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Introduction

TIBCO Nimbus is your on-line work manual. It’s designed to assist you with your role at work by providing easy-to-follow processes and access to useful supporting information. TIBCO Nimbus ensures consistent and standard working practices.

- **View Processes.** View end-to-end processes, represented graphically as diagrams, for instructions on carrying out certain tasks in your workplace. Process diagrams provide step-by-step instructions for undertaking tasks within your company.

- **Access Supporting Information.** View documents, media files, presentations and other files that support particular processes.

- **Follow Storyboards.** Follow end-to-end processes in the storyboard interface.

- **Search Content.** Search for process-related content based on selected keywords or roles.

- **Collaborate.** Suggest improvements and participate in discussions about process content.

- **Manage To-Dos.** Manage your assigned To-Dos, including actions, acknowledgements, authorizations, reviews and change requests.

- **Subscribe.** Receive notifications when processes and documents related to your role change.
Hierarchical Process Maps

In TIBCO Nimbus, processes are represented graphically as process maps. Each map consists of a set of hierarchical process diagrams and each diagram consists of a series of activities, where the output of one activity forms the input of the next activity.

Diagram Activities

The activity is the main element within a diagram as it describes the step involved in completing a particular step in a process. Each activity will have a resource assigned to it, which may be an individual (role) or another resource (for example a machine or a computer). Resources are responsible for ensuring that a particular activity is undertaken. An example activity is given below, which contains all of the elements that you may find and which provide access to further information.
Navigation

There are a number of ways in which to navigate around TIBCO Nimbus.

The Menu

The Menu allows you to access most of the areas of TIBCO Nimbus and provides access to the majority of the functionality that you will use. Additional menu options may become available, depending on what you are viewing (for example, if you are viewing a process then the Diagram menu becomes available).

Home

This links to your personal Home page, which displays your favorite process-related items, such as processes, documents, storyboards, scorecards, etc. If you have any outstanding To-do items then these are indicated in the To-dos section.

The top menu items (Processes, Documents, Scorecards and Actions) provide the same links as described below.
Navigation Panel

The Navigation and Search panel provides access to the main areas in TIBCO Nimbus, including your Home page, processes, documents, actions, your To-dos. There are also a number of search abilities available, see Searching for more information.

**Note:** When viewing a process diagram the Navigation and Search panel will be hidden. However, you can still access the same functionality using the menu that appears above the diagram view.

To-Dos

This links to your To-do items, including authorization requests, acknowledgement requests, review requests and change requests that are currently assigned to you. See To-Dos for more information.

Processes

This links to the Processes page and allows you to view and open any process maps that you have access to.

Storyboards

This links to the Storyboards page and allows you to view and open any storyboards that you have access to. See Storyboards for more information.

Statement Sets

This links to the Statement Sets page and allows you to view and open compliance statements. See Compliance Statements for more information.

Documents

This links to the Documents page and allows you to search for process-related documents. See Searching for more information.

Scorecards

This links to the Scorecards page and allows you to view and open any scorecards that you have access to. See Scorecards for more information.

Actions

This links to your My Actions and allows you to manage the actions that are assigned to you. See Actions for more information.

Reports

This links to the Reports page and allows you to view and open any Web-based reports that you have access to.
Search Panel

Diagrams
This links to the Search page and allows you to search for diagrams based on diagram object text.

Documents
This links to the Documents page and allows you to search for process-related documents.

My Searches
This links to your My Searches page and allows you to search for diagrams, documents and storyboards based on keywords.

Roles
This links to your My Roles page and allows you to search for diagrams, documents and transaction links based on your roles. You can also search against other roles.

Diagram Hotspots
A diagram may possess a number of hotspots. Hotspots provide navigation to related diagrams, access to supporting information directly related to the process or menu functions.

