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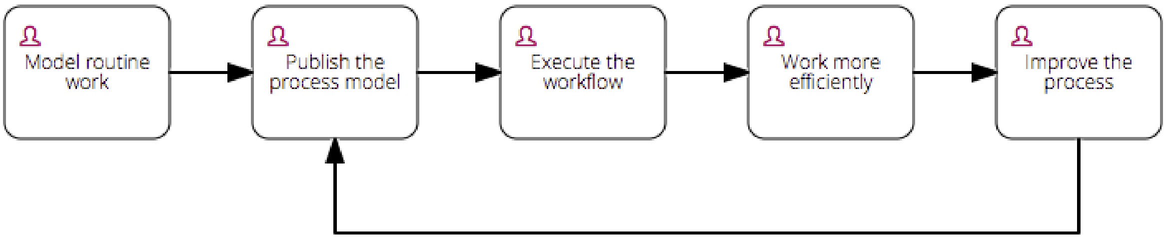
SAP Signavio Process Governance User Guide

THE BEST RUN

Content

1 SAP Signavio Process Governance

SAP Signavio Process Governance is a web-based workflow modeling and execution platform.



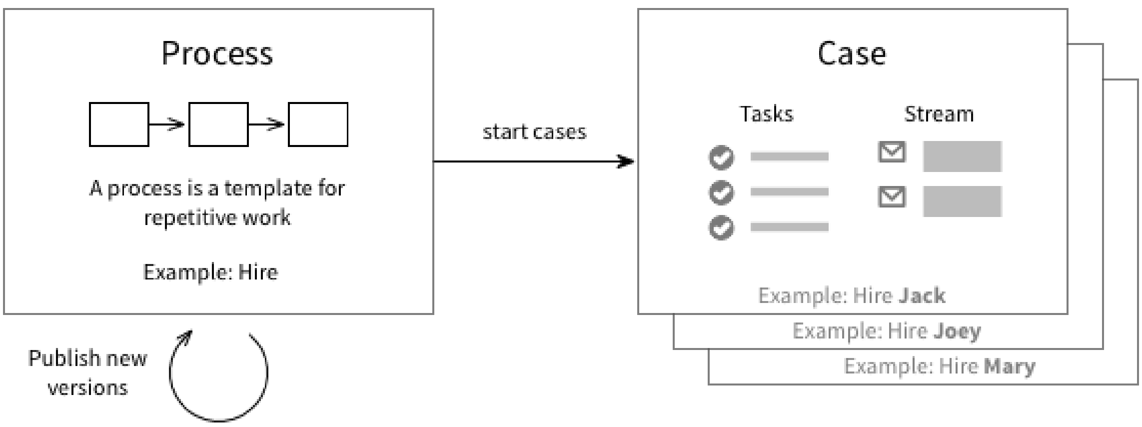
You can use workflow automation for a variety of business processes - both for industry-specific processes, and for central functions such as human resources.

When to use SAP Signavio Process Governance

You will find SAP Signavio Process Governance useful for describing and collaborating on routine work. Use SAP Signavio Process Governance for:

- Coordinating tasks and handovers
- Approvals
- Routing documents
- Fully-fledged business processes

How it works



After you publish a process, you can start many individual cases. SAP Signavio Process Governance keeps track of which tasks and actions you have to perform for each case. Cases bring people together with relevant information that provides context for completing the tasks. You can also use cases as collaboration spaces for people to discuss and create new tasks for individual cases on the fly.

Process Governance in SAP Signavio Process Collaboration Hub

You can access the following functions of SAP Signavio Process Governance from SAP Signavio Process Collaboration Hub:

- Approvals, for details see section Diagram approvals
- Read confirmations, for details see section Read Confirmations
- Process rating, for details see section Process Rating

For details on the necessary settings, see Managing Process Governance Settings.

2 Log in with SAP Signavio Process Governance

Browser Compatibility

SAP Signavio supports all popular browsers. For a detailed description of the supported browsers, see Browser Compatibility.

Log In with Your Account Credentials

SAP Signavio Process Governance is part of SAP Signavio Process Transformation Suite. When you're signing up to SAP Signavio Process Governance, you are signing up to SAP Signavio Process Transformation Suite.

1. Go to the SAP Signavio Process Governance login page .
2. Choose *Register a new account*.
3. Follow the steps on the screen to create your account.
4. Go to the login page:
   - https://editor.signavio.com (region: Europe)
   - https://app-us.signavio.com (region: US)
   - https://app-au.signavio.com (region: Australia)
   - https://app-jp.signavio.com (region: Japan)
   - https://app-ca.signavio.com (region: Canada)
   - https://app-kr.signavio.com (region: Korea)
   - https://app-sgp.signavio.com (region: Singapore)
5. Use your account email and password to log in. The launchpad opens, see Your Launchpad for details.

Log In Using a Shared Link

When SSO is enabled for your workspace, you log in through a shared link. The link is shared with you, for example, in an invitation email or on a wiki page.

> ⓘ Note
>
> We recommend that you bookmark the shared link for future logins. Depending on your workspace configuration, you might only be able to log in to SAP Signavio Process Transformation Suite through the shared link.

1. Select the link.
2. Follow the steps you see on the screen. Your account is authenticated by a third-party application.
3. After successful login, the SAP Signavio Process Collaboration Hub launchpad opens.
4. In the top navigation bar, choose the SAP Signavio product that you need, using the ⁝⁝⁝ app switcher.

3 Navigation Bar

Discover the actions you can take with the SAP Signavio Process Governance navigation bar at the top of your view.

Check Your Location

This navigation bar displays the label of SAP Signavio Process Governance. This identification of your current working product is useful if you navigate back and forth between other SAP Signavio products and workspaces.

Check Your Available Actions

The navigation bar allows for quick access to common functions across SAP Signavio products. Each SAP Signavio product displays a navigation bar with its own product-specific available icons.

Actions for SAP Signavio Process Governance

- SAP Signavio *logo*: Select the logo to navigate back to your current working product's home page.
- (*Search*): Use the search function to find content that is specific to your current SAP Signavio product. If you're located in SAP Signavio Process Collaboration Hub, you can search for content from the complete SAP Signavio Process Transformation Suite.

  > Note
  >
  > The search results open in SAP Signavio Process Collaboration Hub.

  For more information, see Search [page 11].
- (*Built-In Support*): Search the support knowledge base and create support tickets directly within the application. For more information, see Help and Support [page 130].
- (*Feedback*): Provide feedback regarding your experience using SAP Signavio products. You may offer feedback on the product that you are currently using by selecting the feedback button. If you wish to comment on another SAP Signavio product, simply navigate to that product and select the feedback button. Your feedback is invaluable in enhancing the user experience and takes only a minute of your time.
- (*Help*): Select this icon to choose from a list of help resources.
  Also, check the *Workspace ID* and *Product Version* here.
- (*Product Switcher*): Choose this icon to view a list of SAP Signavio products to which you can navigate. Your view reflects the products you're able to access.
- JM (*User Profile Menu*): Note that this icon displays **your own initials** as the logged in user. Choose this icon to view a drop-down menu with the following options:

- Profile settings: Select your email address from the drop-down menu to open the *My Profile* tab. Change your personal data, language preference, or password. Here, you can also view your groups and licenses.
- Personal settings: Choose this option to toggle your notifications.
- Workspaces: Choose this option to change workspaces, if you're a member of more than one workspace.
- Log out: Choose this option to log out of SAP Signavio Process Governance.

For more information, see User Menu [page 16].

4 Search

Use the search function in SAP Signavio Process Governance to find the following items:

- Tasks
- Cases
- Processes
- Reports
- Comments

Included in the search are the entries in the name field of the categories, process descriptions and comments.

> ⓘ Note
>
> - Search for exact phrases by putting the phrase in double-quotes `""`.
> - Use complete words as search terms.
> - Wildcards are not supported.
> - The search is not case-sensitive.

You can open the search page via (*search*) in the main menu bar.

1. Enter a search term.
2.
    - For every category, the number of results is listed on the left. After selecting a category, you see a list of all related results on the right. The list is ordered by relevance. Choose a result to open it.
    - The folder icon next to the case name indicates the case status - open or closed.
    - The checkbox next to the task name indicates the task status - open or completed.
3. If you do not get the expected search result, refine your search, for example by adding or excluding keywords.

5 Notifications

SAP Signavio Process Governance sends a variety of email notifications, to keep process participants up-to-date with cases they work on and to avoid task handover delays when someone assigns a task.

Most of the notifications are sent immediately in a single email.

The following notifications are sent with a delay (of up to 60 minutes) to group them if possible:

- Task created
- Task assigned
- Mentioned in a comment
- Replied to a comment

Before sending a notification, SAP Signavio Process Governance checks whether it is still required. For example, task notifications are no longer sent for completed tasks.

Case Due

This notification indicates that a case has reached its due date.

SAP Signavio Process Governance sends this notification to assignees with open tasks. The case's process owner gets notified if there are unassigned tasks. For ad-hoc cases with open tasks, the case creator receives a notification.

Task Due

This notification indicates that a case has reached its due date and has open tasks.

SAP Signavio Process Governance sends this notification to the assignees of open tasks in the case.

Task Created

This notification indicates that the process has created a new task within a case.

SAP Signavio Process Governance sends this notification to the task's default assignee, if the task has one. SAP Signavio Process Governance also sends this notification to each of the task candidates, or every member of each candidate group, if defined.

Task Assigned

This notification indicates that someone has assigned an existing task within a case.

SAP Signavio Process Governance sends this notification to the task's new assignee.

Task Escalated

This notification indicates that an open task has reached its escalation deadline.

SAP Signavio Process Governance sends this notification to the task's new assignee, as configured in the user task, or every member of each candidate group, if defined.

Reminder Scheduled

This notification reminds case participants that a task remains open.

SAP Signavio Process Governance sends this notification to the task's assignee when someone assigns the task, or to all of the task's candidates if the task does not have an assignee. If the task does not have an assignee or candidates, SAP Signavio Process Governance sends the notification to the process' owner.

Mentioned in a Comment

This notification indicates that a comment on a case has mentioned someone.

SAP Signavio Process Governance sends this notification to each user mentioned in the comment.

Replied to a Comment

This notification indicates that a comment on a case was replied to.

SAP Signavio Process Governance sends this notification to everyone taking part in the discussion.

New User Registered

SAP Signavio Process Governance sends a registration notification when someone registers a SAP Signavio Process Governance trial account.

SAP Signavio Process Governance sends this notification to the email address entered on the registration form.

Invited to Join Organization

This notification indicates that an organization administrator has invited someone to join an organization. SAP Signavio Process Governance also sends a reminder for this notification when an administrator selects the option to resend the invitation.

SAP Signavio Process Governance sends this notification to the person the administrator invited, who may or may not already have a SAP Signavio Process Governance account.

Invitation Cancelled

This notification informs someone that an organization administrator has cancelled an open invitation to join an organization.

SAP Signavio Process Governance sends this notification to the person the administrator invited.

Invitation Resent

This notification reminds someone that organization administrator has invited them to join an organization. Workspace administrators can trigger this notification manually.

SAP Signavio Process Governance sends this notification to the person the administrator invited.

Replace Removed Users

If a user was removed and no replacement was defined, a periodical reminder is sent once a week to all admins of the organization if the replacement has not been done yet.

Password Reset

SAP Signavio Process Governance sends a password reset notification when someone uses the *Reset your password* option.

SAP Signavio Process Governance sends this notification to the email address entered on the password reset form.

Service Account Access Expired

This notification indicates that access to an external service, such as Google Drive [page 91], has expired.

SAP Signavio Process Governance sends this notification to the SAP Signavio Process Governance user who configured their external service account.

License About to Expire

This notification indicates that a SAP Signavio Process Governance license will soon expire.

SAP Signavio Process Governance sends this notification to the administrators of the SAP Signavio Process Governance organization whose license will expire.

Disabling Notifications

You can disable some notifications by disabling *Receive notifications via email* in Preferences [page 16].

The following notifications are still sent, even if notifications are disabled:

- Case due
- Task due
- Task escalated
- Scheduled reminders

6 User Menu

The user menu has several sections.

In the first section, you can access your personal settings for SAP Signavio Process Governance by clicking *My profile*. If you have administrator rights, you find *Organization settings* and *Services & Connectors* in this section.

If you have access to other products of the SAP Signavio Process Transformation Suite, you find them listed in the *Products* section. The current product is highlighted. When you select a product name, a new browser window opens for the selected product.

The *Organizations* section lists all organizations you belong to. When you select an organization, you access the organization in the same browser window. You remain logged in your current organization.

In the *Help* section, you find links to the user guide and to a collection of example workflow. You can also send us feedback in this section.

You can log out of SAP Signavio Process Governance by choosing *Logout*.

Related Information

My Profile [page 16]

6.1 My Profile

From the user menu, select *My Profile* to view and edit your own SAP Signavio Process Governance user settings.

Me

Use the *Me* section to update your contact details and upload an avatar picture.

Save all updates with *Save changes*.

Preferences

In this section, you can set the language and time zone for your SAP Signavio Process Governance user interface.

You can also manage your notifications here.

- If *Receive notifications via email*is active, you receive notifications for tasks, cases, and comments that involve you. Most of the notifications are sent immediately in a single email. For details, see section Notifications [page 12].
- If *Receive a daily digest via email* is active, you get one daily update for all cases that involve you.

> ⓘ Note
>
> The following notifications are still sent, even if notifications are disabled:
>
> - Case due
> - Task due
> - Task escalated
> - Scheduled reminders

Organizations

All organizations that you belong to are listed in the *Organizations* section. You also find the information whether you have the organization administrator role here, and you can leave organizations.

When you leave an organization, the following changes are applied:

- You are removed from the organization's groups.
- You are removed from process models (process owner, access controls, action candidates).
- You are unassigned from tasks in the organization's processes.
- Your participation is removed from cases of the organization's processes.
- One of the organization's SAP Signavio Process Governance licenses is made available.

To leave an organization, choose ✕ (*close*).

Services

The *Services* section shows your personal configurations for third-party services, such as a linked Google account.

Security

To log out of all active SAP Signavio Process Governance sessions, click *Log out of all devices*.

You can also change your password in this section.

6.2 Organization Settings for Administrators

Learn how you, as an organization administrator, can manage users and workspaces. Learn how to set activities and credentials.

> ⓘ Note
>
> You need administrator rights to manage the organization settings.

You find the *Organization settings* in the user menu in the top right corner.

In SAP Signavio Process Governance, an organization represents a collection of users - typically a company - together with all their data. People outside your organization cannot see your organization's data. After you log in, you see all data inside one particular organization. If you belong to multiple organizations, you can switch between organizations by selecting a different organization in the user menu.

You can directly edit the displayed *Organization Name*. Edits are visible after you reload the page.

Members

> ⓘ Note
>
> If you use central user management in SAP Signavio Process Manager, the *Members* settings in the *Organization settings* are inactive.

Under the *Members* tab the following functions are available:

- Add or remove users.
- Add or remove user groups.
- Give or revoke administrator privileges.
- Add users to groups.
- Invite new users to your organization.

Users

> ⓘ Note
>
> When an organization is created with the first user, this user gets an organization administrator role by default.

The *Users* tab shows all users in your organization. You can view their email address, license type, and membership type - collaborator or administrator.

To export a CSV file with all users, click *Export all users*. For each user, the CSV files contains the following:

- User ID
- Full name
- Email address
- Admin status (true/false)

Change Membership Type

There are two types of users in SAP Signavio Process Governance:

- Collaborators
- Administrators

Administrators can give collaborators the administrator role. In the users table, choose (*user type*) and change the user type.

Delete Users

Administrators can delete users.

1. In the users table, choose (*Remove*).
2. In the dialog, select a replacement user or activate *Select a replacement later*.
3. Confirm the removal.

Deleted users with task assignments that weren't replaced are listed in the *User off-boarding* section. Administrators are reminded weekly to specify a replacement.

User Off-Boarding - Replace Users

In this section, you see all deleted users without a replacement. You also see the open items linked to the deleted account.

When you remove users from your organization, there still could be unfinished tasks for their accounts, or the users were owners of workflows and reports. You can specify replacement users to take over. Replacement users have all necessary permissions to complete open tasks and cases, and are automatically assigned to groups. Assignment for closed tasks is not changed for audit reasons.

For more information regarding the assignment of workflow case access to user groups or individual users, see Access Control [page 59].

To replace users, follow these steps:

1. Choose *Select replacement*.
2. Select a replacement user.
3. Confirm in the dialog and click *Replace*.

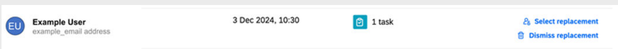
Users are replaced in the following:	Users are not replaced in the following:
• Workflows: Owner, assignments, candidates, default values for form fields, transition conditions, JavaScript test values, permissions • Reports: Owner, permissions • Open tasks: Assignments, candidates, permissions • Groups: Replacement users	• Conditions: Replacement users are not applied to custom rules, form fields, transitions (such as automatic gateways), and reports attributed to the previous user. • Cases: Replacement users are not granted access to past cases, before the replacement takes place.

> **Note**
>
> A deleted user is removed from all group memberships. Selecting a replacement user automatically assigns the replacement user to the groups.

Dismiss Replacement

Dismiss replacement removes all references to workflows, tasks, reports, and cases from the selected user. This option is available when the following conditions apply:

- Your organization is not using the central management system to manage user off-boarding.
- The selected user does not have any workflows.

> **Example**
>
> 
>

1. Choose *Dismiss replacement*.
   A confirmation window opens.
2. Type the name of the selected user in the space provided.
3. Confirm with *Dismiss replacement*.

> **Caution**
>
> The *Dismiss replacement* action cannot be undone.

Delete the User for SAP Signavio Process Manager Integration

When you delete the user for the SAP Signavio Process Manager integration, you need to do the following:

- Set a replacement user.
- Ensure that the replacement user has access to SAP Signavio Process Manager.
- Ensure that the replacement user has the same access rights to the dictionary.

Otherwise the dictionary integration no longer works.

Read more about how to set up the integration under Activating the Dictionary integration [page 114].

Invite a Colleague

The invitations list shows pending invitations for SAP Signavio Process Governance.

1. Select a license type.
2. Enter the email address.

3. Choose *Invite*.

Invited users receive an email with a link to the registration page, where they can create a SAP Signavio Process Governance user that will become a member of the organization.

Single Sign-On

Single sign-on (SSO) makes it possible to access SAP Signavio Process Governance using an existing corporate user account, so you do not have to log in to SAP Signavio Process Governance separately.

For more information, contact support at SAP for Me portal.

> **Note**
>
> Users who are members of more than one organization are forced to log in using the identity provider when they are switching from an organization without SSO.

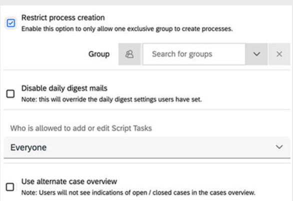
Workspace

Preferences

The *Preferences* section under the *Workspace* tab allows you to set which time zone SAP Signavio Process Governance uses.

Email signature replaces the default SAP Signavio Process Governance team signature in notification emails.

Toggle *Restrict process creation* to allow one exclusive user group to create processes.

> **Example**
>
> 
>

Only users of the selected group have the permission to do the following:

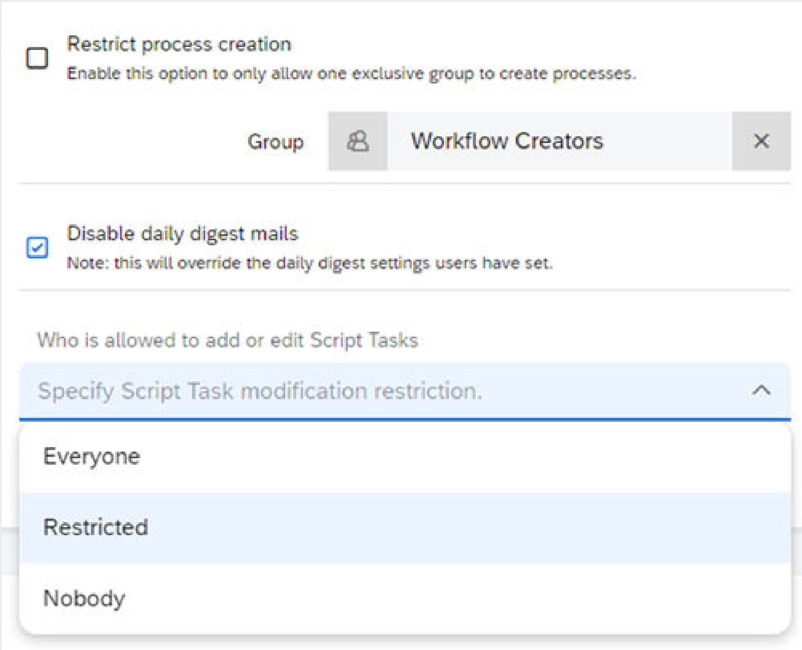
- Create new processes
- Copy processes
- Import processes

Users who are not members of the group, but have editing rights for specific processes, are still able to modify these processes.

> **Note**
>
> The transfer of processes between SAP Signavio Process Manager and SAP Signavio Process Governance is not affected by this action. Any modeler can transfer a process from SAP Signavio Process Manager to SAP Signavio Process Governance.

The *Disable daily digest mails* option overrides individual daily digest settings made by users.

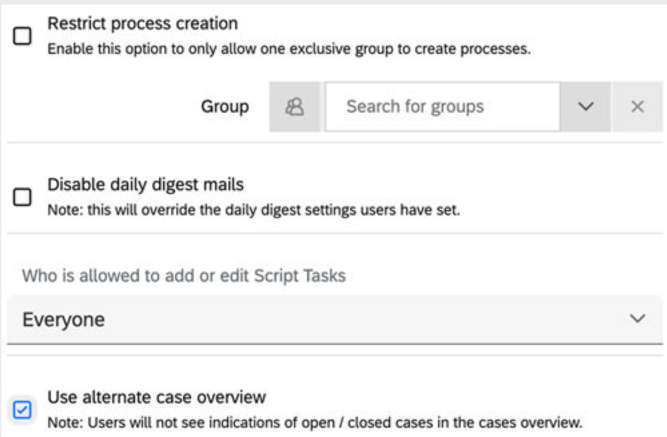
> Example



Use the drop down menu to set who is allowed to add or edit *Script Tasks*.

Choose *Use alternate case overview* to not display both open and closed cases in the case overview window. This causes users to view processes without cases.

> Example



Labels

In the *Labels* section, you can get a better overview of all processes in your organization. Use labels to categorize processes, such as by department or status.

You start with a set of default labels.

To add a new label, enter a new label name and choose *Create label*.

Change the label color by selecting the color.

To change the label name, choose (*write*).

To delete a label, choose (*delete*) next to the label and choose (*confirm*).

Activities

Under the *Activities* tab, you can configure activities to be used in workflows. Use the drop down menu to select an activity and open an activity form window. Make changes to the fields as needed and confrm the changes. Activity configurations vary. For more information about external activities, see Action Types [page 69].

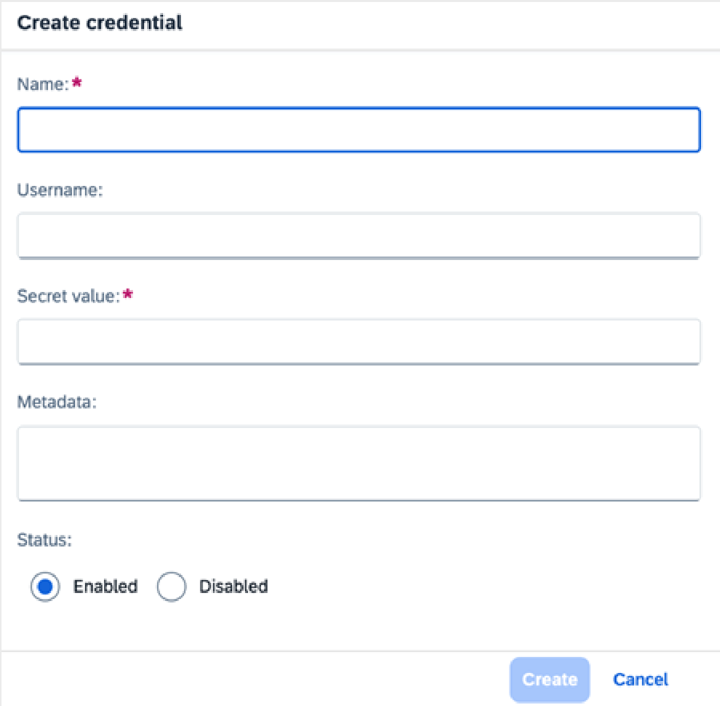
Credentials

Under the *Credentials* tab, you can create, edit, or delete credentials, which are used to store sensitive (*Secret value*) text such as passwords securely in the system. Credentials are encrypted with customer-specific keys and cannot be retrieved or changed by SAP Support.

> ⓘ Note
>
> Operations with credentials are audit logged.
>
> Deleting a credential requires a reason to be submitted. In addition, workflow creators are notified.

1. Choose *Create credential*.
   The credential form window opens.

Example



2. Fill out the fields as needed.
   For more information on the fields, see Credentials for SharePoint Integration [page 87].
3. Confirm with *Create*.

7 Tasks

A task represents work that someone will presumably complete. Cases typically include multiple tasks, usually those that the process defines. You can also add ad-hoc tasks to a case.

In SAP Signavio Process Governance, you can assign a task to a specific user, set a due date and add subtasks.

7.1 View All Tasks

The *All tasks* view shows all open tasks in a workspace. Tasks lists that contain more than 50 tasks are split into pages, each page showing a maximum of 50 tasks.

If a due date is set, the due date is displayed.

> Note
>
> Once a due date is set for a task, it can only be changed manually. If you change a due date for one task, the due dates for other tasks aren't changed automatically.

Overdue tasks are highlighted and marked with (*overdue*). Tasks due today are highlighted and marked with (*due*).

By default, the task list shows the most recently updated tasks first. To sort the list by ascending due date, choose (*sort*). To sort the list by descending due date, choose (*sort*). While sorting by due date is active, *Clear sorting* is visible. When you choose *Clear sorting*, the task list shows the most recently updated tasks first.

Filters

You can use one or more of the following filters to find tasks:

- *Involvement filter* - shows tasks according to how they relate to you, such as tasks that are assigned to you or tasks you started.
- *Assignment* - shows tasks that have a specific assignee, or tasks that have a specific candidate.
- *Process filter* - shows tasks for a specific process.
- *Due date* - shows tasks according to their due dates, such as only overdue tasks or tasks without a due date.
- *More filters*:
  - *Completed* - shows only completed tasks, which the task list normally excludes.

7.2 View Your Tasks in the Inbox

The *Inbox* provides an overview of tasks related to you.

To open the *Inbox*, choose *Tasks* in the main menu and select the *Inbox* tab.

Assigned to me contains all tasks assigned to you.

I'm a candidate contains all tasks where you are a candidate.

I added contains all ad-hoc tasks and subtasks you added.

If a task has a due date, the task is additionally listed in one of the following sections:

- *Overdue*
- *Today*
- *Later this week*
- *Later*

Overdue tasks are highlighted and marked with an ⚠ (*overdue*). To see the due date of an overdue task, hover over ⚠ (*overdue*).

7.3 Add Ad-Hoc Tasks and Subtasks

When a process starts, a case with all tasks is created by SAP Signavio Process Governance. All elements without incoming transitions are started automatically.

Add Ad-Hoc Tasks to a Case

You can add tasks to a case. These tasks are called ad-hoc tasks.

To add ad-hoc tasks to a case, follow these steps:

1. Open a case.
2. Below the task list, enter the task title in the text box.
3. Choose ↵ (*add*) or choose *Add task* to create the task.
   - The task is added to the list.

Add Subtasks to a Task

You can add subtasks to a task.

To add subtasks, follow these steps:

1. Open a task.
2. Below the task details, enter the subtask title in the text box.
3. Choose  (*add*) or choose *Add* to create the subtask.
   - The subtask is added to the task.

