added at a later date then they will be assigned the same date, which may lead to past due (overdue) requests being assigned to newly assigned users.

    Continuous allows you to create an open acknowledgement request for a scope of storyboards which is open indefinitely. When a new acknowledgement request is sent out, new mandatory users will be assigned a due date in advance of the date the new request is sent, thereby ensuring that they do not receive past due (overdue) requests.

4. Select either the **Date to be acknowledged by** or the **Acknowledgement request due dates to** (depending on what you selected in the previous step).
    Note: The **Acknowledgement request due dates to** setting (for continuous acknowledgement requests) will automatically create due dates from the date a new mandatory user is assigned. For example, if you set 2 weeks as the value and a new mandatory user is added on the 1st January, then the due date for that user to acknowledge the content by will be the 15th January.

5. Choose the scope of storyboards to request acknowledgement for.

    Selected Storyboards will request acknowledgement for the storyboards that you have selected in Step 1.

    All Storyboards will request acknowledgement for all storyboards.

6. Enter any additional notes that may be useful for a user when acknowledging the content.
7. Click **Next** to define the reminder and escalation options.

Reminders and escalation options

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue To-do item. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

Enable email reminders will send reminder emails to assigned mandatory users until they have signed the storyboard(s) off.

Enable SMS reminders will send reminder SMS messages to assigned mandatory users until they have signed the storyboard(s) off.

Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

8. Click **OK** to finish.

Resending Acknowledgement Requests to New Mandatory Users

If an acknowledgement request has already been submitted for a selected scope of storyboards and new mandatory users are assigned, you can resend the acknowledgement request to these new users.

In the mandatory users list for a particular storyboard, choose the scope of storyboards to resend any acknowledgement requests for, then select the new users in the list (hold **Ctrl** to select multiple users). Right-click a selected user and choose **Send Current Request**. In the Request Acknowledgement dialog that opens you can deselect any users, if required. Click **OK** to send the request(s).

See Assigning acknowledgers for further information.

Resending Acknowledgement Requests to New Group Members

When a user joins a new user group, you can resend them any previous acknowledgement requests that relate to their new group membership. This ensures that users are made aware of any new processes, documents and storyboards that relate to their new roles.

 This option is only available to Nimbus Control administrators.

Note: If the user has joined a group that is a member of other groups, i.e. the group is a sub-group of one or more parent groups, they will also receive any acknowledgement requests that exist for associated parent groups.

In the User Accounts window, right-click the user and choose **Send Acknowledgements**. Select the user group(s) that you want to send current acknowledgement requests for, i.e. select the group(s) that the user has recently joined. **Automatically reactivate completed acknowledgements** will reactivate the last completed acknowledgement request (i.e. set it to 'active) and send it to the user. If this option is not selected then only active requests will be sent to the user. Click **Next** to define the reminder and escalation details (see above for information) and click **OK**.

Related topics

Assigning acknowledgers

Acknowledge a file

View the acknowledgement log

Cancel and complete acknowledgement requests

Cancelling and completing acknowledgement requests can achieved through the Collaboration Console.

View acknowledgement logs

Whenever an assigned acknowledger (mandatory user) acknowledges a storyboard it is recorded in an acknowledgement log.

1. From the **Tools** menu choose **Storyboards**.
2. Select the storyboard that you want to assign mandatory users to.
3. From the **Manage** menu choose **Acknowledgement Log**.

Actions

Create an action

Actions can be assigned to a storyboard. For information on actions please refer to the Action Management section.

1. In the Storyboard Management window, select the storyboard and from the **Manage** menu choose **New Action for Storyboard**.

   Follow the wizard to create the action and assign it to users. For more information on the action fields see Creating actions (under Action Management).

Chapter 12

Action Management

Action Management

About actions

Actions can be created for diagrams, documents, storyboards and metric links, or general actions can be assigned to users that are not associated with any content.

Action Registry

The Action Registry provides a single interface to allow actions to be tracked and managed.

See Action Registry for more information.

My Actions

My Actions allows you to view and manage the actions that are assigned to you to undertake.

See My Actions for more information.

Action Settings

There are a number of options that can be set by administrators with respect to actions, such as defining action categories, action statuses and specifying default viewers.

See Defining action settings for more information.

The Action Registry

The Action Registry allows you to track and manage current actions (diagram, document, storyboard, metric link and general actions). If you are an administrator, an action manager or an action creator, then you can create and modify actions through the Action Registry.

Note: You may not be able to view an action, depending upon the specific viewing rights.

To View Actions

To view all actions in the Action Registry ensure that there are no display filters specified and click **Search**. Otherwise you can apply one or more filters to your search, such as the owner of the action, the current status, etc. Double-click an action to view it.

Tell me more about the filters

Action Number allows you to filter by the unique action ID that is assigned to the action upon creation
Subject allows you to filter actions by text that appears in the subject of the action
Owner allows you to filter by the action owner
Assignee allows you to filter by any user(s) that are assigned to the action
Priority allows you to filter by action priorities
Status allows you to filter by active, completed and closed actions
Category allows you to filter by action categories
Comments allows you to filter by a word, or words, that appear in the comments
Due Date allows you to specify the action completion date

Export a list of actions

After conducting a search you can export the current list to either a .txt, .xls, .xml or .html file - from the **File** menu choose **Export Grid As Shown To**.

Open the associated link

You can open the diagram, document, metric link or storyboard associated with a particular action. Right-click the action and choose **Open Host**.

To Create Actions

The Action Registry allows you to create actions against diagrams, documents and metric links. General, i.e. non-specific actions, can also be created.

1. Click **New**.
2. Select a type of action to create, then click **Next**.
3. Expand the text below for the action type that you are creating:

General Action

4. Enter the properties of the action, then click **Next**.

   Note: If you do not want to be the owner of the action then click **Select** to specify a different user.
5. To add assignees (users required to undertake the action) click **Add**. Click **Next** to proceed.
6. To add editors (users permitted to edit the action) click **Add**. Click **Next** to proceed.
7. To add viewers (users permitted to view the action, default is everyone) click **Add**. Click **Next** to proceed.
8. Enter a description for the action, such as the reason for it. Click **Next** to proceed.
9. Fill out any additional information with respect to the action category (this step may not be available). Click **Next** to proceed.
10. Fill out any additional information with respect to the action in general (this step my not be available). Click **Next** to proceed.
11. Click **New** to add any attachments to support the action.
12. Click **Finish**.

Diagram Action

4. Click **Change** and select a diagram, then click **OK**. Click **Next** to proceed.
5. Enter the properties of the action, then click **Next**.

   Note: If you want to assign a different owner to the action then click **Select**.
6. To add assignees (users required to undertake the action) click **Add**. Click **Next** to proceed.
7. To add editors (users permitted to edit the action) click **Add**. Click **Next** to proceed.
8. To add viewers (users permitted to view the action, default is everyone) click **Add**. Click **Next** to proceed.
9. Enter a description of the action, such as the reason for it. Click **Next** to proceed.
10. Fill out any additional information with respect to the action category (this step may not be available). Click **Next** to proceed.
11. Fill out any additional information with respect to the action in general (this step my not be available). Click **Next** to proceed.
12. Click **New** to add any attachments to support the action.
13. Click **Finish**.

Document Action

4. Click **Change**.
5. In the Document Registry, search for the document that you want to assign the action to, select it and click **Accept and Close**, then click **Next**.

   Hint: For information on searching for documents in the Document Registry see Finding documents.
6. Enter the properties of the action, then click **Next**.

   Note: If you want to assign a different owner to the action then click **Select**.
7. To add assignees (users required to undertake the action) click **Add**. Click **Next** to proceed.
8. To add editors (users permitted to edit the action) click **Add**. Click **Next** to proceed.

9. To add viewers (users permitted to view the action, default is everyone) click **Add**. Click **Next** to proceed.

10. Enter a description of the action, such as the reason for it. Click **Next** to proceed.

11. Fill out any additional information with respect to the action category (this step may not be available). Click **Next** to proceed.

12. Fill out any additional information with respect to the action in general (this step my not be available). Click **Next** to proceed.

13. Click **New** to add any attachments to support the action.

14. Click **Finish**.

Storyboard Action

4. Click **Change**.

5. Select the storyboard to create an action against, then click **OK**.

6. Enter the properties of the action, then click **Next**.

   Note: If you want to assign a different owner for the action then click **Select** ... .

7. To add assignees (users required to undertake the action) click **Add**. Click **Next** to proceed.

8. To add editors (users permitted to edit the action) click **Add**. Click **Next** to proceed.

9. To add viewers (users permitted to view the action, default is everyone) click **Add**. Click **Next** to proceed.

10. Enter a description of the action, such as the reason for it. Click **Next** to proceed.

11. Fill out any additional information with respect to the action category (this step may not be available). Click **Next** to proceed.

12. Fill out any additional information with respect to the action in general (this step my not be available). Click **Next** to proceed.

13. Click **New** to add any attachments to support the action.

14. Click **Finish**.

Metric Action

4. Click **Change** to select a diagram, then click **OK**. Click **Next** to proceed.

5. Select the activity that as associated with the metric link that you want to assign an action to. Click **Next** to proceed.

6. Enter the properties of the action, then click **Next**.

   Note: If you want to assign a different owner to the action then click **Select** ... .

7. To add assignees (users required to undertake the action) click **Add**. Click **Next** to proceed.

8. To add editors (users permitted to edit the action) click **Add**. Click **Next** to proceed.

9. To add viewers (users permitted to view the action, default is everyone) click **Add**. Click **Next** to proceed.

10. Enter a description of the action, such as the reason for it. Click **Next** to proceed.

11. Fill out any additional information with respect to the action category (this step may not be available). Click **Next** to proceed.

12. Fill out any additional information with respect to the action in general (this step my not be available). Click **Next** to proceed.

13. Click **New** to add any attachments to support the action.

14. Click **Finish**.

Related topics

My Actions

Defining action roles

Viewing actions

Completing actions

Closing actions

Defining action settings

Defining action categories and statuses

Deleting actions

Importing actions

Exporting actions

Define action roles

Two roles exist that provide users with various privileges with regard to actions; Action Manager and Action Creator. For more information see User Account Details.

Related topics

Creating actions

Viewing actions

Closing actions

Defining action settings

Deleting actions

Define action settings

Define the general action options. Administrators only.

1. From the **Administration** menu choose **System Options**.
2. On the General tab click **Action Settings**.

General

Show only categories with at least 1 action on the 'My Workspace' page will not display an action category on users' My Workspaces if a user does not have any actions within that category currently assigned to them. If disabled then all action categories will be displayed.

Actions require password authentication requires users to enter their password when creating or modifying actions.

Assignee must enter a note when completing an action forces users to enter a note when completing actions.

Lock assignee's action after it is set as completed will prevent users from changing their action statuses after setting actions to complete (note that they can still add attachments and comments to the owner's action group record).

Additional Fields associates a data table with all actions, allowing users to add additional data when completing actions.

Archive off completed action records after *x* days defines the number of days after which completed actions are automatically archived.

Default Viewers

Specify the users that are automatically assigned to new actions as default viewers, i.e. users that can view actions.

Related topics

Defining action roles

Creating actions

Viewing actions

Closing actions

Deleting actions

Define action categories and statuses

Define the action categories and statuses that are used when creating actions. Administrators and action managers only.

To define a new action category:

1. From the **Actions** menu choose **Action Registry**.
2. From the **Administration** menu choose **Categories**.
3. From the **File** menu choose **Administration** and then **Categories**.
4. Click **New Item** .
5. Enter a name and description (optional).

    Allow multiple sign off enables assignees to sign off multiple actions in one operation from their My Actions page for actions assigned to a specific category. If this option is not selected, users must open these actions individually to sign them off.

    Action owner metadata fields applicable only to this category of actions allows owners to provide additional information when creating new actions by providing metadata fields derived from a selected data table.

    Action assignee metadata fields applicable only to this category of actions allows assignees to provide additional information when signing off actions by providing metadata fields derived from a selected data table.

Assignee and Owner Statuses

By default, the action category will be associated with all action statuses. You can customize an action category to be associated with a subset of action statuses for assignees and owners, so that when assignees and owners come to update their action status, their status options are limited to a custom set of action statuses.

To assign specific assignee and owner statuses, click the respective tab and select **Use selected statuses only**. Then select or deselect the statuses that you want to associate with the action category.

6. Click **OK** to finish.

Note: To delete an action category, right-click it and choose **Delete**. To edit an action category, double-click it.

To define a new action status:

1. From the **Actions** menu choose **Action Registry**.
2. From the **File** menu choose **Administration**, then either **Assignee Statuses** or **Owner Statuses**.
3. Click **New Item** .
4. Enter a name and description (optional).
5. Select a status type from either Active, Completed or Closed.

    Assignee must enter a note when changing to this status forces an assignee to enter a note when updating their action status to this status (assignee statuses only).

6. Click **OK**.

Note: To delete an action status, right-click it and choose **Delete**. To edit an action status, double-click it.

Related topics

Action Registry

Defining action roles

[Creating actions]
[Viewing actions]
[Completing Actions]
[Closing actions]
[Defining action settings]
[Deleting actions]

My Actions

My Actions allows you to view and manage the actions that are currently assigned to you.

Note: Actions that appear in red are past due (overdue).

To view your actions:

From the **Action** menu choose **My Actions**.

To update the status of an action, double-click it to open the Update Action dialog. In this dialog you can also view and edit the action (if you have the correct access rights) by clicking **Full Details**.

Note: To sign off the action choose **Completed** from the **Status** drop-down list.

To view actions of other users:

Click **User and Groups Filter** to search for the user.

Note: You must be an action manager to view other users' actions.

Related topics

[Action Registry]
[Defining action roles]
[Creating actions]
[Viewing actions]
[Completing Actions]
[Closing actions]
[Defining action settings]
[Deleting actions]

Create an action

You can create general actions and actions that are created for diagrams, documents, storyboards and metric links. General actions can also be created, which are not associated with any object. Once the action is created, assignees will be notified and their To-do lists will be updated.

Only administrators, action managers and action creators can create actions.

Note: You can also create actions in the [Action Registry].

Actions can also be linked with statement records. [More information...]

To create a new action:

1. From the **Actions** menu choose **Action Registry**.

2. Click **New** and choose an action type.

3. Click **Next** and follow the steps in the wizard.

Properties

Enter the details of the action, including subject, owner, due date and associated categories.

Recurrence

Enter the details of how frequently the action should recur. **Note:** This step is only available when creating a recurring statement record action. See Create a recurring statement action.

Assignees

Add users and user groups to complete the action.

Only require 1 assignee to complete action will allow the action owner to close the action after only one of the assignees has completed it.

Editors

Add users that are able to modify the action (editors cannot complete the action unless they are an assignee).

Viewers

Add users that are able to view the action (by default all users can view the action through Action Registry).

Description

Add any information about the action, such as the reason for carrying out the action.

Owner Category Data

If you selected an action category that has a data table associated with it, you can provide additional data with respect to the action category.

Additional Data

If a data table has been associated with all actions, you can provide additional information with respect to the action.

Attachments

Add any attachments to further support the action, if applicable. Attachments can be file links, application links, email links, SAP transaction links, document links, storyboard links and URL links. Click **New** to add an attachment. To modify the access rights for a particular action, select the attachment and click **Set View Rights** .

Reminders and Escalation

Email and SMS notifications can be sent to users to remind them about an upcoming or overdue action. An escalation date can also be set which will send an email notification to users' line managers if they fail to action a particular To-do item. Default notification and escalation options are defined in the system options. If you have the privileges to do so, you can modify these settings for individual actions requests before submitting them.

Enable email reminders will send reminder emails to users until they have completed the action.

Enable SMS reminders will send reminder SMS messages to assigned reviewers until they have completed the action.

Reminders to be sent every is the frequency of days in which email and SMS reminders are sent.

Start sending reminders *x* days before item is overdue is the number of days to start sending email and SMS reminders prior to the due date (set this option to '0' if you only want to remind users after the due date has passed).

Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

To copy an existing action:

1. From the **Actions** menu choose **Action Registry**.

2. Right-click the action that you want to copy and choose **Clone Action**.

Related topics

Importing actions

Defining action roles

[Viewing actions](#)

[Closing actions](#)

[Defining action settings](#)

[Deleting actions](#)

Create and manage recurring actions

Actions can be automatically generated at frequent intervals through Recurring Action Templates, including recurring actions linked to statement records. Recurring action templates can be created which include the details of an action, and how often an action is generated.

Note: For information on creating recurring action templates linked to statement records click [here](#).

To create a recurring action template:

1. From the **Actions** menu choose **Recurring Action Templates**.
2. Click **New** and choose an action type.
3. Click **Next** and follow the steps in the wizard.

Properties

Enter the details of the action, including subject, owner, due date and associated categories.

Recurrence

Enter the details of how frequently the action should recur.

Assignees

Add users and user groups to complete the action.

Only require 1 assignee to complete action will allow the action owner to close the action after only one of the assignees has completed it.

Editors

Add users that are able to modify the action (editors cannot complete the action unless they are an assignee).

Viewers

Add users that are able to view the action (by default all users can view the action through Action Registry).

Description

Add any information about the action, such as the reason for carrying out the action.

Owner Category Data

If you selected an action category that has a data table associated with it, you can provide additional data with respect to the action category.

Additional Data

If a data table has been associated with all actions, you can provide additional information with respect to the action.

Attachments

Add any attachments to further support the action, if applicable. Attachments can be file links, application links, email links, SAP transaction links, document links, storyboard links and URL links. Click **New** to add an attachment. To modify the access rights for a particular action, select the attachment and click **Set View Rights** .