Diagram Links

- Diagram Link
- Diagram Link to Lower Level (provides more detail for a particular activity)
- Diagram Link (flow-line link)
- Diagram Link (sign post)

Metrics (measures)
Metrics are used to measure specific aspects of a business process and these can be represented graphically in TIBCO Nimbus. Some examples of process metrics are listed below. Metrics can be added to your favorites by clicking them and choosing Add To Home Page. If the measure is linked to a scorecard you can also launch the associated scorecard by clicking the measure and choosing Scorecard.
Notes Bubbles
Notes bubbles provide extra information for a specific activity within a process diagram. Click the bubble to view the note.

Hint Text
If you roll your mouse over certain objects (free text, images, attachment logos and notes) hint text may be displayed.

Attachments
There may be attachments (media files, data tables, scorecards, storyboards, images, transaction links, etc) that support particular activities or other objects within a process diagram. If you see one of the icons below then attachments are present. Click the attachment icon to access the associated attachments.

Data Tables
Data tables provide a way of capturing data that is significant to a particular process and may be associated with specific activities. Data tables are accessed through an activity's attachments (above).

Updating data tables
If you have the appropriate access rights you can add and edit data records in a data table. Open the data table and click Add to add data or Edit for the record that you want to edit. * means that the field is mandatory.

Statements
Statements may be associated with an activity as part of a quality system, for example CMMis, internal company policies, ISO 9000/9001, etc. If you see the icon below then statements are associated with the activity. Click the statement icon to access the associated statements or link to other statements. See Statement Sets for more information.

The following icon may also be found on activities, indicating that the activity is currently not linked to any statements. Click the icon to add a new statement link. See Statement Sets for more information.

Diagram Explorer
When you are viewing a process, you might want to view the diagram within the hierarchy of the process map. The Diagram Explorer allows you to view the entire map in its hierarchical structure and navigate to diagrams.

To access the Diagram Explorer, from the View menu choose Diagram Explorer when viewing a diagram.

Diagram Scrolling
If a diagram doesn't fully display in the view, you can scroll the diagram by clicking and dragging.
Searching

There are a number of ways in which to search for process-related information in TIBCO Nimbus.

There are a number of methods available to search for process-related information.

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My Searches

Search for processes, documents and storyboards based on keywords and additional categories.

To access your My Searches page, from the Search panel click **My Searches.**
To search for content based on a selected keyword

1. Select the **Keywords** radio button.
2. From the **Keywords Group** drop-down list choose a keyword group.
3. From the **keywords** drop-down list choose a keyword.
4. Choose any additional filter group categories from the respective drop-down lists.
5. Click **Search**.

To search for content based on free text

1. Click **More Options...**
   
   **Note:** The **More Options** facility may have been disabled by your administrator.
2. Select the **Text** radio button.
3. Click in the **Text** box and type your search text.
4. Choose any additional filter group categories from the respective drop-down lists.
5. Click **Search**.

For example, if you search for Invoice, any diagrams, documents and storyboards that are associated with the keyword **Invoice** will be retrieved, such as 'Raise an invoice'. Following a search, click a process, document or storyboard link to view the item.

**Note:** Clicking on a document will display the document's details.
Keywords
Search for process, storyboards and documents based on keywords. This option is available on your Home page.

My Roles
Search for processes, storyboards and SAP transaction links based on your assigned roles. You can also search for processes, storyboards and SAP transaction links based on other roles, for example if you have been temporarily assigned a colleague's work in their absence.

To access your My Roles page, from the Search panel click Roles.

To search for diagrams, storyboards and transaction links

1. Select the checkboxes of the role(s) that you want to search against.
   Note: This step may not be available, depending upon administrative settings.

2. Select one or more of the following checkboxes:
   Activity Search will search for process diagrams.
   Storyboard Search will search for storyboards.
**Transaction Search** will search for SAP transaction links.

3. Click **Search**.

4. Click an item link to view a particular item.

### Searching against other roles

You can search for diagrams, storyboards and transaction links associated with other roles that are not currently assigned to you.