7.4 Assign tasks

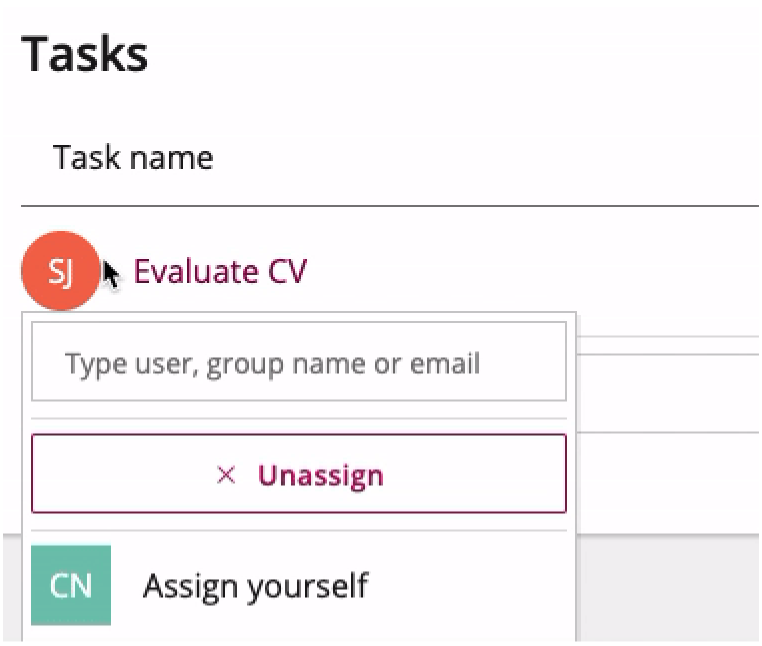
To indicate who should work on a task, assign the task to yourself or to someone else. The assignees find assigned tasks in their *Inbox*, and assignees receive task Notifications [page 12] and User Task [page 69].

> ⓘ Note
>
> A task needs to be assigned before it can be completed. All fields are inactive if a task is unassigned.

Any task that is open can be assigned, either in the *Tasks* view or in the detail view of a case.

To assign a task, follow these steps:

1. Click the assign button next to the task name to open the list of candidates.



2. Select a group or a candidate from the list, to filter enter a name or email address.
3. Click the group or candidate.
   - The task is assigned.

Change a task assignment

1. Click the assign button next to the task name to open the list of candidates.
2. Select a new candidate from the list, or start entering a name or email address to filter.
3. Click the candidate.
   - The task is reassigned.

Unassign a task

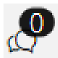
To unassign a task, follow these steps:

1. Click the assign button next to the task name to open the list of candidates.
2. Click *Unassign*.
   - The task is unassigned.

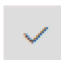
7.5 Task Details View

When you choose a task in the *Inbox* or *All tasks*, the task details view opens.

The task details view consists of three areas.

The *Task overview* lists all tasks associated with a particular case. The center shows all details for the currently selected task. Here, you can complete the task and add subtasks. The information panel shows either  (*comments*),  (*task history*), or the core  (*information*) for your case.

Tasks Overview

All open and completed tasks of a case are listed in the *Tasks overview*. To switch to a different task, click the desired task. The currently selected task is highlighted. Completed tasks are marked with  (*complete*).

Subtasks

Subtasks are tasks that are not created by the workflow, but are added later manually if necessary. Subtasks are listed directly under the related task in the *Task overview*.

7.6 Complete Tasks

To complete a task, choose the *Done* button on the task details page.

In the *Task overview*, completed tasks are marked with a checkmark (*complete*) .

When tasks include a form, the task details page displays the form and you find the button to complete the task below the form.

Usually, there is only a single *Done* button. Decisions do not display a *Done* button. When you have to make a decision to complete a task, there is a button for each choice. When you select your choice, this completes the task.

> **Note**
>
> Anything you enter while working on a task is automatically saved.

8 Cases

Cases typically represent more work than a simple task for a single person, but less than a whole project. A case breaks the goal down into concrete action items (tasks) so you can collaborate with others.

You can use a case as a small collaboration space for a particular goal (for example **Hire employee** or **Sign contract**). A case brings together a set of tasks, a discussion and documents, and allows participants to share any relevant context information for the tasks.

8.1 Cases Overview

In the *Cases* overview, you can view all open and closed cases of a process.

To open the Cases overview, follow these steps:

1. Choose *Cases* in the main menu.
2. Select a process from the *Cases of Process* drop-down list, enter a search term to filter.
    - You can select *Cases without a process* and *Cases of deleted processes* at the end of the drop-down list.
3. From the *Case Status* drop-down list, select between all cases, open cases, or closed cases.
4. The cases of the selected status are listed.
5. To open case details, choose a case name.

Manage Cases

You can close and delete cases in the *Cases* overview.

> ⓘ Note
>
> These actions cannot be undone.

Follow these steps:

1. Choose *Select*.
2. Select the cases you want to close or delete.
   The number of selected cases is displayed.
3. To close a case, choose *Close*, enter a reason for closing the case in the dialog, and confirm.
4. To delete a case, choose *Delete*, decide if you want to delete subcases in the dialog, and confirm.

8.2 Case Details Overview

The case details view consist of three areas: *Case properties*, *Tasks*, and *Sub-Cases*.

The *Case properties* area shows case data like status, case priority, and case due date. You can change the priority and due dates for a case here. If set, this area also shows the current milestones.

Select ⋮ (*more options*) in the *Case properties* header area to perform the actions listed in the table below.

Action	Description
Reuse start info	Starts a new case with the same information as the current case.
Close this case	Closes the current case and its sub-cases.
Navigate to process	Takes you to the process of the current case, if you have requisite permissions.
Delete case	Deletes the current case and its sub-cases.

In *Tasks,* all tasks of a case are listed. You can add ad-hoc tasks here.

If the process contains a sub-process action, the started sub-cases are listed in the section *Sub-Cases*.

You can open the information panel in this view.

Other Open Activities

In most cases, completing the last task closes the case. Sometimes, a case must wait for a sub-process, or some other activity that doesn't correspond to a task in the *Tasks* list, to complete before closing. In these situations, you can close the open activity manually. The open activities are usually timers, for example, an intermediate timer event. The activities are listed in the *Other open activities* section, along with any execution errors that occurred during the process.

8.3 Start a New Case

When you start a case, the case is based on the latest published version of the workflow.

You can start a new case by choosing *Start new case* in one of the following locations:

- On the *Processes* page, next to the name of each published process (depending on trigger type and permission)
- In the Cases view [page 30], for the selected process.
- In the workflow editor, on the Versions [page 50] page, next to the latest published version

If the process does not define a trigger, then you have to enter a case name. Other trigger types generate their own case names, or use a case name template.

Related Information

Details [page 50]

8.4 Configure Cases Overview Table

The cases overview table includes columns for workflow Variables [page 55], which correspond to form fields on a trigger form or in a user task. You can customize the case overview table for a clear overview of the process' cases. The case name is always shown.

To customize the table, follow these steps:

1. In the Cases view, choose *Configure columns*.
2. To change the location of a column, choose (*column*) and drag the column to its new location.
3. To edit the column's heading, change the text in the text box.
4. To remove a column, choose (*close*).
5. To add columns to the table, select new columns from the drop-down list below the table. To filter, enter a search term.
6. To return to the table, choose *Back to the table*.

> Note
>
> All changes are saved immediately. There is no undo option.

8.5 Reuse Start Information

> Note
>
> This feature cannot be used with public forms.

When you're filling out a form (for example when requesting time off from work), you can start several cases re-using the same data, to avoid having to manually fill the form with the same information each time.

To reuse start info when a process includes a confirmation message, follow these steps:

1. Start the case by filling out the form.
    - You get a confirmation message containing the *Reuse start info* button.
2. Choose *Reuse start info*.
    - The start form page opens with a pre-filled form field.

To reuse start information in the case detail view, follow these steps:

1. In the *Case properties* area, choose ⋮ (*more options*).
2. Choose *Reuse start info*.
   - The start form page opens with a pre-filled form field.

8.6 Close a Case Manually

You close a case by completing all case tasks. You can manually close cases you don't want to complete.

To close one case or multiple cases in the *Cases* overview, follow these steps:

1. Choose (*select cases*).
2. Select all cases you want to close.
3. Choose *Close all selected cases*.
4. Confirm the action in the dialog.

To close a case in the *case details view*, follow these steps:

1. In the *Case properties* area, choose ⋮ (*more options*).
2. Choose *Close this case*.
3. Confirm the action in the dialog.

8.7 Information Panel

Each case and each task has three info panels:

- (*core information*)
- (*comments*)
- (*history*)

Whenever you open one of these panels, your selection is stored in your user preferences. The next time you open the case details or the task details, the panel you selected in your previous session opens by default.

8.7.1 Core Information

The core information panel displays all important information about a case.

Open the core information panel by choosing ⓘ (*core information*) in the case details overview.

Core information can be edited or filled in with existing information from the workflow.

You can define the core information in two locations:

- *Details* tab of the workflow editor for existing processes.
- *Set core information* action of the workflow editor when you create or edit a process.

8.7.2 Commenting on a Case

Working on a case often includes collaboration with other people. You can use the case overview to discuss a case with other people.

Everyone who has access to the case can follow the discussion. Keeping the discussion connected to the case preserves the context. In the commenting panel, reply to existing comments to keep the discussion structured.

To view the full name of a user, hover over their avatar. To show the time stamp of a comment, hover over the relative time.

Add a Comment

> ⓘ Note
>
> Once added, comments cannot be edited or deleted.

To add a comment, follow these steps:

1. Open the commenting panel by choosing 0 (*comments*).
2. Enter your comment in the text box.
3. Optional: Format your comment with Markdown.
4. Choose *Submit comment*.
    - The comment is added.

You can add comments to specific tasks or cases. When you are in the *Case details view*, each comment you add is a comment for the complete case.

Add a Comment to a Task

To add a comment to a task, follow these steps:

1. Choose the task name to open the *Task details view*.
2. Choose (*comments*) to open the comments panel.
3. Enter your comment in the text box.
4. Optional: Format your comment with Markdown.
5. Choose *Submit comment*.
    - The comment is added mentioning the task in the case comment overview.

> ⓘ Note
>
> - The comments panel in the task details view only shows comments for the task.
> - Comments on a task can only been viewed by people with access to that task.

Mention others in comments

You can direct a comment to a specific person. While entering a comment, mention someone by typing a @ followed by their name. When you mention someone in a comment, SAP Signavio Process Governance sends them an email notification.

You can also mention two specific user groups, corresponding to people working on the case. Enter `@all` to mention all participants in the case. Enter `@open` to mention the assignees of open tasks within the case.

Format Comments and Add Links

You can use Markdown formatting in comments for things like text styles, headings and lists. Markdown can also be used to use a specific word or phrase as a hyperlink. n-text URLs (like `https://example.com`) are automatically turned into hyperlinks.

Related Information

Markdown [page 125]

8.7.3 Attach Documents to a Case

> ⓘ Note
>
> Once uploaded, attached documents cannot be edited or deleted.

You can attach documents a case to share with the case's participants. For example, you can upload CVs for cases in a job vacancy process. Anyone with access to the case can download the uploaded documents.

To attach a document to a case, follow these steps:

1. Open the commenting panel by choosing (*comments*).
2. Choose (*Upload document*).
3. Select the file you want to upload.
   - The uploaded file is visible in the comment panel and the history panel.

> ⓘ Note
>
> The maximum file size per file is 50 MB.

Download a Document Attached to a Case

1. Choose the attached document in the comment panel or the history panel.
2. Select a location to save the document.
3. Choose *Save*.

Related Information

User Task Form [page 100]

8.7.4 Case History

The case history panel shows a timeline of events for a selected case. Open the history panel by choosing (*history*) in the case details overview.

To view the timestamp of an event, hover over the event in the timeline.

Events in the history panel that include *forms* are collapsed by default. To view the form data, choose the event.

You can select to only view *documents* or submitted *forms*.

When you view a task, the case history panel only shows events related to the selected task. To view all events of the case, choose *this case*.

8.8 Delete Cases

You can manually delete cases, for example test cases you created while developing initial versions of a process model. Cases are closed automatically when all tasks are done. Closed cases are not automatically deleted.

For more information on how to manually close cases, see Close a Case Manually [page 33].

To delete cases in the *Cases* view, follow these steps:

1. Choose **Select** (*Select cases*).
2. Fill the checkboxes for each row of a case that you want to delete. You can select multiple cases.
3. Choose *Delete all selected cases* and confirm.
   In the dialog you can also delete all subcases.

To delete a case in the case detail view, follow these steps:

1. Choose a case in the *Cases* view.
   The case details view opens.
2. In the *Case properties* area, choose (*more options*).
3. Choose *Delete case*. Confirm the action in the dialog.
   - In the dialog you can also delete all subcases.

8.9 Export Case Data

You can export information about cases of a process to a CSV file to open in a spreadsheet. CSV files can for example be used for reporting or auditing.

To export case data, follow these steps:

1. In the Cases overview, choose *Export as CSV*.
2. Edit the CSV export settings if necessary:
   - Sort the exported cases.
   - Filter by status (open or closed).
   - Specify the output format.
3. Confirm with *Export*.
   - The CSV file is downloaded to a location depending on your browser settings.

The output format determines which characters are used in the CSV output to separate characters and lines:

- *Standard* - conventional CSV format

- *Excel* - Microsoft Excel compatibility mode
- *Excel (Northern Europe)* - better Excel compatibility for some European countries
- *Tabs* - separate values with tabs instead of commas.

> ⓘ Note
>
> - The CSV export uses *UTF-8 text encoding*. Select *UTF-8* when opening the CSV in Microsoft Excel, to preserve characters such as letters with accents.
> - Try a different output format option if you have problems loading the exported CSV file into another application, such as Microsoft Excel.
> - Date values always use the UTC time zone.

For more information, see JavaScript action cookbook.

8.10 Failed Tasks

An automatic task can fail for an external reason that you can resolve. For example, a Google Drive - Upload File [page 91] task fails if the configured Google account doesn't have permission to write to the selected Google Drive folder.

Retry Failed Tasks

You can manually retry some failed tasks, after resolving the external issue, so that task completes successfully and case execution continues.

To retry a task, choose (*retry*) in the tasks list.

Skip Failed Tasks

You can manually skip some kinds of failed task, so that case execution continues.

To skip a failed task, follow these steps:

1. Choose (*skip*) in the tasks list.
2. In the dialog, enter a reason for skipping the task.
3. Confirm with *Ok*.
   - The history panel shows the reason with the task completion event.

8.11 Skip Intermediate Timer Events

When a process includes an Intermediate timer event [page 112], case execution waits for the timer to complete before continuing. If you want to continue immediately without waiting for the timer, you can manually skip a timer

The *case details view* shows open timers in the *Other open activities* section.

To skip a timer event, follow these steps:

1. Choose  (*skip*) in the tasks list.
2. In the dialog, enter a reason for skipping the task.
3. Confirm with *Ok*.
    - The history panel shows the reason with the task completion event.

8.12 Ad-Hoc Cases - Cases without a Process

SAP Signavio Process Governance supports two types of cases, cases started from a predefined process and cases not connected to a process (ad-hoc cases). You can use ad-hoc cases for one-off goals.

In the *Cases* tab, you find all existing ad-hoc cases when you select *Cases without a process* in the *Cases of Process* drop-down list.

Create an Ad-Hoc Case

1. In the *Cases* tab, select *Cases without a process* from the *Cases of Process* drop-down list.
2. Choose *Start new case*.
3. Enter a name for the ad-hoc case and choose  (*add*).
    - A new ad-hoc case opens.

Related Information

Add Ad-Hoc Tasks and Subtasks [page 26]
Assign tasks [page 27]

9 Processes

A process defines a template for automating repetitive work, like a recipe that describes the actions that you perform to achieve a goal. For example, consider a Hire employee process. Each time an organization hires someone, the recruitment team has to complete a number of tasks, including **Evaluate CV**, **Plan interview** and **Interview candidate**. Each time someone starts the process, SAP Signavio Process Governance creates a new case.

Use the process builder to create and configure executable processes. You can think of an executable process as a kind of software, but you will find it easier to build automation using processes. With SAP Signavio Process Governance, non-technical people can create useful processes.

9.1 Browse the Processes

Select *Processes* in the main menu to browse your organization's processes. Each process has an icon that indicates what kind of Triggers [page 44] it has, the process owner's avatar and the process name. You can also add labels to categorize processes. If you have published a process, you can start a new case in this view.

Filtering the Processes List

To make it easier to browse a long processes list, you can filter the list so it only includes the processes you want. You can use a combination of several filters, to limit the list to processes that match the selection.

- *Labels* - select one or more labels
- *Owner* - select a user
- *Trigger* - select a trigger type: *Email*, *Form*, *Manual*, or *Signavio Approval Workflow*
- *More Filters* - select a publication status: *Published* or *Unpublished*

To remove a filter, select it again.

9.1.1 Browse Process Workflow Examples

Before you create your own process, check common workflow examples. Learn the uses of different elements in a process.

To help with process creation, SAP Signavio Process Governance offers example workflows within the application for you to browse. Workflows cover common repetitive processes within human resources, finance, logistics, and other departments. You can use these workflows as building blocks and customize processes for your business needs.

To view example process models from SAP Signavio Process Governance, see Workflow examples .

9.2 Creating a New Process

Learn how to create a process in SAP Signavio Process Governance.

Context

Once created using these instructions, you can continue to build and edit your process model by referencing the subsections.

Procedure

1. From the SAP Signavio Process Governance side panel, choose (*Processes*).
2. Choose *Create* to expand the create menu options, and choose *From scratch*.

3. Enter a name for the process in the highlighted field: *What is the goal of this process?*

> ⓘ Note
>
> Use the following guidelines to choose a good process name, to make the list of processes easier to read and talk about:
> 1. Describe the process goal.
> 2. Use an imperative verb phrase that completes a sentence like **For your next job, you have to...**
> 3. Use more than one word, to get a descriptive name.
> 4. Avoid using more than three or four words.
> 5. Avoid vague words like "manage", "do", "process" or "handle".
>
> **Hire employee**, for example, summarizes a process better than **Recruitment**.

4. (Optional) Select the space under the template name to choose one or more *Labels*.

> ⓘ Note
>
> If you group or annotate process names by adding prefixes or suffixes, consider using Labels [page 43] instead.

5. Navigate through the *Trigger*, *Actions*, and *Details* tabs to customize your process.

   For more details about the tab options, see subsections under Creating a New Process [page 41]. The fourth tab, *Versions*, displays any published versions of the process.
6. Confirm by choosing *Publish to run this process*.

9.2.1 Creating a Process from Template (Workflow Example)

Learn how to use a template as the basis for your new process.

Context

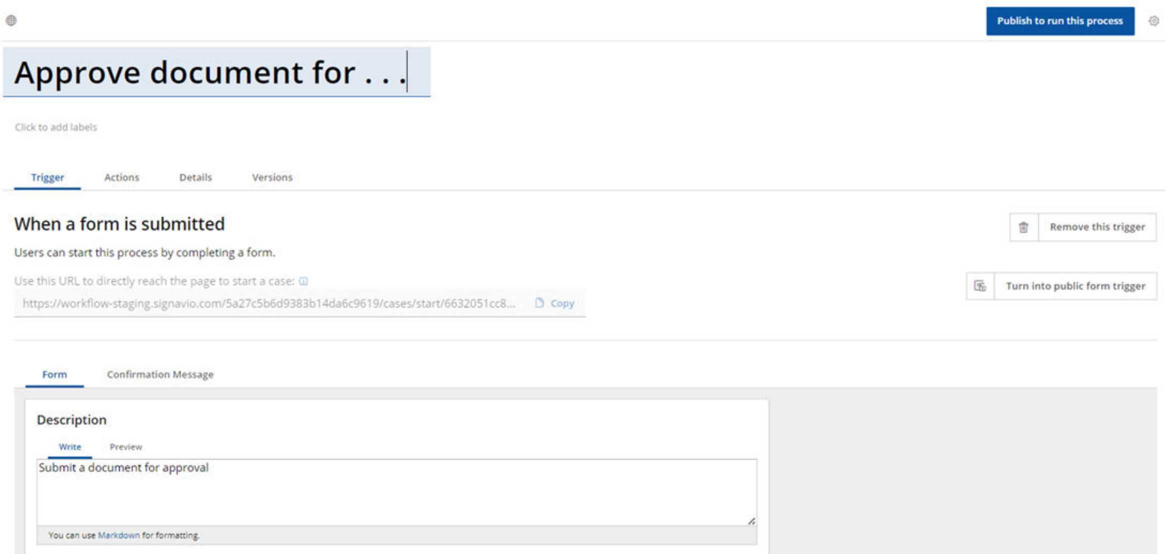
To preview SAP Signavio Process Governance templates, see Browse Process Workflow Examples [page 40]. Once selecting a template, you can customize it to fit your business needs. After following these instructions, continue to build the process model by referencing the subsections under Creating a New Process [page 41].

Procedure

1. From the SAP Signavio Process Governance side panel, choose (*Processes*).
2. Choose *Create* to expand the create menu options, and choose *From templates*.

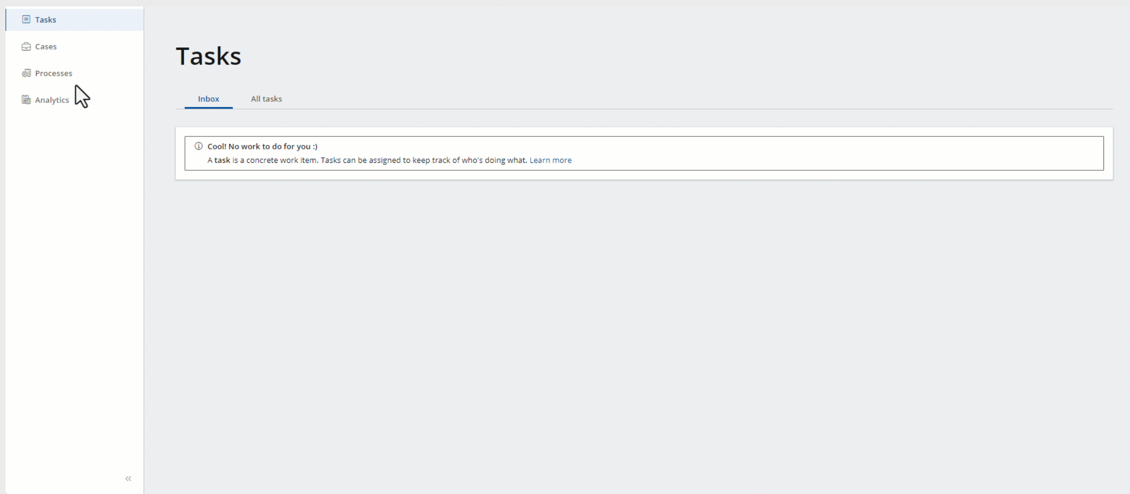
   The *Workflow Templates* opens to display a list of saved templates, including SAP Signavio Process Governance templates. Select the expand arrow at the end of a template's row to see the template's description.
3. At the end of a template's row, choose *Create from this template*.
4. Select the template name to customize it.



5. (Optional) Select the space under the template name to choose one or more *Labels*.
6. Navigate through the *Trigger*, *Actions*, and *Details* tabs to customize your process.

   The *Versions* tab displays any published versions of the process.
7. Confirm by choosing *Publish to run this process*.

Example



9.2.2 Labels

When several departments in your organization create processes, the processes list becomes full of other people's processes. Labels categorize processes so you can filter the list by label.

After creating a process, select *Click to add labels* under the process name and choose one or more labels from the list. The list of labels can be configured by administrators. Choose a label's delete icon to remove it from a process.

9.2.3 Triggers

Learn the different types of triggers you can set up for your process.

A **trigger** specifies how a process starts. It provides conditions that would cause a process to start. A trigger differs from a **start event** in that a start event does not have prerequisite conditions to be fulfilled. A start event indicates the beginning of a process.

- For more information on start events, see Start event [page 112].
- For more information on on how to use triggers when creating a process, see Implementation Guidelines [page 117].

> ⓘ Note
>
> After a process has been published, related SAP Signavio Process Governance cases can be created manually. If you choose one of the below triggers for your process, new cases start automatically consequent to specified events.

Manual Trigger

A manual trigger gives you the simplest way to start a process. With a manual trigger, you start processes manually, by selecting a process and then selecting *Start new case*.

Form Trigger

Form triggers allow you to start a process by using a form.

There are two kinds of form triggers: public and private.

- *Public form triggers* allow anyone, including people outside your organization without user accounts, to start processes in your organization via a form. Public forms do not have user or connector fields, for data security reasons. When a private form containing those fields is made public, SAP Signavio Process Governance automatically removes them from the form. Cases that are created via a public form trigger don't have a case creator listed, even if they were created by a logged in user.
- *Private form triggers* allow only registered members of your organization to start a process via a form.

You can activate and deactivate the public form trigger by clicking the *Turn into public form trigger* button and publishing a new version of the process. (The *Versions* tab will record if a public form was used in any of the previous versions of a process.)

Regardless of the type, after selecting a form trigger, use the form builder to specify form fields.

For some processes, such as an HR request from an employee, the person who starts the case doesn’t have access to view the case. This means that after using a form trigger to start a case, they don’t see the case details view, and might not know that the case started successfully. For these processes, you can use the *Confirmation Message* template to show a message to the case creator.

In the template, you can use placeholders to insert trigger form field values. Choose # to select a form field value. If you do not define a confirmation message, you get a default message informing you that the case is closed and you don't have permission to see it.

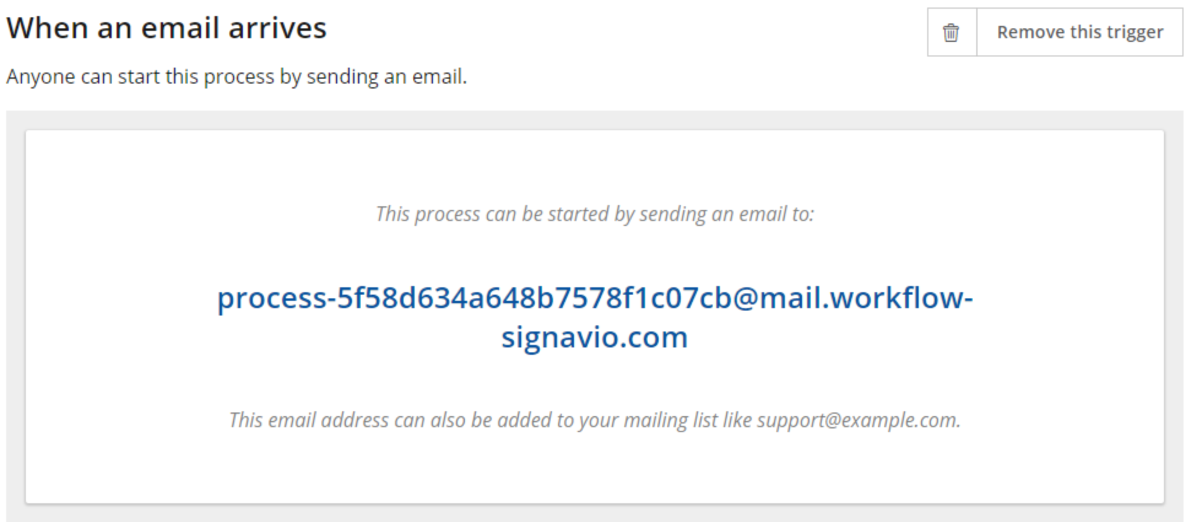
Process Manager Trigger

There are two possible values for a process manager trigger:

- *Journey Model approval*: Allows customers to approve journey models in SAP Signavio Process Collaboration Hub.
- *Process Manager approval*: Allows customers to approve SAP Signavio Process Manager diagrams and objects.

Email Trigger

An email trigger starts a new case for each email that you send to the trigger's SAP Signavio Process Governance email address. Note this differs from reading an existing email account, such as your own. After selecting the email trigger, you can see its email address:



Mail trigger configuration

The email trigger creates a Trigger email variable [page 123].

You can use an email trigger by adding the trigger email address to a mailing list, such as `support@example.com` or `info@example.com`. You'll have to ask the administrator of the mailing list to add the process trigger's email address to the list. Once you have done this, the process trigger address will also receive any email sent to the mailing list, starting the process in SAP Signavio Process Governance. You will then see the email in the history panel.