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Enable escalations will escalate an overdue request by notifying users' line managers by email.

Escalate after is the number of days after the due date has passed before notifying users' line managers.

To manually trigger a recurring action:

1. From the **Actions** menu choose **Recurring Action Templates**.
2. Select the recurring action templates that you want to run.
3. Right-click a selected recurring action and choose **Trigger Actions**.

To edit a recurring action:

1. From the **Actions** menu choose **Recurring Action Templates**.
2. Right-click the recurring action template and choose **Properties**.
3. Edit any of the information on the various tabs, then click **OK**.

To delete a recurring action:

1. From the **Actions** menu choose **Recurring Action Templates**.
2. Right-click the recurring action template and choose **Delete**.

Related topics

Create an action
Link a statement record with an action

View actions

Actions that are assigned to you will appear in your My Actions. Diagram actions can also be viewed in a tree structure within the Memos dialog (from the **Diagram** menu choose **Memos**).

To view the actions assigned to you:

1. From the **Actions** menu choose **My Actions**.
2. Double-click an action to view the respective details.

   If you have completed an action see Completing an action for information on signing off the action.

To view the actions assigned to a diagram:

1. When viewing a diagram, from the **Diagram** menu choose **Memos**.
2. Expand the **Actions** node.

To view the actions assigned to a document:

1. Right-click a document following a Document Registry search and choose **Details**.
2. From the **File** menu choose **Memos**, then expand the **Actions** node.

To view the actions owned by you:

You can filter the list of actions in the Action Registry to display only actions that are owned by you.

1. From the **Actions** menu choose **Action Registry**.

   Enter your user name in the **Owner** field to retrieve only actions that are owned by you.

   See The Action Registry for more details.

To view data added to actions by assignees:

You can view any data that has been entered by any of the assignees when completing their actions. If an assignee has entered data then will appear next to their name in the Assignees tab for a particular action. To view the information they've added, double-click the assignee.

Related topics

Defining action roles

Creating actions

Closing actions

Defining action settings

Deleting actions

Import actions

Importing actions from a CSV file into the Action Registry is a quick way in which to create and assign actions in Nimbus Control. The following CSV file format is required:

Subject,Category,Priority,Owner,Due Date,Assignee1;Assignee2;Assignee*n...*

Note: Only Action Managers and Nimbus Control Administrators can import actions. Any users that don't exist in Nimbus Control will be created as new Nimbus Control unassigned users.

1. From the **Actions** menu choose **Action Registry**.
2. From the **File** menu choose **Import From CSV**.
3. Locate and select the CSV file, then click **Open**.

Related topics

Creating actions

Viewing actions

Closing actions

Defining action settings

Deleting actions

Exporting actions

Export actions

Export a list of actions to either Excel or a number of different formats and (.txt, .xml and .html).

1. From the **Actions** menu choose **Action Registry**.
2. Search for the actions that you want to export.
3. From the **File** menu choose **Export Grid As Shown To** and then choose a format.

Related topics

Creating actions

Viewing actions

Closing actions

[Defining action settings]

[Deleting actions]

[Importing actions]

Complete an action

Once you have completed an action that you have been assigned to undertake you must set the status to complete.

Note: This will not close the action as this must be done by the action owner or an administrator.

1. From the **Action** menu choose **My Actions**.
2. Double-click the action that you want to sign off.
3. In the Sign Off tab choose **Completed** from the **Status** drop-down list.
4. Enter any relevant notes in the Notes panel.
5. If available, enter any additional information relating to the action category.
6. Click **OK**.

Related topics

[Defining action roles]

[Closing actions]

[Creating actions]

[Viewing actions]

[Defining action settings]

[Deleting actions]

Close an action

An action can be closed by the action owner, or administrator, once all assignees have completed the action. **Note:** If enabled, an action can be closed when only one assignee has completed it.

1. From the **Action** menu choose **Action Registry**.
2. Search for the action that you want to close and double-click it to open it.

   Hint: See [The Action Registry] for details on searching for actions.
3. In the Settings panel on the Action tab, from the **Status** drop-down list choose **Closed**.
4. Click **OK**.

Related topics

[Signing off actions]

[Defining action roles]

[Creating actions]

[Viewing actions]

[Defining action settings]

[Deleting actions]

Edit an action

If you are the owner of an action, or an assigned action editor, you can edit the details of an action, add assignees, editors and viewers, add attachments, update the notes, etc.

1. In the Action Registry, right-click the action that you want to edit and choose **Properties**.

   ⊞ Action Properties

   Note: You can view any data that has been entered by any of the assignees. If an assignee has entered data then will appear next to their name in the Assignees tab. To view the information they've added, double-click the assignee.

2. Click **OK** to close the action.

Delete an action

If you are the owner of an action and it is no longer valid then you can delete it. When an action is deleted it will remain in the system until it is deleted a second time. Actions that are initially deleted will have a status of 'Deleted' and can still be viewed by users in the Action Registry (deleted records are no displayed by default).

1. From the **Actions** menu choose **Action Registry**.
2. Right-click the action and choose **Delete**.

   Note: To physically remove an action from the system this process must be repeated.

Related topics

Defining action roles

Creating actions

Viewing actions

Closing actions

Defining action settings

Chapter 13

Importing and Exporting Maps

Importing and Exporting Maps

About importing and exporting maps

Maps can be exported in order to work on them off-line, for example, or to transfer them to another process repository. Drafts, scenarios and attachments can be included or excluded when packaging a map. Maps can also be imported from and exported to third-party software.

Exporting

Export a map

Maps can be packaged and worked on off-line or transferred to another process repository. This function can also be used to back-up a map before making any changes that you may want to undo. Packaged maps have a .cpk file extension.

1. From the **File** menu choose **Package Map**.
2. Select the map that you want to export and click **Next**.

   Note: If the map is located in a folder within the process repository then select the folder from the Path panel.
3. Select to include or exclude the draft copy, any scenario copies, attachments and storyboards links, then click **Next**.

   Note: If a master copy of the map does not exist then the draft will be automatically packaged.

   Include Storyboards will include all storyboards that have links in the map. If this option is not selected then the storyboard links will remain in the map when it is unpacked into another Process Repository, however they may become broken links or point to the wrong storyboards.
4. Select a folder to save the packaged map in and click **Next**.
5. Click **Next** and then **Close**.

   Note: To view the location of the packaged map, or to email it, select the relevant option and click **Next**.

Related topics

Importing (unpackaging) maps

Export a drill down

Refer to Importing and exporting a drill down for more information.

Export to MS Project

You can export project-related data (tasks, durations, resources, etc) from diagrams which can then be imported into MS Project. High level tasks can be shown graphically with the ability to drill down to view more detail, i.e. sub-tasks. Supporting information such as forms, templates and staffing hints and tips can then be attached to the specific task. Exporting to MS Project allows you to view the day-to-day tracking and monitoring of a project and you can include resources and costing information.

Note: Microsoft Project must be installed on your PC.

Preparing to export to MS Project

- Ideally a standard map should exist which is specific to the project approach, methodology or framework. This map should set out the standard tasks, durations and resources.
- Open the standard map and save as a new map which can then be tailored to meet the specific needs and approach of the project.
- If necessary, modify the resources, durations, etc, until you are happy. Alternatively, create a new map with tasks, durations and resources.

1. From the **File** menu choose **Import/Export** and then choose one of the following options:

   - **Export to MS Project (MPX)** for MS Project 2000 and earlier.
   - **Export to MS Project (XML)** for MS Project 2003 and later.

2. Click **Choose Location** ... to specify the location where you want to create the MS Project file.

3. Choose the start date for the project from the **Project Start Date** selector.

4. Choose the scope of diagrams to export.

5. Select or deselect **Export default work periods** and **Export activity dates**, as required.

6. To change the language and include resources from the parent activity, click the Advanced tab.

7. Click **Export**.

Conversion Rules

The following rules and principles are applied for the conversion to a MS Project format:

Nimbus Control	MS Project
Activity boxes and titles	Tasks (name truncated to 200 characters)
Activity ID numbers	Task WBS number
Activity text	Task name
Activity bubble notes	Task notes
Activity durations	Task duration if lowest level task, otherwise calculated automatically from totals of lower level tasks
Task start and finish dates	Calculated automatically based on duration and project start date
Resources on tasks (including % allocated, even if hidden)	Added as resources to task
Resource rates and information fields	Added to resource library with rates and notes
Flow lines between activities	Task dependencies (all converted as Finish-to-Start type links)
Child activities, e.g. Activity 8 on diagram 1.1 has child activities on diagram 1.1.8	Sub tasks
Free text (no drill downs)	Ignored
Images (no drill downs)	Ignored
Free text (with drill downs)	Ignored
Images (with drill downs)	Ignored
Calendars	MS Project standard (8 hours/day, 5 days/week, no public holidays, week commencing Monday)

The project may need tweaking in MS Project. Note, however, that it is not backward compatible, i.e. you cannot import it back into Nimbus Control. Use the map as the project repository and attach all project documentation to it, i.e. the project scope document to the tasks called Scope Project. You can even create a link from the top level of the map to the MS Project plan.

The entire project is the map. The methodology/approach that the team can follow, a MS Project plan, project documentation and correspondence attached to the relevant step. You can also package the entire project and send it to a colleague. At the end of the project you can simply package the map to archive it as one file.

Unpackaged Maps

If you have unpackaged the map then the resources will not have been added to the Resource Library, meaning that the export will not be complete. To remedy this, open the map in Nimbus Control and double-click each resource to transfer the resources into the Resource Library. Then you can update the resource rates and any information fields.

Export to MS PowerPoint

You can create PowerPoint files based on a map, whereby each separate diagram is converted into a single PowerPoint slide. Slides are hierarchically ordered based on the diagram level numbers.

Note: Microsoft PowerPoint must be installed on your PC.

1. From the **File** menu choose **Import/Export** and then **Export to MS PowerPoint**.
2. Click **Choose Location** ... to specify the location where you want to create the MS PowerPoint file.
3. Choose the scope of the diagrams that you want to export as PowerPoint slides.
4. Click **OK**.

Export to MS Word

Word documents can be created for a scope of diagrams and a number of options can be included or excluded.

Note: Microsoft Word must be installed on your PC.

1. From the **Import/Export** menu choose **Export to MS Word**.
2. In the General tab select the following options:

   Output File is the location and file name of the Word document that will be created. To change the default location and file name, click **Browse** .

   Template File allows you to specify a Word template to use to create the document. Click **Browse** to locate the template.

   ⊟ What Word styles are used?

   The table displays the Word styles that are used for particular Control items when you export a diagram to Word:

Control Item	Word Style
Diagram title	Heading 1
Diagram information	Normal
Activity number	List Bullet + Bold
Activity text	List Bullet
Activity properties	List Bullet 2 + Bold
Activity Properties Data	List Bullet 2
Table Titles	Heading 3
Tables	Table Grid

   You can edit any of the Word styles for a particular template and these will be adopted by the corresponding Control items upon export.

   Scope allows you to specify the scope of diagrams that you want to export. See Creating diagram scope lists for information on scope list files.

   Orientation allows you to choose between portrait and landscape display.

Options

In the Options tab you can select what to include in the generated document.

Diagram Title Format will appear on the first page of each diagram that is exported. You can remove any of the elements, for example if you don't want the Map name to appear then remove <map>. You can also add words, for example:

Map: <map> - Level: <level> - Title: <title>

⊟ Diagram and Activity Options

Include snapshot includes a snapshot image of each diagram.
Display activity notes displays activity notes on each snapshot (if the option to include snapshots is selected).

Include document control includes the document control information for each diagram.

Include authorizers includes a list of authorizers for each diagram.

Include mandatory users includes a list of acknowledgers for each diagram.

Include reviewers includes a list of reviewers for each diagram.

Include change log includes the change log details for each diagram.

Include audit history log includes the audit history details for each diagram.

Include lines without text includes input and output lines that have no line text in the activity text items (they will be labelled as MISSING in the exported document).

Include hidden resources lists all activity resources for each diagram.

Include notes includes the associated activity notes for each diagram.

Include attachments includes a list of attachments for each diagram.

Include statement links includes a list of statement links for each diagram.

Include statement details includes the descriptions and details of any additional data table information for linked statement records (the 'Include statement links' option must also be selected).

Record export in audit log creates an audit log entry for each diagram that is exported.

Page break between diagrams starts a new page for each new diagram that is exported.

Include commentary text includes all activity and line commentary text.

Include free text includes any diagram free text objects as rich text items in the Additional Information section.

⊟ Map Options

Include abbreviations includes a list of process map abbreviations in a table.

Include references includes the list of process map references in a table.

Include responsibilities summary includes a list of resources and their associated activities in a table.

Formatting

In the Formatting tab you can configure a number of formatting options for the generated document.

Export as bullet points exports related activity text items (activity text, inputs, outputs, resources, etc) as bulleted points.

Enclose diagram titles in a border adds borders around diagram titles.

Use styles from template to determine fonts allows you select styles from a template (note a template must be selected in the General tab). If not selected, you can choose the font for the individual styles.

Indent text by indents the text by *x* mm from the left-hand side.

Insert line break between each activity inserts a blank line between each activity section that is exported.

3. Click **OK** to export.

Export as XML

Diagram information can be exported as XML, which is based on an XMI structured schema. A new folder is created with the same name as the map.

Note: Exporting as XML can be run from the command line prompt and set up as a scheduled task. Please see the Administration Guide that is included on the CD for more information.

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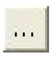
1. From the **File** menu choose **Import/Export** and then **Export to XML**.
2. Click **Choose Location**  to specify the location where you want to create the XML files.
3. Select the type of export from the following:

   Standard XML export includes all diagrams within the specified scope, drill downs, activities, resources, attachments (including data tables), costing information, activity inputs/outputs, flow-line links, free text, commentary text, change logs, authorizers, reviewers, mandatory users, history audit logs, acknowledgement logs, subscribers, memos and change requests. A single file is created for each diagram.

   Simplified XML export includes all diagrams within the specified scope, diagram URLs, the parent folder structure, user access rights (default and specific), drill downs, activities, notes, keywords, activity inputs/outputs, commentary text, attachments (including data tables), statement links and statement data. A single file is created for a scope of diagrams.

4. Select any export options, as required:

   Leaf diagrams only exports all diagrams except diagrams that have drill downs (standard XML export only).

   Record export in diagram's history audit log records the export in the diagram history audit log.

Export a separate XML file for each diagram exports each diagram as a separate XML file (simplified XML export only)

Note: From the **Manage** menu choose **Authorization** and then **Diagram Audit Trail** to view the history audit log).

5. Choose the scope of diagrams to export.

   Current Diagram exports the currently displayed diagram.
   Current Diagram And Lower Levels exports the currently displayed diagram and all lower level diagrams.
   Diagram Scope List File exports all diagrams within a diagram scope list file.

6. Click **Export**.

Export to BPM-Xchange

The BPM-Xchange is a tool that facilitates data exchange between applications such as SAP Solution Manager, ARIS, Microsoft Visio and Nimbus Control. When a diagram or scope of diagrams is exported to BPM-Xchange format, a single XML file is created that contains a list of all the objects and properties and which is compatible with BPM-Xchange.

Note: This method should not be used to backup a diagram or scope of diagrams. To backup a diagram or scope of diagrams see Exporting maps.

---

1. From the **File** menu choose **Import/Export** and then **Export to BPMC-Xchange**.

2. Click **Browse** to select a different location and specify a different file name, if necessary.

   Include object style properties will include object styles, for example fonts, colors, line styles, etc when converting the data into different formats using the BPMC tool. If this option is not selected then the objects will be unformatted when importing into BPMC, which is useful for importing data into a work flow system or into a technical definitions system. It should be noted that if many styles have been applied, the XML output file may be large if this option is selected.

   Exporting Resources allows you to choose whether to export the resources as separate elements, or as properties within the activity elements.

3. Select the scope of diagrams to export.

4. Click **OK**.

Importing

Import a map

Packaged maps can be imported (unpacked) into any process repository.

---

1. From the **File** menu choose **Unload Packaged Map**.

2. Click **Select Packages** to locate and select the packaged (.cpk) map.

3. Select or deselect any of the following import options:

   Overwrite existing templates will overwrite any existing templates in the process repository that have the same name.
   Overwrite existing storyboards will overwrite any existing storyboards in the process repository that have the same name (if storyboards are included in the package). If this option is not selected then duplicate storyboards will not be unpacked.
   Unload differences in existing data table definitions will create copies of data tables and popup lists with the same names but which have structural differences (such as additional data table fields or additional popup list items).
   Overwrite existing data tables will overwrite any existing data tables and popup lists in the process repository that have the same name.

4. Choose the location to import the packaged map into from either the root of the process repository or a folder contained within and click **OK**.

   Note: You can create a new folder within the process repository by clicking **New Folder**.

Related topics

Exporting (packaging) maps

Redirecting unloaded attachments

Import a drill down

Refer to Importing and exporting a drill down for more information.

Import from MS Visio

Microsoft Visio diagrams (VSD files) can be imported and converted into Nimbus Control diagrams. Import rules govern how Microsoft Visio shapes are converted. Unknown shapes are converted to metafile images.

Note: Microsoft Visio must be installed on the PC and should not be open when attempting an import.