1. Click **New Item**.

2. Do one of the following:
   - If you know role you are looking for, click in the **Resource name** box and type the name of the role.
   - If you do not know the role, from the **Group** drop-down list choose the role group, then click **Find**. Select the checkbox(es) of the roles that you want to search against.

3. Click **OK**.

   Notice that the selected role(s) appear in your list of searchable roles. Please note that roles added by this method will not be associated with your account. If you want to be permanently associated with a particular role, contact your administrator.

   **Note:** To remove a temporary role, click adjacent to the role that you want to remove.

### Search

Search for diagrams based on diagram object text. You can select which diagram objects to search against and any diagrams matching the search criteria will be returned.

**To search for processes**

1. From the Navigation panel click **Diagrams**.

2. Click in the **Find This** box and type your search query.

3. Choose a language to search against (if available).

4. Select/deselect the diagram objects that you want to search against.

   **Whole words only** will search for exact text matches. Disable this option if you want to search for part of a word. For example 'test' will return test, tester, testing, etc, if disabled.

5. Click **Search**.

   Any diagrams that include objects with the specified search text will be displayed. Click the thumbnail image of the diagram to navigate to it. If you want to view the hierarchical list of diagrams in the associated process map then click the respective **map title**.
Documents

Search for process-related documents (Word documents, media files, presentations, etc). You can select a number of filter options, so for example you could filter your search by documents that are only relevant to your department.

To access the Documents page, from the Navigation panel click Documents.

To search for documents

To return all documents you can click Search without specifying any filter options. Please note that if there are many documents in the document repository, this process may be time consuming. Or to conduct a filtered search specify any of the following filters, then click Search.

**Less Options...**
- **Document No.** allows you to enter the specific document number if you know it.
- **Title must include** is used to specify certain words that must be in the title of the document(s).

**More Options...**
Click More Options... to enable the following options:

- **Authorization Filter** allows you to choose the authorization status of the documents that are returned in the search:
  - **All Authorized** returns only authorized documents
  - **Own Unauthorized** returns only documents that are awaiting authorization and that are owned by you
  - **All Unauthorized** returns documents that are awaiting authorization
  - **Authorized & Own** returns only authorized documents that are owned by you
  - **All Files** will return all files in the Document Registry, regardless of their authorization status
  - **All Pending & Authorized** returns only documents that have been authorized or are awaiting a further authorization

- **Categories** allows you to choose from predefined categories that are associated with documents. Choosing multiple items from a particular category will return all documents that match any of the selected categories.

- **Items per page** allows you to change the number of documents to display on each page.

- **Show withdrawn** will include documents that have been withdrawn (deleted).

To view a document

Following a document search you can view the details for a particular document, or open/save the master or draft copy.

- **View the details of the document**
- **Open or save the master version**
- **Open or save the draft version**
Collaboration

There are a number of ways that you can assist in the improvement of processes and supporting documents, such as adding memos and change requests. You can also contact the author or owner.

Memos

A memo is a brief written record of communication that is used to provide comments about processes and documents. Memos provide an open forum in which to discuss improvements, amendments and enhancements to processes and documents, by allowing users to view and reply to existing memos.

Please note: The formal method for requesting a change is through a Change Request. Memos can be submitted as formal change requests.

Viewing Memos

You can view any memos added to diagrams and documents. When viewing a particular diagram or the details of a document, from the Navigation menu choose Collaboration. Click the Memos tab and then click a memo to view it. When viewing a diagram, the number of memos associated with that diagram is also displayed in the top-left-hand corner of the diagram. Click the Memos link to view the memos.
Adding Memos

Assuming you have access to a particular diagram or document, you can add a memo. When viewing a process or the details of a document, from the Collaboration menu choose Add Memo. Enter a subject, reference (optional) and message, then click OK.

Replying to Memos

To reply to a memo, open the memo and click either Add Reply or Add Reply with Quote.