ⓘ Note

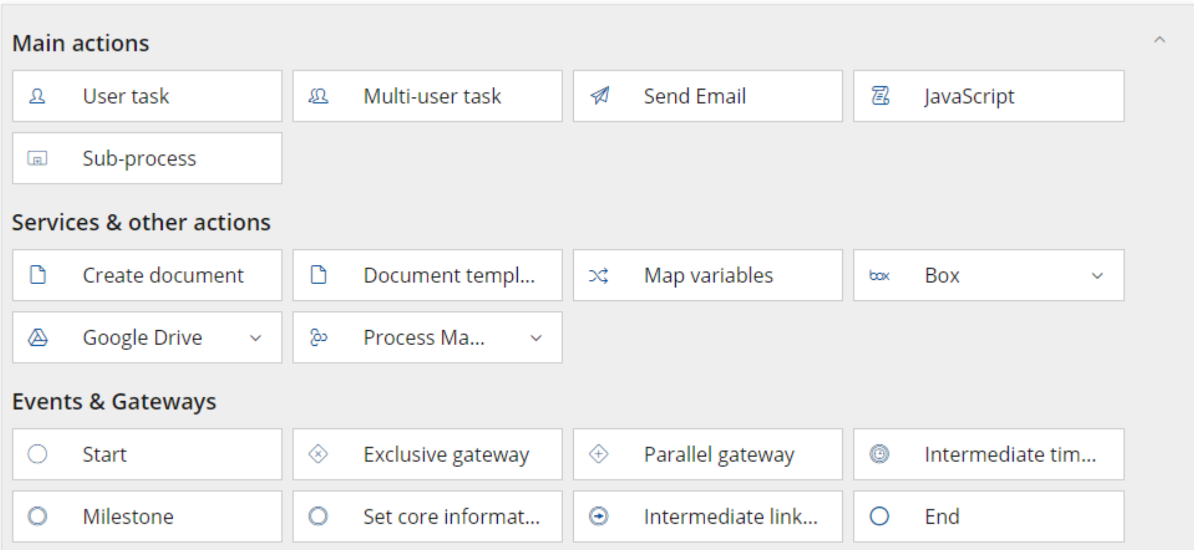
- Anyone who knows the email trigger address can use it to start a new case. We recommend that you do not share the email trigger addresses of any process. In case an email trigger address has been compromised, please contact our SAP Signavio service experts from the SAP for Me portal.
- To protect the system from a Denial of Service attack, there is a rate limit for the email trigger in place. A maximum of 500 emails per process per hour are sent.

9.2.4 Actions

Actions represent the steps in a process - things to do.

Actions include things like user tasks in SAP Signavio Process Governance, operations on a file in a document management system or any other actions that represent work that someone will perform as part of a process. When starting a process, SAP Signavio Process Governance will execute the actions in a process in the proper order. The process JavaScript action cookbook determines this order, using transitions, gateways and events.

A process can include different JavaScript action cookbook. A user task will create a task in a case. A *Send Email* action will send an email. A *Google file upload* action will upload a file to a Google Drive folder.



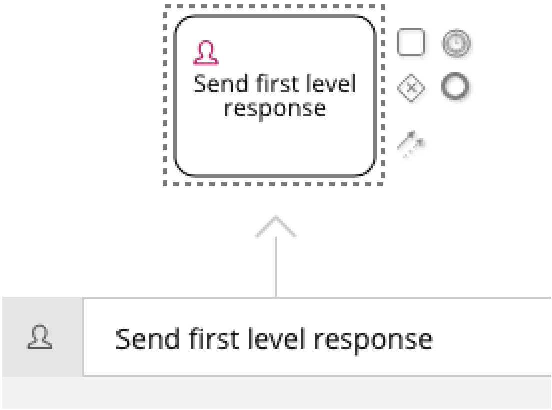
The Process builder's actions palette

The BPMN diagram editor shows actions and control flow elements, such as events and gateways. Use the diagram editor to add sequential flows between actions, decisions and other control flow behavior.

Adding a Transition

A transition specifies sequential flow, which means the next action only starts when someone has completed the previous one.

To add a transition, click to select the first action. Several symbols appear to the right of the selected element:



Start creating a transition by dragging the transition symbol to the destination

Choose the transition symbol and drag it to the destination element. When you drag the symbol over the destination element, it indicates that you can drop to create the transition:

Creating a transition hovering over destination

Release the mouse button over the destination to create the transition.

Creating the Next User Task

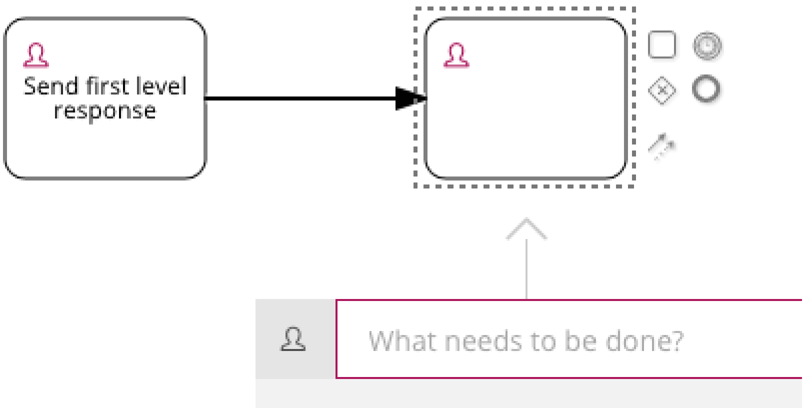
You can easily create the next user task in a process in the same way you created transitions, above. Start by selecting the previous action:

Start creating the next user task by dragging the action symbol

Click the rounded rectangle symbol and drag it to an empty place on the canvas.

Drag the rounded rectangle symbol to an empty place

Drop the symbol where you want to create the next user task. Release the mouse button to create new user task where you dropped it, with a transition from the previous action.



Adding the next user task and its transition at the same time

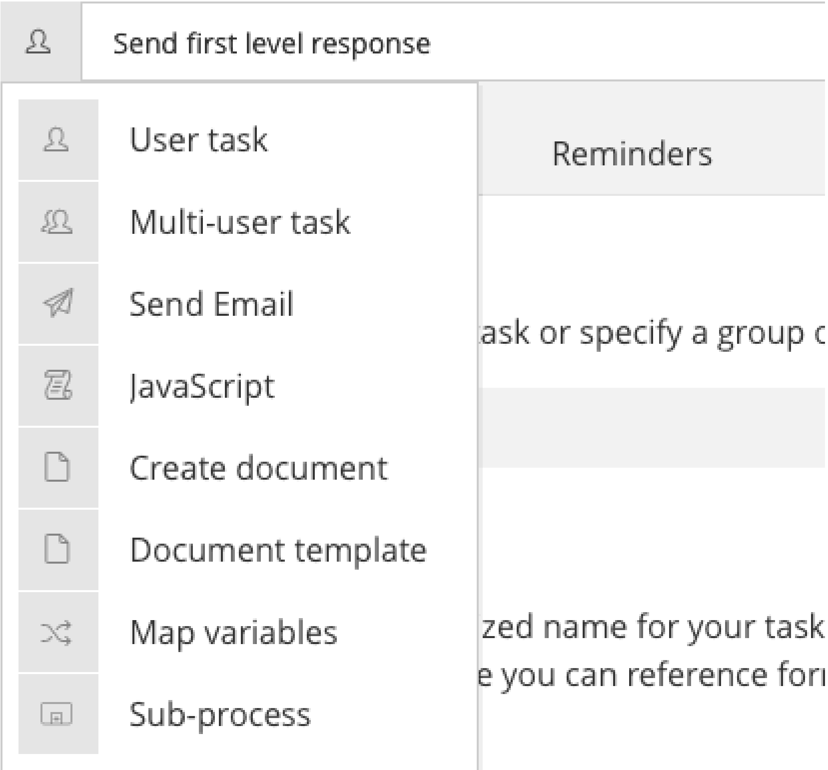
Alternatively, choose the user task icon to create a new user task in the default location, with a transition.

Changing the Action Type

Sometimes, modifying a process means changing an action from one type to another. In the recruitment process, you might change the action to reject the candidate from a manual task to an automatic email task.

To make this change, first select the action in the process editor to open the configuration panel, then click the action type icon at the top-left corner of the configuration panel to open the list of action types. Next, select *Send Email* from the list to change the action type.

Changing a User Task [page 69] to a Send Email [page 73].



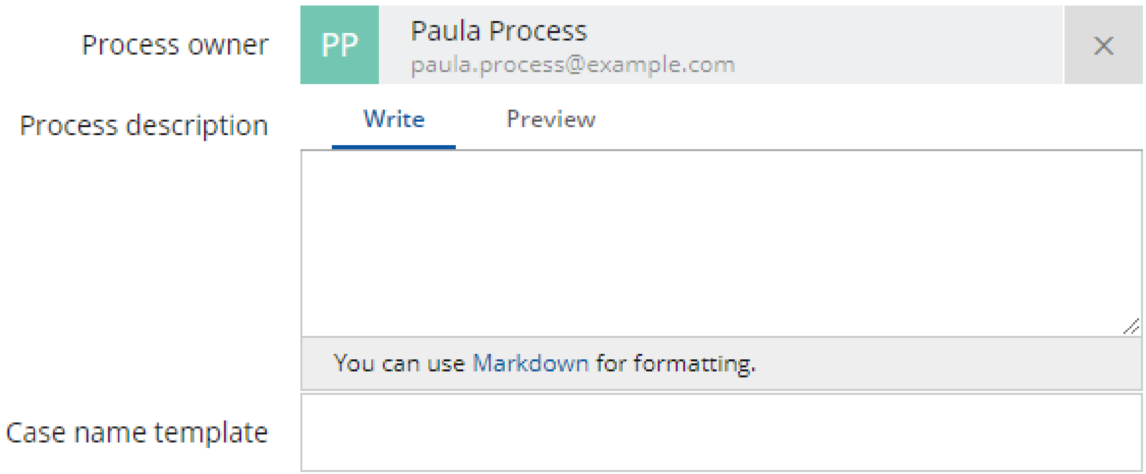
> ⚠ Caution
>
> Changing the action type discards the previous action type's configuration, such as a user task form or an email template. If you change the action type back, the editor will not restore the original configuration.

Control Flow Elements

The diagram also includes control flow elements, such as events and gateways. Unlike actions, control flow elements don't represent something that should happen. Instead, you use events and gateways to specify the flow between the actions.

9.2.5 Details

In the process builder, select the *Details* tab to further configure the process.



Configuring process details

On the *General* tab, configure the following process properties.

- *Process owner* - shown on the *Processes* page to indicate who has responsibility for a process model, and used as the default recipient of some Notifications [page 12].
- *Process description* - documents a process, usually by describing the process goal.
- *Case name template* - the name for new cases of this process, usually containing trigger Variables [page 55] so that each case has a different name.

Use the *Access control* tab to restrict access to this process and its cases.

Use the *Fields overview* tab to view and rename this process' Variables [page 55].

Use the *Core information* tab to view and edit important information about a process or case.

9.2.6 Versions

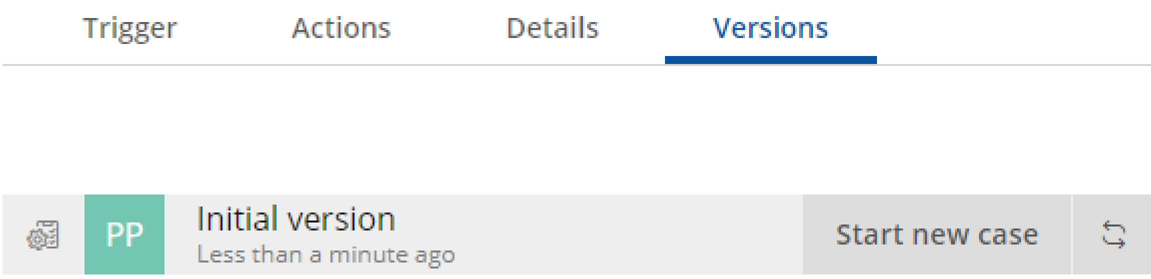
When you use the process editor to edit your process model, SAP Signavio Process Governance saves all of your changes immediately. You can go back and edit the process again later, and it will not have changed. However, to execute a process by starting a new case you need a published version.

Publishing a process version

The process editor's *Versions* tab shows a list of published versions. Until you publish a version of a process, the following message is displayed:

The process editor's Versions tab with no published versions

You can only start a new case for a process that has a published version, hence the button displays *Publish to run this process*. After you publish the first version, the list shows version #1 and you can start a new case using that version.



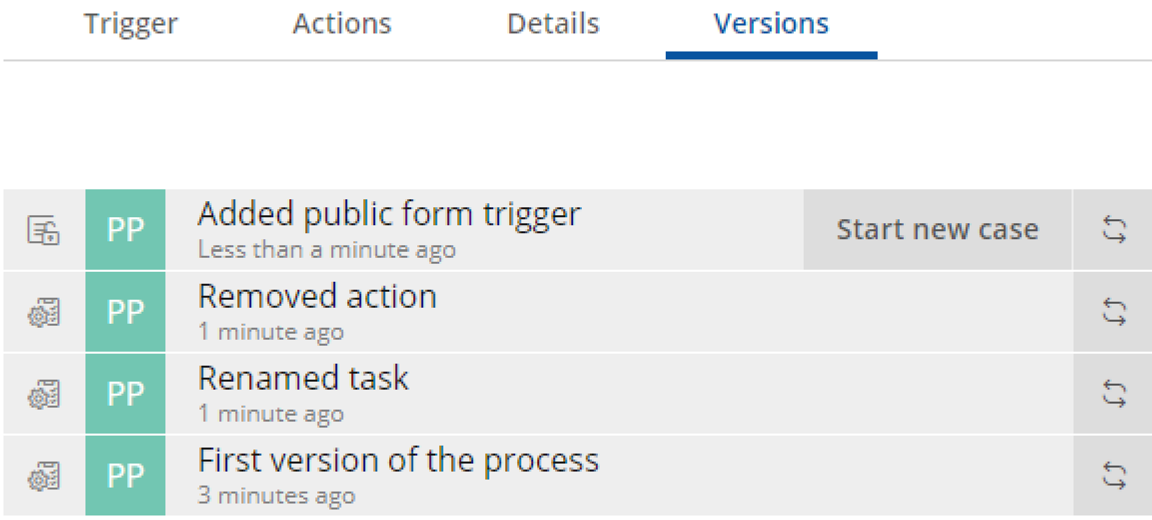
The Versions list after publishing the first version

Version #1 always has the description *Initial version*. For later versions, you can add your own description.

Adding version comments

After the first published version, you can add a comment to describe the changes when you publish a new version of a process.

You can omit the version comment, but it helps collaboration between team members by making process modeling more transparent.



Published versions with descriptive version comments

In this example, each version has a short comment that describes the changes.

Writing good version comments

When you write version comments, use the following tips to make them more consistent and useful.

- Make the comment an imperative phrase that starts with a word like "Add" or "Fix".
- Capitalize the first word and don't include a full-stop at the end, for consistency.
- Describe specifics, instead of vaguely referring to "changes".
- Keep it short; 3-10 words usually suffice.
- Consider making the comment longer to explain why you made this change.

You may find it easier to publish a series of small changes, creating a number of intermediate versions instead of one big change. Fine-grained versions make the version history more useful.

Re-publishing a process version

If you change a workflow to handle a temporary situation, such as an understaffed team, you may wish to go back to the original workflow when you have resolved the situation. Use the *Re-publish* option to change which process version new cases use.

1. On the *Versions* page, select the re-publish/restore button next to the name of the original version you want to use again.
2. On the *Re-Publish or Restore* dialog, select *Re-Publish*.

SAP Signavio Process Governance will now publish a new copy of the selected version. New cases will now use this new published version. Re-publishing a process version does not affect unpublished changes you are working on.

Restoring a process version

While improving a workflow and publishing a series of process versions, you may want to look at an earlier version. You can use the *Restore* option to abandon your unpublished changes, and instead continue editing a previous process version.

1. On the *Versions* page, select the re-publish/restore button next to the name of the version you want to edit.
2. On the *Re-Publish or Restore* dialog, select *Restore*.

SAP Signavio Process Governance will now replace your unpublished changes with the selected version. Restoring a process version does not change the published version that SAP Signavio Process Governance uses to start new cases.

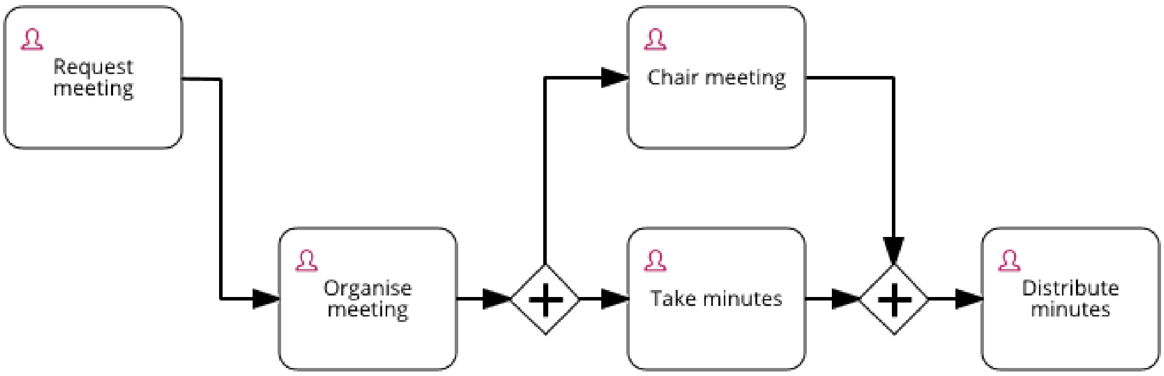
9.3 Roles

Creating a role gives a process-specific name to whoever performs one or more process tasks.

You can optionally configure a role with a list of candidates. Roles have the same function as swimlanes in BPMN.

Process roles differ from organizational roles. A process role only lasts for the duration of a case, while organizational roles last longer and relate to the job you perform at the organization. For example, when you have a meeting, one person sometimes takes the role of chairperson. That person doesn't have the job title **Meeting chair** - they've just adopted that role for the duration of the meeting.

A process in SAP Signavio Process Governance can define roles, in the same way that a business meeting 'process' has roles for whoever chairs the meeting (the **Chair**) and whoever takes minutes (the **Secretary**). The following meeting process model assigns the tasks on the top row to the **Chair** and the tasks on the bottom row to the **Secretary**.



A Meeting process, with tasks for Chair (top row) and Secretary (bottom row) roles

In each meeting (each case in SAP Signavio Process Governance), one person takes the role of chair, and one the role of secretary. These assignments generally don't change during a meeting. Similarly, SAP Signavio Process Governance role assignments don't change during a case. SAP Signavio Process Governance automatically assigns each new task with a role assignment to the person who already has the role.

In SAP Signavio Process Governance, a process role works like a workflow variable that you use to assigning tasks. A role variable has the User type and stores a single user.

These process roles differ from organization roles. For example, you can have the **Team lead** role in your organization, an assignment that does not necessarily have an end date. A process role, such as **Meeting chair**, has a different scope and only applies for the duration of a single case.

To assign a role to a user task, open the task's configuration panel, select the *General* tab, and select a role in the *Assign using a role* menu on the right-hand side.

You can also use the edit icon next to the role name to rename the role.

Role Candidates

You can use a role to assign multiple tasks a person from a group of candidates. For example, you might have a support process that includes three user tasks that you assign to a support engineer.

Instead, assign the three tasks to a new role called **Support engineer**, and add the relevant people as candidates for the role.

Creating the first task that has a role will notify all of the candidates for the role. When one of the candidates takes the task, SAP Signavio Process Governance will assign the subsequent tasks with the same role to the same person. That helps this person work more efficiently because they have the context knowledge about that case.

If you reassign a task that has a role assignment, SAP Signavio Process Governance will update the role variable, and assign all subsequent tasks with the same role to the new assignee.

Using a Form Field to Assign a Role

When you execute a process, you usually assign a specific person to a role by using the assignee button to select someone. Sometimes, you want this assignment to an explicit part of the process, to make sure the assignment happens at the right time. For example, you may find it important to assign the **Support engineer** before completing an **Initial investigation** task.

You can do this by adding the role assignment to a form, because you can use task assignment roles as process variables, just like any other *User* form field.

To add a role assignment to a form, first define the process role, such as the **Support engineer** role created above, then on the form, under the *Reuse field* heading, select the role variable to add it to the form.

Alternatively, you can first define the **Support engineer** role by adding a field with type *User* to the **Initial investigation** task's form, and then select the **Support engineer** role on another user task's *General* configuration.

9.4 Variables

Variables contain the workflow data that the process defines.

You can use variables in a case name template and when configuring the output of some action types. For example, you can use variables to repeat workflow data on a User task form [page 100], or include a variable value in an email task subject line or body text.

These variables contain all of the information from forms as well as information required by the process actions. Each case stores its own values for each workflow variable.

You usually add a variable to your workflow by adding a form field. You can also create variables in a JavaScript action (Script Task) [page 74], to capture data that the script retrieves or calculates.

In addition to your own workflow variables, SAP Signavio Process Governance automatically creates variables that give you access to additional data in each case. The Case variable [page 121] contains data from when SAP Signavio Process Governance creates the case. An Email trigger [page 44] adds an email variable that contains the trigger email.

Variables can have different Data types and formats that determine which kind of data the variable stores, such as text or a date, and whether the data has a single value or contains multiple fields.

9.5 Process Locking

In the process builder, only one person can edit a process at a time. If someone else is editing a process, the *Processes* list shows you a message.

You can still open the process, but you get a warning message explaining that you cannot make changes:

You can edit the process and make changes after the other person leaves the process editor.

9.6 BPMN Import

You can import a SAP Signavio Process Governance process model from a BPMN 2.0 XML file. You can use this to import a model that you created in another tool, or to load a file that you saved using the BPMN Export [page 56] option.

To import a BPMN process model, follow these steps:

1. Choose (*Processes*) from the SAP Signavio Process Governance side panel.
2. From the (*Create*) menu options, choose *Import BPMN*.
3. Select the BPMN XML file from your file folders and confirm the selection.

ⓘ Note

SAP Signavio Process Governance does not support all BPMN 2.0 elements, so the process may appear differently in SAP Signavio Process Governance.

SAP Signavio Process Governance removes unsupported elements, such as message events.

The following table lists supported BPMN elements, and the corresponding action type.

Supported BPMN Elements

BPMN element	Action type
Business rule task	SAP Signavio Process Manager - DMN Task [page 94]
Call activity	Subprocess [page 75]
End event	End Event [page 112]
Exclusive gateway	Exclusive Gateway [page 104]
Intermediate timer event	Intermediate Timer Event [page 112]
Manual task	User Task [page 69]
Parallel gateway	Parallel Gateway [page 108]
Script task	JavaScript Action (Script Task) [page 74]
Send task (`type=email`)	Send Email [page 73]
Service task (`type=changeState`)	SAP Signavio Process Manager - Set Model State [page 98]
Service task (`type=boxFileUpload`)	Box - Upload File [page 89]
Service task (`type=googleAddCalendarEvent`)	Google Drive - Add Calendar Event [page 93]
Service task (`type=googleDriveAddRow`)	Google Drive - Add Row to Sheet [page 92]
Service task (`type=googleDriveFileUpload`)	Google Drive - Upload File [page 91]
Start event	Start Event [page 112]
Sub-process (embedded)	Subprocess [page 75]
Swim lanes	Roles [page 53]
Task	User Task [page 69]
User task	User Task [page 69]

9.7 BPMN Export

You can export a process model as a BPMN 2.0 XML file.

You may find this useful for opening the model in another tool that supports BPMN, or to make a backup that you can load using the BPMN Import [page 55] option.

To export a process model, follow these steps.

1. Open the model in the SAP Signavio Process Governance process editor.

2. Choose ⚙ (*Settings*) and select *Export BPMN 2.0 XML*.

This results in a file download that describes your process model in BPMN format. Only export of one kind of BPMN file is possible, so there aren't any options to configure.

9.8 Create a Copy or Delete a Process

You can create a copy of a process or delete a process using the process menu. The process menu is located under the process name.

The options *Create a copy* and *Delete process* can be selected after you click the ⋮ (*more options*) menu.

The *Create a copy* option duplicates the process in the same organization. You may find it useful to duplicate a process if you want to experiment with changes without publishing changes to a live process. You may also want to duplicate a process to model a special case of the process, instead of adding a conditional flow to the standard process.

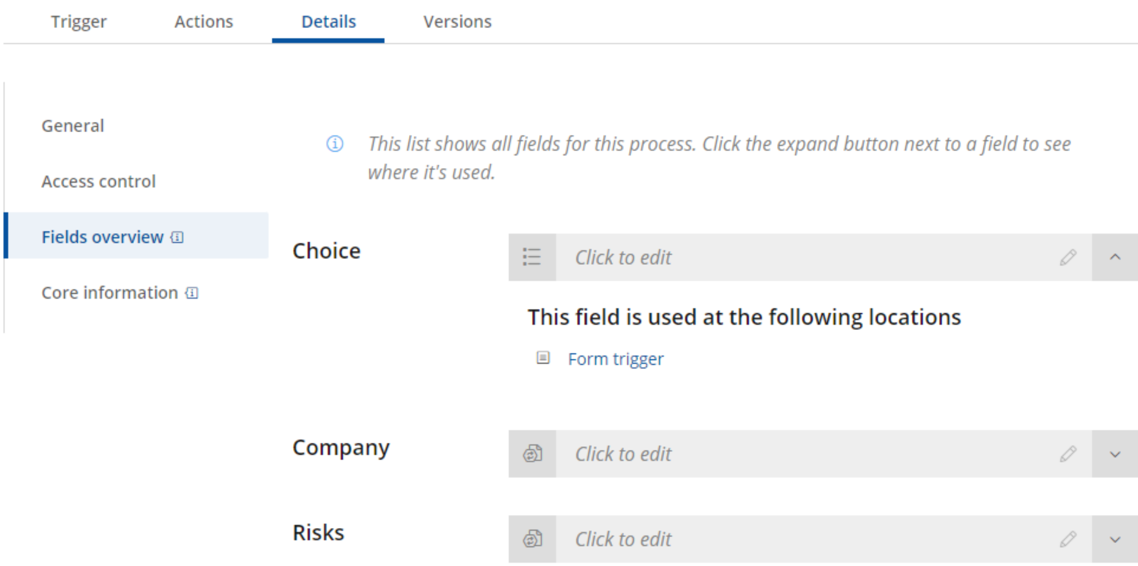
The *Delete process* option permanently deletes a process. You can also chose to delete all of its cases. When you click *Delete process*, a confirmation dialog opens. There, you can select to delete all of the process's cases before continuing.

You cannot delete individual cases, which you might want to do if you have created test cases while developing the process. However, you can use *Create a copy* and *Delete process* to duplicate a process and then delete the original. This deletes all of the cases with the original process, and leaves a copy with no cases.

9.9 Fields Overview

Fields overview lists all fields in a process.

To see where a field is used, expand the field details.



Note

If you rename a field in one location, the field is renamed everywhere in a process.

Before you change or rename a field, check the listed locations to make sure that the change has no undesired effects.

You can also use the *Fields overview* to see if a field has been deleted everywhere.

10 Access Control

Set who can view or edit a process, work on cases, and create reports.

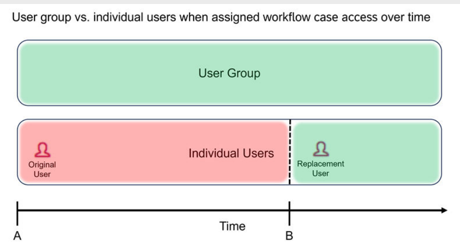
In SAP Signavio Process Governance, use access control to restrict who can access a process, edit cases, or access specific tasks within a process. By default, processes and tasks are publicly accessible to all users in your organization. When you configure access controls, you restrict access to specific users or groups.

Restricting Access to Processes

We recommend defining workflow case access with **user groups** rather than **individual users**. See the following example scenarios, which include an individual user limitation.