To import a single Microsoft Visio diagram:

1. From the **File** menu choose **Import/Export** and then **Import from Visio**.
2. Click **Browse** to select the Microsoft Visio file that you want to import.
3. In the **Nimbus Control Map Name** box enter a name for the new map, if appropriate.
4. If you want to use a different import rules file, click **Browse** (adjacent to the **Rules File** text box).
5. Select or deselect any of the following import options:

   Import custom properties as data table attachments will convert any custom properties on Visio objects into fields within a data table attachment on imported activity-type objects in Nimbus Control.

   Import cost and duration values as costing values will convert the custom properties 'cost' and 'duration' on Visio objects into an activity's cost and duration values in Nimbus Control.

   Import the resources property as activity resources will covert any text defined in the 'resources' custom property on Visio objects into an activity's resource in Nimbus Control.

   Import as BPMN diagrams will convert all Visio objects into BPMN-style objects. **Note:** You must specify a BPMN style rule file that contains BPMN objects only (Nimbus provides a style rule file for BPMN objects, which will be automatically selected when this option is selected).

   Note: If you choose not to import costing values and resources, these values will be included in the data table attachment if **Import custom properties as data table attachments** is selected.

6. Click **Convert**.

To import multiple Microsoft Visio diagrams:

You can convert multiple Microsoft Visio files that are stored in a single folder.

1. From the **File** menu choose **Import/Export**, then **Import from Visio**.
2. Select the **All Files in Folder** tab.
3. Click **Browse** to select the folder that contains the Microsoft Visio files that you want to import.
4. If you want to use a different import rules file, click **Browse** to select the rules file.
5. Click **Convert**.

Principles of importing a Microsoft Visio diagram

Microsoft Visio shapes are complex shapes, built from simpler shapes in a hierarchical fashion, as too are grouped Microsoft Visio objects that form a single, more complex object. Each shape in Microsoft Visio has a name as defined in the Microsoft Visio stencil libraries. When importing into Nimbus Control, these shape names define how the various shapes are imported into a Nimbus Control diagram. For example, you might specify that the Microsoft Visio Paper Tape shape is imported as a rectangular activity box, or the Office Chair and Table shape is imported as a metafile image.

The default Microsoft Visio import rules that are installed with Nimbus Control provide sufficient rules for all of the basic flowchart shapes available in Microsoft Visio. However, it is possible to define your own set of import rules if required. The default import rules convert Microsoft Visio shapes as follows:

Microsoft Visio Shape	Nimbus Control Shape
Process	Rectangle

Predefined Process	Rectangle
Data	Data
Document	Document
Decision	Decision
Sequential Data	Magnetic Disk
Stored Data	Stored Data
Internal Storage	Rectangle
Card	Manual Input
Direct Data	Direct Access Storage
Manual Input	Manual Input
Manual Operation	Manual Operation
Paper Tape	Rectangle
Display	Alternate Process
Loop Limit	Rectangle
Preparation	Preparation
Parallel Mode	Rectangle
Off-page Reference	Pentagon
Terminator	Terminator
On-page Reference	Ellipse
Property Reporting	Image/Metafile
Flowchart Shape	Rectangle
Auto-height Box	Rectangle
Control Transfer	Chevron
Dynamic Connector	Straight/Dog-leg Line
Line-curve Connector	Straight/Dog-leg line
Annotation	Image/Metafile

To edit a specific Visio rules file:

1. From the **File** menu choose **Import/Export**, then **Import from Visio**.
2. If not already selected, click **Browse** to specify the Visio rules file that you want to edit.
3. Click **Rules**.
4. Select the Visio shape that you want to edit and click **Modify**.
5. Select the conditions for the Visio shape conversion.

   Note: You can select multiple conditions to apply to the rule.
6. Select the actions for the Visio shape conversion.
7. In the Rule Description box you can modify the underlined values if required by clicking on them.
8. In the Name of the rule box you can change the name of the Visio rule.
9. Click **OK**.
10. Click **Save** to save the changes to the current Visio rules file or **Save As** to save a new Visio rules file.

To create a new Visio rule:

1. From the **File** menu choose **Import/Export**, then **Import from Visio**.
2. If not already selected, click **Browse** to specify the Visio rules file that you want to add a new rule to.
3. Click **Rules**.
4. Click **New**.

5. Select the conditions for the Visio shape conversion.

   Note: You can select multiple conditions to apply to the rule.

6. Select the actions for the Visio shape conversion.
7. In the **Name of the rule** box enter a name for the Visio rule.
8. Click **OK**.
9. Click **Save** to save the changes to the current Visio rules file or **Save As** to save a new Visio rules file.

To delete a Visio rule:

1. From the **File** menu choose **Import/Export**, then **Import from Visio**.
2. If not already selected, click **Browse** to specify the Visio rules file that you want to edit.
3. Click **Rules**.
4. Select the Visio shape that you want to delete and click **Delete**.
5. Click **Save** to save the changes to the current Visio rules file or **Save As** to save a new Visio rules file.

To build rules graphically:

The Graphical Rules Builder allows you to view and edit the objects used in a selected Visio diagram graphically, then save it as a new rule.

1. From the **File** menu choose **Import/Export**, then **Import from Visio**.
2. Click **Browse** to select the Microsoft Visio file that you want build Visio rules from.

   Note: If you want to add new rules to an existing file based on the selected Visio diagram then you must select the Visio rules file.

3. Click **Rules**.
4. Click **Build Rules Graphically**.

   Building Rules Automatically

   You can create a rule set automatically, based on the object shapes in the selected Visio file, by clicking **Build Automatically**. New rules will be automatically created in the selected Visio rules file for all objects that are not currently defined. **Note:** Nimbus Control rectangle shapes are used for any Visio shapes that are not defined in the specified Visio rule file - to edit a particular rule please follow the steps outlined below.

5. Select the Visio object that you want to create a rule from.
6. Right-click the object and choose **Create new rule**.
7. Select the conditions for the Visio shape conversion.

   Note: You can select multiple conditions to apply to the rule.

8. Select the actions for the Visio shape conversion.
9. In the **Name of the rule** box, modify the name for the Visio rule if required.
10. Click **OK**.
11. Click **Show Rules Editor** .
12. Click **Save**.

Import from iGrafx

Data captured in iGrafx (.igx) can be imported into Nimbus Control.

Note: iGrafx must be installed on your PC.

1. From the **File** menu choose **Import/Export** and then **Import from iGrafx**.
2. Locate the iGrafx file that you want to import and click **Open**.

   For information on using this feature correctly contact Nimbus Support.

Import from ARIS

Import an ARIS XML export file into Nimbus Control to create a new map.

The following rules are applied when importing:

- The name of the ARIS database will become the map name.
- RADs (Resource Allocation Diagrams) are ignored.
- PSDs (Process Selection Diagrams) are ignored.
- EPC (Event Process Chain) diagrams are imported.
- FADs (Function Allocation Diagrams) are imported.
- Data table attachments are created for any data entity objects (blue and green rectangles on FADs).
- Document-type ARIS objects are converted into data table attachments on the activity that is connected to the document object via a low line.

Note: Diagrams within ARIS that are not linked to any other ARIS diagrams are placed within the Orphaned Diagrams box on level 1 of the map.

1. From the **File** menu choose **Import/Export** and then **Import from ARIS**.
2. In the **ARIS XML File** click **File Browse** to locate the ARIS diagram to import.
3. In the Options panel select to import the ARIS diagram based on the Nimbus Control map style or the ARIS style (see the example below of how these two styles differ).
4. To specify what elements to include in the import, click the Advanced tab and select or deselect the following options:

   SAP transaction links enables direction connection to the relevant SAP transaction (screen) using the SAP user-interface.

   Include inactive transactions includes inactive SAP transactions.

   Data table attachment for data attributes converts relationships between data objects and functions into activity data tables.

   Data table attachment for function objects converts functional objects into activity data tables.

   Generate one data table definition for all imported attributes converts all attributes into a single activity data table.

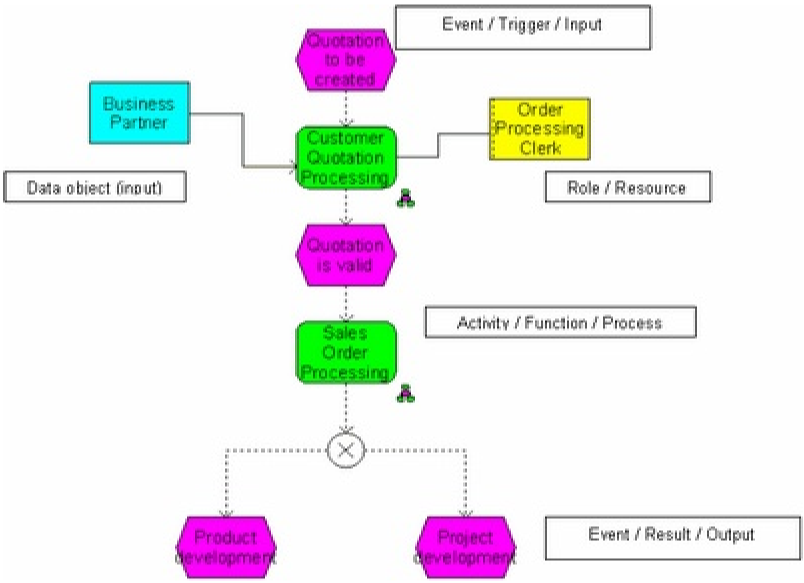
   Import descriptions as: allows you to specify how object function descriptions are imported. Choose to convert them to notes bubbles, internal WP documents or ignore them completely.

   > **Internal WP documents**
   >
   > If there are less than 250 characters in the object description then the text will be stored in an Object Description field in the object's data table. This requires the **Data table attachment for data attributes** option to be enabled; if it is not then the text will be imported as an internal WP document, regardless of the number of characters.

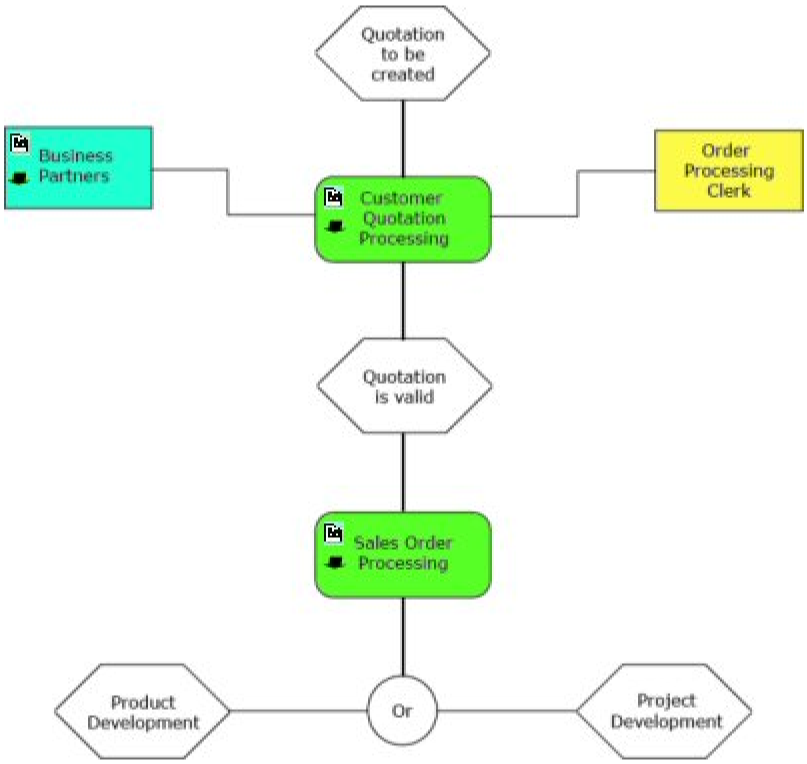
5. Click **OK**.

Example

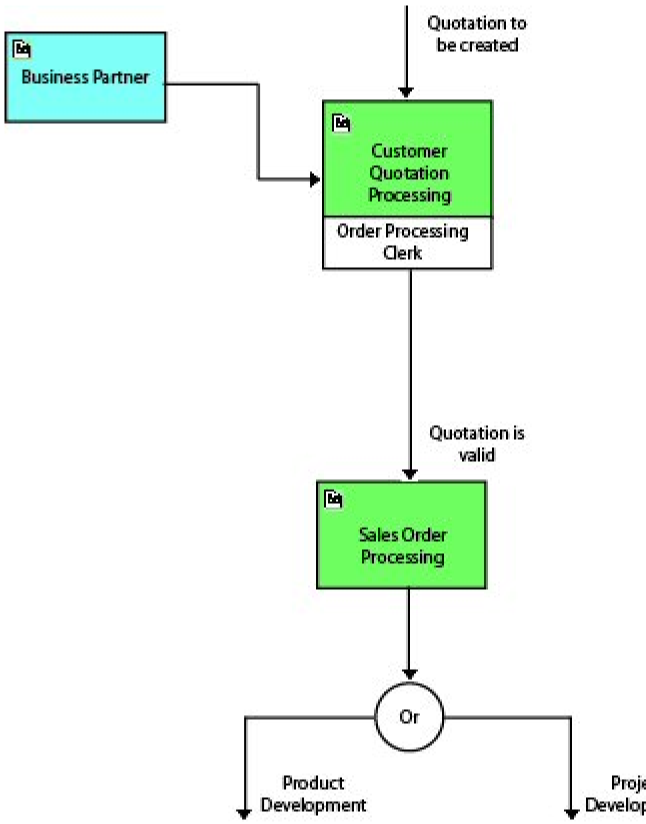
Original ARIS Diagram (EPC)



Imported map based on ARIS style:

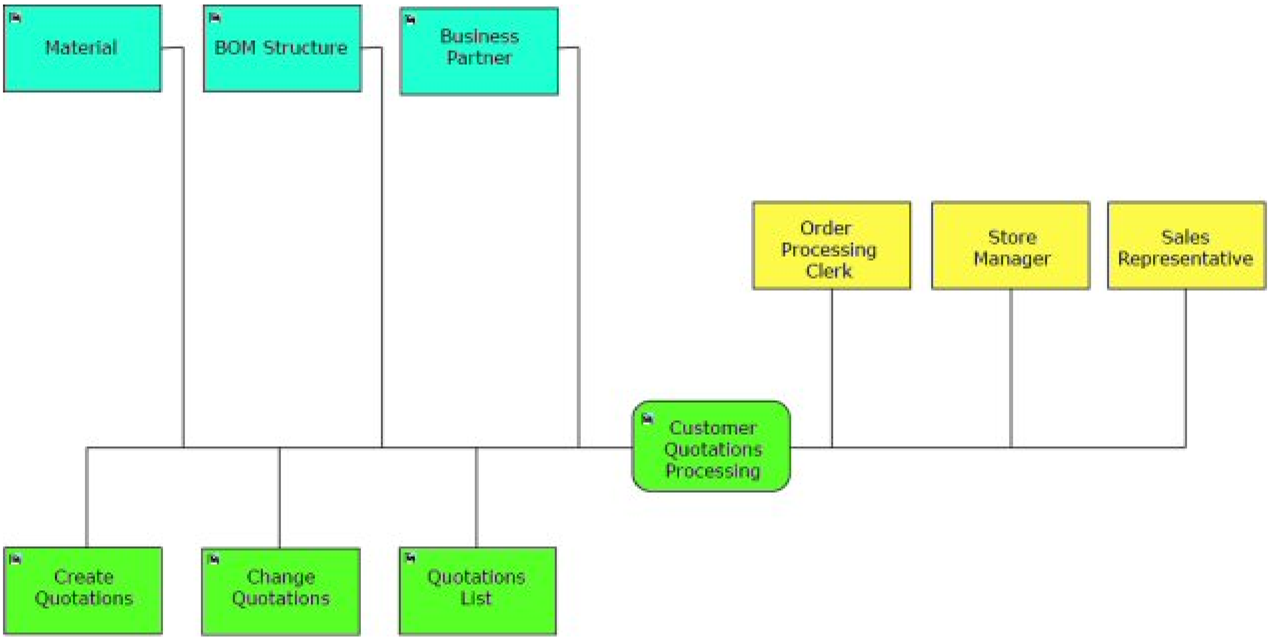


Imported map based on Nimbus Control style



Function Allocation Diagrams (FADs)

FADs are diagrams that a drill down from a function (activity) and contain the supporting relationships, including roles, resources, data, documents, etc and are equivalent to **Nimbus Control** data tables. When importing into **Nimbus Control** using the **Nimbus Control** style, these diagrams are not generated but the information is converted into resources and data tables associated with the parent activity. If the ARIS style of import is selected then the FAD is generated as a child diagram, as shown below.



Structural Differences

Multiple drill downs to child diagrams from one activity are supported in ARIS but not Nimbus Control. In most cases, an EPC diagram will drill down to an EPC column diagram, a FAD and a RAD. RAD diagrams are ignored in Nimbus Control. This is handled by creating the normal EPC diagram drill down to the FAD which then drills down to the other EPC column diagram.

Any orphan diagrams that exist in an ARIS database are imported as new diagrams which are accessible under a single Orphan Diagrams activity on level 1 of the new map, thereby maintaining the original map structure.

Import from BPM-Xchange

The BPM-Xchange is a tool that facilitates data exchange between applications such as SAP Solution Manager, ARIS, Microsoft Visio and Nimbus Control. BPMC converts diagrams into single XML files which can then be imported into Nimbus Control.

---

1. From the **File** menu choose **Import/Export** and then **Import from BPMC-Xchange**.
2. Click **Browse** to select the source file that you are importing, then click **Next**.
3. From the **Data Language** box select the language of the data, then click **Next**.