Submitting Memos as Change Requests

If you think that a memo warrants a change to a particular diagram or document you can escalate a memo to a change request. Any associated memos, i.e. replies to the memo you are submitting, will be included in the notes of the change request. Once a memo is submitted as a change request the owner will be notified.

To submit a memo as a change request, open the memo and click Submit as Formal Change Request.

Change Requests

The formal method for requesting a change to process content is through a change request. As a user, if you think that a diagram or document needs to be modified, for example if there is a mistake or you want to suggest an improvement, you can submit a change request.
**Viewing Change Requests**

If a change request is currently assigned to you then it will appear in your **To-Do list** (from the Navigation panel click **To-Dos**). To view any change requests that are open for a particular diagram or document, from the **Navigation** menu choose **Collaboration**. When viewing a diagram, the number of change requests currently open for the diagram will also be displayed in the top-left-hand corner of the diagram. Click the **CRs** link to view the current change requests.

**Submitting Change Requests**

When a change request is submitted, the diagram or document’s owner will be notified. The owner will then either accept the change request, which will progress the change request on to the author, or it will be rejected.

**To submit a change request**

1. From the **Collaboration** menu choose **Add Change Request**.
2. Enter a user reference (optional), audit reference (optional) and notes, i.e., details of the change request.
3. Type your password and click **OK**.

**Adding Comments to Change Requests**

You can add your comments to any existing change requests, for example you may want to provide additional information to further support the request.

**To add comments to a change request**

1. Open the change request and do one of the following:
   - Click **Add New Note** to add a new note to the change request.
   - Select the note that you want to reply to, then click **Add Reply** or **Add Reply with Quote**.
2. Enter the subject, reference (optional) and details of the note.
3. Click **OK**.

**Progressing Change Requests**

If you are the owner or author of a diagram or document, any change requests that are submitted will appear in your To-do list and you will be notified with the details. If you are the **owner** of a diagram or document and a change request is submitted against it, you will be required to either accept the change and progress it to the author to make the changes, or you can reject it. If you are the **author** of a diagram or document and you receive a request to change the content, you will be required to make the required changes and then close the change request.

**To progress a change request**

1. From the **Go To** menu choose **To-Dos**, then click the **Change Requests** tab.
2. Click the change request identifier. For example:
   
   Please review the change request "<Change Request Identifier>" relating to the diagram/file...
3. Click **Progress Change Request** (bottom right of the screen).
Depending upon your role, the following options will be presented:

### Owners
- **Allocate Request** will accept the change request and assign it to the diagram or document author.
- **Need More Information** will return the change request to the originator with a request for more information.
- **Reject Request** will reject the change request and return it to the originator.
- **Impact Assessment** will hold the change request to allow the impact on the diagram or document to be assessed.

### Originators
- **Provide more information** will allow you to add more information to the change request and return it to the owner.
- **Cancel Request** will cancel the change request.
- **Provide more information** will allow you to add more information to the change request and return it to the owner.

### Authors
- **Need more information from originator** will return the change request to the originator with a request for more information.
- **Need more information from owner** will return the change request to the owner with a request for more information.
- **Confirm completion** will complete and close the change request.

**Note:** Add a new note to support the change request by clicking Add New Note, or reply to an existing note by clicking Add Reply.

4. Select an option and enter some associated notes.
5. Enter your password and click **OK**.

### Contacting the Owner or Author
If you have any questions or issues with a process diagram or document you can contact the owner or author.

**To contact the owner or author**

When viewing a diagram or document, from the **Collaboration** menu choose **Send Message To** and then choose either **Owner** or **Author**.

### Subscribing to Diagrams and Documents
Subscribing to diagrams and documents will notify you when the content has changed. This is useful if a process or supporting document relates to your role and you want to know every time the content is updated.

You may be subscribed to process diagrams and documents by process authors or administrators, or you can subscribe yourself.
To subscribe to a diagram or document

From the Manage menu (on the right-hand side) choose Subscription. If you want to unsubscribe yourself from a particular diagram or document, deselect Subscription.
To-Dos

Process diagrams and supporting documents must go through an authorization cycle in order for the content to be released to end users through the Web interface. You may be required to assist in authorizing, reviewing or acknowledging process content. You will be notified of any requests and an item will appear in your To-Dos.