Example

User Groups	Individual Users
Scenario 1.1: From the time a user group gets access to workflow cases (shown in the illustration as Point A), all individual users who are members of the user group have this access for the same amount of time as the user group.	Scenario 1.2: An individual user (shown in the illustration as *Original User*) can be granted case access from Point A onward.
Scenario 2.1: If a new individual user joins the user group at a later point in time (Point B), the new user has access to all cases from Point A onward.	Scenario 2.2: If *Original User* retires and no longer needs the access at Point B, you can assign *Replacement User* to inherit the same workflow case access. • **Limitation:** *Replacement User*'s access begins at Point B. *Replacement User* cannot access cases that *Original User* had access to from Point A to Point B.



Note

- Changes to the access rights for the process and for report creation are applied immediately.
- Changes to the access rights for cases take effect when a process is published and are not applied to existing cases. When you publish an access-restricted version of a process, all cases started before the publication stay accessible.

To apply process restrictions, follow these steps:

1. Open a process and select *Details*.
2. On the *Process details* page, open the *Options* tab, it has an *Access rights* section.
3. Choose *Make this process private* to configure access control.
4. Grant permissions to users and groups.

When you make a process private, you can grant permissions to users and groups.

Reports	Description
Create reports	Create reports of the process

Process	Description
Edit process	Make changes to a process and publish new versions
See process	See the process in the list of processes
Start process	Start new cases for the process

Case	Description
Delete cases	Delete cases of a process
Edit cases	Work on the process' cases, by editing or completing tasks
View cases	View the cases for the process

For example, use the permission:

- *Create reports*, granted to a business user group to allow them to analyze process metrics.
- *Edit process*, granted to a group, to restrict process editing to experienced process modelers.
- *See process*, granted only to your own user, to hide incomplete or draft processes from other people while you create a first version.
- *Start process*, granted only to your own user, so that people with *View process* and *Edit process* permission can collaborate on process modeling but cannot start cases until you publish it.
- *Delete cases*, assigned to the user responsible for deleting cases that are out of scope, especially cases containing sensitive information.
- *Edit cases*, assigned to one group but not another, to allow one group to work on cases, while the other group can view their work.
- *View cases*, assigned to a group, to restrict access to cases that contain sensitive information.

To remove all access restrictions on the process, click *Make this process public*.

Restricting Access to User Tasks

You can also restrict access to individual user tasks in a process. By default, user tasks have the access rights set for the process.

To apply user task restrictions, follow these steps:

1. Open a process and select the user task.

2. In the user task configuration panel, open the *Access Rights* tab.
3. Choose *Define specific access* to configure access control.
4. Grant permissions to users and user groups:
    - *View task* - review the task and participate in discussion by adding comments
    - *Edit task* - change the task's title, assignment and due date, and create subtasks

Example

Suppose you have a process that includes an approval, where someone from a *Managers* group must approve or reject a request from someone in the *Employees* group. You need to use the *Edit task* permission to restrict access to the approval user task, so that only managers can provide the approval.

11 Analytics (reporting)

When you work in or manage a team, you sometimes have questions about the work in progress or completed work. For example, management decisions about team resources might depend on what work the team completed last month and what work remains incomplete. While day-to-day case work focuses on completing one task at a time, managing a team of case workers demands an aggregated overview of the team's work.

The *Analytics* menu makes it possible to create and share reports that provide these overviews. Each report runs on demand and aggregates a process' cases in tabular and graphical form in the web user interface.

You can also export your case data for an investigation in SAP Signavio Process Intelligence, read more in the section Export case data for SAP Signavio Process Intelligence [page 66].

11.1 Create and manage reports

> ⓘ Note
>
> Creating and viewing reports requires the *Create reports* and *See process* permissions, see Access Control [page 59].

To create a report, follow these steps:

1. Select *Analytics* in the main menu.
2. Click *Create new report*.
3. Enter a descriptive name for your report.
4. In the *General* tab, select a *Process* from the processes published in your organization.
5. If necessary, filter your data. See details below.
6. If necessary, configure the report columns.
   A report is created.
   The report is listed when you open the *Analytics* tab. By default, only you can view the report.

Filter cases

You can filter which cases a report includes, by status or by the values of the process variables.

Filter cases by status

To filter cases by status, click *Case status* and select a case status from the options *all cases*, *open cases*, or *closed cases*. For example, you can use this filter to create separate reports for completed work and outstanding work.

Filter cases by variables

You can add conditions to specify in detail which cases are included in a report.

To filter cases by variable values, follow these steps:

1. In the section *Filters*, select if all or some conditions need to be met.
2. Choose *Add another condition*.
3. Enter the parameters for your condition in the 3 fields:
    - Select a field in the first list.
    - Select a comparison operator from the second list. Default is *equals*.
    - Specify your condition in the third field.

For example, a monthly case report needs two conditions for the *Case / End date* field, using the *is after* and *is before* conditions to define a date range.

(*warning*) indicates that a condition isn't specified yet.

To clear a field, choose (*close*).

To remove a condition, choose (*delete*).

View and export results

The report shows a table of all cases of the process, one case per row. The table header indicates the number of cases included in the report. Choose *Configure columns* to select which columns the table includes.

To create your own report and visualization using different spreadsheet software, you can download the report data as a CSV file.

Grouping and charts

You can group cases by one of the process variables, so that cases with the same value appear together in the table. By grouping cases, you can also add visualization to the report.

To compare the number of a variable in a pie chart, follow these steps:

1. Select a variable from the *Group by* list.
2. In *Show each group's*, select *Count*.
3. Select the variable of which you want to illustrate the distribution.

To compare data in a bar chart, follow these steps:

1. Select a variable from the *Group by* list.
2. In *Show each group's*, select *Average*, *Minimum*, *Maximum* or *Sum*.
3. Select the variable of which you want to illustrate the distribution.

Share a report

> ⓘ Note
>
> - Currently you can only grant viewing permissions.
> - Users and groups who want to view a shared report need the permissions *See process* and *Create reports* for the process. See section Access Control [page 59] for details.

By default, only you can view the reports you create.

To share a report, open the *Share* tab. Here, you can give users, groups, or organizations access to your report.

Delete a report

To delete a report, choose ⋮ (*more options*) below the report title and select *Delete report*.

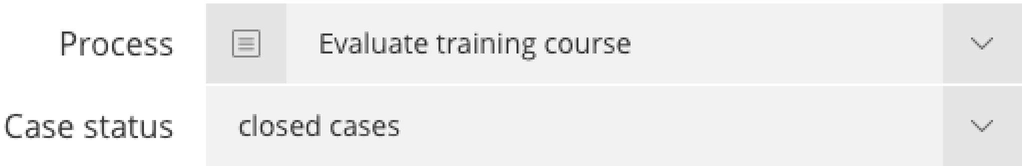
11.1.1 Report Creation Example

In this section, the report creation is shown with an example. For the process **Evaluate training course**, which collects ratings for training courses, the report should show the ratings in a pie chart.

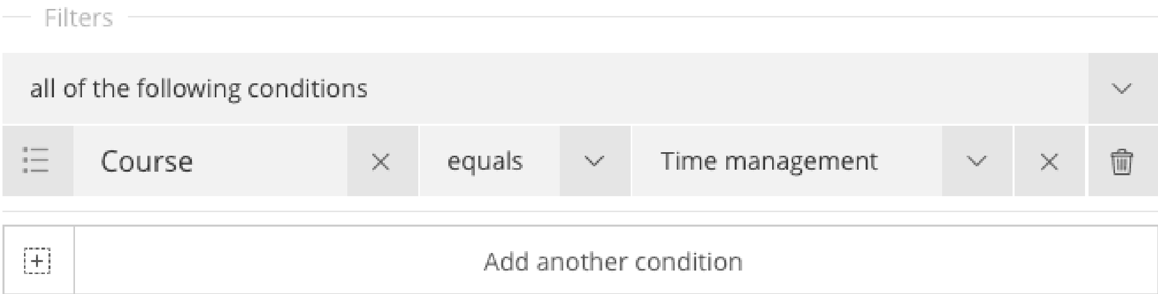
First, you create a new report. In *Analytics* in the main menu, you choose *Create new report*. Then, you enter a name for the report that describes the data, in this case **Training course evaluation results**.

In the list *Select a process* you choose the published process **Evaluate training course**. Now, a report is created.

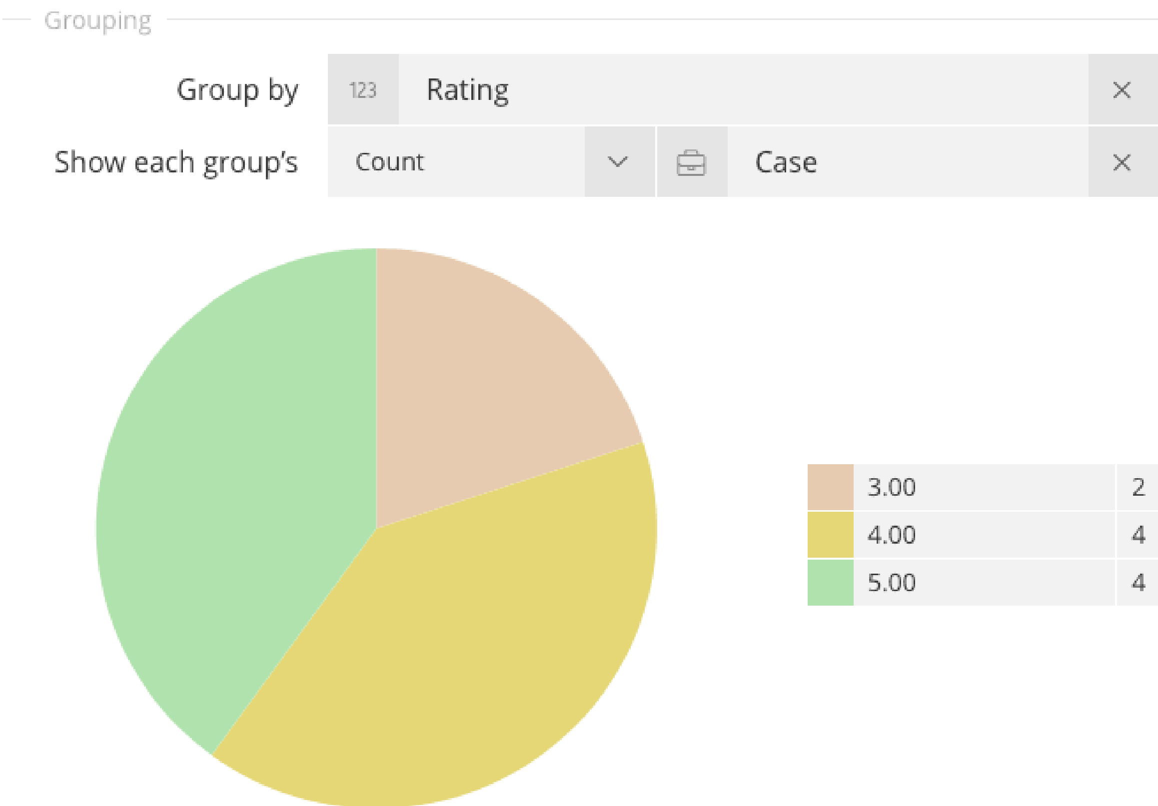
The report shows a table of all of the cases of the process, one case per row. You only need to include cases that are closed, because closed cases correspond to completed evaluations, so you select *closed cases* in the *Case status* list.



You also need to filter cases by variable values. You use *Add another condition* to filter for all **Time management** courses.

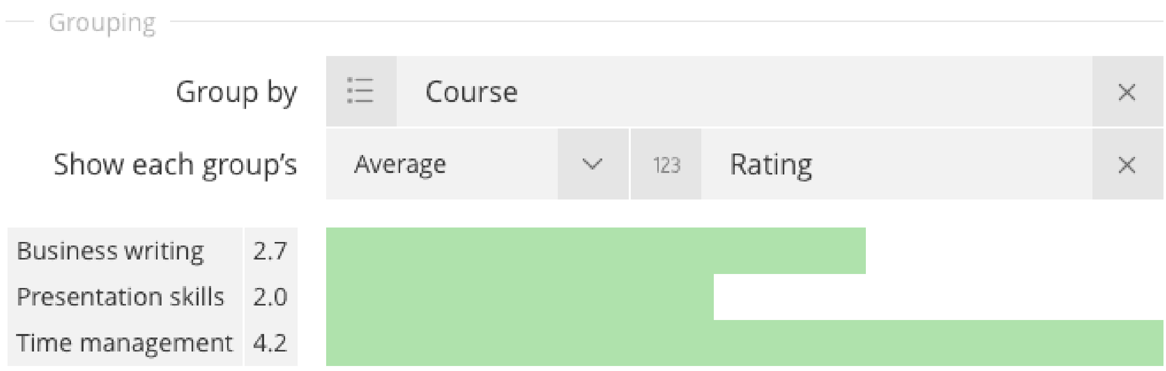


To show a pie chart of the course evaluation ratings, you select the *Rating* variable from the *Group by* list. Then, you select the *Count* of *Case* values to count the evaluations with each distinct rating value.



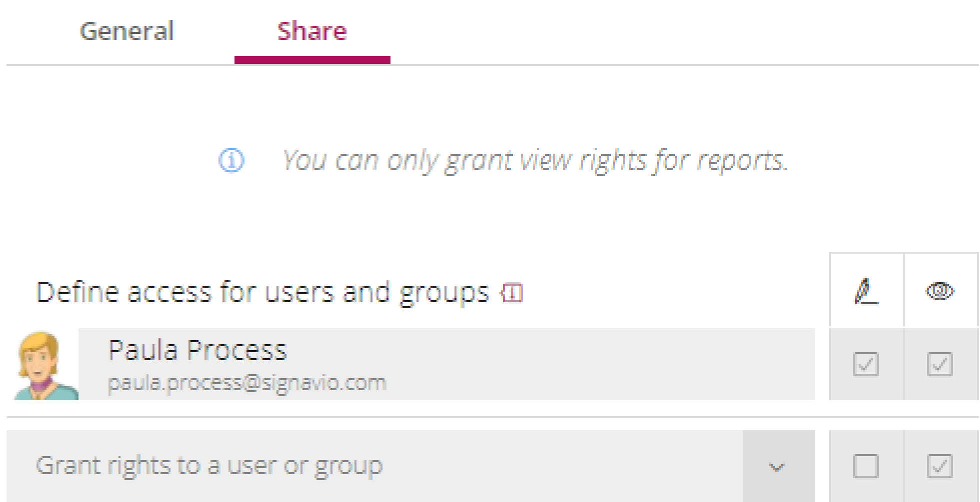
Grouping evaluations by rating, and counting the number of evaluations with rating 3, 4, or 5.

To show a bar chart of the average rating for each course, you group by the *Course* (title) and show the *Average* of *Rating* values.



Grouping evaluations by course title, and calculating each course's average rating.

You want to share the report with Paula. In the *Share* tab, you add her so she gets viewing permission for the report.



Paula now can view the report in the *Analytics* tab.

11.2 Export Case Data for SAP Signavio Process Intelligence

> **Note**
>
> You need *Create reports* permission for a process to export case data.

Case data is exported as CSV files. You can modify the CSV files after download, for example to anonymize the data.

Case Events

Case events are necessary for an investigation in SAP Signavio Process Intelligence. Case events contain activities (for example user tasks) and events. Only completed activities are included. Gateways are excluded.

The case event file contains the following columns:

- Case ID
- Activity type
- Activity name
- Activity ID
- Start time
- End time

Exporting Case Events

1. Under the *Analytics* tab, choose *Export case events*.
2. Select a process.
3. If necessary, filter your data.
4. Choose *Export*.
   The file is saved to your browser's download folder.
5. In SAP Signavio Process Intelligence, upload the data as an event log and start an investigation.
   Read more in the sections Upload process data files and Manage investigations.

Different activities or events with the same name are recognized as one in SAP Signavio Process Intelligence.

Each activity and event must have a name, otherwise the upload fails. You can modify the CSV file to add missing names, and to combine activity name and activity ID.

> ⓘ Note
>
> When you upload new data to an existing process in SAP Signavio Process Intelligence, set the process merge strategy to *Overwrite*. Read more in section Set the merge strategy for data uploads.

Filter Case Events

By default, all case events are exported.

You can export case events for a specific time frame, for example to download only the latest case events or to divide larger exports into smaller files.

To filter the case events, enter a start date and an end date in the section *Cases started between:* before you click *Export*.

Case Attributes

Case attributes provide additional information about cases. To use case attributes in an investigation, you first need to upload the case events of the same process to SAP Signavio Process Intelligence.

While the case event file contains fixed columns, you can configure the columns for a case attribute export.

> ⓘ Note
>
> - Not all data types created by SAP Signavio Process Governance are supported in SAP Signavio Process Intelligence.
> - To export the complete data set, don't use grouping or filters . You can filter your data in SAP Signavio Process Intelligence.

Exporting Case Attributes

1. On the *Analytics* tab, choose *Create new report*.
2. Enter a name for your report that describes the data.
3. In *Select a process*, choose the same process you selected for your case event export.
4. Choose *Configure columns* and add the column *Case / ID*.
5. Add or remove columns as necessary.
6. Save your changes by choosing *Back to the table*.
7. Choose *Download full result set* to download the data in a CSV file.
8. Upload the data as a case attribute log to an existing process in SAP Signavio Process Intelligence. Read more in section Upload process data files.

12 Action Types

When you create JavaScript action cookbook, actions are displayed as rounded rectangles. Actions typically have a configuration panel that opens when you select the action.

12.1 User Task

A (*user task*) indicates that a person performs a task.

In the configuration form, you can specify the following optional details:

- *General* - assign a task to a user or a process role.
- *Form* - add a form to a task; submit the form to complete the task.
- *Reminders* - task deadline notifications.
  - *Escalations* - automatic task reassignment.
  - *Automatic close* - define a duration for the task to be completed, after which it will close automatically.
- *Access rights* - task permissions for users and groups.

General

Use the *General* tab to specify the task's default assignee or candidates.

As candidates, you can select the following:

- Individual users
- Variables of type user (or list of users)
- User groups

You can also specify a role for the task's assignment, similar to a BPMN swim lane, so that SAP Signavio Process Governance automatically assigns related tasks to the same person.

Task name template

You can use task name templates to create dynamic task names from Variables [page 55]. Enter the task name template in the *General* tab of the user task configuration panel. In the text field, type a # to select a variable.

Use task name templates to avoid a Tasks view that fills up with identically-named tasks.

Form

Use the form builder to create a user task form for entering and updating data as part of the user task. To use dynamic due dates for tasks, add or reuse a date field or a duration field.

Reminders

Use *Reminders* to set up notifications on task deadlines. If you configure a *Due date* or a *Reminder* period, then SAP Signavio Process Governance sends an email when the deadline expires.

SAP Signavio Process Governance sends these notifications to the task's assignee if the task has an assignee, or to all of the task's candidates if the task it not assigned. If the task remains unassigned and does not have any candidates, SAP Signavio Process Governance sends the notification to the process owner.

Due Date

With *Due date*, you can specify an automatic task due date.

To set a date relative to the task's creation date, click the text field and set the desired time. To reuse (*duration field*), choose (*pound*) and select the field from the drop-down list. To find a field, enter a search term.

To set an absolute due date, you need to reuse a date field (*date or date/time*). Choose (*pound*) and select the field from the drop-down list. To find a field, enter a search term.

The due date is visible in the task inbox.

> Note
>
> Once a due date is set for a task, it can only be changed manually. If you change a due date for one task, the due dates for other tasks aren't changed automatically.

Reminder

A *Reminder* works separately from the due date and only sends a reminder notification, which you can use to remind task assignees and candidates earlier than the task deadline.

With *Continue reminding*, you can add recurring reminders.SAP Signavio Process Governance sends a maximum of 25 reminders for one task.

To reuse (*duration field*), choose (*pound*) and select the field from the drop-down list. To find a field, enter a search term.

Escalations

You can also use the *Reminders* configuration panel tab to configure escalations. Use escalations to automatically reassign a user task when a deadline expires.

To take over a task in an escalation, you can select the following:

- Individual users
- Variables of type user (or list of users)
- User groups

Follow these steps:

1. On the *Reminders* configuration panel, select *Escalations*.
2. In the *After* field, set a period to wait after the task creation date. When that time period has passed, SAP Signavio Process Governance automatically reassigns the task. To reuse (*duration field*), choose (*pound*) and select the field from the drop-down list. To find a field, enter a search term.
3. In the *Escalate to* field, select who receives a task escalation notification and take over the task. If you leave this field blank, the task escalates to the process owner.

Automatic Close

This feature allows the setting of a specific duration of time to complete a task, after which it will automatically be closed. For example, you can use this feature to assign certain inspection tasks to managers, and give them a set time to complete them. If they don't complete them in the specified time frame, the task is closed automatically and the execution of your process continues.

> ⓘ Note
>
> This feature does *not* work for tasks that require a manual decision. If you try to use it with a manual decision, SAP Signavio Process Governance will stop executing your process at the gateway.

Access Rights

Use the *Access Rights* tab to set permissions for viewing, assigning, and completing the task. See Restricting access to user tasks [page 59] for details.

12.2 Multi-User Task

A multi-user task indicates that a group of people will each perform the same user task. You can use this to model multiple approvals, where several people in a group must approve a proposal.

In the configuration panel, you can set the same configuration as for a user task, plus the following additional configuration.

- *General* - assign tasks to users and groups
- *Results* - specify how form fields map to lists of values

General

Use the *General* tab to specify the users to create tasks for. The multi-user task creates a task for each user or group member.

You can also specify parallel or sequential *Execution type*. If you select *Parallel*, the multi-user task will create all of the tasks at the same time, for their assignees to complete in any order. If you select *Sequential*, the multi-user task will create one task at a time, and wait for its assignee to complete it before creating another.

Form

Use the form builder to create a task form for entering and updating data as part of the task. To use dynamic due dates for tasks, add or reuse a date field or a duration field.

Results

Use the *Results* tab to map each form field to a list of values. This list collects the values entered by the people who complete the tasks that this multi-user task generates.

To use the results of a multiple approval, use a JavaScript action (Script Task) [page 74] to implement whatever logic consolidates the list of results in the list into a single decision.

Manual Decision (Exclusive Gateway)

The multi-user task supports manual decisions. If an exclusive gateway follows a multi-user task, you can configure the buttons that reflect the possible decisions of this gateway. The buttons are displayed in the form of the multi-user task.

Select the decision type *Manual* for the exclusive gateway. Then choose the decision option from the drop-down menu:

- All users have chosen this option
- At least one user has chosen this option

12.3 Send Email

The send email action sends an email to the specified user.

> → Tip
>
> The maximum size for an email is 10 MB including attachments.

When an email was sent successfully, the case event **email was sent** is added to the case history. If the email can't be sent because it exceeds maximum size, it is sent without attachments. If this is successful, the case history shows the event **email was sent without attachments**. If sending the reduced-size email is not successful, the email won't be sent. In this case, the case history shows **email could not be sent**.

In the configuration you can specify the following:

Sender name	By default, the email is sent with the *From* field set to SAP Signavio Process Governance. You can set the *From* field to your company or department name.
To	The recipients of the email. You can enter one or more plain email addresses, or select email variables or users in the organization. Note that if you enter a plain email address, you must then select it from the pick list.

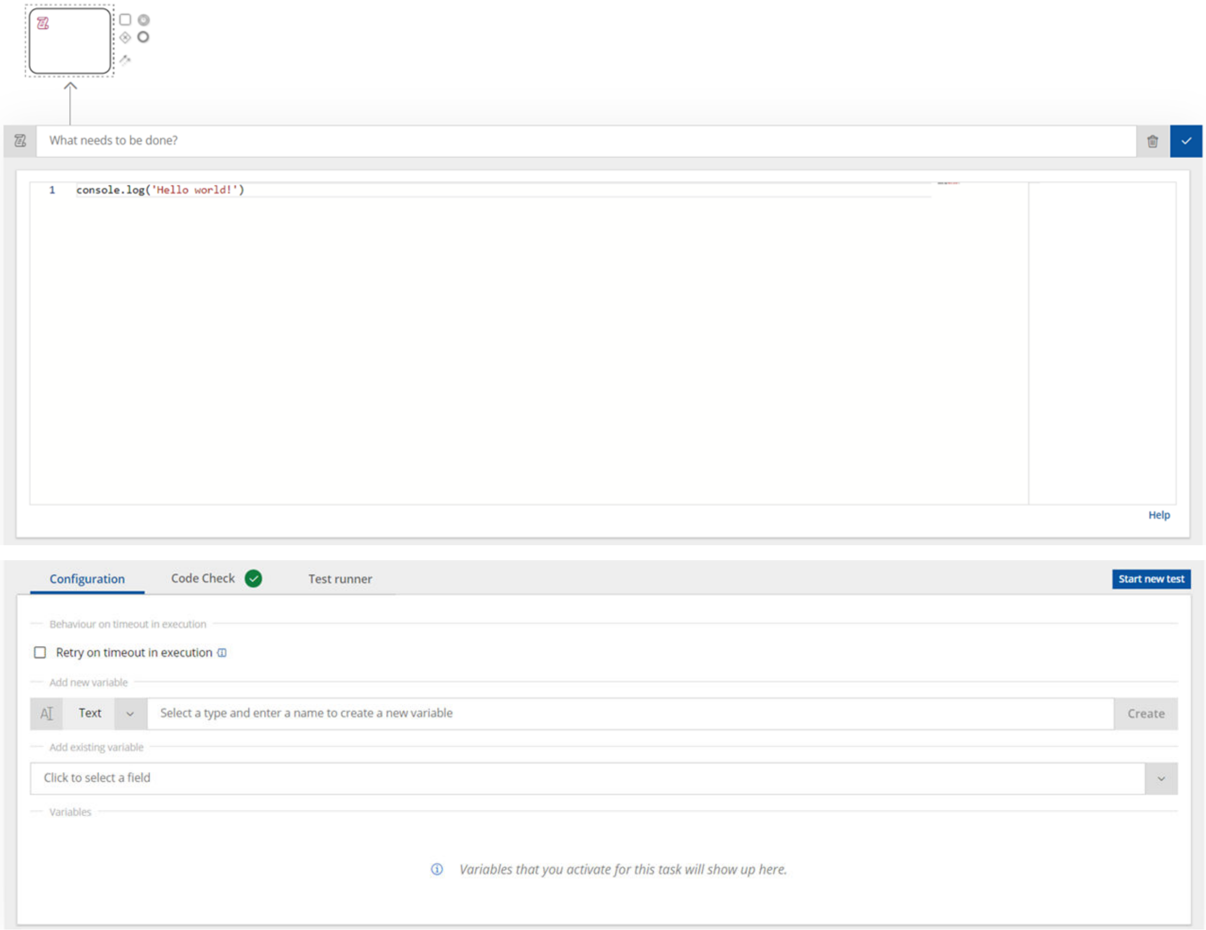
Reply to	SAP Signavio Process Governance sends emails from the following addresses: • notifications@workflow-au.signavio.com (Australia server) • notifications@workflow-ca.signavio.com (Canada server) • notifications@workflow.signavio.com (Europe server) • notifications@workflow-jp.signavio.com (Japan server) • notifications@workflow-kr.signavio.com (Korea server) • notifications@workflow-sgp.signavio.com (Singapore server) • notifications@workflow-us.signavio.com (US server) You cannot reply to these addresses. If you set this field to an alternative email address, you override the address for replies to the email.
Subject	The email subject line. To use variables in the subject, type a # and select a field from the list. If the list contains too many variables, you can just keep typing after the # to filter the list. You can use the arrow keys to move the section, and `Enter` to select a field. To remove a variable, just delete it the same way you delete normal text.
Attachments	To add attachments, choose *Attachments* and select a file field from the list. The list includes trigger email attachments, files generated by the *Create document* action, and file upload form fields.
Body text	You can use variables in the main email body by typing a #, just like in the *Subject*. You can use Markdown [page 125] to format the email body by formatting text or including hyperlinks, headings or lists. Select the *Preview* tab to see how your email looks for the recipient.

12.4 JavaScript Action (Script Task)

Access data in form fields or make HTTP requests to external systems using JavaScript.

The JavaScript action, called a *Script Task* in BPMN, allows developers to add JavaScript code to process execution.

> ⓘ Note
>
> SAP Signavio Process Governance administrators must go into system *Preferences* to grant users permissions to create or modify a JavaScript action. For more information, see Script Task Modification Restriction.