   Note: The language is the regional setting of the PC that the file was imported from. If you select <NONE> then any text in the file, for example activity text, will not be imported.

6. Select a folder within the Process Repository to save the map to.

   Note: To create a new folder click **Create Folder**.

7. Modify the map name, if required, choose a template and enter a title for the first level diagram.

   Hint: Click **Edit Language Variants** to define the title in multiple languages (language variants must have been specified by an administrator).

8. Click **OK**.

What if a map of the same name already exists?

You will be prompted with the following options:

Create New will create a new map with a number added to the existing map name (for example, if 'Process Map' already exists, a new map will be created called 'Process Map 1'.

Replace will replace the existing map in the Process Repository.

Skip will skip the import process if a map of the same name exists in the Process Repository already.

How are activity resources handled?

Resources can either be imported from the actual activity elements, or from any separate resource elements that exist (resource elements take precedence over resources associated with activity elements if a resource is defined in both).

Chapter 14

Costing

Costing

About costing

Validating and ranking potential business process improvements requires further analysis. One of the powerful analysis tools can be understanding the costs of running a process. Nimbus Control offers a process-based activity-costing functionality where basic costing can be gathered. This is particularly helpful with exploring costs around simple volume changes, decisions points, resource replacements or alternatives and process simplification improvement projects.

For detailed costing analysis, Nimbus Control should be used in conjunction with other cost analysis and simulation or resource scheduling and loading analysis tools.

When can a process be costed?

1. When the process has been captured down to task level.

Processes in Nimbus Control are captured from the top level to the bottom level, allowing a business to understand the core process in simple terms and then drill down to lower levels for granularity. Process costing in Nimbus Control is captured from the lower level to the top level after the process has been fully captured. This requires that the lower levels have captured detail at a task level so that the average durations may be attached. Lower-level costings can be 'rolled' upwards to higher levels.

2. When the process has integrity.

The process diagrams need to have been integrity checked to ensure that no input or output arrows are missing or unattached, that resources are allocated, if the volume is changing frequently or if there are too many feedback loops (a high number of feedback loops indicates that the process has not been defined accurately or the loops need to be moved down to lower levels).

Principles and Definitions

Costing assumptions

Nimbus Control makes certain assumptions when calculating process costs.

- If **multiple resources** are attached to a single activity, all resource costs will be calculated (unless a resource is specifically set not to be included in any costing calculations). For example, if 3 resources are attached to an activity that takes 4 hours to complete, the total work hours for the activity is 12 hours.

- If **no resources are associated with a map**, Nimbus Control will assume that one resource is associated with each activity, thereby allowing durations and volumes to be calculated in order to obtain the FTEs.

- If **probabilities** are introduced, Nimbus Control will assume that multiple paths are exclusive. For example, if two paths exist, A and B, it is assumed that the process will take either path but not both paths. Therefore probabilities may need to be adjusted to account for this.

  For example, the probability that the process will take path A is 20% and path B is 40%.

  The probability of the process taking path A OR path B is 20% + 40% = 60%.

  The probability of the process taking path A AND path B is 20% x 40% = 8%.

  To account for this you can split the extra probability of the process taking path A AND path B, i.e. the 8%, between the probability between path A and path B. Therefore, the probabilities of the process taking path A then becomes 24% and path B 44%.

  Note: If you are working out the probabilities from a study of volumes of transactions along different paths, these volumes will account for any possible effect of passing along both or all of the various paths at the same time.

  Nimbus Control also allows the probabilities of a path to be more than 100% to reflect manual interpretations of the AND possibilities; however the probability of any given activity occurring is capped at 100%.

- **Nimbus Control** uses **predefinable working periods** to translate a working day into hours, a working week into days and a working year into weeks. The defaults are set at a 8 hour day, 5 days per week and 48 weeks per year. For instructions on modifying these values see Setting costing defaults.

- If **feedback loops** are implemented, Nimbus Control requires users to identify the feedback loop probabilities. Multiple feedback loops that terminate at a single activity cannot be calculated as Nimbus Control does not know which feedback loop to calculate first. This requires a business understanding of the diagram in order to make the decision. Therefore, feedback loops need to be broken up by feedback breaks, which is achieved by creating 2 activities (an input and an output) and manually updating the volume of the output activity based on the calculated volume of the input activity. The output value will need to be adjusted as this will affect the value in the input box.

The rules for tuning multiple feedback breaks in a diagram are as follows:

- Ensure the Perform Calculations flag is set on the Basic Costing panel (see Nimbus Control Interface for more information).
- Ensure both pairs of activities in all feedback breaks are approximately equal (+/1 100).
- Identify the largest feedback break (or the one that has the most impact on the map) and set them to within +/- 10. Then look at the other feedback breaks and get them within +/- 10. Once this is done, modify the feedback breaks to get them exactly correct.

See Probability feedback loops for more information.

Level costing

Most activity-based costing will be executed from the lowest level upwards; therefore for each parent activity involved in costing, the cost should be updated from the child level and repeated as you move up to the highest level. This ensures that activity cost contributions are reflected accurately at each level of detail.

However, when a cost report is generated, all costing information is returned for all levels within a specified scope of diagrams. This might result in inaccurate costing information as the lowest level cost information and the higher levels, which already include the lower level costs, are calculated. For this reason, costing reports can be exported into a third-party spreadsheet application, for example Microsoft Excel, and manipulated further.

For example, the costing of a process comes from 3 levels in a map and these diagram references are as follows:

1.1.1 1.2.1 1.3.1

1.1.2 1.2.2 1.3.2

1.1.3 1.2.3 1.3.3

If this report was exported to Excel as a CSV file, the rows relating to the higher level diagrams (for example 1, 1.1, 1.2, 1.3, etc) can be deleted. The remaining columns can then be calculated to obtain the total process costs, durations and FTEs, or manipulate the data to calculate other measures, produce charts and statistical analysis with rich reporting features in third-party software. You can also take the reports in full, or configured, and import into project management applications such as MS Project.

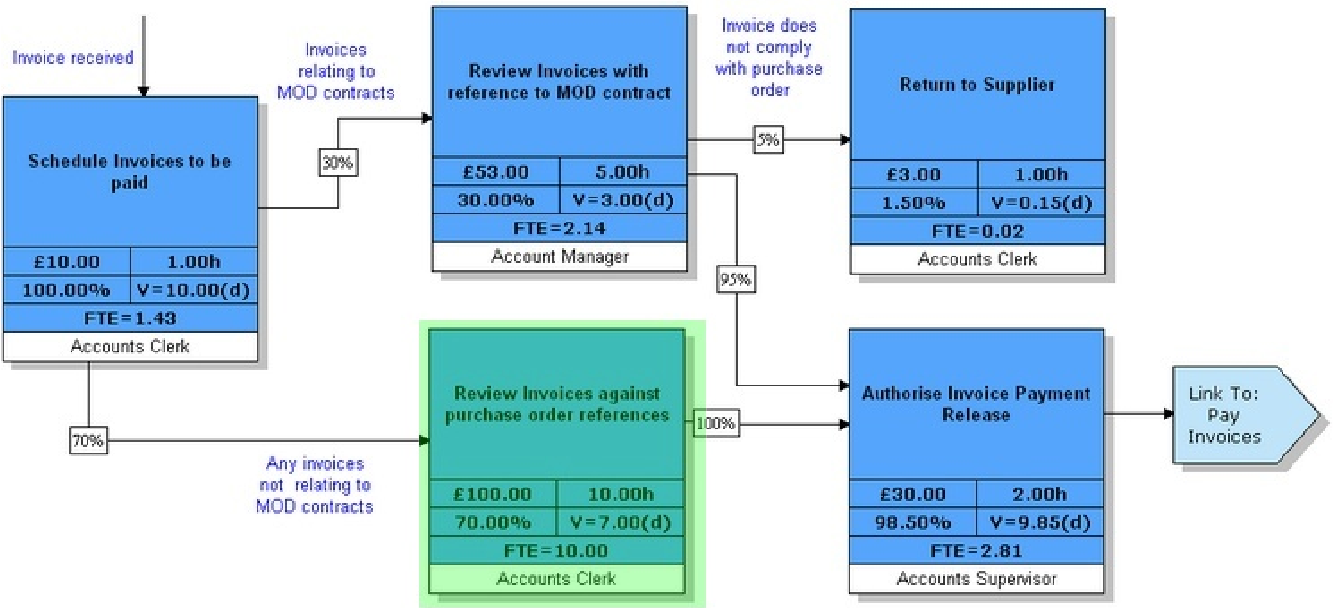
Related topics

Exporting costing as CSV

Full Time Equivalent (FTE)

The FTE is a measure of the resource requirement for a given process over a defined period, for example the number of account clerks required to deal with 200 invoices per week following a given process. The FTE is obviously dependent on the volume and duration of associated activities.

FTE = (Number of resource types for activity x Volume through activity x Duration of activity) / Working period



In this example, the accounts clerk in the third activity (highlighted in green) deals with 7 invoices per day, each taking 10 hours. The costing defaults have been set as a 7 hours per day and 5 days per week. The FTE is worked out as follows:

FTE = (1 resource x 7 invoices x 10 hours each) / 7 hrs per day = 10

This calculated FTE implies that 10 account clerks are required to deal with the workload based on the current working day settings. If you consider the total FTE for the account clerk in the diagram:

Total FTE = 1.43 + 10 + 0.02 = 11.45

Running a resource-based costing report can list the FTEs for a given resource across a specific diagram or scope of diagrams.

Related topics

Displaying activity costs

Volumes

The volume of transactions occurring along a given path can be calculated and is defined as the volume of transactions of a given activity over a working period (per day or per week, for example). By establishing the volume of transactions of an activity, you can establish the cost, resource loading and FTE values across a given period. The total cost and duration is calculated by adding together the activity costs and multiplying them by the activity volume. The total diagram cost is, therefore, the total activity volume costs, i.e. the total of all activity costs x total activity volumes.

You must first enter the starting volume in the first (start) activity. Then, all subsequent activity volumes are calculated based on the starting volume and the probability that the activity will occur.

Related topics

Displaying activity costs

Basic Costing

About basic activity costing

The total cost of an activity is calculated by taking two costs into account: resource (cost of resources involved in the activity) and volume (additional costs incurred when the activity occurs). This provides the following equation:

Cost of resources carrying out the activity + Custom volume cost = Total Activity Cost

If a costed resource is attached to an activity, Nimbus Control will calculate the cost of the activity using the costed rate of the resource, the percentage allocation of the resource and the specified duration of the activity.

Resource Cost = rate x **duration** x **percentage**

This would result in a resource cost of £40 if the resource costs £20 per hour (rate), the activity takes 2 hours to complete (duration) and the resource is allocated to the activity 100% (percentage).

Multiple resources can be allocated to an activity and these will also be costed.

Resource Cost = (rate 1 x **percentage 1 + rate 2** x **percentage 2 +...+ rate n** x **percentage n)** x **duration**

Nimbus Control assumes that all resources work in parallel on an activity and not consecutively. Resources can be marked as 'not costed' on a particular activity and therefore will not be included in the costing.

> **Scenarios**
>
> Scenarios are an effective way of experimenting with cost analysis without having to commit the changes to a current diagram or process map.

Related topics

Defining activity costing values

Updating costs from child diagrams

Turning off resource costs

Example of basic costing

Setting costing defaults

Displaying activity costs

Viewing activity costs

Scenarios

Define activity costing values

When calculating process costs, the activity values and volumes need to be defined. These values can be displayed on activities .

Hint: Activity-based costing values can be used to define metric links. See Adding metric links for more information.

1. Right-click the activity that you want to display or edit the costing values for and choose **Costing**, then **Values**.

   The following details can be defined for the cost of the activity:

Activity Values

Obtain Duration values from a data source will obtain values for the duration from an external data source via SQL query links (note that these are created by administrators through the Admin Utility).

Duration is how long the activity lasts on a single run-through.

Late is the latest possible start time without increasing the overall duration of the process.

Start is the date and time that the activity commences.

Volume

Obtain Volume values from a data source will obtain values for the volume from an external data source via SQL query links (note that these are created by administrators through the Admin Utility).

Override Volume will override the volume that is automatically inherited from the first activity in the process.

Ignore Feedback Calcs will ignore any probability feedback loops that are in place. See Overriding a volume for more information.

Volume is the starting volume of material or number of units (e.g. 10 kg of carbon or 100 bolts), which will be inherited by subsequent activities (unless overridden).

Custom Volume Cost is the price per weight or unit (e.g. if you have 10 kg as the volume you would state the cost of 1 kg).

Override Activity Calculations

Override Cost will override the total cost of the activity.

Override Volume Cost will override the total volume cost of the activity.

> **Note -** by overriding the volume cost you can use an activity's volume cost in the cost per period calculation for a particular diagram (otherwise the total cost and volume of an activity is used in the calculation of the diagram's cost per period value). To achieve this, click the Calculated Information tab and select the **Use overridden volume cost when calculating the diagram's cost per period** checkbox.

Override Volume Duration will override the volume duration value (Volume x Duration)

Override FTE will override the calculated full-time equivalent (FTE) value.

Completion Status

You can define the completion status of each activity in a process with respect to costing.

Incomplete will display an X for the activity completion status.

Complete will display Done for the activity completion status.

Ignore Status will not display a completion status.

Activity Timing

In the Custom Properties tab you can specify activity timing information, such as the frequency of an activity (for example, twice a month or the last week of every quarter, etc).

Related topics

About basic activity costing

Updating costs from child diagrams

Turning off resource costs

Example of basic costing

Setting costing defaults

Displaying activity costs

Viewing activity costs

Scenarios

Use volume cost to calculate cost per period

Usually the total cost of activities and the volume is used to calculate the cost per period (day, week, etc) for a specific diagram. You can choose to use the volume cost of activities to calculate the diagram cost for a period instead.

Note: This method requires the Override Volume Cost to be defined and selected for a particular activity.

1. Right-click the activity and choose **Costing** and then **Values**.
2. Click the Calculated Information tab.
3. Select the **Use overridden volume cost when calculating the diagram's cost per period** checkbox.
4. Click **OK**.

Example

```
Activity 1 - Volume = 10 per day, Total Cost = £80
Activity 2 - Volume = 10 per day, Total Cost = £240
Activity 3 - Volume = 10 per day, Total Cost = £160

Diagram's Cost Per Day = (£80 x 10) + (£240 x 10) +
(£160 x 10) = £4800
```

However, if we use the overridden volume cost of activity 2 as part of the diagram's cost per day calculation:

```
Activity 1 - Volume = 10 per day, Total Cost = £80
Activity 2 - Volume = 10 per day, Total Cost = £240
(Overridden Volume Cost = £5000)
Activity 3 - Volume = 10 per day, Total Cost = £160

Diagram's Cost Per Day = (£80 x 10) + £5000 + (£160 x
10) = £7400
```

Update a cost from a child diagram

Activity costs can be updated based on the total cost of a child diagram.

1. Right-click the activity and choose **Costing**, then **Values**.
2. Click **Refresh From Drill Down**.

   Note: The **Override Cost** checkbox must be selected for an activity cost to be overridden.

Related topics

About basic activity costing

Defining activity costing values

Turning off resource costs

Example of basic costing

Setting costing defaults

Displaying activity costs

Viewing activity costs

Scenarios

Turn off a resource cost

You can specify if you do not want a specific resource to be included when undertaking costing.

1. Right-click the activity and choose **Resources**.
2. From the list of resources attached, deselect the **Costed** checkbox.
3. Click **OK**.

Related topics

About basic activity costing

Defining activity costing values

Updating costs from child diagrams

Example of basic costing

Setting costing defaults

Displaying activity costs

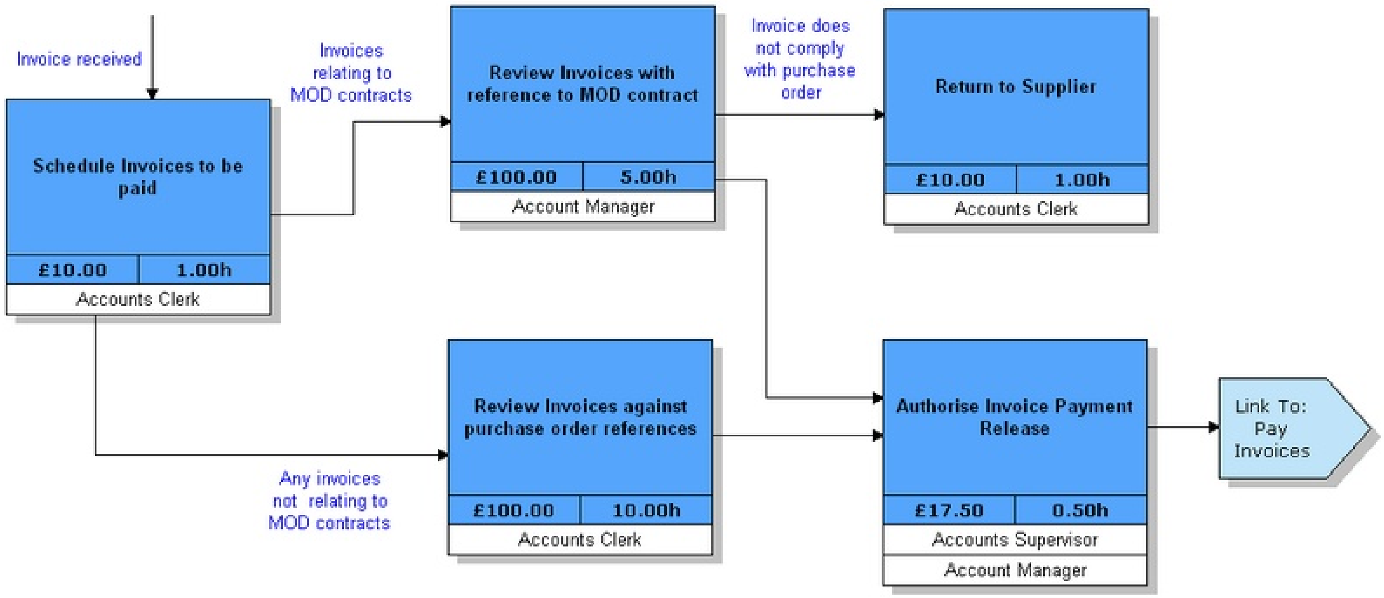
Viewing activity costs

Scenarios

Example of Basic Costing

This example demonstrates a process of dealing with invoices within a company and the associated costs.