To-Do List

Your To-Dos lists any authorization requests, review requests, acknowledgement requests and change requests that are currently assigned to you.

To access your To-do list, click **To-Dos** in the Navigation panel on the left.

Each To-do item will provide a link to the related item. Please note that any past due (outstanding) To-do items will be highlighted in red. To view all your past due items click the **Past Due** tab. These items should be prioritized and completed as soon as possible.
Contacting the Author or Owner

If you have any issues with a particular request then you can contact the author or owner of a the diagram or document - when viewing the diagram or document, from the Collaboration menu choose Send Message To and then choose either Author or Owner.

Authorization Requests

Before process diagrams and documents are released to end users through the Web interface, they must undergo an authorization cycle. An authorization cycle requires certain users (authorizers) to view and then authorize the content.

Authorizing Diagrams and Documents

If you are a designated authorizer for a particular process diagram or document you will be notified when a request to authorize it is made. By authorizing a diagram or document you are consenting to it being published to end users. Any authorization requests assigned to you will appear in your To-Do list.

Thinking about rejecting a diagram or document?

Rejecting a diagram or document will require it to undergo another full authorization cycle. It is advised that you first discuss your views with either the author or owner of the diagram or document to try to resolve the point without the need for a further authorization cycle.

To authorize or reject a diagram or document

1. From the Navigation panel click To-Dos.
2. Click the Authorizations tab.
   
   **Hint:** To authorize multiple diagrams and documents see below.
3. Click the diagram or document title to view it.
4. From the Manage menu choose Accept or Reject.
5. Enter a comment and your password, then click OK.

Authorizing Multiple Diagrams and Documents...

If you are familiar with the content, you can authorize or reject multiple diagrams and documents in one operation from your To-Do list. When viewing your list of authorization requests, select the checkboxes of the items that you want to authorize or reject, then click either Accept or Reject.

Acknowledgement Requests

When new content (processes, documents or storyboards) is released to end users, the author or owner may request users to acknowledge the new content.

Acknowledging Diagrams and Documents

If you are an assigned acknowledger for a particular process diagram, document or storyboard, you may be requested to acknowledge the content. Any acknowledgement requests assigned to you will appear in your To-Do list.
To acknowledge a diagram or document

1. From the Navigation panel click To-Dos.
2. Click the Acknowledgements tab.
   
   Hint: To acknowledge multiple diagrams and documents see below.
3. Click the diagram or document title to view it.
4. From the Manage menu choose Acknowledge.
5. Enter a comment and your password, then click OK.

Acknowledging Multiple Diagrams and Documents...

If you are familiar with the content, you can acknowledge multiple diagrams and documents in one operation from your To-Do list. When viewing your acknowledgement requests in your To-do list, select the checkboxes of the items that you want to acknowledge, then click Acknowledge.

Acknowledging Storyboards

If you have a storyboard to acknowledge, open and step through the storyboard. The last step will ask you to enter your password in order to acknowledge the storyboard.

Review Requests

From time to time, it is a good idea to ensure that process content is still up-to-date. Scheduled and ad-hoc reviews can be sent to assigned reviewers to ensure that content is still relevant.

Reviewing Diagrams and Documents

If you are an assigned reviewer for a particular process diagram or document then you may be requested to review it and, if appropriate, provide feedback. This may be a one-off review (ad hoc) or a scheduled review that occurs at defined intervals. Any review requests assigned to you will appear in your To-Do list.

To review a diagram or document

1. From the Navigation panel click To-Dos.
2. Click the Acknowledgements tab.
   
   Hint: To acknowledge multiple diagrams and documents see below.
3. Click the diagram or document title to view it.
4. From the Manage menu choose Review.
5. From the Review Outcome drop-down, choose a relevant option.
6. Enter any review comments, enter your password, then click OK.
   