A JavaScript configuration panel

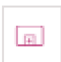
The configuration panel option *Retry on timeout in execution*, when activated, means that if there is an interruption during execution, the system will automatically retry the execution up to three times.

For a more detailed explanation of the use of JavaScript actions, see JavaScript actions.

To learn how to complete common tasks in JavaScript actions, see JavaScript action cookbook.

12.5 Subprocess

When you create a high-level overview of the main process, you model subprocesses as separate workflows and link these subprocesses to the main process, also called parent process.

When you add a subprocess action  to your parent process, this action executes the process selected in the subprocess action.

We recommend using a subprocess action in the following cases:

- To simplify complex process models. To view the next level of detail, you open the subprocess.

- To delegate responsibility to a different process owner.
- To reuse a part of the process that is the same for several processes.
- To update a part of the process that is changed often.

When SAP Signavio Process Governance executes a subprocess, a new case for the subprocess is started. After completing the subprocess case, SAP Signavio Process Governance continues executing the parent case. When a subprocess is started by another process, there's no case creator.

Create a Subprocess

You create subprocesses the same way you create processes. To read more about process creation, go to section Creating a process [page 41].

If your subprocess contains a trigger form, you can select input variables in the subprocess action that SAP Signavio Process Governance uses to auto-fill the trigger form fields when starting the subprocess case. To be able to select a process as a subprocess, you need to publish it.

Configure a Subprocess Action

When you have published your subprocess, you can add the subprocess action to the main process diagram.

> ⓘ Note
>
> We recommend not selecting the parent process as the subprocess, since this causes a loop.

To configure a subprocess action in your process, follow these steps:

1. Add the subprocess action to your workflow.
2. Select the process you want to use as a subprocess.
3. In the *Input* tab, you can either enter static values or link the inputs with data that already exists in your workflow.
4. In the *Output* tab, you can either create new fields or link the outputs to fields that already exist in your workflow.
   The outputs provide new data for your workflow.

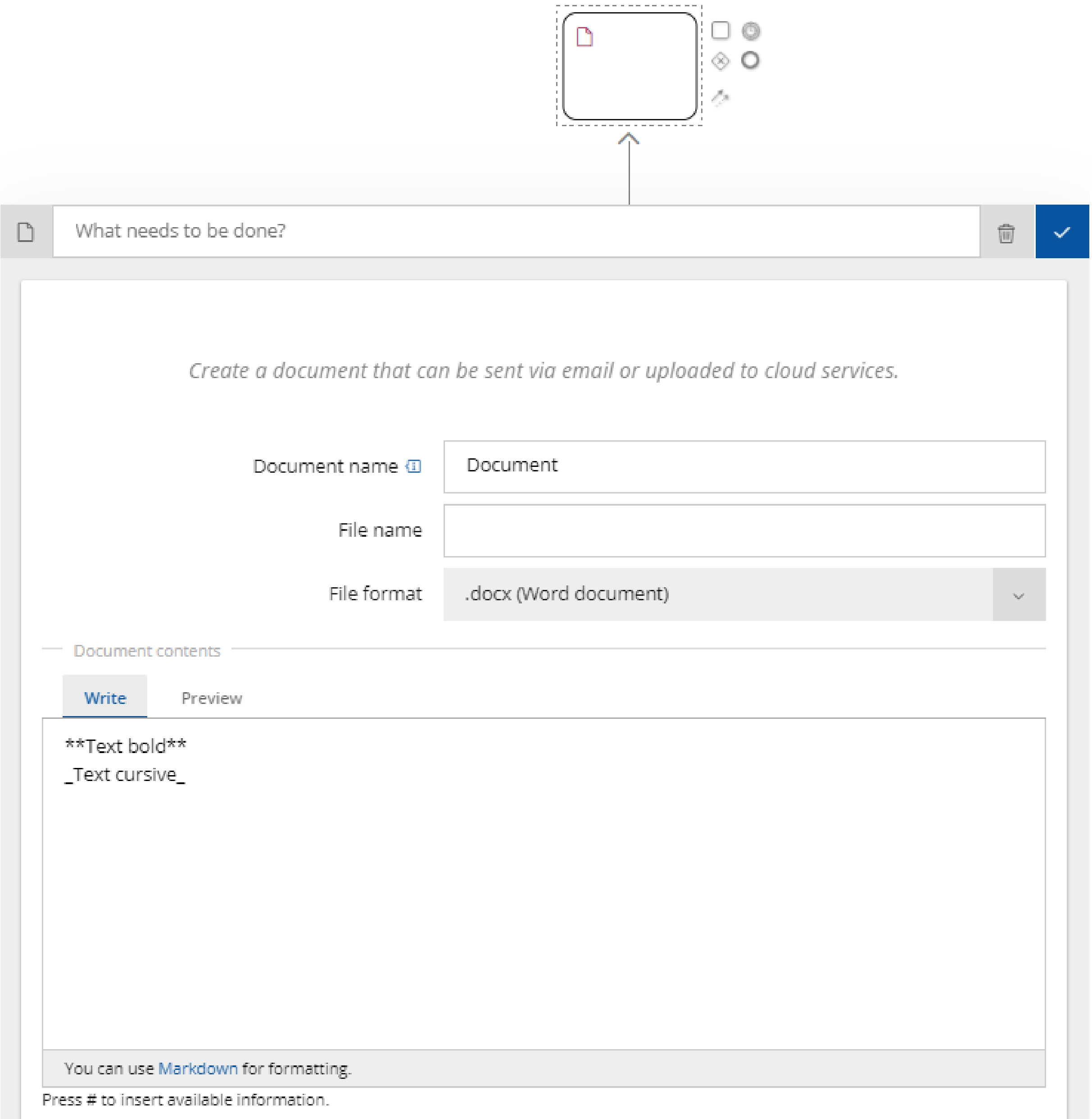
12.6 Create Document

A create document action in the process editor

The *Create document* action allows you to create a file that contains case information.

When you use Send Email [page 73] or Google Drive - Upload File [page 91] to save information from a case, you use a file variable for email attachments or the file to save. You normally provide these files via a form. You can also use the *Create document* action to create a new file using data from other variables.

Consider a shipping process whose trigger form includes details of a recipient to ship a product to and a shipping address. This process can use a *Create document* action to prepare a shipping label for printing:



Configuring a create document action in the process editor

Select a *Create document* action in the process editor to configure the following options.

Document name	Defines the name of the file variable that will store the created document.
File name	Defines the document's file name. Type # to include placeholders for variables.

File format	Choose between Microsoft Word, plain text, and comma-separated values (CSV) file types.
Body text	Use the text area to enter a template for the new document. Type # to include placeholders for variables, as you would in a Send Email [page 73] action's template.

> ⓘ Note
>
> The *Create document* action does *not* support formatting text or embedded images.

12.7 Document Template

When you are modeling a workflow, there is often the need to collect the information input entered by users of the workflow tasks. SAP Signavio Process Governance can add these data dynamically to a document, which is then used as a basis for a later audit, for example for further decisions.

To do this, add the action type *Document template* to your workflow. With this action, a task is assigned to users including the request to specify the necessary information in a custom task form. The information that is retrieved from this task form is applied to the uploaded template.

Output File Formats

You can select two different output formats, DOCX (Microsoft Word) and PDF. DOC is not available as an output format.

The output in DOCX uses the layout settings of the template.

> ⓘ Note
>
> Content collected in a Microsoft Word file can later be modified.

For the PDF output, the layout differs from the template:

- The font is always Times New Roman.
- Formatting, like italic, bold, or underlined text within replacements is not supported.

Template Creation

> ⓘ Note
>
> - Only templates created with a Windows version of Microsoft Word can be used for this function.

- Once document templates are uploaded, they cannot be downloaded and re-used. Safe the original template file for later changes.

To use this feature, you need to create a template as a Microsoft Word document that contains the required content controls. You find a detailed description on how to implement content controls in a Word document in these instructions from Microsoft .

Content Controls

ⓘ Note

Currently only plain text and rich text are supported as types of content controls.

Content controls, which have been created in the document template, each represent a form field. To map and display form fields correctly, it is mandatory to specify a title to each content control. The title is set as a property of the control.

ⓘ Note

Rich text fields don't support line breaks. If you need fields that support line breaks, use plain text fields and activate the check-box *Allow carriage returns (multiple paragraphs)*.

Select a *Document template* action in the process editor to configure the following options.

Document template	Upload the template. This action creates a new file from a document template.
Inputs tab	Specify the desired data and link either with static values or existing fields of the workflow.
Outputs tab	Select the output value *Document* and enter the desired name.

Example

Suppose your company has set up a workflow for contracts or quotations, in which several roles define the relevant document data in different tasks. The contract or quotation is created based on a standard template, so that required data from the workflow are assigned accordingly in an output form. At the end of the process, the output document containing all relevant information is made available to a sales person, who has then the ability to make any personal additions before the contract or quotation will be sent to the customer.

12.8 Map Variables

The *Map variables* action copies the value of one variable to another. You can use this to set the value of a process variable automatically, instead of manually using a form.

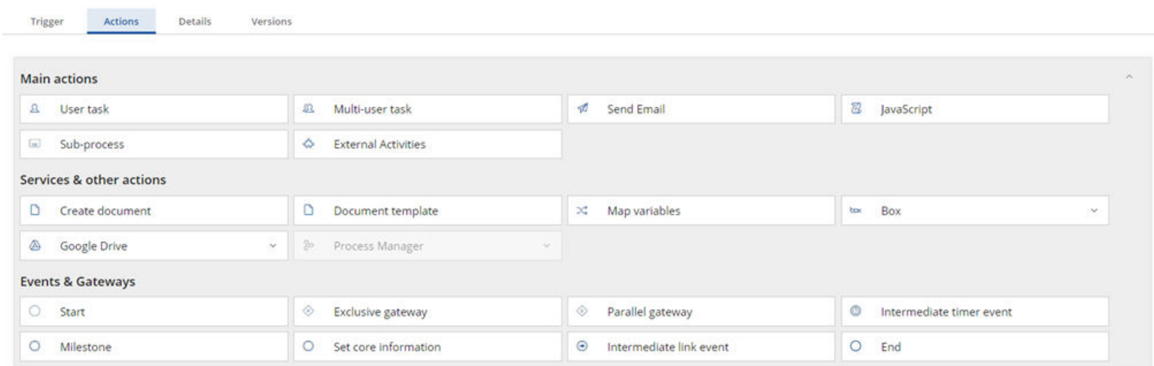
In some processes, the person who started the case should participate in the process by adopting one of the process's roles. To achieve this, you map the Case/Creator role to the relevant process role. The *Map variables* task automatically sets this role to the value of the Case creator. This automatically assigns the tasks of the process role, and any other tasks that use the same role, to the person who started the case.

12.9 External Activities - Model Guideline Check

Learn how to launch a check as to whether your process diagram complies with your company's BPMN guidelines.

Useful for detecting process errors and warnings in approval workflows, the model guideline check can be configured as follows:

1. In SAP Signavio Process Governance, choose *Processes* from the left side panel.
2. Select your process.
3. Choose the *Actions* tab.



4. Under the *Main actions* section, choose the *External Activities* tile.
5. Navigate to the *Activities* field that opens at the bottom of the page and select *Model Guideline Check* from the activity menu options.
6. Make a *Configuration* selection from the menu options.

> ⓘ Note
>
> Your workspace administrator must first configure the model guideline check activity and enable the configuration for it to be available for selection. For more information see the section below titled, *Model Guideline Check Enablement for Organization Administrators*.

7. Map the input and output values.

Inputs	Description
Guideline ID	Your organization's best practices modeling conventions, selectable from the drop-down list or configurable in SAP Signavio Process Manager. For more information, see Managing Modeling Conventions.
Model ID	A text variable or static value containing the Model ID to be checked.

> ⓘ Note
>
> Inputs need to be configured with some data. You can either enter static values or link inputs with data that already exists in this workflow.

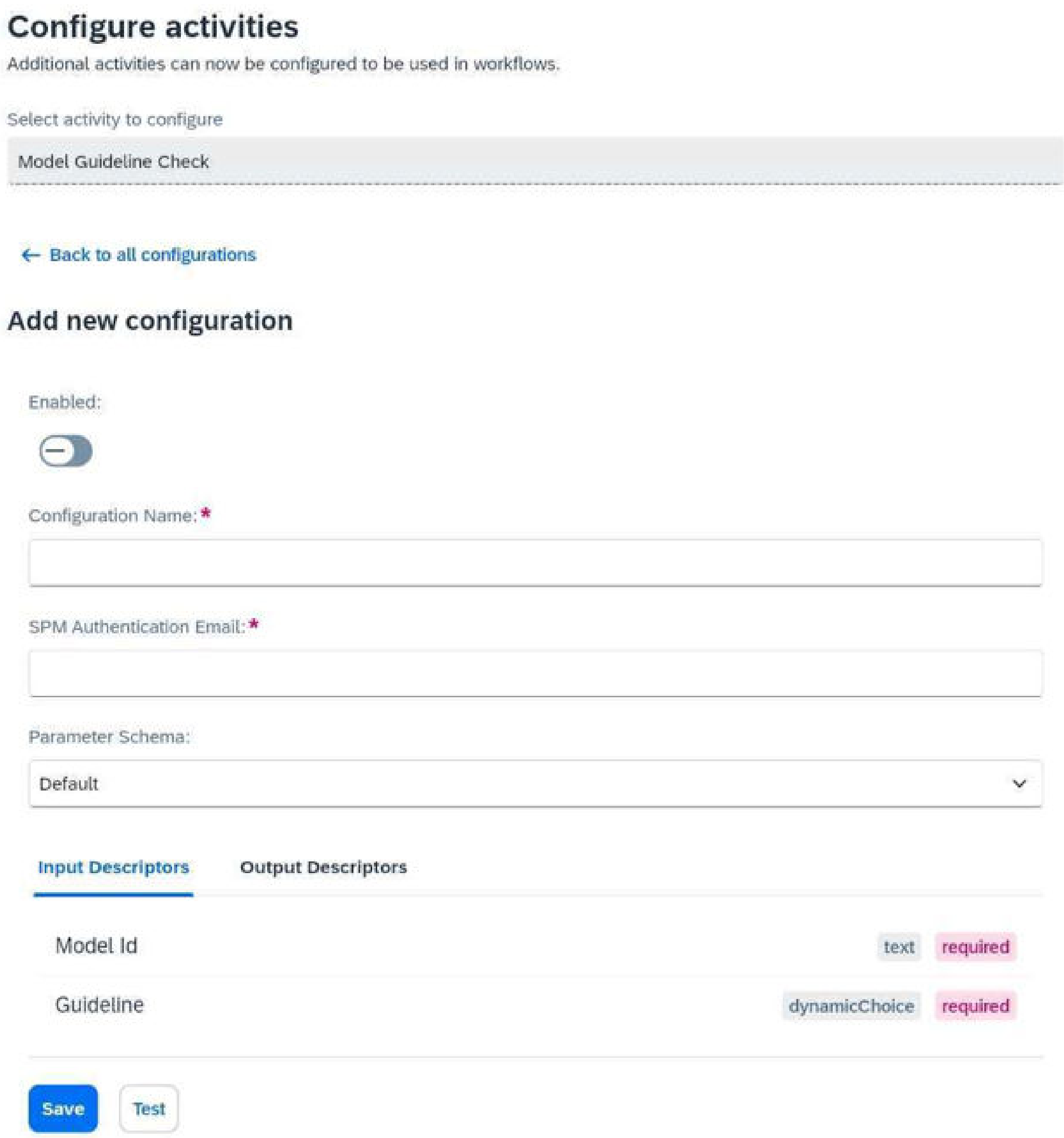
Output	Default Output Field Type
Guideline check error	Yes/no checkbox
Guideline check musts	Number
Guideline check warnings	Number
Guideline check infos	Number

> ⓘ Note
>
> Outputs provide new data for your workflow. You can either create new fields or link the outputs to fields that already exist in this workflow.

Model Guideline Check Enablement for Organization Administrators

You, as an administrator of your organization, can configure the model guideline check and toggle whether to enable or disable the activity for modellers.

1. From the navigation bar, select the bubble icon with your initials inside (*User Profile Menu*) and select *Organization settings*.
2. Choose the *Activities* tab.
3. From the *Select an activity* field, choose *Model Guideline Check*.
   The *Configure activities* window opens.



4. Select a configuration from the list under *All configurations* or choose *Add configuration* to make a new one. Saved configuration details automatically fill the fields on the right side of the window.
5. Toggle the *Enabled* option above the text fields.

> ⓘ Note
>
> To limit the users who can edit a process or configure a model guideline check, manage *Access Control* under the *Details* tab.

6. (Optional) If needed, adjust your configuration name and the associated SAP Signavio Process Manager email.

> ⓘ Note
>
> *SPM Authentication Email* is a mandatory field. For security and audit reasons, we recommended that this user is a technical user assigned an API license in SAP Signavio Process Manager.

> ⓘ Note
>
> The default input descriptors for *Parameter schema* are *Guideline* and *Model Id*.

7. Confirm with *Save*.

> ⓘ Note
>
> If a modeler uses the enabled *Model Guideline Check* configuration and the configuration is later disabled, the activity will not be available for selection for the future. Current processes already using *Model Guideline Check* continue to use the activity.

Viewing Configuration Statistics

From the *Configure activities* window, you can view statistics of configurations.

1. Select a configuration from the list under *All configurations*.
2. Choose ••• (*more options*).
3. Select *Statistics*.
   The *Configuration statistics* window opens, displaying values under the following categories:
   - Number of activities using this configuration
   - Number of processes using this configuration
   - Number of executions of activities in last 30 days
   - Last execution timestamp

Notifying Users of Configuration Changes

From the *Configure activities* window, you can send a message to workflow creators when there are changes to a configuration. Workflow creators are automatically notified when a configuration is deleted.

1. Select a configuration from the list under *All configurations*.
2. Choose ••• (*more options*).
3. Select *Notify*.
   The notify message window opens.
4. Customize a message about the configuration changes to the configuration's workflow creators, and confirm with *Notify* to release the message.
   As a result, the recipients are notified of the new message.

Deleting a Configuration

From the *Configure activities* window, you can delete existing configurations.

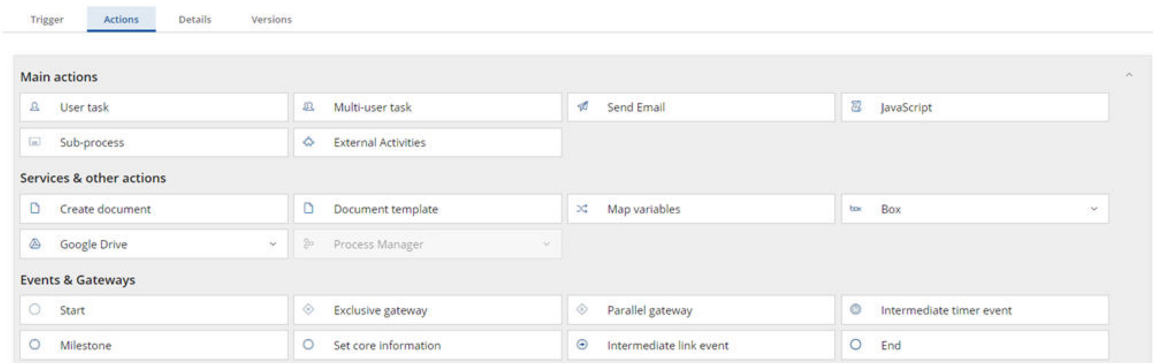
1. Select a configuration from the list under *All configurations*.
2. Choose ••• (*more options*).
3. Select *Delete*.
   A confirmation window opens with the following warning: *Deleting this configuration will interrupt current and future case execution for affected workflows. Workflow creators will be notified.*
4. In the mandatory text field, enter a reason for deleting the configuration.
5. Choose *Delete* to confirm.

12.10 External Activities - SharePoint File Upload

Learn how to connect your workflow with SharePoint files.

The SharePoint File Upload activity can be configured as follows:

1. In SAP Signavio Process Governance, choose *Processes* from the left side panel.
2. Select your process.
3. Choose the *Actions* tab.



4. Under the *Main actions* section, choose the *External Activities* tile.
5. Navigate to the *Activities* field that opens at the bottom of the page and select *SharePoint File Upload* from the activity menu options.
6. Make a *Configuration* selection from the menu options.

> ⓘ Note
>
> Your workspace administrator must first configure the SharePoint File Upload activity and enable the configuration for it to be available for selection. For more information, see Enabling SharePoint File Upload as an Organization Administrator.

7. Map the input and output values.

Input	Description
Target folder	Here you choose the destination to store the SharePoint file. The target folder is either the configured base folder or one of its subfolders.
Upload file(s)	This field allows you to select the file variables to be up-loaded. You can choose a single file or multiple files.

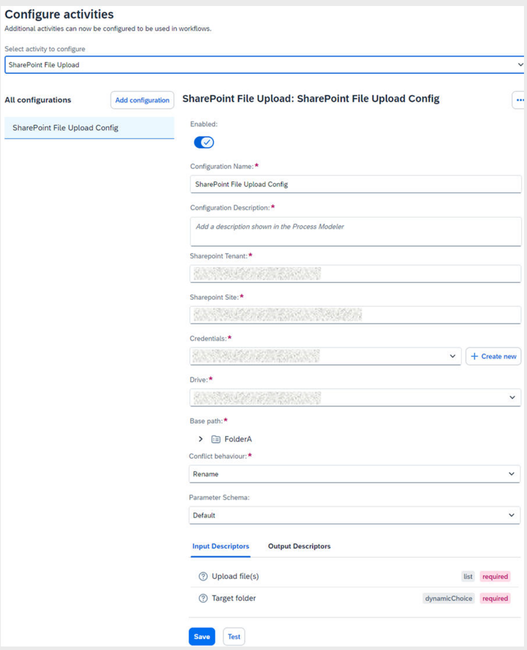
Output	Description
Uploaded files	Here you find a list of each uploaded file and the following details: original file name, SharePoint file name, file ID, and direct link to the uploaded file.

Enabling SharePoint File Upload as an Organization Administrator

You, as an administrator of your organization, can configure the SharePoint File Upload activity and toggle whether to enable or disable the activity for modelers.

1. From the header area of SAP Signavio Process Governance, choose JM (*User Profile Menu - your intitials*) and select *Organization settings*.
2. Navigate to the *Activities* tab.
3. From the *Select an activity* field, choose *SharePoint File Upload*.
   The *Configure activities* window opens.

   Example

4. Select a configuration from the list under *All configurations* or choose *Add configuration* to make a new one. Saved configuration details automatically fill the fields on the right side of the window.

5. Toggle the *Enabled* option above the text fields.
6. Fill out the *Configure activities* fields as needed.

Field Name	Description
Configuration Name	The name of the configuration.
Configuration Description	An explanation of the configuration's purpose, to be displayed in the activity configuration.
SharePoint Tenant	The tenant ID.
SharePoint Site	The URL of the SharePoint site or site ID.
Credentials	The credentials used for SharePoint authentication. Credentials must be added from Credential Store.
Drive	A storage location where users can upload files. Options available in drop down list after selection of the SharePoint tenant, site, and credentials.
Base path	A list of folders from the *Drive* field.
Conflict behaviour	Determines the action when an uploaded file name matches an existing file. • *Rename*: Keeps both files and renames the new file. • *Replace*: Overwrites the existing file by creating a new version. • *Fail*: Stops the upload activity to allow for manual file managing.
Parameter schema	The default input descriptors for *Parameter schema* are *Upload File(s)* and *Target folder*.

7. Confirm with *Save*.

12.10.1 Credentials for SharePoint Integration

Check the requirements for access to SharePoint integration activities.

> ⓘ Note
>
> When integrating with SharePoint, as it is being authenticated with Microsoft Entra ID application:
>
> - *Username*: Refers to clientID value from Microsoft Entra.
> - *Secret Value*: Refers to ClientSecret value form Microsoft Entra.
>
> To deconflict or to clarify authentication fields, check the descriptions in the chart below.

Field Name	Description
Name	Name of the credential.
Username	The username or client ID associated with the credential.

Field Name	Description
Secret value	Text that needs to be securely stored, such as a password or secret access key.
Metadata	Any text string used for description by administration.
Status	• *Enabled*: The credential can be used by external activities. • *Disabled*: The credential cannot be used by any configuration or activity.

When creating a credential, *Name* and *Secret value* are mandatory fields.

Application Setup in Microsoft Entra ID

Setting up an application in Microsoft Entra ID is also necessary to properly configure the integration. This involves the following steps:

- Register your application in Microsoft Entra ID.
- Obtain the *Client Id* and *Client Secret* during the registration process.
- Configure the necessary permissions for your application to interact with SharePoint (including sites access and write permissions).
- Assign API Permissions. There are two ways to do this and you need to align with your Microsoft SharePoint admin:
  1. Grant the app full read and write access to all SharePoint Sites of the tenant (Scope: Sites.ReadWrite.All).
  2. This requires an additional app to grant our app access to the selected site via Graph API or PowerShell. Often there is an app/script available within the company to do this, please reach out to your SharePoint admin. Ensure that the Application has only API write access to the required SharePoint Page. For more information, search for releated Microsoft-based tutorials.

For more information, navigate to Microsoft Entra ID and search for application help.

Related Information

Organization Settings for Administrators [page 18]

12.11 Box - Upload File

A box upload file task in the process editor

The Box *Upload file* action saves one or more files to a Box account that you select.

> ⓘ Note
>
> The maximum file size per file is 50 MB.

Configuration

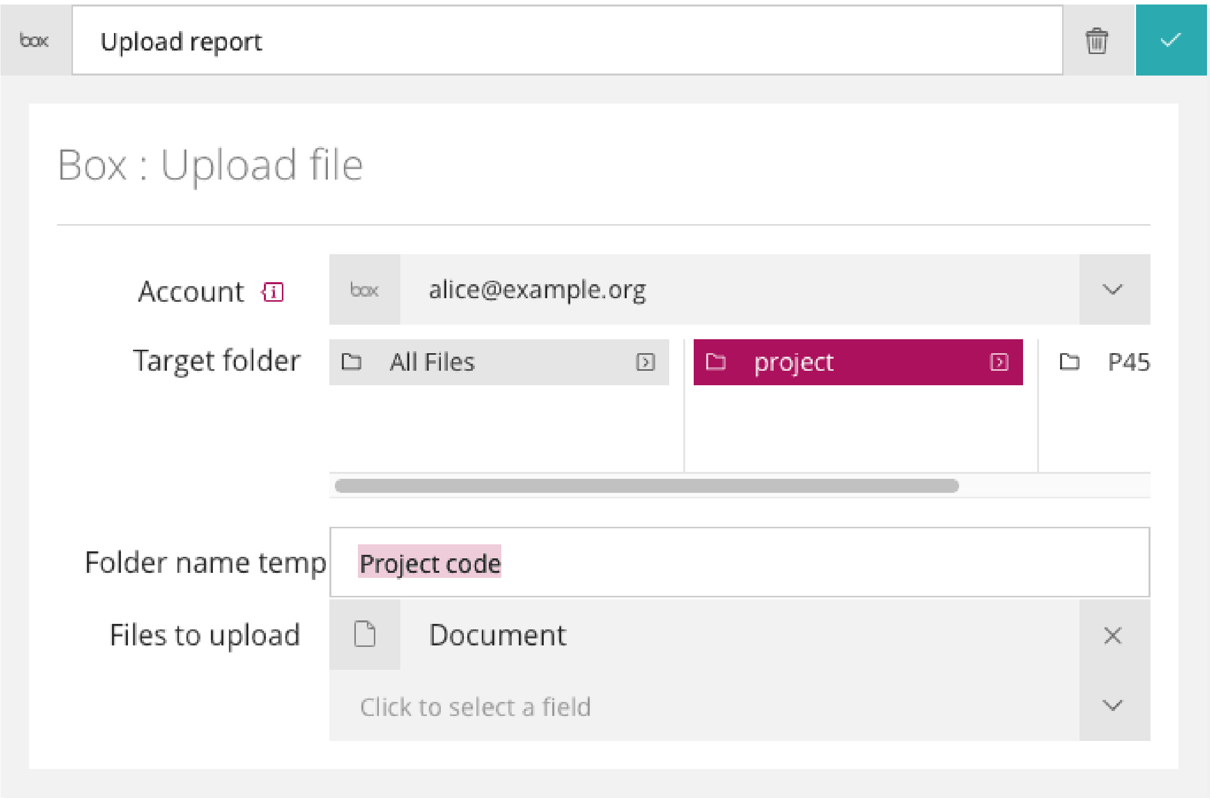
After creating a Box *Upload file* action, the configuration panel shows a button to start configuring the account.