The cost values on display are activity duration and activity cost. The cost display on each activity display the activity duration and the cost of the activity.



The total cost of this example process is £237.50 and the total duration is 17hrs 30mins. This will be displayed on the Basic Costing panel (to display the Basic Costing panel, from the **View** menu choose **Toolbars and Panels**. Select the **Panels** tab and select the **Basic Costing Panel** checkbox).

Default Costing Settings

Set costing defaults

Costing default values such as working periods, the working day start time and the currency display can be defined. Modifying working day values will affect costing calculations when, for example, the duration of an activity is defined in days, weeks or years.

1. From the **Map** menu choose **Costing** and then **Costing Defaults**.
2. Modify the costing default settings, as required.

   Time
   These settings allow you to modify the working day periods and the working day start time.

   Display
   These settings allow you to modify the default currency.

   Calculations
   The option to **Include Late values in duration and FTE calculations** will include late values when calculating the total duration and FTE. **Note:** The Late values will always be included when calculating the critical path analysis.

   Note: When creating an Excel-based metric link there is an option (Map Currency) to use the currency format set here.

4. Click **OK**.

Displaying Costs

Display activity costs

An activity can be configured to display up to nine calculated cost fields.

Note: Costing values are visible in the web interface. If you don't want users to see diagram costs, consider using scenarios. Alternatively, the Basic Costing Panel will display the total cost of each costed diagram and activity costs can be hidden so that when a map is promoted the values will not be displayed.

---

1. Right-click the activity and from the **Costing** menu choose **Display Layout**.
2. Click on a cell in the display layout grid and choose a cost field from the pop-up list.

   Visible will toggle the field display on and off.
   Font allows you to modify the font, font color, font size, etc of displayed fields.

   > **Displaying Field Labels**
   >
   > To display the field label of a particular costing field, select the relevant checkbox in the Display Field Labels panel.

3. Click **OK**.

Related topics

Viewing activity costs

Hiding activity costs

Defining activity costing values

Setting costing defaults

View activity costs

You can view activity-associated calculated information, for example the probability of the activity occurring if probabilities have been defined, the feedback factor, critical path information, etc.

---

1. Double-click on the costing display layout of the activity (see Displaying costs for more information).
2. Click the Calculated Information tab.

Related topics

Displaying activity costs

Defining activity costing values

Setting costing defaults

Hiding activity costs

If activity costs are displayed when a map is promoted then activity costs will be visible to all users in the web interface (except central resource costs unless specific users have this option enabled in their user settings). Activity costs can be hidden for a scope of diagrams before promoting.

Note: Total diagram costs can still be viewed in the client through the Basic Costing Panel.

---

1. From the **Map** menu choose **Costing** and then **Costing Visibility**.
2. Deselect the **Visible** checkbox and choose a scope of diagrams to hide costing values over.

Note: To display activity costing values select the **Visible** checkbox.

Probabilities

About probabilities

Probabilities can be defined for particular activities. The probability is the percentage chance that the process progresses along a certain path, i.e. the chance that a particular activity will occur in a process. You can model possible real-world simulations by assigning probabilities to various paths in a diagram. Probabilities affect the cost of a process, multiplying each activity cost by the probability that it will occur before adding all costs in order to calculate the total cost of the diagram.

Note: It is possible for the sum of the different paths to add up to more than 100%. By default, Nimbus Control assumes the paths to be exclusive. However, this is not always the case and multiple probabilities will be calculated for a given activity but capped at 100%. Also, if you are working out the probabilities from a study of volumes of transactions along different paths, these volumes will account for any possible affect of passing along both or all of the various paths at the same time.

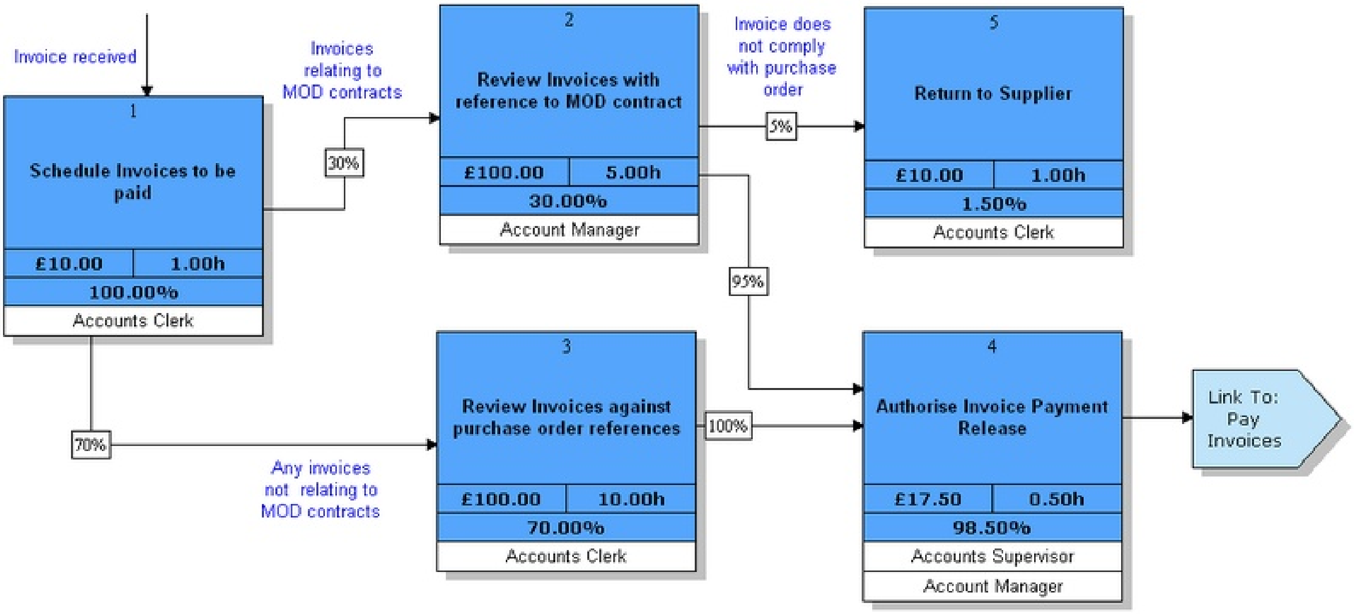
Example

In an organization, on average 3 out of 10 invoices that come in relate to MOD contracts. Therefore the probability that an invoice is passed from activity 1 to activity 2 is 30%, i.e. the probability of action 2 occurring is 30%. Out of this 30% of invoices referring to MOD, on average 5% are returned to the supplier, i.e. the probability of action 5 occurring is 5%.

Therefore, the chance that an MOD contract is returned to the supplier is:

30% x 5% = 1.5%

Putting this in terms of diagram cost, the cost of activity 2 is £30 (£100 x 30%) and the cost of activity 5 is £0.15 (£10 x 1.5%).



Define a probability

Probabilities can be defined for particular activities. For more information on probabilities see About probabilities.

1. Right-click the flow line that enters the activity that you want to define the probability of and from the **Costing** menu choose **Probability**.

2. Enter the probability value and click **OK**.

Scenarios

Scenarios are an effective way of experimenting with cost analysis without having to commit the changes to a current diagram or process map.

Related topics

[About probabilities]()

[Defining probabilities]()

[Modifying probabilities]()

[Hiding probabilities]()

[Probability feedback loops]()

[Costing assumptions]()

Modify a probability

Assigned probability values can be modified.

1. Double-click the probability and define a new value.

Related topics

[About probabilities]()

[Defining probabilities]()

[Modifying probabilities]()

[Hiding probabilities]()

[Probability feedback loops]()

[Costing assumptions]()

Hide a probability

Probabilities can be hidden from view.

1. Right-click the probability and from the **Costing** menu choose **Display Probability**.

   Note: Repeat this step to display a probability. Hold **Shift** to select multiple probabilities.

Related topics

[About probabilities]()

[Defining probabilities]()

[Modifying probabilities]()

[Hiding probabilities]()

[Probability feedback loops]()

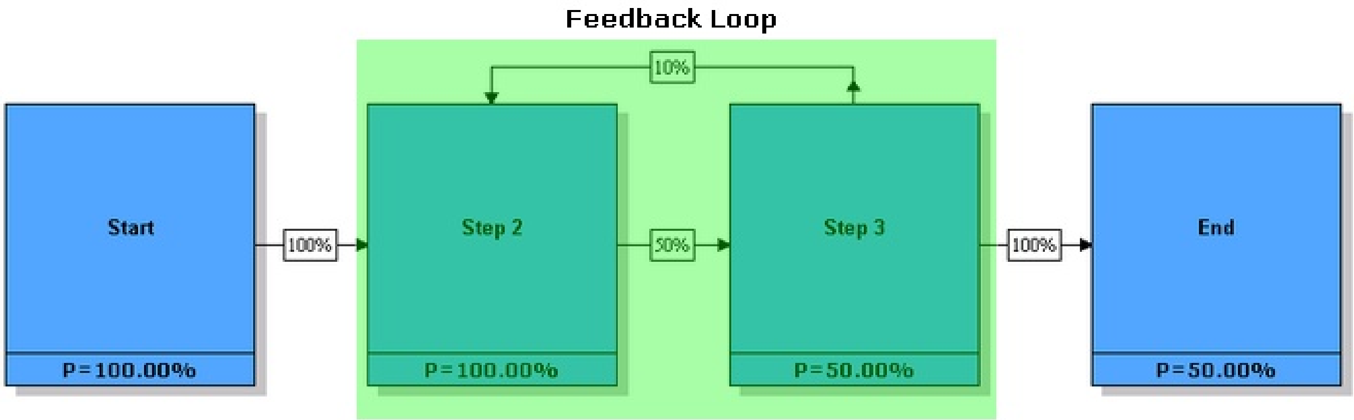
[Costing assumptions]()

Probability feedback loops

When an activity feeds back to a previous activity, a recursive feedback loop is created and a probability that this feedback loop occurs must be defined.

Note: A start and end box must be present when working with feedback calculations and they must exist outside of the feedback loop.

Example



The probability of the first activity (Start) occurring is **p(Start)=100%**.

The probability of Step 2 occurring is **p(Step 2)=100%**.

Therefore, the probability of Step 3 occurring is **100% x 50%=50%**.

Now, there is a 10% chance that Step 3 feeds back to Step 2. Therefore the chance of Step 2 occurring a second time is **50% x 10%=5%**.

So the effects of this feedback loop are as follows:

The probability of Step 2 occurring remains at 100%, although there is an affect on the volume of transactions. In this example, there is a 5% chance that Step 2 will need to be repeated. This means that the volume of Step 2 of one pass through the feedback loop is 105% of the original volume. Simply put, 100 forms may be passed to Step 2, 5 may have to be redone, therefore the volume becomes 105 forms in total, accounting for the probability of one loop back to Step 2.

If the loop is encountered a second time, i.e. Step 2 is repeated a third time, the probability is **5% x 50% = 2.5%**. The chance that it feedbacks again and Step 2 is repeated a fourth time is **2.5% x 50% x 10% = 0.0125%**, fifth time is **0.0125% x 50% x 10% = 0.000625%**.

So we now have a series of probabilities that Step 2 occurs:

One = 100%
Two = 5%
Three = 0.25%
Four = 0.0125%
Five = 0.000625%

If we set the number of feedback iterations at 5 to cover the chance that one of the above situations will arise, the recursive feedback factor is the sum of all probabilities.

Feedback factor = 105.26%

To set the number of feedback iterations:

Note: By default, Nimbus Control automatically sets the number of iterations at 20.

1. Right-click the feedback loop line and from the **Costing** menu choose feedback iterations.
2. Increase or decrease the number of **Iterations** (minimum is 1, maximum is 20).
3. Click **OK**.

n loops

In the unlikely event that a feedback loop has a probability of 99.99%, the feedback factor still needs to be calculated. Nimbus Control calculates the probability of Step 2 occurring enough times for the feedback factor to be greater than 4 decimal places, since probabilities of less than 0.01% are ignored by Nimbus Control.

Multiple feedback loops

These are handled in the same way as the above example.

Related topics

[About probabilities]

[Defining probabilities]

[Modifying probabilities]

[Hiding probabilities]

[Probability feedback loops]

[Costing assumptions]

Volumes

Define the starting volume

For information on volumes see About volumes.

1. Right-click the start activity (i.e. the first activity in a process diagram) and choose **Costing** and then **Values**.
2. In the **Volume** box enter the starting volume.
3. From the **Per** drop-down list choose a time period.
4. In the **Custom Volume Cost** text box enter the cost per weight or unit (for example, if you have 10kg as the volume you would define how much 1kg costs).
5. Click **OK**.

> **Scenarios**
>
> Scenarios are an effective way of experimenting with cost analysis without having to commit the changes to a current diagram or process map.

Related topics

Volumes

Overriding volumes

Displaying activity costs

Override a volume

To calculate volume-based costing, the initial volume is entered for the starting activity (i.e. the first activity in a diagram) and carried through the process, taking into account probabilities and feedbacks.

However, for some processes it may not be suitable to have the same volume **type** running throughout the process. For example, a process may involve envelopes, but half-way through a process the volume type may change to boxes of envelopes. In this case, the volume type will need to be changed for the relevant activities.

Note: If you refresh the costing data from a drill down and the start volume has been overridden, the volume is also refreshed in the activity that you are refreshing from a lower level.

1. Right-click the activity and choose **Costing** and then **Values**.
2. In the Volume panel select the **Override volume** checkbox.
3. In the **Volume** text box enter a new value for the volume cost and, if required, choose a new time period from the **Per** drop-down list.
4. If the volume cost has changed then enter a new value in the **Custom Volume Cost** text box.

5. Click **OK**.

> **Ignore feedback calculations**
>
> Complications can arise if the volume is overridden midway through a probability feedback loop, for example where envelopes change to boxes of envelopes and a feedback loop is present later that feeds back to a part of the process before the volume type was changed. In this case you can ignore the feedback volume by selecting the **Ignore feedback calculations** checkbox. However, due to the potential problems, it is recommended that overriding the volume is avoided when a feedback loop is in place.

Related topics

Volumes

Defining start volumes

Hierarchical Costing

Display costs from a drill down

Activity-based costing is calculated on a single diagram basis, however it is possible to refresh the cost of a diagram from the child diagrams.

Note: This is not a live process and will therefore need to be repeated every time any child diagram costs are updated.

---

1. Right-click the activity and from the **Costing** menu choose **Values**.
2. Click **Refresh From Drill Down**.

   Note: This will only work if the **Override Cost** option is enabled.

Related topics

Refreshing data hierarchically

Refresh data hierarchically

Activity-based costing is calculated on a single diagram basis; however it is possible to refresh the costing data either from the lowest levels upwards or from a high level downwards.

Note: It is good practice to backup your map before refreshing costing-based data. Alternatively you can use scenarios to preview any changes.

---

1. From the **Map** menu choose **Costing** and then **Refresh Hierarchically**.
2. Select any options to apply from the Activity Data To Refresh panel.

   Volume (only start boxes will be updated) will update the volumes of all start activities.

   Dates and times will update the start date and times of activities.

   Duration (only applicable when refreshing upwards) will update the duration of activities from lower levels upwards.

   Overridden costs (only applicable when refreshing upwards) will update the total costs of activities from lower levels upwards. **Note:** The Override Cost must be enabled - see Displaying activity costs for more information.

3. Select the hierarchical direction to refresh the costing data.

   Refresh from lowest levels upwards will update the activities from the lower levels upwards.

   Refresh from top level downwards will update the lower levels from the top level.

4. Click **OK**.

Related topics

[Displaying costs from drill downs]

Critical Path Analysis

About critical path analysis

The critical path is the route that takes the longest time to complete in a diagram and identifies which route to focus on. By identifying the activities in a critical path, you can focus your efforts on reducing their durations in order to improve the overall performance of the process. These efforts may involve examining the process model itself, or performing process instance resource allocation analysis to investigate whether costs and durations can be reduced by adjusting resource levels.

Note: For the critical path to be analysed, durations must be specified for all activities in a given diagram. Use scenarios to modify diagrams in order to improve a process and make it more efficient before making changes to the original diagram or process map.

Principles of critical path analysis

Nimbus Control sets the start activity on each path to a start time of zero. The Early/Late Start, Early/Late Finish and Float times are then calculated for each subsequent activity in the diagram.

Early Start (ES) - the earliest possible start time of an activity, relative to the start time of the first activity (i.e. zero).