   Note: If you have requested a change or action you will be presented with the new change request or new action form.

Reviewing Multiple Diagrams and Documents...

If you are familiar with the content, you can sign off multiple diagrams and documents in one operation from your To-Do list. When viewing your review requests in your To-do list, select the checkboxes of the items that you want to sign off, then click Review. Note that it is not possible to request changes for
multiple items. If changes are required, items must be signed off individually.

**Viewing the details of a Review Request**

You can view the details of a particular review request that is assigned to you. You can also open any attachments that are linked to the review. In the Reviews tab in your To-do list, click the number in the attachments column (0). **Note:** If a review does not have any attachments then you cannot access the Review Details page for that particular review.
Actions

Actions are particular tasks that can be related to a diagram, document, storyboard or metric link, or general tasks not associated with an item. Actions should be completed by users before the specified due date.

Viewing Actions

Any actions that are currently assigned to you and still active will be displayed on your Home page and accessible in your My Actions. The Action Registry allows you to view all actions currently in the system (note that you may not have viewing rights for some actions). If any actions are assigned to diagrams then the number will be displayed in the Actions link in the top-left-hand corner of the diagram (click the link to view the current actions).

Creating Actions

Action managers can create general actions, or actions relating to diagrams, documents, metric links, statements and storyboards.

To create an action

1. Do one of the following:
   - To create a general action, from the Navigation panel click Action Registry to launch the Action Registry. Then, click Add Action.
   - To create a diagram or document action, when viewing the diagram or details of the document, from the Collaboration menu choose Add Action.
   - To create a statement action, when viewing the statement details of the statement click the Actions tab, then click Add Action.
   
   Note: Actions cannot be created for metric links or storyboards in SharePoint. This must be done through the Author Client.

2. Enter the details of the action.

   Note: You will be automatically assigned as the owner. If you want to assign a different owner click * means that the field is mandatory.

Attachments

3. To add attachments click Add Attachment.

   Upload File allows you to attach a file on your PC or from a network drive.

   Web Link URL will allow you to specify a Web link URL (e.g. http://www.website.com).

   Diagram Link allows you to link to a diagram.

   Document Link allows you to attach a document from the Document Registry.

Assignees (users required to complete the action)

4. To add assignees click Add Assignees.
Only require 1 assignee to complete action will allow the action to be closed when only one action assignee has completed the action.

Editors (users permitted to edit the action)

5. To add editors click Add Editors.

Viewers (users permitted to view the action)

6. To add viewers click Add Viewers.

Note: The <Everyone> group defines the permissions for all users. If you want to restrict viewing to particular users and user groups, ensure that you remove the <Everyone> group.

Comments

7. To add comments, such as the reason for the action, click Add Comments.

Additional Category Information

8. Complete any fields that relate to the action.

Additional Information

9. Complete any fields that relate to the action.

Note: This step may not be available, depending upon administrative settings.

10. Click OK.

Editing Actions

If you are an action manager, the action owner or an assigned editor, you can modify the details of an action, including adding/removing assignees, editors and viewers, updating the due date and modifying any other details.

To edit an action

1. From the Navigation panel click Action Registry to launch the Action Registry.

2. Search for the action that you want to edit.

3. Click the subject of the action to open it.

Note: The Action Details page will be displayed. Assuming you have the correct access rights, you can add attachments, assignees, viewers, editors and comments here.

4. Click Edit Action.

Note: The Edit Action page will be displayed. If you are the owner of an editor you can modify the details of the action, including the due date, owner, category, etc.

Completing Actions

As an action assignee you will be required to undertake the action and then set the status of the action to complete. Once all assignees have completed the action, the action owner can close it. Actions that are assigned to you will appear in your My Actions.

To complete an action

1. Click Actions (on the top) to view your list of current actions. Alternatively, actions that are assigned to
you are displayed on your Home page.