When you choose the *Configure a Box account* button, a pop-up window will open for you to authorize SAP Signavio Process Governance to use your Box account. After logging in to your Box account, if you have not already logged in, Box shows an authorization page.

After granting access, the pop up will close and your Box account is connected.

Upload File Action

Once you have configured your Box account, the *Upload file* action configuration panel displays the account and also shows the folders in *All Files* in your Box account.



Box authenticated configuration

Other people in your organization can see that you have configured an account, but they cannot see your email address or browse your account folders.

On the configuration panel, next to *Target folder*, you can now browse and select the folder you want to upload the file(s) to.

Next to *Folder name template*, you can optionally specify a subfolder name to create inside the target folder. This name template can include process variables, so you can create new subfolders dynamically to organize your files. For example, if your process variables include a unique customer ID, then you can use that to save each customer's files in a separate folder. Use a forward slash / to separate nested subfolder levels.

Next to *Files to upload*, you can select the variable field containing one or more files to upload. If the process did not already include a file variable, SAP Signavio Process Governance automatically creates a variable called 'File'. If the process variables did include a file or list of files, SAP Signavio Process Governance preselects it.

12.12 Google Drive - Upload File

A Google Drive Upload file task in the process editor

The Google Drive *Upload file* action sends one or more files to an account of your choice.

> **Note**
>
> The maximum file size per file is 50 MB.

Configuration

After creating a Google Drive *Upload file* action, the configuration panel shows a button to start configuring the account.

When you click *Configure a Google Drive account*, a pop-up window helps you integrate SAP Signavio Process Governance with your Google Drive account.

Google will check that you have already logged in to Google. This check has three possible outcomes:

1. If you have already authenticated with a single user with Google, the set-up process skips the log in page and you go straight to the Google Drive permission grant below.
2. If you haven't authenticated with Google, you will see a log in window.

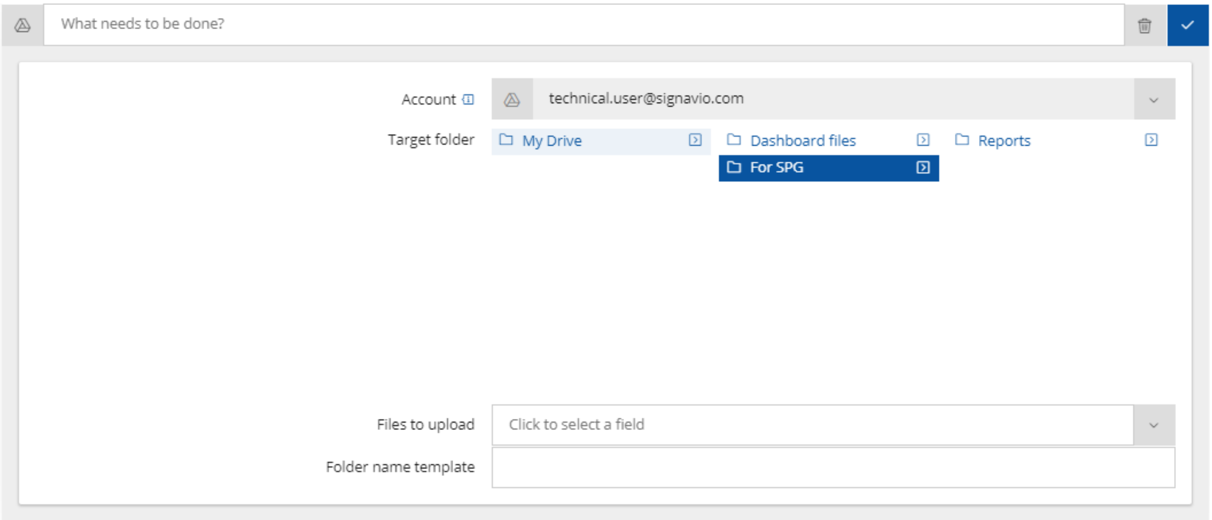
1. If you have authenticated with multiple Google accounts, select the account you want to use.

After you have completed authentication, you'll see a page that allows you to give SAP Signavio Process Governance access to your Google account.

After accepting the permissions, the pop up will disappear and SAP Signavio Process Governance will have completed connecting to your account.

Upload File Action

Once you have configured your Google Drive account, the *Upload file* action configuration panel displays the account and also shows the folders in *My Drive* in your Google Drive account.



Google Drive Upload file authenticated configuration

Other people in your organization can see that you have configured an account, but they cannot see your email address or browse your account folders.

In the *Target folder* section you can now browse and select the folder you want to upload the file(s) to.

Next to *Folder name template*, you can optionally specify a subfolder name to create inside the target folder. This name template can include process variables, so you can create new subfolders dynamically to organize your files. For example, if your process variables include a unique customer ID, then you can use that to save each customer's files in a separate folder. Use a forward slash `/` to separate nested subfolder levels.

Next to *Files to upload*, you can select the variable field containing one or more files to upload. If the process did not already include a file variable, SAP Signavio Process Governance automatically creates a variable called `File`. If the process variables did include a file or list of files, SAP Signavio Process Governance preselects it.

12.13 Google Drive - Add Row to Sheet

The Google Drive *Add row to sheet* action adds a row to a Google Sheets spreadsheet. You can use this to save the values of process variables at process milestones, and build a custom overview of cases.

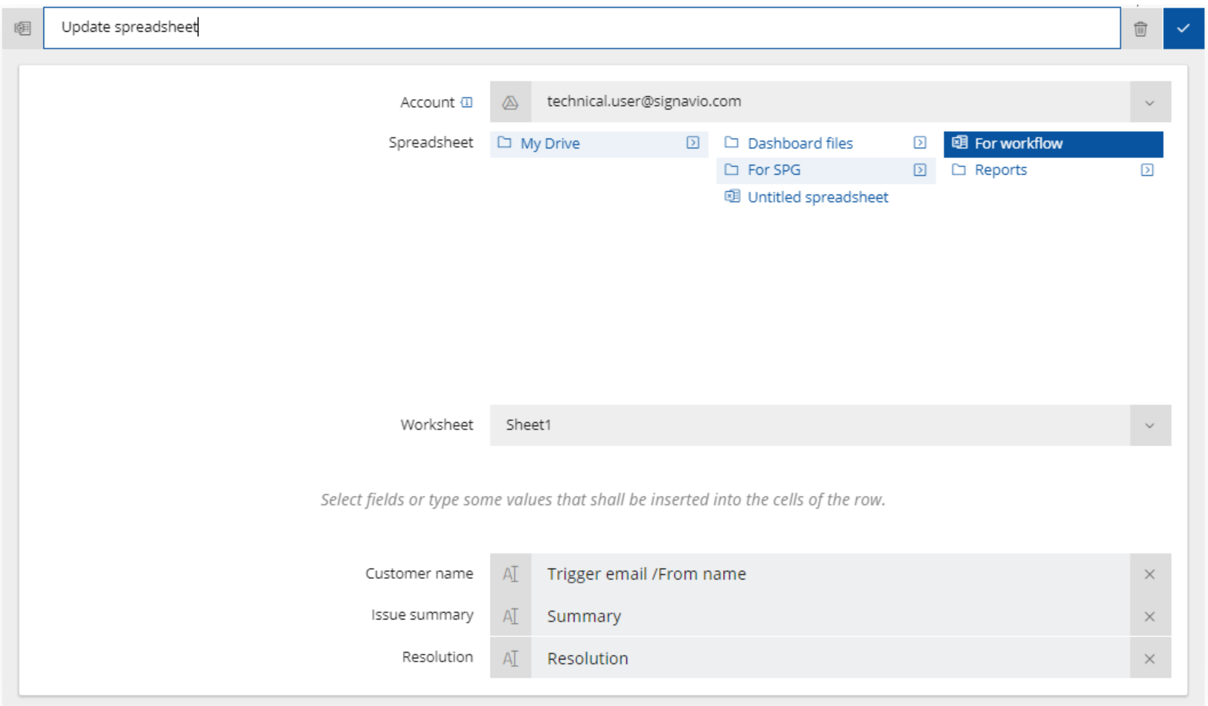
Configuration

After creating a Google Drive *Add row to sheet* action, the configuration panel shows a button to start configuring the account. This configuration has the same steps as in the Google Drive - Upload File [page 91] configuration.

When you have authenticated with a Google account and granted permission, you can configure the *Add row to sheet* action.

Add Row to Sheet Action

Once you have configured your Google Drive account, the *Add row to sheet* action configuration panel displays the account, the spreadsheet, the worksheet within the spreadsheet, and the worksheet columns.



Google Drive Add row to sheet authenticated configuration

Each column name, such as *Customer name* in this example, comes from a column heading in the spreadsheet. For each column, select one of the variables from the list.

12.14 Google Drive - Add Calendar Event

The Google Drive *Add calendar event* action adds an event to a Google Calendar. You can use this to schedule meetings or time to work on a task, based on the values of process variables.

Configuration

After creating a Google Drive *Add calendar event* action, the configuration panel shows a button to start configuring the account. This configuration has the same steps as in the Google Drive - Upload File [page 91] configuration.

When you have authenticated with a Google account and granted permission, you can configure the *Add calendar event* action.

Add Calendar Event Action

Once you have configured your Google Drive account, the *Add calendar event* action configuration panel shows the calendar event fields.

In the configuration you can specify the following.

Calendar	The calendar within the selected Google account.
Event summary (optional)	A text variable to use as the name of the new calendar event. If you don't select a text variable, the event will have a blank name.
Start date	A date variable for the event's start date and time.
End date	A date variable for the event's end date and time.
Attendees (optional)	Email address variables for people to invite to the calendar event.

12.15 SAP Signavio Process Manager - DMN Task

> **Note**
>
> To use DMN Tasks, SAP Signavio Process Governance needs to be linked to SAP Signavio Process Manager, read more in the section Integrating SAP Signavio Process Manager with SAP Signavio Process Governance.

DMN (Decision Model and Notation) is suitable for business decisions that follow a rule-based decision logic.

With DMN tasks , you can execute the decision logic from a DMN diagram in SAP Signavio Process Governance. You create the DMN diagram in SAP Signavio Process Manager.

Creating a DMN Diagram in SAP Signavio Process Manager

1. Model a decision, see Model a decision.
2. Publish the DMN diagram in SAP Signavio Process Collaboration Hub. The published DMN diagram can be used for a DMN task in SAP Signavio Process Governance.

> → Tip
>
> You can test the decision logic in SAP Signavio Process Collaboration Hub, read more in section DMN diagrams. If the simulation shows an invalid decision, the decision cannot be used for DMN tasks.

Limitations

The following limitations apply for DMN diagrams to use with DMN tasks:

- Multi hit policies can be used, with the exception of the Output order hit policy (see Hit policy types).
- Only decision diagrams with a single top-level decision can be used (this is the decision used by the DMN task).
- Multi-instance decisions and DMN diagrams that include linked decisions cannot be used in DMN tasks.

Configuring the DMN Task in SAP Signavio Process Governance

In the process builder, drag the DMN task action either from the collapsed actions palette or from the drop-down list of **SAP Signavio Process Manager** actions.

1. Build a process with a *DMN task* action.
2. In the configuration panel of the *DMN task*, select a *DMN Diagram* to use.
    - The published revision and the *Decision* is inserted automatically.
3. Select the necessary *Inputs* and *Outputs*.
4. Add an element to the process that uses the output of the decision. The most common use is an exclusive gateway with an automatic decision, based on the output of the DMN task.

Updating the DMN Task

When a new revision of the DMN diagram is published in SAP Signavio Process Manager, the DMN task is not updated automatically.

If a new revision is available, you see an update suggestion in the configuration panel of the DMN task.

To update the DMN task, follow these steps:

1. In the configuration panel of the *DMN task*,click the link informing you about a new revision.

- The revision is updated.
- The *Decision* is inserted automatically.

2. If necessary, change the *Inputs* and *Outputs*.
3. Publish the new process version.
   - The updated DMN task is used for new cases.

→ Tip

Running cases are not affected by the update.

If the logic of the DMN diagram was changed, it can be necessary to change the process to match the new logic. Inputs and outputs are reset if they no longer fit the new revision.

ⓘ Note

- The update suggestion in the configuration panel is the only notification for updated revisions.
- If you don't update the DMN task, the previous revision is used when starting cases.

Removing a Decision from a DMN Task

You can select a different decision for an existing DMN task or delete a DMN task to no longer use a decision in a workflow.

To remove a decision completely, so that it no longer can be selected for DMN tasks, delete the decision in SAP Signavio Process Manager. Empty the trash folder to remove the decision completely. While the decision is still in the trash folder, the decision can be used for DMN tasks.

ⓘ Note

You can't change an existing DMN rule task to a DMN task.

Example

You can use DMN diagrams for decisions like:

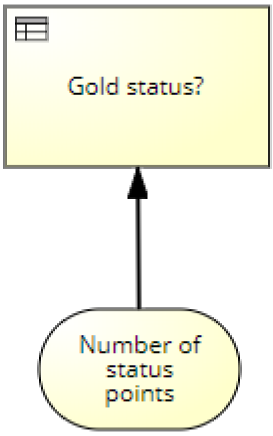
- Does this customer receive a discount?
- Does this expense comply with tax regulations?
- Does this order qualify for a free gift?

In the following example, the decision modeled with DMN is "Does this customer qualify for gold status?". The process with the DMN task uses this decision for further actions.

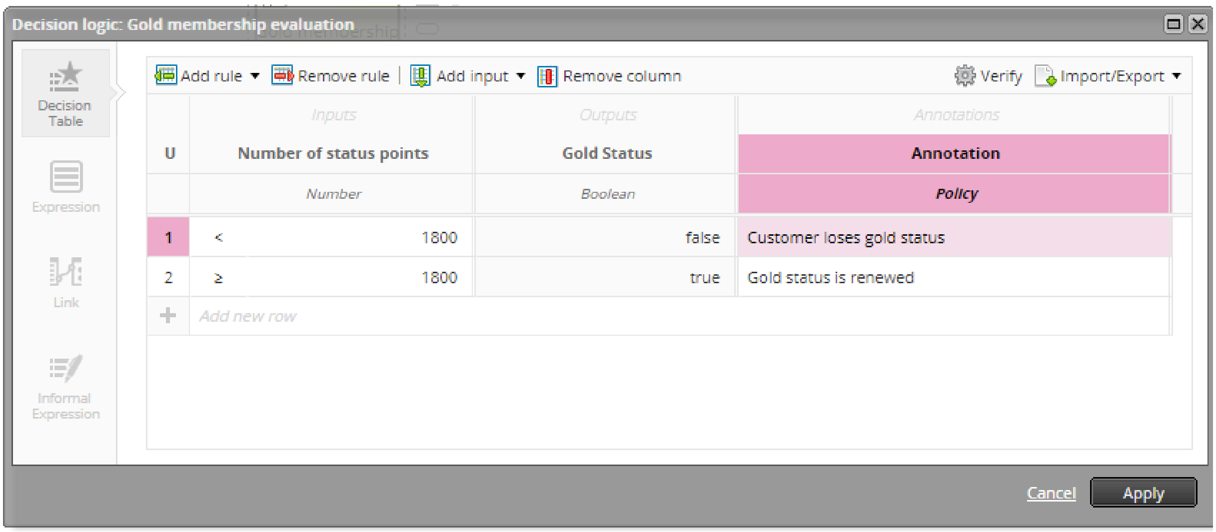
First create a DMN diagram named **Status evaluation** in SAP Signavio Process Manager.

The customer is rewarded Gold status for a certain number of status points. Since the number of status points is the deciding factor, this number is the input for the decision. The decision element is named **Gold status?** in this example.

Add a DMN element with one input, **Number of status points**. The decision logic follows two rules, one for fewer than 1800 points and one for 1800 points and more. Add the rules to the *Decision table*.



DMN diagram with one input



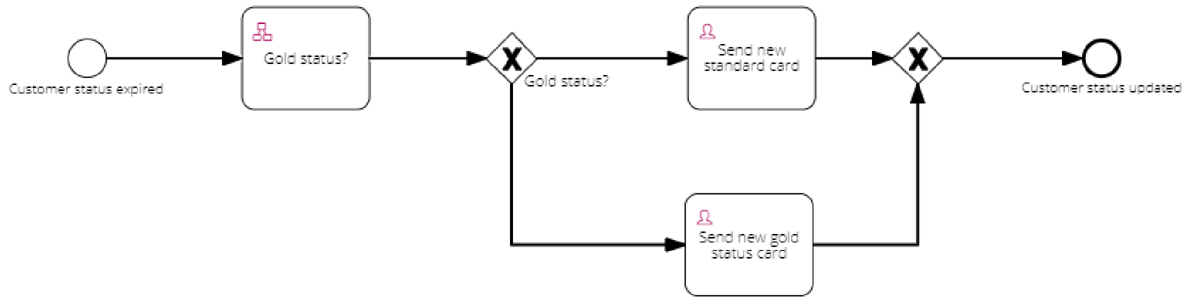
Decision logic table with two rules

ⓘ Note

The annotations are not visible in SAP Signavio Process Governance.

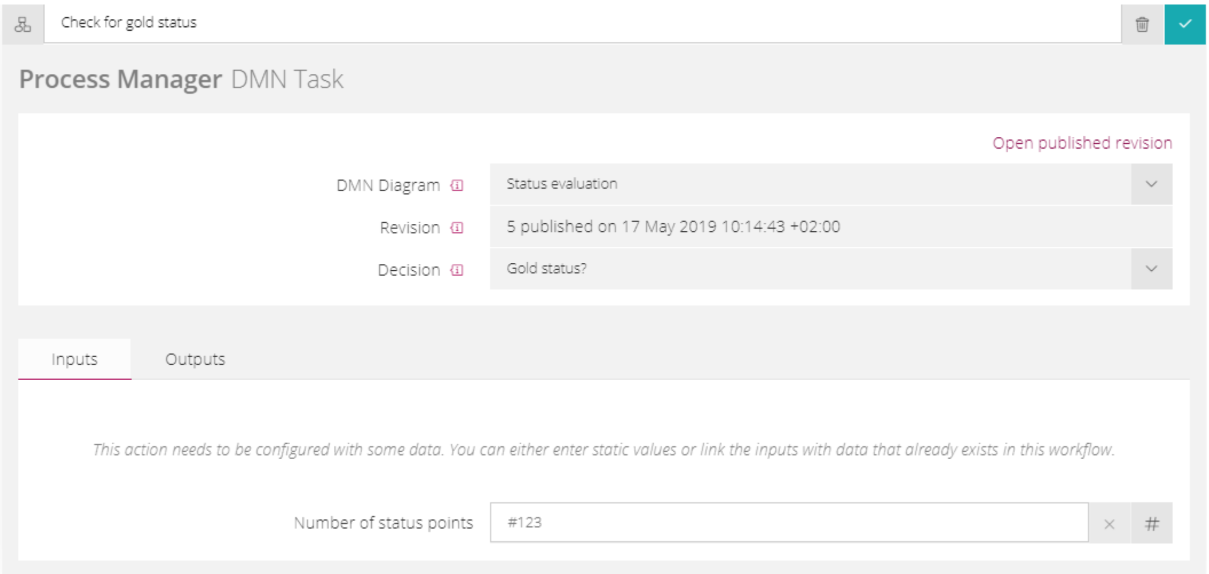
After you have added the decision logic, publish the diagram in SAP Signavio Process Collaboration Hub.

Now use SAP Signavio Process Governance to build a new process **Determine customer status**.

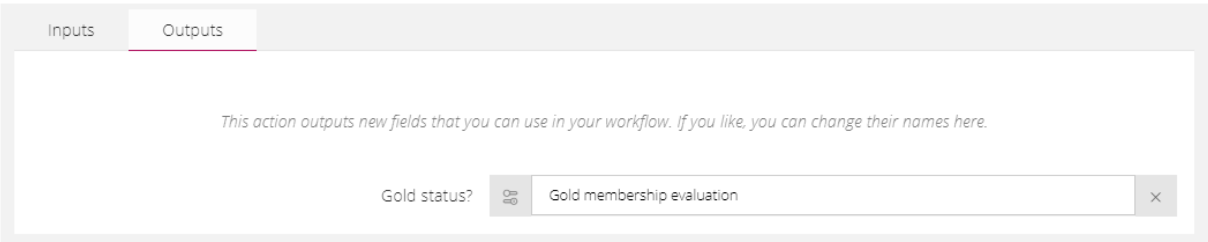


Determine customer status process

To set up the DMN task in the process, open the configuration panel of the DMN task. Select the DMN diagram **Status evaluation**. You can see the revision, the *Decision* is found automatically.



The only *Input* in this example is **Number of status points**. The *Output*, used by the exclusive gateway, is **Gold membership?**.



Now you can publish the process and start a case.

12.16 SAP Signavio Process Manager - Set Model State

Use this sction type to create approval workflows.

When you use SAP Signavio Process Manager for process modeling, you can use SAP Signavio Process Governance to manage process diagram approvals. SAP Signavio Process Manager triggers these process diagram approval workflows, which run in SAP Signavio Process Governance and in turn update the process model in SAP Signavio Process Manager.

Approval workflows can also be started and tracked in SAP Signavio Process Collaboration Hub, see section Diagram approvals for details.

ⓘ Note

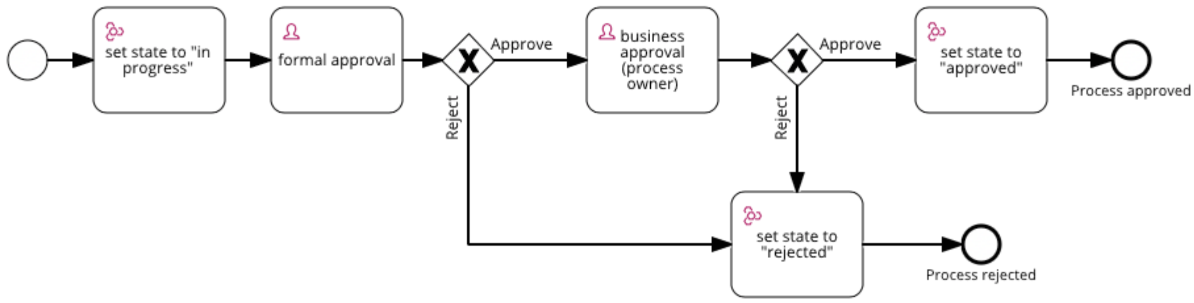
To use the *Set model state* task, you need to have access to SAP Signavio Process Manager . This task only works in a process that has the **SAP Signavio approval** trigger. Read more about approval workflows in section Create and edit approval workflows.

Set Model State Action

The *Set model state* action automatically updates the diagram state in SAP Signavio Process Manager and SAP Signavio Process Collaboration Hub, for example to mark the diagram as *approved* or *in progress*. You typically use this as part of a management approval process that marks the diagram as *accepted* or *rejected*.

The *Model state* options are set in SAP Signavio Process Manager. See Manage approval workflows for instructions on the setup.

The following image shows a process diagram approval workflow that uses *Set model state* actions.



To create the approval workflow above, follow these steps:

1. Add a *Set model state* action for the first state, usually "In progress".
2. Enter a description to the action and select the *Model state* the action should set from the drop-down list.
3. Add a user task for the approval.
4. Add an exclusive gateway for a manual decision, for details see section Exclusive Gateway [page 104].
5. For the Approve decision, add a user task.
6. For the rejection, add a Set model state action and select the state, usually "Rejected".
7. Behind the exclusive gateway, add a Set model state action and select the state, usually "Approved".

13 Forms

In SAP Signavio Process Governance, you can use forms to enter information when you run a process. You can use forms in two places: form triggers and user tasks.

13.1 Form Triggers

You use a form trigger to set the values of workflow variables when you start a new case for a process.

This form has a description (for example, "Enter personal details") and two fields. The icon next to the *Name* field label indicates that the field has an additional description.

To add a form trigger to a process, use the process builder's Triggers [page 44] page to select *When a form is submitted*.

13.2 User Task Form

You use a user task form when users need to for enter and update data as part of the task.

To add a user task form to a process, follow these steps:

1. On the process builder's *Actions* page, add a user task.
2. In the user task's configuration panel, select the *Form* tab to open the form builder.
3. Add fields from the palette to the form. You can reuse forms and fields already available in the workflow.

13.3 Use the Form Builder

To create a form in the process editor, for a form trigger or user task, you use the form builder.

Use the *Description* text area to provide initial instructions to people who complete the form. You can use Markdown [page 125] to format the description, which makes it convenient to link to additional information, for example.

In the *Reuse a form* section, you can select any form already available in your workflow to reuse. Doing so copies all fields and field configurations (including mandatory, read-only and custom conditions). If you later edit the original form field, it will not change the information in the duplicated form.

The *Reuse a field* section lists variables that the process has already defined on other forms, such as a trigger form. Type to search for an existing field.

The *Add a field* section contains a field types palette. Choose one of the field types to add a field of that type to the form.

Adding an existing field to a form makes it possible to view or update existing information, such as a user task form that you use to complete information the person who started the case did not enter on the trigger form.

13.3.1 Configure Form Fields

The *Fields* section shows the fields you add to a form.

Select a field in the *Fields* section to open its configuration panel. The top row of the field configuration panel shows the field type label, the editable field name.

To delete a field, choose (*delete*), and confirm with (*check*).

You can also configure the following properties:

- *Description* - an optional field description, shown via context-sensitive help icon
- *Initial value* - an optional default value that prepopulates the form field
- *Read-only* - specifies that you cannot edit the value, used to display previously-entered information
- *Mandatory* - specifies that you must enter a field value, so that you cannot complete the form without a value for this field
- *Define custom rules* - define custom rules for your field, such as when the field should be shown to users.
- *Allow entering multiple values* - specifies that the field has a list of values that you add and remove independently

Text fields have a *Multi-line* option to display the form field as a multi-line text input area, for longer text values. If the text field is referenced in another place in the workflow, this option can't be changed. To check if a field is used elsewhere in the process, use the *Fields overview* in the *Details* tab.

When you enable the *Allow entering multiple values* option, the field appears differently on forms. Entering a value adds it to the list. Use the × icon to remove a value.

Choice fields have an *Options* list, so you can add values to choose between.

Date fields have a *Date/time* option for choosing between a date and time, just a date without a time of day, or just a time.

User fields have a *Candidates* option that you can use to limit which users can be assigned.

Money Fields

You can define one or multiple permitted currencies when you add a money field. This way you can control which currencies can be used in the case execution.

When you define multiple permitted currencies, you can set a default currency.

Related Information

Fields Overview [page 57]

13.3.2 Form Groups

If you have a very long form, keeping your fields as a long, unbroken list can be confusing. You can use form groups to add structure to your form by grouping similar fields together. For example, you can use form groups to create a section where users can add their address.

To use form groups, follow these steps:

1. Open the form builder.
2. Choose *Form Group* in the field types palette.
3. In the configuration dialog, you can name your form group and write a description. (You can use Markdown [page 125] to add formatting your description.)
4. Drag and drop fields from the list to add them to your form group.

> ⓘ Note
>
> Form groups can be reused in other forms. They can also be nested inside other form groups, like a folder.

You can define custom rules for your form group, such as when the form should be shown to users. These rules are applied to all fields within the form group, unless the field has a custom rule of its own.

13.3.3 Dynamic Form Fields

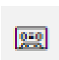
Sometimes, a process only uses a form field when another field has a certain value. You can configure form fields with a dynamic configuration that depends on custom rules.

When you select *Define custom rules*, in the *Visibility* tab you can specify conditions to determine when the form displays the field. You can combine multiple conditions.

On the *Configurations* tab, you can also configure conditions that make the field read-only or mandatory.

13.4 View Form Data

Form data can be viewed in the history panel.

To view all forms in an event, choose  (*history*) and then the *forms* tab.

To view the form data, choose the name of a form.

14 Control Flow

You use transitions, gateways and events to specify the processing order of the actions in a process.