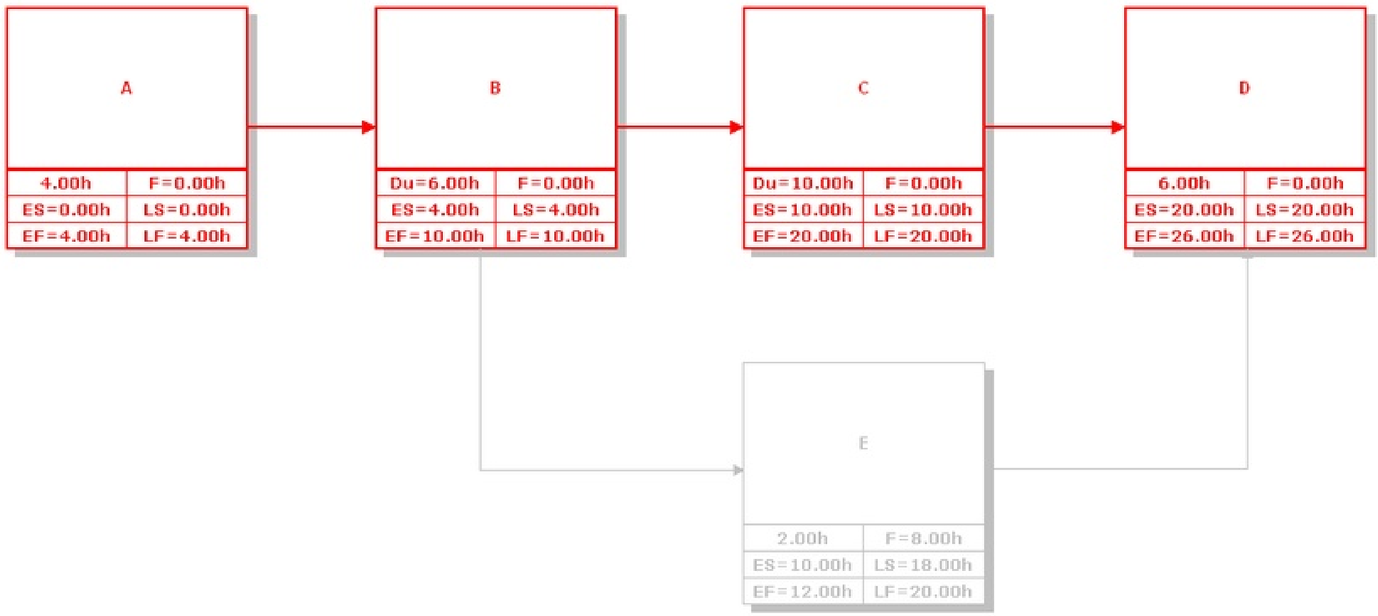
Late Start (LS) - the latest possible start time without increasing the overall duration of the process

Early Finish (EF) - the finish based on the early start plus the activity duration

Late Finish (LF) - the finish based on the late start plus activity duration

Float - the late start minus the early start (i.e. flexibility on activity duration without increasing the overall process duration)

Example



In the diagram above, the critical path includes activities A, B, C and D. Activity E is not the route of the critical path as it takes less time (2 hours) than activity C (10 hours). Therefore there is some flexibility for activity E in terms of start times and duration, which is defined by the **Float** value. In this example:

Float = Duration of activity C - Duration of activity E = 8 hours

The total duration of activities A and B is 10 hours, therefore the Early Start for activities C and E is 10 hours.

The Late Start of activity E is 18 hours since it has a float of 8 hours. The Late Start of activity C must be the same as the Early

Start, i.e. 10 hours, since activity C is on the critical path.

The Early Finish for activity E is 12 hours and the Late Finish is 20 hours.

As activity C is on the critical path, the Early Finish is the same as the Late Finish, i.e. 20 hours.

Nimbus Control allows for a process map to represent a live project or situation, so you can enter Late values if, for example, an activity is running late. In the example above, activity C may be running 2 hours late. This would impact activity E by increasing its Late Start and float by 2 hours. Late values affect the total duration of the activity and therefore also the diagram cost and FTE values.

Display the critical path

For information about critical path analysis see About critical path analysis.

1. On the Basic Costing Panel select **Highlight Critical Path**.

   Note: To display the Basic Costing Panel, from the **View** menu choose **Toolbars & Panels**. Access the Panels tab and then select the **Basic Costing Panel** checkbox.

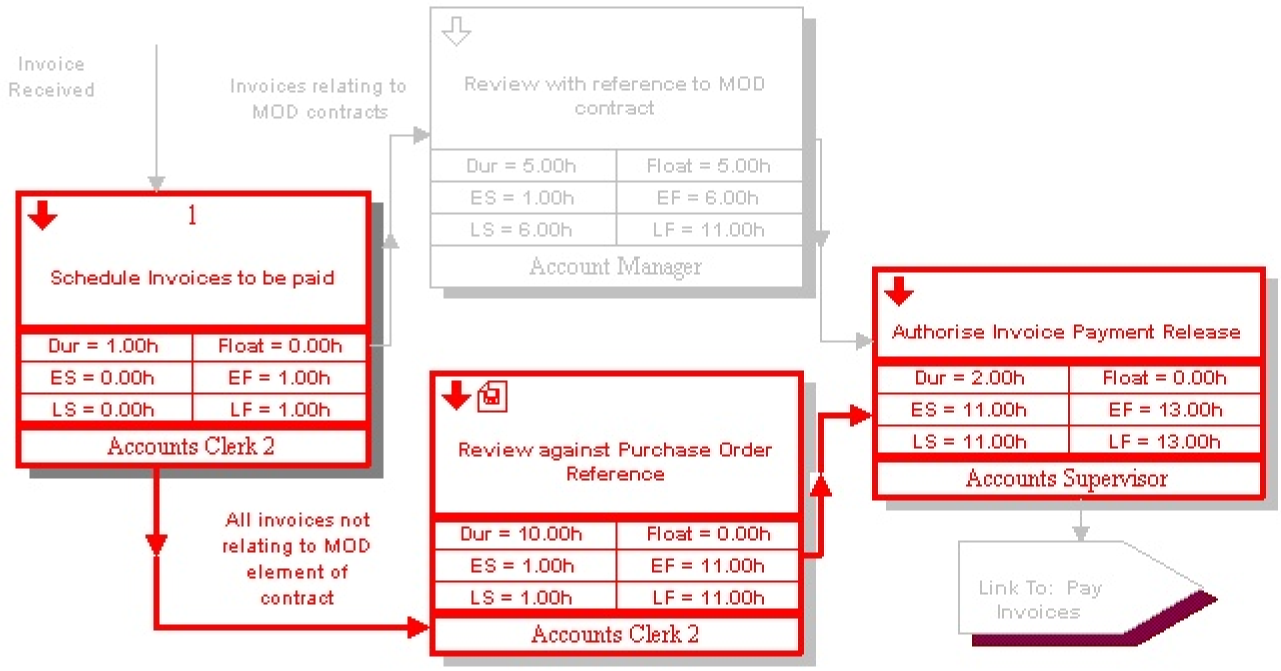
Related topics

About critical path analysis

Example of a critical path

Example of a critical path

This is an example diagram with activity cost displays set to show the critical path analysis values.



Early Start (ES) - the earliest possible start time of an activity, relative to the start time of the first activity (i.e. zero).
Late Start (LS) - the latest possible start time without increasing the overall duration of the process
Early Finish (EF) - the finish based on the early start plus the activity duration
Late Finish (LF) - the finish based on the late start plus activity duration
Float - the late start minus the early start (i.e. flexibility on activity duration without increasing the overall process duration)

Related topics

[About critical path analysis]

[Displaying the critical path]

Exporting

Export costing data

Costing-based data can be exported as a CSV file from a storyboard. The data can then be imported into MS Excel, for example, in order to generate and calculate costs for end-to-end processes.

1. From the **Tools** menu choose **Storyboards**.
2. Double-click the storyboard that you want to export the costing data from.
3. From the **File** menu choose **Costing Based Export**.
4. Choose the duration time unit to export the cost data in.
5. Click **OK**.
6. Choose a location to save the file in and enter a file name, then click **Save**.

Related topics

Exporting costing data from storyboards

Scenarios

About scenarios

Scenarios are copies of whole maps that allow you to create and test 'what-if' scenarios. A good example where scenarios can be effective is when conducting cost analysis. Scenarios allow you to reconfigure a process by moving resources about, reducing the probability of feedbacks to reflect the effects of improved systems, change the percentages on paths or remodel parts of the process completely. The results of these amendments are immediately apparent in the cost, duration and FTE information on the costing panels at the bottom of the screen.

One other obvious use of scenarios is when you have identified the end process goal of a Business Process Re-engineering Project you can create map-wide scenarios representing the phases over a period of months or years to take you from the 'current state' to a 'future state' in manageable and clearly-defined stages.

You can also convert a scenario into a draft, either to copy over the existing draft or to create a new draft.

Create a scenario

This creates a map that is a parallel named copy to the current map. If you look at the title bar at the top of your screen you will see the map name and level as [MAPNAME - Level 1.2.3 (Scenario name)]. This also appears on the Diagram Control panel. The original remains simply as [MAPNAME - Level 1.2.3]. There is no practical limit to the number of scenarios, however you should remember that each scenario is a copy of the map and not simply the diagram.

1. From the **Map** menu choose **Scenarios**, then click **Add** .
2. Enter a name for the scenario and click **OK**.

Related topics

About scenarios

Replacing drafts with scenarios

Creating new draft maps from scenarios

Renaming scenarios

Accessing scenarios

[Deleting scenarios]

Replace a draft with a scenario

You can replace an existing draft with a scenario. This operation will replace the current draft with the scenario and keep the scenario.

Note: You must be viewing the scenario to replace the draft with a scenario.

1. From the **Map** menu choose **Scenarios**, then click **Copy Scenario To Draft** .
2. Select the **Replace the existing draft map** radio button.
3. Select the scope that you want to replace the existing draft with.

   Current Diagram and Lower Levels will replace the current level and all lower levels in the draft.
   Current Process Map will replace the whole process map in the draft.
   Save existing draft as a separate scenario before overwriting will create a new scenario based on the existing draft before updating the draft.

4. Click **OK** when prompted to run a check on the current process map for the status of all diagrams. If a diagram has a status Update Pending then it may have been updated recently and you may want to keep it. Otherwise, to continue to replace the draft with the scenario, double-click the diagram(s) that you want to overwrite to change the Action status to Overwrite.
5. Click **Continue** .

Related topics

[About scenarios]

[Creating scenarios]

[Creating new draft maps from scenarios]

[Renaming scenarios]

[Accessing scenarios]

[Deleting scenarios]

Create a new draft map from a scenario

You can create a new draft map with a scenario. This operation will not update the existing map but create a new map and uses the scenario name as the name of the map.

Note: You must be viewing the scenario to create a new draft map.

1. From the **Map** menu choose **Scenarios**, then click **Copy Scenario To Draft** .
2. Select the **Create a new draft map** radio button.
3. Select the scope that you want to create a new draft map with.

   Current Diagram and Lower Levels will replace the current level and all lower levels in the draft.
   Current Process Map will replace the whole process map in the draft.

4. Click **OK**.

Related topics

[About scenarios]

[Creating scenarios]

[Replacing drafts with scenarios]

[Renaming scenarios]

[Accessing scenarios]

[Deleting scenarios]

Rename a scenario

Scenarios can be renamed.

1. With the scenario in view, from the **Map** menu choose **Scenarios** and then **Rename**.
2. Enter a new name for the scenario and click **OK**.

Related topics

[About scenarios]

[Creating scenarios]

[Replacing drafts with scenarios]

[Creating new draft maps from scenarios]

[Accessing scenarios]

[Deleting scenarios]

Access a scenario

A map may have several scenarios.

1. From the **Map** menu choose **Scenarios** and then **Select**.
2. Choose the scenario from the drop-down list and click **OK**.

Related topics

[About scenarios]

[Creating scenarios]

[Replacing drafts with scenarios]

[Creating new draft maps from scenarios]

[Renaming scenarios]

[Deleting scenarios]

Delete a scenario

Deleting a scenario will delete the entire process map for a selected scenario.

Note: You must have the scenario in view when deleting it.

1. From the **Map** menu choose **Scenarios**, then choose **Remove** .

Related topics

[About scenarios]

[Creating scenarios]

[Replacing drafts with scenarios]

[Creating new draft maps from scenarios]

[Renaming scenarios]

[Accessing scenarios]

Chapter 15

Tools

Tools

Text

Replace text

It is possible to replace object or attachment-associated text in a map, including activities, note bubbles, lines, sign posts, file and URL links, Excel measures, hint text and internal images.

Important Note: Replacing text cannot be undone, therefore it is advisable to package the map before committing to this operation.

1. From the **Search** menu choose **Replace**.
2. Click in the **Text To Find** text box and enter the text that you want to replace.
3. Click in the **Replace With** text box and enter the text that you want to replace it with.
4. In the Scope tab select the scope of diagrams that you want to perform the search and replace on.
5. Select any of the options below:

    Update Version Numbers will update diagram and attachment version numbers.

    Whole Words Only will only replace whole words as defined in the Text To Find box. If you want to replace part of a word then deselect this option.

6. In the Search And Replace On tab select or deselect the objects that you want to perform the search and replace on.
7. Click **OK**.

Related topics

Changing text cases

Finding text

Checking spelling

Change text cases

Text cases in activities, notes, lines, free text and sign posts can be changed for a scope of diagrams.

1. From the **Tools** menu choose **Change Case**.
2. Select the scope of diagrams to check.
3. Select the case option from the following:

    UPPERCASE will change all text to uppercase.

    lowercase will change all text to lowercase.

    Word Case will change the first letter of every word to uppercase and all other letters to lowercase.

    Sentence case will change the first letter in a sentence, dictated by a full-stop, to uppercase and all other letters to lowercase.

    Object case will change the first letter to uppercase and all other letters to lowercase (ignoring any sentence structure).

4. Select which objects to apply the operation to.
5. Click **OK**.

Related topics

Replacing text

Finding text

Checking spelling

Find text

Search for specific object-related text within a scope of diagrams.

1. From the **Search** menu choose **Find**.
2. In the **Text To Find** text box enter the text that you want to search for.
3. Choose the scope of diagrams to search.

    Whole Words Only will only replace whole words as defined in the Text To Find box.
4. Select the Search On tab and select or deselect the objects to search on.
5. Click **OK**.

Related topics

Replacing text

Changing text cases

Checking spelling

Check spelling

You can check the spelling of a number of objects in a diagram or scope of diagrams. It is also possible to update diagram version numbers if any amendments are made.

1. From the **Tools** menu choose **Check Spelling**.

    Update version numbers will update the version numbers of any diagrams that are amended following the spell check.
2. Choose the scope of diagrams to check.
3. Select or deselect any of the options that will be spell checked.
4. Click **OK**.

    Ignore will ignore the word in this instance only.
    Ignore All will ignore all instances of the word.
    Replace will replace the word in this instance only.
    Replace All will replace all instances of the word.
    Add To Custom will add the word to the custom dictionary.
    Options allows you to set a number of different spell checking options.

Related topics

Replacing text

Changing text cases

Finding text

Diagrams

Compare and update

The Compare and Update tool allows you to compare two diagrams and update specific elements.

Compare

This is useful if a section of a map has been worked on off-line, or if there are two projects being worked on at the same time. It is also useful to show the differences between a draft and master map, or between a master map and a scenario.

Update

Data in a target map can be updated from a source map following a comparison report. The following information can be updated:

- Non-visual data - memos, change requests and keywords
- Document control data - author, owner, version number and diagram date
- Access rights - diagram and print access rights
- Assigned users - authorizers, mandatory users, reviewers and subscriptions

To compare and update two diagrams:

1. From the **Tools** menu choose **Compare and Update**.
2. Next to the Source Diagram box click **Select** to select the source diagram that you want to compare to.
3. Next to the Target Diagram box click **Select** to select the target diagram.

   Note: The target diagram is the diagram that will be updated with the differences from the source diagram.
4. In the Comparison Includes panel, select or deselect any options that you want to compare the two diagrams against.

   Objects will highlight any changes to visual drawing objects such as activities, flow lines, resources, free text, note bubbles, file links, drill down arrows, hint text, sigh post links, etc.

   Title will highlight any differences in the titles.

   Author and Owner will highlight changes in authors and owners.

   Version Number will highlight updates to the diagram version numbers.

   Object Display Order will highlight changes made to the order of objects displayed on the screen (the Z order). For example, if an activity box is sent behind another activity so that the overlap is in a different location, this will be flagged if this option is selected.

   Assigned Templates will highlight any changes in the template name.

   Non-visual Data will highlight memos, change requests and keywords.

   Assigned Users will highlight changes in authorizers, mandatory users, reviewers and subscriptions.

   Advanced Tab

   Force list window to stay on top of Control allows you to work outside of the compare and update tool whilst keeping the comparison window open. If this option is not selected then when you click outside of the window, for example to access a drill down, the window will be lost.

   Ignore costing update changes will ignore any changes to activity costs, volumes and durations.

   Allow for link redirection changes will treat all diagram links as the same. For example, if diagram 1.4 in the source map is linked to diagram 1.8.2 in the source map, this will be considered the same if the diagram 1.4 in the target is linked to diagram 1.8.2 in the target map.
5. Click **OK**.

Comparison Report

Once you have run the compare and update tool you will be presented with a report, highlighting the differences between the source and target diagrams. The source diagram(s) are presented on the left, the target diagram(s) on the right and the differences are displayed in the middle. Diagrams that are the same are displayed in black with the status **OK** and diagrams that differ are displayed in red with the status **Changed**. If corresponding diagrams cannot be found in either the source or target then these diagrams will be highlighted in blue.