2. Click the subject of the action to open it.

3. Click Change Status.

4. From the Status drop-down list choose Complete.

5. Add a comment, if appropriate.

6. Add any information that relates to the selected action category (note this option may not be available for some action categories).

7. Click OK.

Note: If you completed the action earlier than today's date then specify when you completed the action.

Quick Sign Offs

If enabled, it is possible to sign off multiple actions in one go. In your My Actions page, select the checkboxes of the actions that you want to sign off, then click Change Status. Choose a status, enter a comment and add a supporting attachment (if appropriate), then click OK.

Closing Actions

If you are the owner of an action you must close the action once the action has been completed.

To close an action

1. From the Navigation panel click Action Registry to launch the Action Registry.

2. Click in the Owner field and enter your username.

   This will retrieve only actions that you are managing. If the Owner field is not present, click More Options.

3. From the Status drop-down list choose Completed.

4. Click Search.

5. Click the subject of the action that you want to close.

6. Click Edit Action.

7. From the Status drop-down list choose Closed.

8. Modify any of the details, such as the Finish date.

9. Click OK.
Storyboards

A storyboard is a series of steps that show you how to follow a particular end-to-end process. Storyboards are useful as training aids, to highlight changes in a process or to highlight relevant areas within a large process.

Storyboard User Interface

Viewing Storyboards

To open a storyboard

1. From the Navigation panel click Storyboards.
2. Click the storyboard that you want to open.

To navigate a storyboard

Stepping through a storyboard

There are two ways in which to step through a storyboard. You can step through the storyboard by clicking either Previous Step or Next Step.

You can also use the navigation panel on the left-hand side.
Navigation Panel
All steps in the storyboard are listed in the navigation panel on the left. Click a step to display the respective details.

Commentary Text
Any commentary text for a particular step will be displayed at the bottom (Diagram mode only).

Hint: You can increase the viewing area for the storyboard content by resizing or hiding the navigation and notes panels. To hide either of the panels, click the respective resize handle. To resize the panels, click and drag the resize handles.

Key steps
Key steps highlight important steps in a process. For example, a key step may include an important attachment, or it may highlight a change to an activity. Any steps that are key steps will have ● displayed next to the step in the playlist.

To display or hide steps that are not key steps click ●.

Storyboard Branches
Sometimes a storyboard may have one or more branches at certain steps that link to related storyboards. Branches will be indicated by the icon in the Steps list. You can click on the branch sub-step to follow it.

When you follow a storyboard branch the linked storyboard will open, allowing you to follow the steps in that storyboard. A History tab will also appear within the Steps panel. This allows you to return to previous storyboards that you have navigated from.

Storyboard Modes
You can choose to view the storyboard in either diagram mode or text mode. Diagram mode will display the diagram related to the step on the right-hand side and text mode will display the storyboard steps as text.

Diagram Mode

Text Mode

Attachments
Certain steps may be associated with attachments (documents, media files, etc.); attachments provide further information about the activity. An option to add an action to the diagram may also be available in the list of attachments (Actions, New Action). Note that this option is only available if you are permitted to add actions.

If one of the following icons is present on an activity then one or more attachments are present. Click the icon to access the attachment(s).

Activity Statement Links
If statement links are attached to any activities within the storyboard then you can click them to view them.
Details
You can view the details of a storyboard (owner, author, version and last modified) by clicking Details at the top of the page.

Feedback
You can add feedback to the storyboard that you're viewing or reply to existing feedback in the Feedback panel. To add feedback, click in the Enter feedback title text field and enter a title, then enter the details in the Enter feedback details text field and click Submit. To reply to existing feedback, click Reply for the feedback thread that you want to reply to.

To close the feedback panel, click Hide Collaboration.

Storyboard Languages
It's possible to view the processes within a storyboard in a different language if other language variants exist for any of the processes. The order of preference that the system will display processes in are as follows:

1. The last language that you were viewing processes in.
2. The default language of the process repository.

To change the language of a storyboard, simply change the language of any process first from the View menu (then choose Switch Language). When you open a storyboard, if that language exists then it will be used as the preferred language.