14.1 Transition

The process builder displays a transition an arrow from a source element to a destination element. The transition specifies that the workflow engine only executes the destination element after completing the source element. BPMN calls a transition a *sequence flow*.

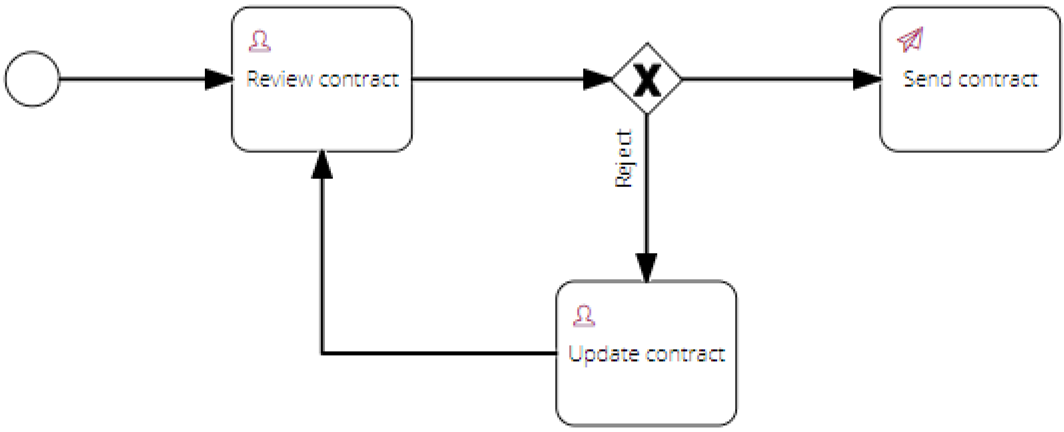
14.2 Exclusive Gateway

Use an exclusive gateway to make a choice between multiple execution paths. The exclusive gateway selects one of the outgoing transitions, and only continues execution on that transition. You can configure an exclusive gateway with a *manual decision* or an *automatic decision*.

Manual Decision

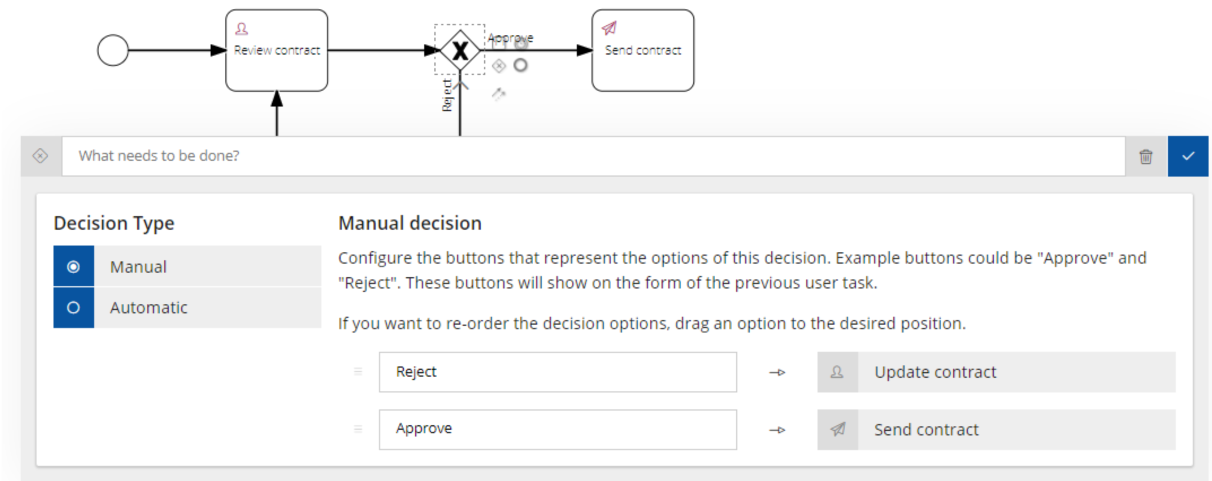
Use a manual decision for an exclusive gateway when a person must make a decision. A user task must precede the gateway; this task includes making the decision. The user interface presents the decision to the user as buttons on the user task form.

Suppose you have a user task called **Review contract**, an exclusive gateway and the two user tasks **Print contract** and **Update contract**:



An exclusive gateway must have at least one incoming and two outgoing transitions

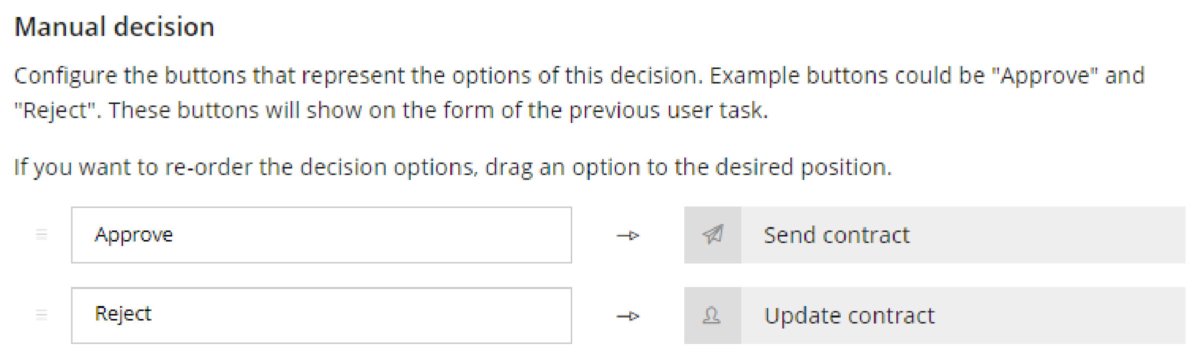
Select the exclusive gateway. Its type defaults to *manual decision*. After creating the elements and connecting them, as above, you have configured the exclusive gateway:



Default manual decision configuration

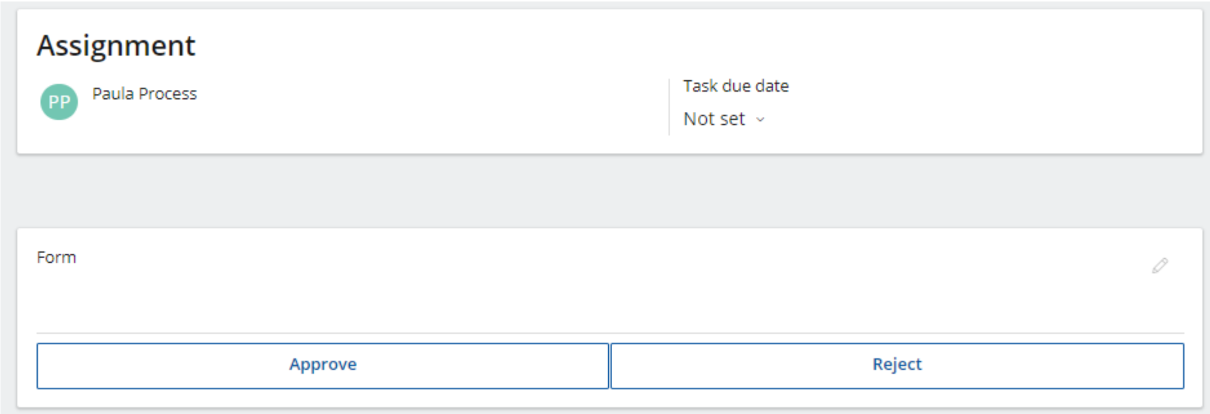
To use the decision, you need to name the buttons that represent the decision. For each button, the label on the right indicates the next action in the process, which SAP Signavio Process Governance will perform when someone clicks the button. In this example, when the user clicks the decision button **Print contract**, SAP Signavio Process Governance executes the **Print contract** task, but *not* the **Update contract** task.

You can easily change the text on the buttons, and order they appear in. For example, change them to **Approve** and **Reject**, and drag the **Approve** button configuration to the top so that **Approve** appears first on the form:



Customized decision buttons

After starting a new case for this process, the **Review contract** task will have decision buttons:



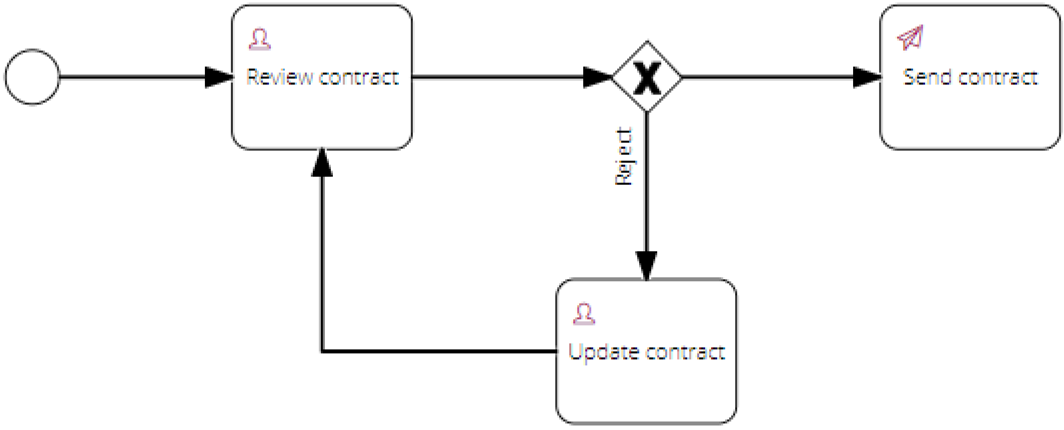
Task decision buttons

When the task before the exclusive gateway - **Review contract** in this example - has a form, the form includes the decision buttons.

Manual Decision Variable

Adding a manual decision to a process also creates a workflow variable. You can use this to re-use the result of a decision later in the process, either to display the entered value on another form, or to use the value in an automatic decision's condition.

During workflow execution, selecting a decision sets the variable's value to the selected decision -the text on the decision button. In this example, the decision variable has the value **Approve** or **Reject**.

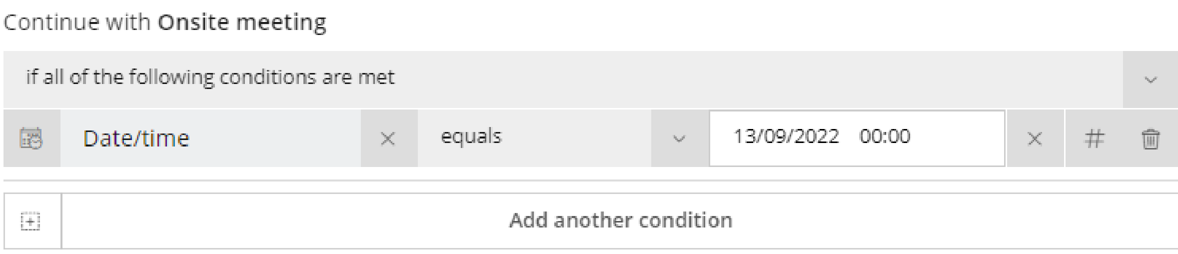


Decision variable values - "Approve" or "Reject"

The variable has the name **Decision**, by default, or the name of the gateway if it has one. You can change the variable name on the process editor's *Details* tab, in the *Fields overview*.

Automatic Decision

An exclusive gateway that selects an outgoing transition based on conditions that you choose models an automatic decision. For each transition, you can formulate a condition using workflow data. The workflow engine evaluates transition conditions in order, from top to bottom. The workflow engine will take the transition with the first condition that evaluates to true, using the current case's field values.



Automatic decision condition editor

To specify a condition, start by selecting a field and a comparison operator. Enter either a static value in the input field on the right, or choose the  button to select another field.

A condition can include multiple field value comparisons. To add more sub-conditions, click the button at the bottom of the list. You can also use the select field at the top to specify that either *all* conditions in the list must evaluate to true, or that at least one of them must evaluate to true.

If you do not completely specify a sub-condition, evaluating the whole condition will fail and the workflow engine will not follow the transition. The  symbol indicates an incomplete sub-condition. Choose the trash icon  to remove the sub-condition from the list.

Default Transition

An automatic decision usually has a default transition. You use a default transition as a fallback mechanism: if none of the conditions evaluate to true, the workflow engine follows the default transition.

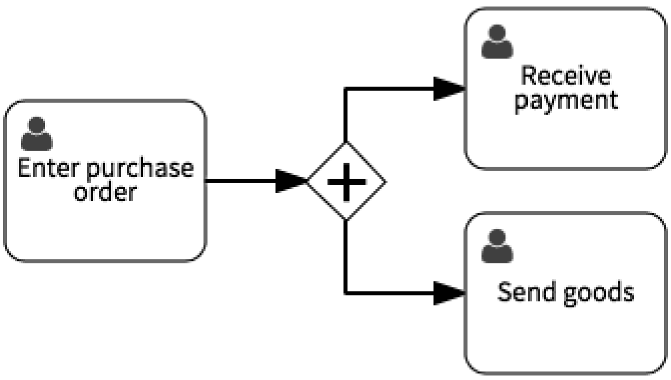
To make a transition the default, select the *per default* item in the selection field at the top.

14.3 Parallel Gateway

Use parallel gateways to model tasks that people will complete at the same time as each other, or one at a time but not in a particular order. To do this, you *fork* and *join* the sequence flow.

Forking

With a parallel gateway, you can fork execution into multiple, concurrent flows. When process execution arrives in a parallel gateway, the workflow engine creates a new individual execution flow for each of the gateway's outgoing transitions. Let's look at the following purchase order example:



A parallel gateway example

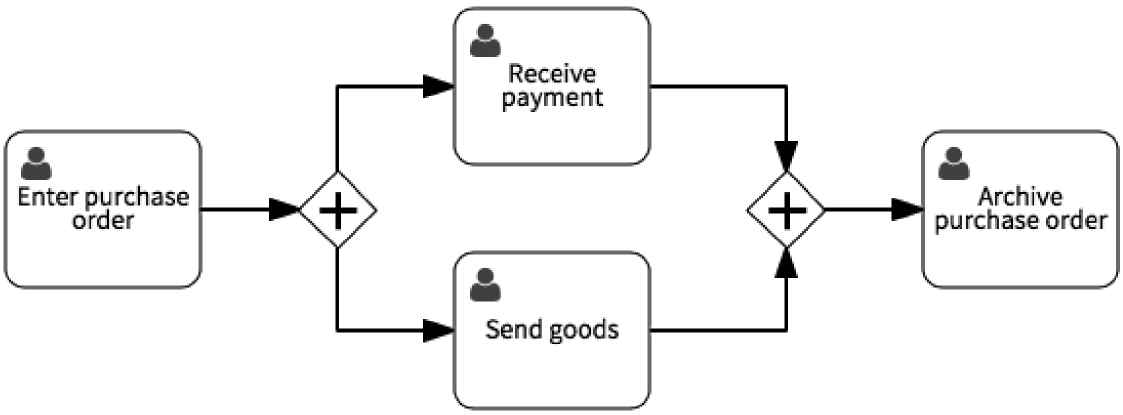
In this example, completing the **Enter purchase order** user task activates the parallel gateway. The parallel gateway will create two individual paths of execution. One will take the transition to **Receive payment** and create that user task. Meanwhile, the other will create the **Send goods** user task.

You can have as many outgoing transitions as you want. The workflow engine will create all destination tasks for those transitions at once.

Joining

You also use a parallel gateway to join concurrent paths back together. In this case, the joining parallel gateway has more then one incoming transition. Workflow execution will wait at the gateway until as many execution flows arrive as it has incoming transitions. When the last concurrent flow arrives, the joining parallel gateway will activate and the workflow engine will create one execution flow on the outgoing transition.

To continue the previous example, extend the purchase order process to look:

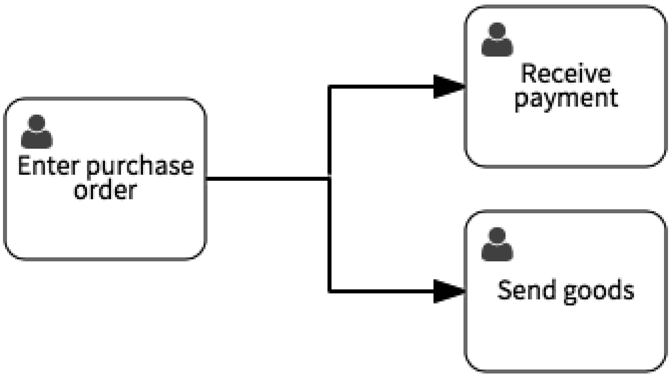


A parallel gateway example with join

In this example, **Archive purchase order** will only start after people complete both the **Receive payment** and **Send goods** tasks.

Default Forking

By default, the workflow engine interprets multiple outgoing transitions from an action as parallel tasks. This means that if you have multiple transitions from a user task, the workflow engine will create concurrent tasks for all of the transitions' destination actions. Let's look at a simple example.



Default forking

After **Enter purchase order** completes, the workflow engine will create the tasks **Receive payment** and **Send goods** immediately.

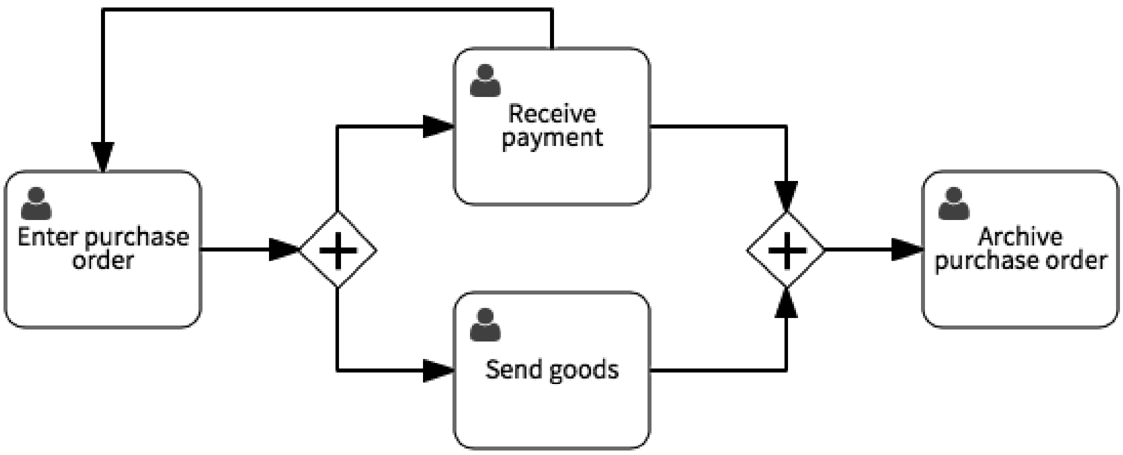
You can combine default forking with a parallel gateway for joining.

Default Merging

When multiple transitions lead to a user task, the workflow engine will start the user task once for each execution flow that arrives. This means that the workflow engine does not perform implicit joining for parallel flows.

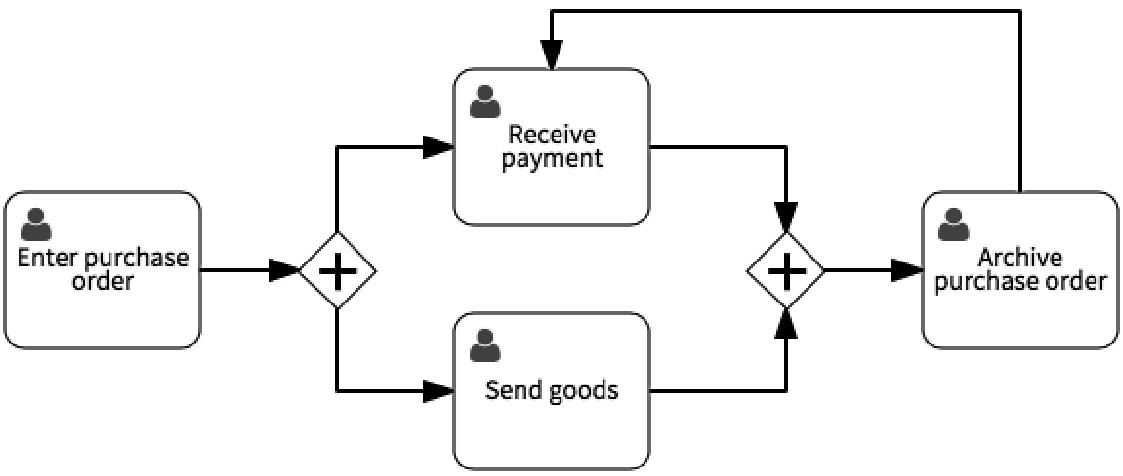
Parallel Gateway Issues

You will end up with problems if you loop back over parallel gateways. To avoid situations:



Undesirable loopback

and this:



Undesirable loopback

To avoid these issues, think of all actions between forking and joining as a self-contained part of the process, such that no transitions should cross that scope.

14.4 Start Event

A start event marks the start of a process.

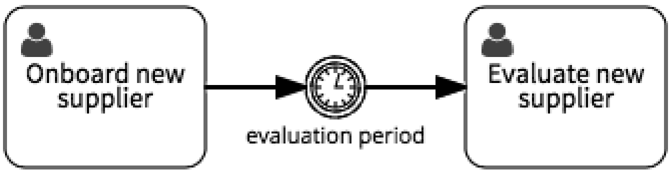
All process elements that do not have incoming transitions act as start elements. Start events don't have a direct connection to triggers. You can usually leave out start events if you want to create more concise diagrams.

14.5 End Event

Like start events, you can also omit end events. End events mark the end of an execution flow.

14.6 Intermediate Timer Event

An intermediate timer event indicates that process execution waits for a timer. You can use this to prevent SAP Signavio Process Governance creating the next task in a process until it becomes relevant.



Using an intermediate timer event to model an evaluation period

Configure how long the timer waits by selecting the timer in the process editor. In an open case, you can skip a timer manually.

14.7 Intermediate Link Event

With the intermediate link event, you can trigger other processes. Unlike the similar sub-process activity, this link event does not wait for the sub-process to execute before continuing the parent process.

Related Information

Subprocess [page 75]

14.8 Set Core Information

With the set core information event, you can set values to the core information of a workflow. If you leave a field empty, its value is not changed.

You can define the core information in this event and in the *Details* tab of the workflow editor.

Related Information

Core Information [page 34]
Details [page 50]

14.9 Milestone

A milestone is an intermediate event which allows you to mark an important event or a turning point within a process. By setting milestones, process owners obtain an overview of the workflow progress.

You can set a milestone either by using the intermediate event or via a Script Task.

Script Task sample:

```
_case.milestone = 'Document archived'
```

When using the intermediate event, you can reuse any variables from the workflow to create the milestone text by typing #.

To show the current milestone, add the field *Case/Milestone* as a column in the case list.

> Note
>
> Only the latest milestone is displayed.

15 Dictionary Integration

For organization administrators: Set up the integration with SAP Signavio Process Manager.

You can integrate the Dictionary from SAP Signavio Process Manager to work with SAP Signavio Process Governance. Doing so allows you to pull data from Dictionary entries and use them in your workflows.

> ⓘ Note
>
> Your SAP Signavio Process Governance organization needs to be connected to a SAP Signavio Process Manager workspace before you can use this feature.

Activating the Dictionary Integration

> ⓘ Note
>
> Access to the *Dictionary integration* settings requires an administrator account.

In SAP Signavio Process Governance, select *Services & Connectors* from user menu.

Select **SAP Signavio Process Manager Integration**, then select a user that also has a SAP Signavio Process Manager account. Make sure this user is able to see all necessary dictionary entries, as all requests to retrieve dictionary items will be done with this user.

You can always change this user later. When you delete the user and want to keep the integration, see section Deleting the user for SAP Signavio Process Manager integration [page 18] for details.

In the drop-down list, select which dictionary categories you want to use. Open one of these categories to see which fields are now available to use in SAP Signavio Process Governance.

Using Dictionary Categories with Forms

In SAP Signavio Process Governance, in the *Processes* tab, open the process editor. Select a process element that requires configuration, such as a user task.

In the *Configuration* tab, the categories you imported from Dictionary will be displayed as fields. Drag fields to your form to use them.

Now, when you execute your case, you will see a field where you can type and search for entries. Once you find the entry you want to use, simply click it to use it.

> ⓘ Note
>
> You can also use dictionary entries in gateway conditions, script tasks, and emails the same as any other fields.

Changed Attributes

Whenever you select an entry used in the task form during the case execution, SAP Signavio Process Governance takes a snapshot of that entry. If the entry is changed later on, the snapshot in the case is NOT automatically updated. This is necessary to properly track past decisions that were based on dictionary entries. If a selected entry is set as the default value for a field, SAP Signavio Process Governance will take a snapshot when the case is started.

Whenever you add or remove attributes to or from the dictionary category, you have to press the `Reload integration` button. The new attributes can then be used in the workflow editor after reloading the integration. They will become available as nested fields of the category fields.

> ⓘ Note
>
> - Attributes that have been removed from a dictionary category will still show up in old cases. You have to manually remove old dictionary attributes anywhere they are used in a workflow.
> - Dictionary categories can be deactivated at any time. Once they have been deactivated, they can no longer be used in the workflow editor. You also have to manually remove deactivated categories anywhere they are used in a workflow. Old cases will still show data from deactivated categories.

Troubleshooting

Errror message	Solution
Could not set up the Dictionary integration for the following reason: The tenant ID is not configured for your SAP Signavio Process Manager workspace. Please contact customer support.	Try to sync the configuration from SAP Signavio Process Manager again: • Open *Setup* > *Manage approval workflows* in SAP Signavio Process Manager and choose *Synchronize configuration now*. If that option is not available, please contact our SAP Signavio service experts from the SAP for Me portal to set the tenant ID for you.
Value '`2019-03-11`' for field 'DateField' with type 'DateType' is not allowed. (The date is an example.)	The data sent from SAP Signavio Process Manager has the wrong format. • Make sure that the date string for the Dictionary item has been created in the ISO_8601 format. (For this example: `2019-03-11T10:38:41.998Z`.)

Errror message	Solution
An error is shown as soon as a dictionary item is selected, or an error message is shown: **Script execution failed** **Value 'xxx' for field 'xxx' with type 'xxx' is not allowed.**	This error occurs if in a dictionary category the type of a custom attribute was changed, but the name of this attribute stayed the same. The attribute might have been changed directly in the dictionary or after a dictionary export in the Excel file before this file was imported again. • Fix the custom attribute: Delete the custom attribute from the dictionary category and create a new one with a different name. If the problem continues, please contact our SAP Signavio service experts from the SAP for Me portal.

16 Implementation Guidelines

When you create processes, you have many choices to make and questions of style to consider. This chapter recommends guidelines and defaults for automating workflows with SAP Signavio Process Governance. You can use these guidelines, with your own modifications, to help a team create processes more consistently without forgetting things.

Process Details

- Set a process name that summarises the process goal for one case as an active verb phrase.
- Select one or more labels to categorise the process.

General

- Use the *Process description* field to document the process goal, as a single phrase describing the desired outcome.
- Set the *Case name template* to generate a concise readable unique name for each case.

Access Control

- Restrict *See process* permissions for processes that are quick experiments, to avoid filling the *Processes* page with processes called *Test*
- Restrict *Start process* permissions for processes that are under construction and not yet ready to be used.
- Restrict *View cases* permissions for processes whose cases include sensitive information.
- Specify access for organization groups instead of individual users, so you can edit groups to grant access, including for existing cases.

Trigger

- Include a form trigger by default, rather than using a manual trigger.

Form Trigger - Form

- *Description* field: add a Markdown heading to describe creating a new case for this process, e.g. `# Submit new change request`.
- *Button label to start new cases*: customize the start button text to either describe the action that starting a case represents, e.g. *Send feedback*, or to describe the submitted form, e.g. *Submit vacation request*.

Form Trigger - Confirmation Message

- Add a confirmation message, when the first process task is not assigned to the case creator, to indicate what happens next.

Actions

- Follow the BPMN Modeling guidelines.

See also: SAP Signavio Process ManagerModeling Conventions .

Action names

- Check spelling.
- Use sentence case for action names.
- Name the action with an active verb phrase, e.g. *Review request*.
- Make the action name as specific as possible.

Events

- Name the event after what happened, e.g. *Request submitted*.

Milestones

- For processes with more than about ten actions, use Milestone events to identify process phases. Add a Milestone event at the start and end of the process to set the initial and final value of the Case / Milestone field.