The source's corresponding target diagrams are based on the level number, for example:

Source Map	**Target Map**
Level 1	Level 1
Level 1.1	Level 1.1
Level 1.4	Level 1.4
Level 1.4.1	Level 1.4.1

However, if the starting levels of the source and target maps are different, the corresponding levels will be based on the last level, for example if the target is an exported drill down from a larger map.

Source Map	**Target Map**
Level 1.3.8	Level 1
Level 1.3.8.1	Level 1.1
Level 1.3.8.4	Level 1.4
Level 1.3.8.4.1	Level 1.4.1

Note: If any of the source or target diagrams have been restructured then the comparison report will be unable to find and match the corresponding diagrams, for example if the level numbers have changed due to a change to the activity ID numbers.

Export to Excel

Save the report as a Microsoft Excel spreadsheet. From the **File** menu choose **Export to MS Excel**.

Note: If the data contains non-English characters and the report is opened in Microsoft Office 2003, these characters may not display correctly. This is a known Microsoft issue; a hotfix can be found at http://support.microsoft.com/kb/952208.

To view and update the differences between two diagrams:

Any differences may be due to more objects in the target diagram, for example if a new activity has been added, or it could be more detailed, for example if the fill settings or shadow colors of any activities have changed. Internal word-processed and image attachments will also be compared and highlighted if any changes are present.

There are a number of options available to view differences between maps (highlighted in red).

1. Right-click the row and choose one of the following options:

   Go to source will navigate to the source diagram.

   Go to target will navigate to the target diagram.

   Side By Side View will display both the source and target diagrams side by side to allow you to physically view the changes.

   Difference Log will display a list of changes between the source and target diagrams.

   Update will allow you to update the target diagram (see below for details).

Updating

When you choose to update target diagrams you have a number of options. You can update non-visual data, document control data, access rights and assigned user information (see above for details). The following update options are available:

Keep target's data will not change the information in the target diagram.
Overwrite target's data will update the information in the target diagram with the differences from the source diagram.
Merge data will add new information from the source diagram to the target diagram.

You can update specific information for all areas by clicking **Show Advanced Options** and selecting or deselecting the various options within each tab and choosing an update option.

Integrity check

The Integrity Check tool will report on objects that do not adhere to best-practice mapping principles (as defined by Nimbus). It is a good idea to run an integrity check before authorizing, promoting or releasing a diagram to end users. Any resource mismatches in swimlane diagrams will also be reported on.

1. From the **Tools** menu choose **Integrity Check**.
2. From the Options tab select the scope of diagrams that you want to check.

   Diagram Scope List Files

   A diagram scope list file is a list of diagrams within a process map, or across multiple process maps. See Creating diagram scope lists for more information.

3. From the Object Check Options tab select the objects that you want to check.

   Activities Have Text will report on any activities that do not have any associated text.

   Resources Assigned to Activities will report on any activities that do not have any assigned resources.

   Flow Lines Have Text will report on any flow lines that do not have any associated text.

   Disconnected Lines will report on any flow lines that are not connected to an activity.

   Input/Output Lines Without Flow Line Links will report on any input or output lines that are not connected to other diagrams through a flow line link.

   Broken Diagram Links will report on any broken diagram links.

   Broken File Links will report on any broken file links.

   Broken Flow Line Links will report on any broken flow line links.

4. From the Diagram Check Options tab select any other options that you want to check.

   Input and Output Flows Match Parent Activity will compare the number of input and output flow lines between parent and child diagrams.

   Check Template Can Be Found will report on any deleted templates that have been previously applied.

   Check Size of Diagram will report on any diagrams that have objects outside of the screen view.

5. Click **OK** to generate the report.

Swimlane Integrity Checking

Once the report has been generated, click the Swimlane tab to view any resource mismatches that are present in any swimlane diagrams.

Attachment analysis

A report can be generated that lists the location of all external files referenced in a process repository.

1. From the **Tools** menu choose **Attachment Analysis**.

   The folders paths of the current process repository will already be defined. You can add, remove and modify folder paths.

2. Click **OK**.

Refresh input and output text

The input and output line text can be automatically updated for a scope of diagrams.

1. From the **Map** menu choose **Refresh Input/Output Text**.
2. Select the scope of diagrams.

   Note: The **Current Diagram from Parent** and **Parent Diagram from Current** options are not available from level 1 of a map.

   Current Diagram from Parent will update the current diagram based on the input and output lines of the parent activity.

Parent Diagram from Current will update the parent activity based on the input and output lines of the current diagram.

Current Diagram and Lower Levels will update all lower levels based on the input and output lines from the current diagram (from the lowest level upwards or the highest level downwards).

Current Process Map will update all diagrams within the process map (from the lowest level upwards or the highest level downwards).

3. Select the hierarchical direction of the refresh operation.

   Note: These options only apply if you have selected **Parent Diagram from Current** or **Current Diagram and Lower Levels** as the scope.

Refresh from lowest levels upwards will update the parent activity's input and output line text based on the child diagrams.

Refresh from top level downwards will update the child diagram's input and output line text based on the parent activities.

Highlighting

Define a highlight rule

Rules can be defined to highlight data table values and resources in a map. Highlight rules become centrally available upon creation, i.e. a highlight rule library stores the rules and makes them accessible to any map within the process repository.

The following rules can be defined and applied:

Data Table allows you to highlight data tables that contain values within a specific criteria (for example, Less Than 10, Not Equal To 15, etc).
Resource allows you to highlight any activities that have a specific resource or resource group attached to it.
Multi-Rules Logic allows you to combine up to three highlight rules in a single highlight rule using AND logic.

Note: Only Administrators and Rule Managers can add, modify and delete highlight rules. Highlight rules are **not** supported in the web server.

To create a data table highlight rule:

Note: You cannot create highlight rules against alpha fields in a data table.

1. From the **Tools** menu choose **Highlight** and then **Highlight Rules**.
2. From the **File** menu choose **Add**.
3. In the **Name** text box enter a name for the highlight rule.
4. From the **Type** drop-down list choose **Data Table** and click **Next**.
5. From the **Data Table** drop-down list choose the data table.
6. From the **Field** drop-down list choose the data table field.
7. From the **Criteria** drop-down list choose the criteria for the data table value.
8. In the **Value** text box enter a data table field value and click **Next**.
9. Modify any style settings and click **Finish**.

To create a resource highlight rule:

1. From the **Tools** menu choose **Highlight** and then **Highlight Rules**.
2. From the **File** menu choose **Add**.
3. Enter a name for the highlight rule in the **Name** text box.
4. From the **Type** drop-down list choose **Resource** and click **Next**.
5. Select either **Resource** or **Resource Group** and choose a resource or resource group from the respective drop-down list.

6. Click **Next**.
7. Modify any style settings and click **Finish**.

To create a combined highlight rule:

1. From the **Tools** menu choose **Highlight** and then **Highlight Rules**.
2. From the **File** menu choose **Add**.
3. Enter a name for the highlight rule in the **Name** text box.
4. From the **Type** drop-down list choose **Multi-Rules Logic** and click **Next**.
5. From the **Rules** drop-down lists choose the highlight rules that you want to combine with AND logic.

   Note: All rules selected must be true for a particular activity to be highlighted.
6. Click **Next**.
7. Modify any style settings and click **Finish**.

Related topics

Applying highlight rules

Editing highlight rules

Deleting highlight rules

Displaying swimlane views (storyboards)

Apply a highlight rule

Highlight rules that are applied will apply to all maps in a process repository. Multiple highlight rules can be applied and the rules will be evaluated in the order in which they appear in the list. For example, if an activity matches three highlight rules then the style of the first rule that it applies to in the list will be used.

1. From the **Tools** menu choose **Highlight Rules** and then **Apply Highlight Rules**.
2. From the **Rules To Apply** list (right-hand side) select the rules that you want to apply.

   Note: To add a rule from the Rules Library (left-hand side), select the rule and click **Add Rule to Apply List** .
3. Select **Apply selected highlighting rules**.
4. Click **OK**.

   Note: To remove a highlight rule deselect the highlight rule, or to remove all highlight rules deselect **Apply selected highlighting rules**.

Related topics

Defining highlight rules

Editing highlight rules

Deleting highlight rules

Edit a highlight rule

1. From the **Tools** menu choose **Highlight** and then **Highlight Rules**.
2. Select a highlight rule and from the **File** menu choose **Edit**.

Related topics

Defining highlight rules

Applying highlight rules

Deleting highlight rules

Delete a highlight rule

1. From the **Tools** menu choose **Highlight** and then **Highlight Rules**.
2. Select the highlight rule and from the **File** menu choose **Delete**.

Related topics

Defining highlight rules

Applying highlight rules

Editing highlight rules

Displaying swimlane views (storyboards)

Chapter 16

Reporting

Reporting

About reports

A variety of data can be reported on in Nimbus Control. These reports can be printed and exported as text, XLS, XML and HTML.

Note: Only administrators can create and maintain scheduled reports.

Generate a report

A variety of data can be reported on in Nimbus Control. See Report types for information on what reports can be generated.

1. From the **Tools** menu choose **Reports**.
2. From the Categories column choose the report category.
3. From the Reports column choose the report type.

   Note: For a description of what data will be generated in a report type, click the report type and the Report Description (at the bottom of the dialog) will update.
4. From the Scope column choose the scope of diagrams to include in the report.
5. Click **OK**.

   Note: For Statement Compliance reports, you can view and create associated statement audit records by right-clicking statements and choosing **Statement Audits**.

To report on the Document Registry:

A number of reports can be run on all documents, or selected document, from the Document Registry, such as the subscribers for a scope of documents or the usage of all documents in the Document Registry.

Note: You must have at least one document displayed in the Document Registry to enable the reporting options.

1. From the **Documents** menu choose **Document Registry**.
2. Search for the document(s) that you want to report on.

   Note: If you want to report on all documents in the Document Registry then it is not important what you search for.
3. From the **Manage** menu choose **Reports** and choose a report type to run.
4. Choose the scope of files/documents to report on and click **OK**.

Related topics

Report types

Generating data table reports

Customize a report

Schedule a report

Save a report

Print a report

Generate a data table report

Data table reporting allows you to search for specific data associated with diagrams, for example:

- All activities that triggered a non-conformance in an internal audit, conducted by J.Smith on or after the 5th June 2007.
- All flow line links that carry invoice information between activities across the company.
- All activities where customer information is referenced.
- All activities with an internal or external customer satisfaction index of 6 or less.
- All activities that are involved in the test cycle of a new prototype product.
- All activities that are non-value added across the company.
- All activities involving procurement across the company.

Reporting on data tables is a very powerful tool, but it relies on data tables being structured logically.

If you are reporting on a data table an additional dialog will appear following the selection of the data table that you want to report on. The Data Table Report/Extract Wizard dialog allows you to filter on any field(s).

1. From the **Tools** menu choose **Reports**.
2. Select **Data Tables** in the Categories column.
3. Select the data table that you want to report on in the Reports column.
4. Choose the scope of diagrams that you want to report against.
5. Click **OK**.
6. To filter the data table report, see below, otherwise click **Generate Report**.

To filter the data table report:

1. Double-click a field that you want to apply a filter to.
2. Choose the filter operator from the **Filter Operation** drop-down list.
3. Enter a value to filter against in the **Filter Value** text box.

To update multiple records:

It is possible, once the report has been generated, to update any of the data table records with new values.

1. In the data table report, select the records that you want to update.

   Note: Hold Ctrl to select multiple records.
2. From the **Administration** menu choose **Multi-Record Update**.
3. Enter new values for any of the data table fields.
4. Click **OK**.

Customize a report

Report data can be sorted, filtered and grouped and columns can be added, removed and repositioned.

To add a column:

1. From the **View** menu choose **Column Customizing**.

   A list of additional columns will be displayed in the Customize window.
2. To add a column, drag the column header from the Customize window and drop it in between the two column headers in the report view where you want the new column to appear.

   Note: Green arrows indicate that the column can be dropped into place.

To remove a column:

1. Drag the column header from the report view into the Customize window.

To group columns:

1. Drag and drop the column header into the grey area above.

   You can then expand each group category by clicking the expand button ⊞.

   To ungroup a column, drag and drop the column header back into place within the existing ungrouped column headers.

   Multiple columns can be grouped. The precedence of grouping is determined by the order of the column headers in the grouping area, i.e. the first column header will be grouped first, followed by the second column header and so forth.

To reposition a column:

1. Drag and drop the column header in between the two column headers where you want the column to appear.

   Note: Green arrows indicate that the column can be dropped into place.

To sort columns:

1. Click the column header to toggle the direction of data.

To filter column data:

1. Click the filter button ▼ for the column you want to filter and choose either **(Custom...)** to define a custom filter or choose one of the existing data records.

   Note: Filtered columns will be indicated with a blue filter button. To remove a filter select the **(All)** option.

Related topics

Generate a report

Schedule a report

Save a report

Print a report

Report scheduling

Schedule a report

Reports can be automatically scheduled to run using the Scheduled Report Manager. Only administrators and report managers can create, edit and delete scheduled reports.

Note: Any reports that are run through the Scheduled Report Manager are logged. You can access this log file in the Scheduled Reports dialog - from the **File** menu choose **View Log**. You can schedule reports to be available in the web server. See Scheduling a web server report for more details.

---

1. From the **Tools** menu choose **Scheduled Reports**.
2. From the **File** menu choose **New**.
3. Define the scheduled report from the following:

   Report Parameters is the type of report to run and the scope of diagrams to run it across. Click **Select** to define the parameters.

   Scheduled Item Name is the name as it appears in the Scheduled Report Manager. It will also be the name of the generated report.

   Send Notification To allows you to define a user or user group to notify upon completion or failure of the report. This will default to you. To select another user click **Select** to find a user.

   Schedule Information requires you to define the time, date, interval, etc of the schedule in Windows Task Manager. Click **Configure** to define the report schedule.

   Save Data to a Folder on Disk allows you to specify the format to save the report in (note the **Save Data for Web Server** option is covered in Scheduling a web report).

Data Location is the location that the report will be saved to once it has been generated. Click **Browse** to specify a location.

4. Click **OK**.

Exporting as XLS

Exporting as XLS can only handle up to 256 characters and any data exceeding this in a single cell will be truncated. For example, a data table report may generate cells with more than 256 characters. To rectify this, choose to export the report as HTML and select the **Use .xls Extension for the File** checkbox. This will generate a HTML report with a XLS extension.

Tips

- Running broad reports can be resource intensive, therefore consider running these reports when the number of users accessing the system is minimal.
- If scheduling multiple consecutive reports, ensure a reasonable time is allowed for each successive report to complete before the next one begins to avoid two reports being run at the same time.
- If scheduling multiple recurring reports it is advisable to manually run each report that is included in the schedule to assess the time required for completion. A safety margin should be added to this time to prevent report generation overlapping.
- Choose the report scope carefully to save time on running reports.
- Consider running reports in Nimbus Control under a dedicated Windows domain account used solely for report generation.

Related topics

Editing scheduled reports

Deleting scheduled reports

Scheduling web reports

Generating reports

Customizing reports

Manually running scheduled reports

Saving reports

Printing reports

Schedule a web report

Reports can be automatically scheduled to run using the Scheduled Report Manager and made available to users in the Control web interface. Only administrators and report managers can create, edit and delete scheduled reports.

Note: Any reports that are run through the Scheduled Report Manager are logged. You can access this log file in the Scheduled Reports dialog - from the **File** menu choose **View Log**.

---

1. From the **Tools** menu choose **Scheduled Reports**.
2. From the **File** menu choose **New**.
3. Define the scheduled report from the following:

   Report Parameters is the type of report to run and the scope of diagrams to run it across.

   Scheduled Item Name is the name as it appears in the Scheduled Report Manager. It will also be the name of the generated report.

   Send Notification To allows you to define a user or user group to notify upon completion or failure of the report.

   Schedule Information requires you to define the time, date, interval, etc of the schedule in Windows Task Manager.

4. Select **Save Data for Web Server**.

5. To define default and specific user access rights click **Configure** (adjacent to the Access Rights field under the Save Data to a Folder on Disk option).

   By default, all users are granted access to the report. Select the default access rights for all users, if required. To assign access rights to specific users click **Add** and select a user.

   Note: There are two levels of access rights that can be applied - you can define access rights for specific reports, as above, and you can also define access rights to specific web report folders in the web report repository (see below).

6. Click **Browse** to specify the folder in the web reports repository to save the report to.

7. Click **OK**.

Managing folders in the web report repository

Web reports are saved in the web report repository. The location of the web report repository is:

...Nimbus Control\Process Repository\System\Web Reports

You can add, edit and delete folders within the web report repository.

To create a new folder:

1. In the Scheduled Reports dialog (from the **Tools** menu choose **Scheduled Reports**), from the **File** menu choose **Web Reports**.
2. From the **Edit** menu choose **New Folder**.
3. Enter a name for the web report folder.
4. Define default user access rights and specific user access rights.

   By default, all users are granted access to the web report folder. Select the default access rights for all users, if required. To assign access rights to specific users click **Add** and select a user.

   Note: A user must have access to both the web report and the web report folder in which the report is stored to view the report in the web server.

5. Click **OK**.

To edit a folder:

1. Select the web report folder and from the **Edit** menu choose **Edit Folder**.

To delete a folder:

1. Select the web report folder and from the **Edit** menu choose **Delete Folder**.

Related topics

Scheduling reports

Manually run a scheduled report

Scheduled reports can be manually run at any time.