To add a storyboard to your Home page
You can add a storyboard to your favorites when you are viewing it by clicking Favorite.
Scorecards

Scorecards provide a visual summary of important data, consolidated and arranged on a single screen. Scorecards can chart the progress of tactical and strategic goals, such as providing sales people with an insight into their progress against their defined targets. Unlike dashboards that display actual metric values, scorecards typically display the gap between actual and target values for a small number of key performance indicators.

Viewing Scorecards

To open a scorecard

1. From the Navigation panel click Scorecards.
2. Click the scorecard that you want to open.

To add a storyboard to your Home page

1. When viewing a scorecard click Add to Favorites.
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, CMMI, internal company policies, etc. Individual statements can be linked to related activities within a process; these are called statement links.

Linking Statements with Activities

To link an activity with a statement

1. Find the activity that you want to link to a statement and click ☐.
   
   **Note:** If an administrator has configured TIBCO Nimbus to allow statements to be linked to activities that are currently not linked to any statements, click ☒ to link the activity to a statement.

2. Choose **Modify Links**...

3. Click **Add statement link** (at the bottom of the page).

4. Expand ☐ the statement set that includes the statement(s) that you want to add.

5. Select the checkboxes for the statements that you want to add, then click **Add**.

6. Click **OK** when prompted.

To remove an activity statement link

1. Find the activity that you want to remove a statement link from and click ☐.

2. Choose **Modify Links**...

3. Click Select the checkbox(es) of the statements that you want to remove.

4. Click ☒ for the statement link that you want to remove.

Adding Audit Records to Statements and Statement Links

To add an audit record to a statement

1. From the Navigation panel click **Statement Sets**.

2. Click the statement set that contains the statement(s) that you want to add audit records to.
   
   **Note:** Click ☐ to expand the statement hierarchy within the statement set.

3. Click **Add Audit Record**.

4. Enter the details for the audit record, then click **OK**.

To add an audit record to a statement link

1. Find the activity that is linked to the statement which you want to add an audit record to and click ☐

2. Choose **Modify Links**...

3. Click the statement link ☐.

4. Choose a status and type the description of the audit record.

5. Click **OK**.
Other Information

When viewing processes you can view the details, change the language, zoom in and out, view abbreviations/references, create a PDF copy. You can also access associated logs for process diagrams and documents.

Viewing Process Diagrams

There are a number of options available when viewing a particular process diagram.

View the details
When viewing the diagram that you want to view the details for, from the Navigation menu choose Diagram Details.

View the master, draft or a particular scenario
View the master (authorized), draft or a scenario of the diagram that you are viewing. Note that you may not have access to a draft, master or a scenario.

From the View menu choose either Master, Draft or a Scenario.

Change the language
If a diagram exists in different languages you can select which language to view it in.

When viewing a diagram, from the View menu choose Switch Language and then choose a language.

Zoom in and out
Change the resolution of the diagram view by scaling it up or down.

From the View menu choose Scale and then choose a screen resolution. Choosing a lower resolution will zoom out, higher resolutions will zoom in. To view the entire diagram choose Zoom To Fit. Reset Zoom will reset the zoom to the original scale.

View associated abbreviations and references
Abbreviations and references used within process content may have been defined by the process authors. Note that this page is not a default web page, therefore it might not be available.

When viewing a process diagram, from the Navigation menu choose Libraries.

Create a PDF
You can create a PDF version of a diagram that you are viewing.

From the Navigation menu choose Print to PDF. Select or deselect to include the diagram level information and document control information, choose the orientation, then click OK.
Diagram and Document Logs

You can view any associated audit, acknowledgement and change logs for a particular diagram or document.

From the Navigation menu choose Logs, then click the Audit, Acknowledgement or Change tab to view the respective logs.