1. From the **Tools** menu choose **Scheduled Reports**.
2. Right-click the scheduled report and choose **Run Now**.

Related topics

Scheduling reports

Editing scheduled reports

Deleting scheduled reports

Generating reports

Customizing reports

Saving reports

Printing reports

Edit a scheduled report

1. From the **Tools** menu choose **Scheduled Reports**.
2. Double-click the scheduled report.

Copy a scheduled report

Scheduled reports can be copied. Please note that the scheduled task details are not copied, therefore these will have to be defined manually.

1. From the **Tools** menu choose **Scheduled Reports**.
2. Right-click the scheduled report that you want to copy and choose **Copy**.

Related topics

Scheduling reports

Editing scheduled reports

Deleting scheduled reports

Generating reports

Customizing reports

Saving reports

Printing reports

Delete a scheduled report

1. From the **Tools** menu choose **Scheduled Reports**.
2. Select the scheduled report and press **Delete**.

Save a report

Reports can be saved in TXT, XLS, XML and HTML formats.

1. From the **File** menu choose **Export Grid As Shown To** and choose a file format.
2. Browse to a location to save the report in, enter a name in the **File name** box and click **Save**.

Related topics

Generate a report

Customize a report

Schedule a report

Print a report

Print a report

Entire reports or selected diagrams within a report can be printed.

1. From the **File** menu choose **Print**.

   Note: To print selected diagrams, select the diagrams that you want to print by holding Ctrl and from the **File** menu choose **Print Selected Diagrams**.

Related topics

Generate a report

Customize a report

Schedule a report

Save a report

Chapter 17

Printing

Printing

Printing Maps

Page Setup

You can define the page setup with respect to printing across a scope of diagrams. These options will apply to all users when they print the selected diagram(s).

Note: The page setup options of templates can be defined and these will be used unless the **Override Template** option is selected.

---

1. From the **File** menu choose **Page Setup**.
2. In the Print Scaling tab you can choose how to scale the diagrams.

   Always scale diagram to fit page will scale diagrams up or down to fit the page.

   Scale diagram to fit, only when larger than page will only scale down diagrams that are too large for the page. Diagrams that are smaller than the page will not be scaled up.

   Scale diagram to fit user defined area allows you to define a printable area. If this option is selected then resizing handles will be present when you exit Page Setup. When you adjust the print area of one diagram then all lower level diagrams (for the current diagram and all lower levels and the current process map options) will also be set. Diagrams can also be adjusted individually. You can also enter specific dimensions for the print area by clicking **Adjust Manually**.

   Note: The **Scale diagram to fit user defined area** option is pixel based and not true page size. Nimbus Control will compress or expand the diagram to fit the standard page size of the printer that it is being sent to. A4/A3, for example, is determined by your printer and what you see on the screen is literally what you get when the page is printed.
3. Choose the scope of diagrams to set the printing options for.

   Override Template will override any template page setup settings defined for applied templates. If this option is not selected then the template page setup settings will be used.
4. Click the Orientation and Size tab to change the print orientation, margins and header and footer font sizes.

   The print margins define the distance from each edge of the printable area (the printable area is between the bottom of the title area at the top and the document control panel at the bottom). The Header And Footer panel allows you to change the font point sizes of the control panel and title.

Print diagrams

The current diagram, the current diagram and all lower levels and the current process map can be printed. Various print options allow you to include or exclude various diagram objects and the page setup can be modified.

---

1. From the **File** menu choose **Print**.
2. Select from the following options:

   #### General tab

   Select or deselect the features that you want to include in the printout and choose the number of copies that you want to print.

   #### Scope tab

   Choose the scope of diagrams that you want to print.

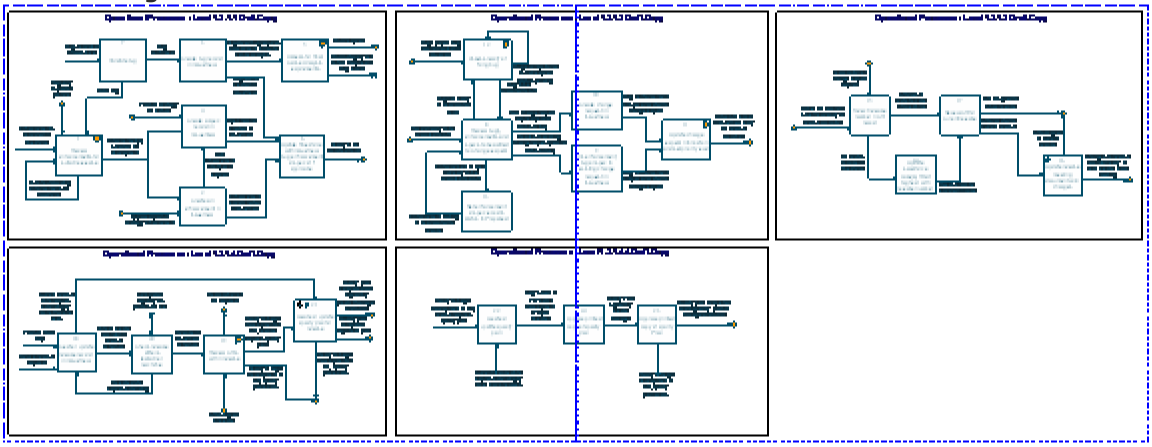
   Choose any multiple printing options:

   1 Diagram per Page will print 1 page for each diagram in the selected scope.

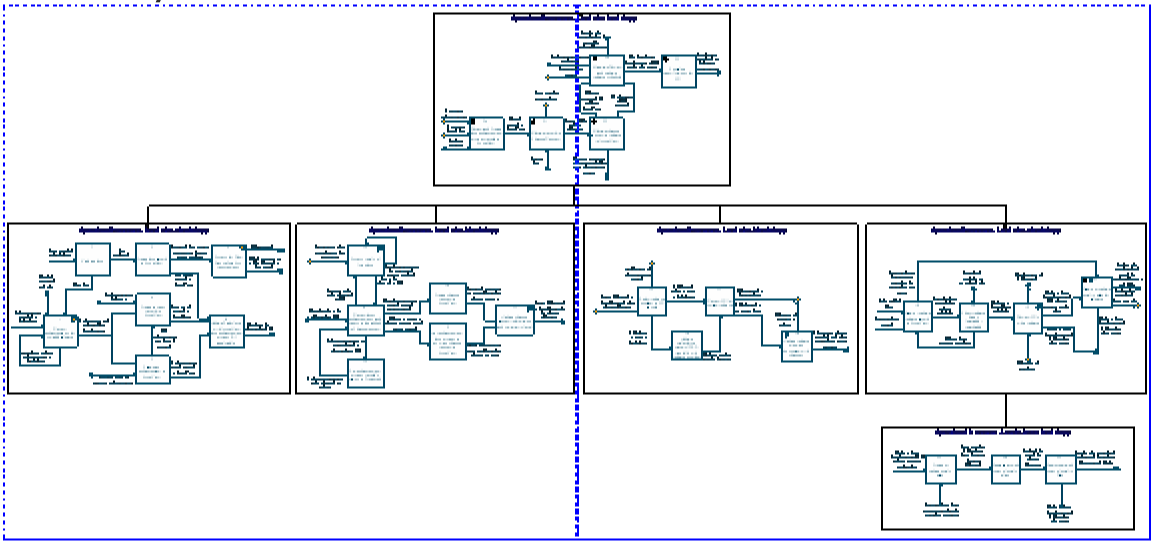
   Fit To allows you to specify how many pages to print for the selected scope of diagrams. For example, if you have 5 diagrams in the selected scope and you choose 1 by 1, Control will print all 5 diagrams on one page. If you are printing the current diagram only and select to fit it to 3 by 3 pages, it will stretch the diagram over 9 pages.

Choose the layout if printing multiple diagrams per page.

Rows of Diagrams:



Hierarchically Structured:



3. Click **Print**.

Related topics

[Page Setup]

[Defining print access rights]

Define print rights

Printing rights can be defined for a diagram or scope of diagrams.

1. From the **Manage** menu choose **Diagram Print Rights**.
2. In the Print Rights panel select the default print rights.

   Normal Print allows users to print the diagram(s).

   Print Denied prevents users from printing the diagram(s).

   Controlled Print allows users to print the diagram(s) and adds the word CONTROLLED to the top-right of every page in the printout.

   Uncontrolled Print allows users to print the diagram(s) and adds the word UNCONTROLLED to the top-right of every page in the printout.

3. In the Scope panel select the scope of diagrams to the assign print rights to.
4. Click **Add** ✚ to select a user or user group.

Note: Users will be automatically granted normal print rights. To modify their print rights double-click the user or user group once added and reselect.

Printing Documents

Print the Document Registry

The Document Registry view can be printed.

1. From the **File** menu choose **Print**.

   Note: One field can be used as a preview field, which is displayed in between each row in the report. Choose a field from the **Preview Field** drop-down list (located top right on the Document Registry dialog). To toggle the preview field on/off, from the **View** menu choose **Preview**.

Related topics

[Designing the print format](#)

[Page setup](#)

Page setup

You can configure the print output, including page settings, margins, headers, footers and page scale.

1. From the **File** menu choose **Page Setup**.

Design the print format

You can design the print format when printing from the Document Registry. Designing the print format is undertaken when you are ready to print.

Note: The settings are not saved between printing sessions.

1. From the **File** menu choose **Print Preview**.
2. From the **File** menu choose **Design**.

   Title Properties allows you to edit the title, the title's font, color, alignment and where it appears in the printout.

Options tab

Show

Bands displays the column header bands
Headers includes column headers
Footers includes footers
Group Footers includes footers in each grouped section of the Document Registry
Preview includes the preview field
Auto Calculate Preview Lines will calculate the number of preview lines to insert based on the data. If unselected then you can specify how many lines are inserted in between rows

Grid

Grid includes all grid lines
Nodes Grid includes grid lines within expanded nodes when fields are grouped
Group Footers Grid includes group footers within expanded nodes when fields are grouped

Miscellaneous

Flat CheckMarks THIS OPTION DOES NOT APPLY
Display CheckMarks as Text THIS OPTION DOES NOT APPLY

Colors

Transparent does not apply any colors to the report rows. If deselected then the row and preview colors can be selected.
Fixed Transparent does not apply any colors to other aspects of the report. If deselected then various report colors can be selected.
Grid Line Color allows you to choose the color of the grid lines.

Fonts

Change various fonts, font sizes and font colors. Click an option and click **Change Font**.

Behaviors

On Every Page

Bands On Every Page includes column headers on every page of the printout
Headers On Every Page includes headers on every page of the printout
Footers On Every Page includes footers on every page of the printout

Selection

Only Selected prints only the file(s) that were selected in the Document Registry list when the Print Preview was accessed
Extended Select THIS OPTION DOES NOT APPLY

Node Expanding

Auto Nodes Expand will automatically expand group nodes to display all rows

3D Effects

Use 3D Effects will apply a 3-D effect to the appearance of the report
Soft3D will apply a softer 3-D appearance to the report

Graphics

Transparent Graphics THIS OPTION DOES NOT APPLY
Display Graphics As Text THIS OPTION DOES NOT APPLY

Chapter 18

Navigation

Navigation

Activity Details Panel

The Activity Details Panel displays information about a selected activity, including the input/output text, resources, commentary text, links, notes bubbles, etc.

1. From the **View** menu choose **Activity Details Panel**.

   Note: You can undock and dock the Activity Details Panel by double-clicking the top of the panel. To show a single activity or all activities, right-click in the Activity Details Panel and select or deselect **Show all activities**. If viewing all activities, clicking an input/output or activity in the Activity Details Panel will highlight it in the diagram.

Diagram list

A diagram list allows you to view a list of diagrams within a particular scope and then navigate to a particular diagram.

1. From the **View** menu choose **Diagram List**.
2. Select the scope of the diagrams that you want to view and click **OK**.

   Current Diagram displays the current diagram only.
   Current Diagram and Lower Levels displays the current diagram and all lower-level diagrams.
   Current Process Map displays all diagrams in the current process map.
   Diagram Scope List File displays all diagrams in a diagram scope list file.
   Map Selection allows you to select diagrams from any process maps in the repository.

3. Double-click a diagram to navigate to it.

Diagram Viewing Tips

To filter the columns click the filter button on the column that you want to filter and select the filter criteria.

To add or remove columns choose **Column Customizing** from the **View** menu. Drag columns from the Customize dialog on to the Diagram List dialog to add them and drag columns from the Diagram List dialog on to the Customize dialog to remove them.

To group columns, drag the column header onto the grey area above the column headers.

Related topics

Creating diagram scope lists

Managing diagram scope lists

Hierarchical list

Object list

Information list

Zooming

Hierarchical diagram list

Viewing diagrams as a hierarchical list provides a management overview of the process map by displaying all diagrams at their representative levels. You can navigate to particular diagrams by double-clicking them.

1. From the **View** menu choose **Hierarchical Diagram List**.
2. Double-click a diagram to navigate to it.

Diagram Viewing Tips

To add or remove columns choose **Column Customizing** from the **View** menu. Drag columns from the Customize dialog on to the Diagram List dialog to add them and drag columns from the Diagram List dialog on to the Customize dialog to remove them.

Related topics

Diagram list

Object list

Information list

Zooming

Object list

View a list of activity boxes within a selected scope of diagrams and then navigate to a particular diagram.

1. From the **View** menu choose **Object List**.
2. Select the scope of the diagrams that you want to view and click **OK**.

   Current Diagram displays the current diagram only.
   Current Diagram and Lower Levels displays the current diagram and all lower-level diagrams.
   Current Process Map displays all diagrams in the current process map.
   Diagram Scope List File displays all diagrams in a diagram scope list file.
   Map Selection allows you to select diagrams from all process maps in the repository.

3. Double-click a diagram to access it.

Object Viewing Tips

To filter the columns click the filter button on the column that you want to filter and select the filter criteria.

To add or remove columns choose **Column Customizing** from the **View** menu. Drag columns from the Customize dialog on to the Diagram List dialog to add them and drag columns from the Diagram List dialog on to the Customize dialog to remove them.

To group columns, drag the column header onto the grey area above the column headers.

Related topics

Diagram list

Hierarchical list

Information list

Zooming

Information list

Display a report of the functions that you are assigned to within a selected scope of diagrams, including group memberships and associated functions within diagrams.

1. From the **View** menu choose **My Information List**.
2. Select the scope of the diagrams that you want to view and click **OK**.

   Current Diagram displays the current diagram only.
   Current Diagram and Lower Levels displays the current diagram and all lower-level diagrams.
   Current Process Map displays all diagrams in the current process map.
   Diagram Scope List File displays all diagrams in a diagram scope list file.
   Map Selection allows you to select diagrams from any process maps in the repository.

3. Double-click a diagram to access it.

Object Viewing Tips

To filter the columns click the filter button on the column that you want to filter and select the filter criteria.

To add or remove columns choose **Column Customizing** from the **View** menu. Drag columns from the Customize dialog on to the Diagram List dialog to add them and drag columns from the Diagram List dialog on to the Customize dialog to remove them.

To group columns, drag the column header onto the grey area above the column headers.

Related topics

Diagram list

Hierarchical list

Object list

Zooming

Zooming

You can zoom in and out of a diagram as well as zooming to fit the whole diagram on the screen.

1. From the **View** menu choose from the following:

   Zoom In will zoom in on the diagram
   Zoom Out will zoom out on the diagram
   Reset Zoom will reset the zoom that has been applied
   Zoom To Fit will zoom in or out to fit the entire diagram on the screen

   Draw Zoom in Area allows you to zoom in on an area in the diagram in order to edit the diagram at close range.

Related topics

Diagram list

Hierarchical list

Object list

Information list

Chapter 19

Training

Training

Training

Nimbus offers a full training program for Nimbus Control, which can be conducted at our office or on-site. Nimbus has a portfolio of training courses that covers process essentials, advanced training, a range of discipline-orientated courses (for example Business Continuity Management, CMMi, etc), and Nimbus Control administration. Nimbus also provides tailor-made courses to support any specific training requirements that customers may have.

For more information please refer to the Nimbus training website.

Alternatively, call +44 (0) 23 92 410 363 or Email professionalservices@nimbuspartners.com.

Chapter 20

Technical Support

Technical Support

Technical support

Nimbus technical support is on hand to provide your clients with assistance on using Nimbus Control.

For more information please refer to the Nimbus support website.

Alternatively, you can contact support by the following Methods

EMEA		
	Telephone	**+44 (0) 23 9241 0352**
	Email	**nimbus-support@tibco.com**
	Opening Times	**07:30 - 20:00 UK Time**
AMERICAS		
	Telephone	**+1 800 706 1196**
	Email	**nimbus-support@tibco.com**
	Opening Times	**00:30 - 17:00 Pacific Time**
China		
	Telephone	**+86 10 8263 7807**
	Email	**nimbus-support@tibco.com**
	Opening Times	**09:00 - 17:00 Beijing Time**

Support Portal

The Nimbus Support Portal allows users to log direct cases (this is especially useful outside of support hours). You can also request updates, view other cases raised by your company and search the Nimbus Knowledge Base.

Please contact Technical Support to request details of the Support Portal.

Chapter 21

Attributions

Attributions

Attributions to third-parties

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jQuery 1.4.1
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miGIF Compression

msTask.pas Jul-00
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Toolbar 97/2000 1.78

WinPerf.pas Dec-99
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XDom.pas 2.3.14