Start Event

- Prefer exactly one start event.

End Event

- Name the event after the new status at the end of the process.
- Avoid multiple events with the same name; instead join the sequence flows.

User Tasks

General:

- Set the *Candidates for this task* using users or groups, to generate notifications.
- Prefer specifying candidates using groups instead of individual users, so you can edit groups to make changes, including for existing cases.
- Set *Assign using a role* for every user task.
- Use a *Task name template* to disambiguate repeated task names.
- Prefer roles that match organization roles, captured in Dictionary .

Form:

- Use the *Description* field to summarise the purpose of completing the form.
- Start the form with read-only fields that provide context for the information or decision the form requires.

Reminders:

- Set a *Reminder* and *Escalation* by default with relatively long time periods to catch forgotten tasks, e.g. 1 week and 2 weeks, respectively.
- Escalate to the original candidate group, or a management group.

Send Email Action

- Set the *Sender name* to the role for whoever the information comes from.
- Set the *Reply to* address to match the *Sender name*.
- Append the case name to the *Subject* to disambiguate email notifications for different cases.
- For regular notifications, consider removing greetings and sign-off, and using concise wording, to make it clear that it is an automated notification and not a personal email, and to reduce reading time.

Exclusive Gateway

- Use title case for manual decision transition/button names.
- Order manual decisions with happy path decisions first, e.g. *Approve, Reject*.
- For automatic decisions, configure one transition as *per default*, to avoid none of the conditions matching, and to simplify the configuration when there are two conditions.

Form Fields

- Use sentence case for field names.
- Limit field name length to a few words, and use field descriptions for longer explanations.
- Remove *Enter*, *Select* and *Upload* from the start of trigger form field names.
- For *File* type fields, use the default value to provide a document template.
- For *User* type fields, use organization groups to specify candidates.
- Avoid duplicate field names.

JavaScript

- Remove the default `'Hello World'` console log statement.
- Note that ECMAScript 2015 (ES6) - the JavaScript version that JavaScript actions use - does not require end-of-line semicolons.
- Adopt a consistent coding style.

17 Variables reference

See Variables [page 55] for an introduction.

17.1 Case Variable

The *Case* variable contains the data that starting a case creates.

This variable has several fields. You cannot change most of this data, except for the case name and due date.

An email has a composite type, with the following properties.

Property	JavaScript	Type	Description
Case ID	`id`	Data types and formats	Unique identifier
Name	`name`	Data types and formats	Entered or generated editable name
Case number	`caseNumber`	Data types and formats	Sequential case number
Creator	`creatorId`	Data types and formatsUser	User who created the case
Start date	`createTime`	Data types and formatsDate	Date and time the *Creator* started the case
Due date	`dueDate`	Data types and formatsDate	Optional editable due date
Priority	`priority`	Data types and formatsText	Case priority - values `'0'` (high) to `'3'` (low)
Case link	`link`	Data types and formatsText	URL of the case page in SAP Signavio Process Governance
Cycle time	`duration`	Data types and formatsDuration	The duration the case has been open
Milestone	`milestone`	Data types and formatsText	The last milestone the case has passed

Case ID

The case variable's *ID* uniquely identifies this case among cases for all processes.

Name

The *Name* field stores the name that either the Creator [page 122] entered manually, or that SAP Signavio Process Governance generated. Case participants can edit this name. You might use the case name variable in a Send Email [page 73] action configuration, to send emails that clearly identify their context by prefixing the subject line with the case name.

You can update the case name in a JavaScript Action (Script Task) [page 74] by assigning a value to `_case.name`.

Case Number

The *Number* field stores a sequential case number. Each process uses a separate case number sequence for its cases. In a *Handle customer order* process, you could use the case number as a generated order reference, for example.

Creator

The *Creator* field records the SAP Signavio Process Governance user who started the case. The Data types and formats type includes name and email address fields, so you can use the case creator to configure a Send Email [page 73] action that automatically notifies the requestor of an approval process' result.

> ⓘ Note
>
> Only users can be case creators. When a sub-process is started by another process, there's no case creator.

Start Date

The *Start date* records when the case creator started the case. In an order process, for example, you could use this as the order date.

> ⓘ Note
>
> To use the revision switcher, users need read access for the diagram revisions they want to view.

Due Date

The *Due date* field stores the due date that case participants can set on the case view. Unlike the other case variables, the due date does not always have a value.

You can update the case due date in a JavaScript Action (Script Task) [page 74] by assigning a value to `_case.dueDate`.

Case Link

The *Link* field stores the URL of the case page in SAP Signavio Process Governance. You can include this link in the body of email you send using a Send Email [page 73] action, so that the recipient can immediately open the case in SAP Signavio Process Governance. SAP Signavio Process Governance includes this link its own built-in Notifications [page 12].

17.2 Trigger Email Variable

The *Trigger email* variable contains the email that started the case, for processes that have an Email trigger [page 44]. You can use this variable to use information from the email that started the case during the process, and to send email to the sender.

This variable has the fields that the Email type defines. You cannot change their values.

18 Keyboard Shortcuts

In some parts of the software, you can use the keyboard as well as the mouse for specific operations.

Process Builder

Arrow keys	Move the selected diagram element
Delete	Delete the selected diagram element

19 Markdown

Markdown is a markup language which allows a text-to-html conversion. You can use Markdown to format descriptions, comments, and even emails sent out from SAP Signavio Process Governance.

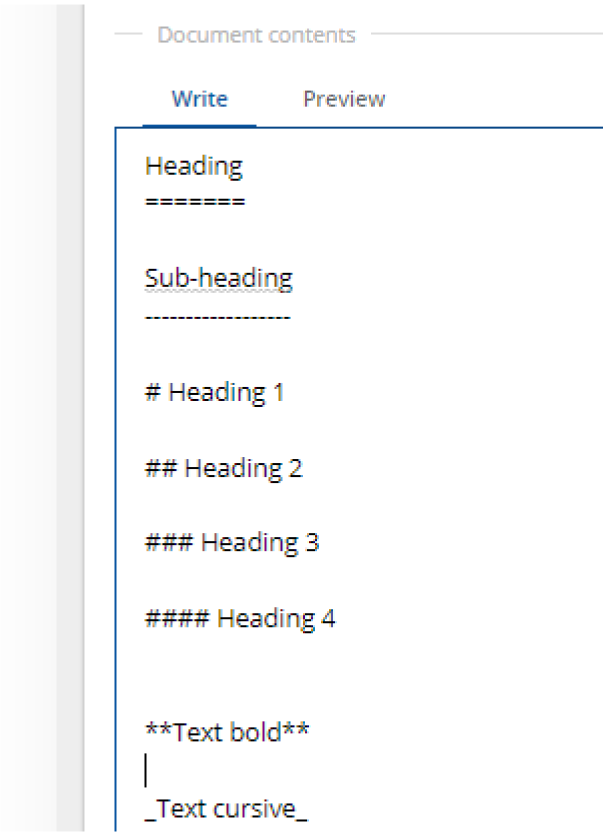
> ⓘ Note
>
> The Create document [page 77] action does *not* support formatting text or embedded images.

The following is a brief overview of how to use our variation of Markdown.

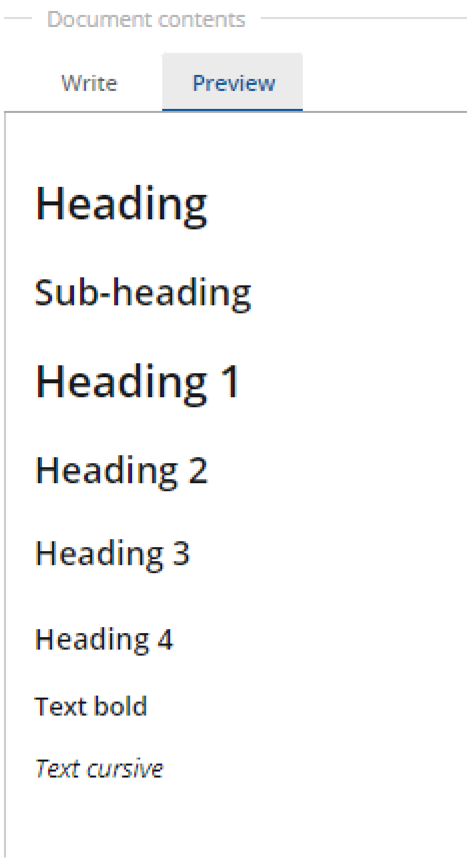
Headers

Larger headers can be formatted using = or #. Sub-headings can be created using - or multiple #.

For example:



and the rendered result looks like this:



Hyperlinks

Hyperlinks can be used in descriptions or comments.

In-text URLs (like `https://example.com`) are automatically turned into hyperlinks without the need for additional formatting.

If you want to use a specific word or phrase as a hyperlink, use the following format: `[Word or phrase you want to turn into a link](https://example.com)`

Emphasis

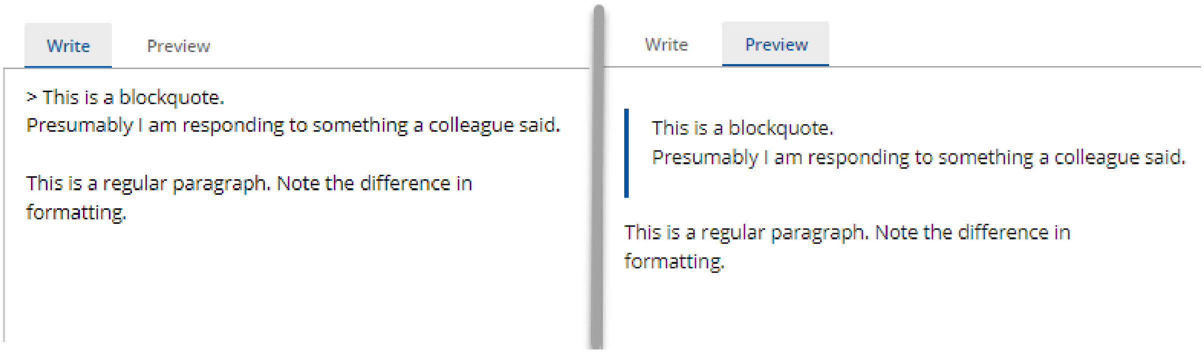
For **bold** and *italic* text, use `**double**` and `*single asterisks*`, respectively.

New Paragraph

To start a new paragraph, add two blank lines by pressing ENTER twice. This creates a new paragraph separated by one blank line in the output. Paragraphs can only be separated by one blank line, additional blank lines are removed automatically.

Blockquotes

Use > followed by a space to create blockquotes in your text. If you don't follow the > with a space, the formatting won't work.



Lists

You can easily create numbered or bulleted lists using Markdown.

For numbered lists, simply type it as you would normally.

For bulleted lists, use an `*` or `-` for each bullet, with a space between the asterisk or dash and the beginning of the bulleted point.

Horizontal Rule

Use three or more `---`, `***` or `___` to create horizontal rules in your text.

Tables

You can create tables with Markdown, without having to copy and paste them from another application.

To create a table, use `|` to separate the different columns. Use at least 3 dashes `-` to separate the header cells from the table body, and use colons `:` to align the columns.

```
| Signavio | Markdown | Guide |
| ------------ | :------------: | -------: |
| Row     1 | words | so |
| Row     2 | are | are |
| Row     3 | neat | tables |
```

When finished, your table will look like this:

Signavio	Markdown	Guide
Row 1	words	so
Row 2	are	are
Row 3	neat	tables

Note that the table is still created correctly if not all individual rows of the table are perfectly aligned.

Embedding Images

> ⓘ Note
>
> Only embed images that are publicly accessible, otherwise images aren't shown later. If a system requires you to sign in to open the image URL, images won't be displayed in the email, even for other signed-in users.

To embed images, use the following format: `![Alt text](https://example.com/image-url-here "Optional hint")`

`Alt text` will be shown when the image cannot be loaded. `"Optional hint"` is an optional text, use it to show more information when hovering over the image.

Inline Code and Code Blocks

Use ` to highlight inline code.

Single backticks are used for highlighting a single word or phrase. Use three backticks to wrap whole code blocks. Note that highlighting the code block will also preserve the line breaks and indentation.

````
Emphasize a single `word` or `a whole phrase` with single backticks.
```
Or wrap whole blocks of code

which also preserve line breaks
```
````

Emphasize a single `word` or `a whole phrase` with single backticks.

```
Or wrap whole blocks of code

which also preserve line breaks
```

Inline HTML

SAP Signavio Process Governance does not support inline HTML.

20 Help and Support

There are several ways to find more information and get support for SAP Signavio Process Governance.

Built-In Support

Built-In Support helps you get real-time support and find context-sensitive information from within SAP Signavio Process Governance. It provides simplified guided support that allows you to search for knowledge directly within the application.

When you're signed in, you can open the Built-In Support panel by choosing *(Built-In Support)*at the top right of the screen. Enter one or more key words and choose from the results displayed in the right-side panel. Filter the results by selecting .

SAP Help Portal

You can find an overview of all related documentation at SAP Signavio Process Governance.

SAP Signavio Support

To learn how to get your questions answered when using SAP Signavio products and how to create a support case, see SAP Signavio Support.

SAP Support Portal

You can find onboarding and support information here:

- SAP Signavio Suite
- SAP Signavio Process Governance

21 Tutorials

Tutorials to Get Started

Learn how to get started with SAP Signavio Process Governance:

- Your first document approval process [page 132]
- Adding a decision to an approval process [page 137]

Tutorials on Specific Topics

The following tutorials introduce features based on concrete examples.

- Workflow examples - example process models relating to human resources, banking, finance, logistics, and others.
- Multi-level-approval-workflows - complex approvals with many steps and rules
- Supervisor look-up automation with CSV data - automatic task assignment using external data
- Starting new cases with the workflow API - submitting public trigger forms via HTTP
- Using an external web service for EU VAT number validation - calling an external web service via SOAP
- Automatically starting scheduled workflow - repeating cases on a fixed schedule
- Automatic workflow quality control tasks - adding automatic review tasks
- Workflow web service integration - updating an external database from a workflow
- Process milestones for Workflow execution status visibility - using intermediate events to model process milestones
- DocuSign workflow integration - adding electronic signatures to documents
- Multi-instance user tasks - creating user tasks for members of a group
- Business days calculation - using external public holiday data in JavaScript action
- Vacation handovers - reassigning tasks and configuration task escalation
- Integrating a workflow with external web services - fetching external data
- Integrating a spreadsheet with a workflow - reading CSV data in a JavaScript action
- 'Four-eye' approvals - adding permissions and parallel tasks to approval workflows
- Automatically triggering a workflow with form data - reading from a trigger email
- Custom activity types using sub-processes - managing process complexity
- Decision gateway variables - re-using decision results
- Form fields with multiple values - entering lists
- Box.com integration - uploading files to the cloud
- Google Cloud Print Integration - printing files via the cloud

- [Case name templates that identify orders](#) - organizing cases
- [Role-based assignment](#) - configuring sticky task assignment

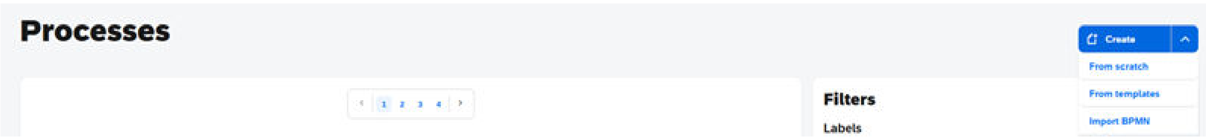
21.1 Your First Document Approval Process

People often use workflows for document approval, a kind of management approval. This tutorial uses the example of a recurring process for approving some kind of report, which has two parts:

1. Defining the process that forms a template of tasks for approving reports.
2. Running the process - starting a new case that groups the tasks for approving one particular report.

To get started, in the main menu, select *Processes*. This shows the *Processes* view, which you can use to create and view Processes.

> ⓘ Note
>
> To set up an approval process specifically for journey models, see Creating an Approval Process for Journey Models.

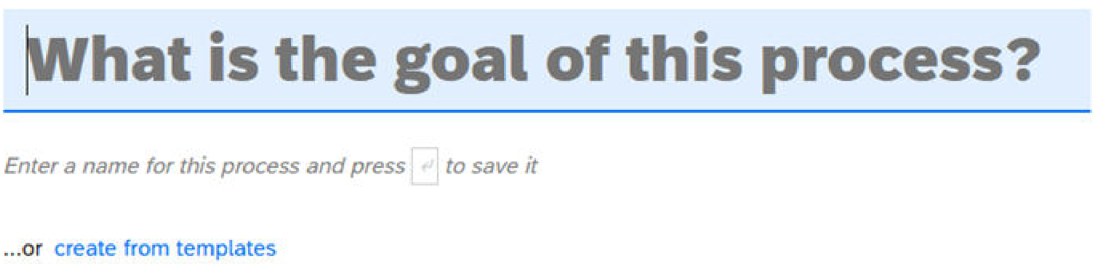


The Processes view, where you can create a new process

> ⓘ Note
>
> You can also use an ad-hoc case, without a pre-defined process.

Select *Create new process* to start creating a new process model. Choose *From scratch*, *From templates*, or *Import BPMN*.

If you choose *From scratch*, a process name prompt opens.

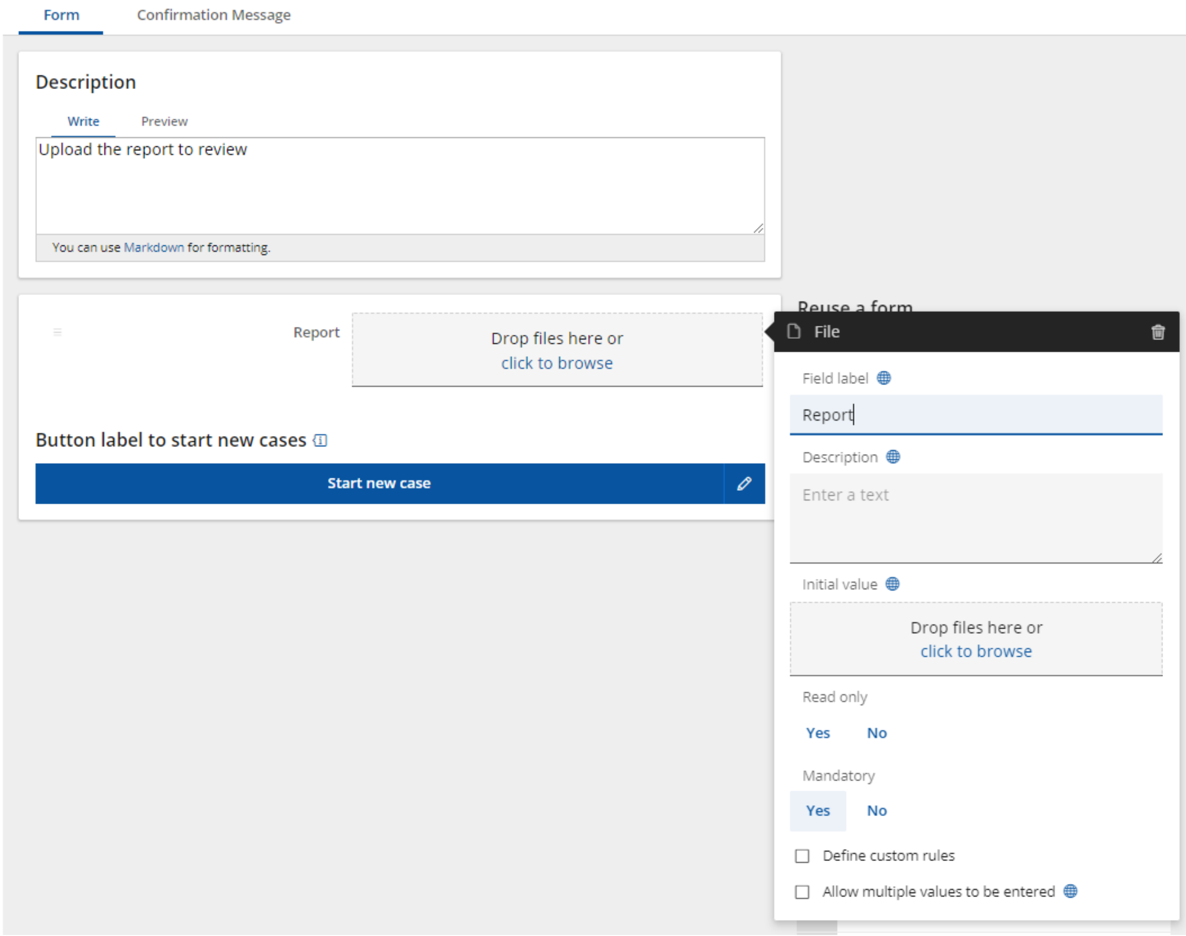


Entering a process name, to create a new process

Enter the name *Approve report*, which describes the process' goal. This creates the new process and opens the process builder's *Trigger* tab, which you use to define how the process starts.

On the *Trigger* tab, select *When a form is submitted* to add a form trigger, so you can start running the process by filling in a form. The document approval process requires a report to approve, which corresponds to a trigger form field called *Report* that you will use to upload a file.

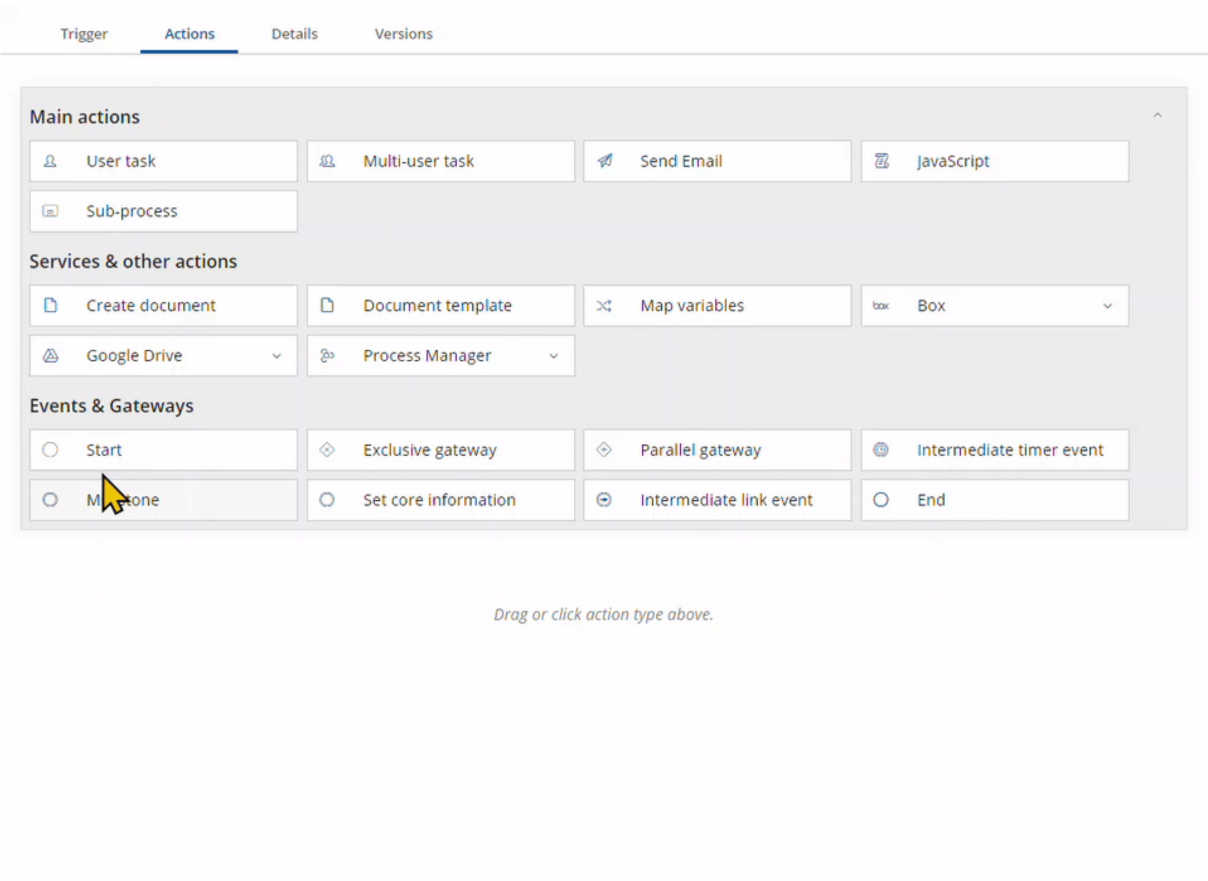
In the form builder palette, select *File* to add the field to the form. Then select the field to open its configuration panel on the right, enter the field label *Report* and select the *Mandatory* option so the form requires a file upload.



The Trigger tab, after defining a form trigger to start a case by uploading a file

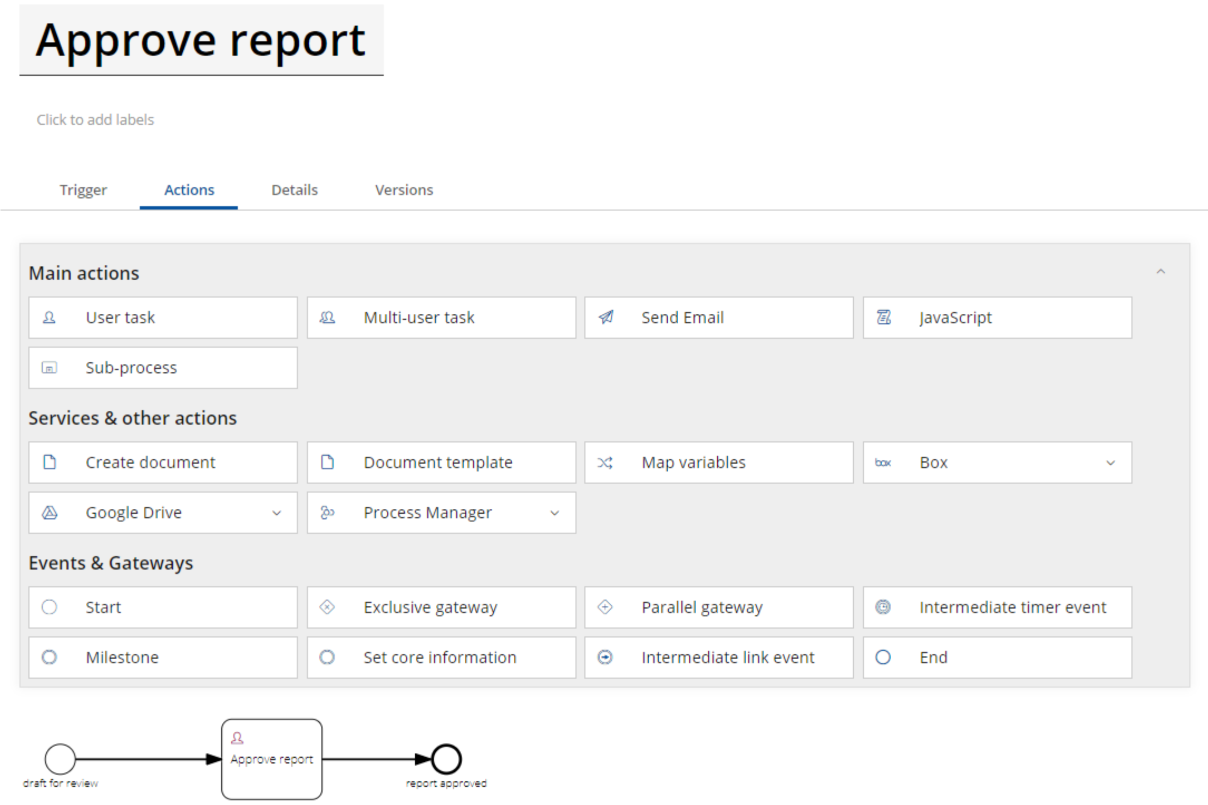
After choosing how the process starts, next define the actions that you will perform when running the process.

Select the *Actions* to load the graphical process editor. In the actions palette, select *Start* to add a start event to the diagram. Then, with the start event selected use the actions palette or the mini palette that appears when you select a diagram element to add a user task and end event.



Adding a start event (1), clicking the start event mini-palette's rectangle icon to add a user task (2), and clicking the user task mini-palette's circle icon to add an end event (3)

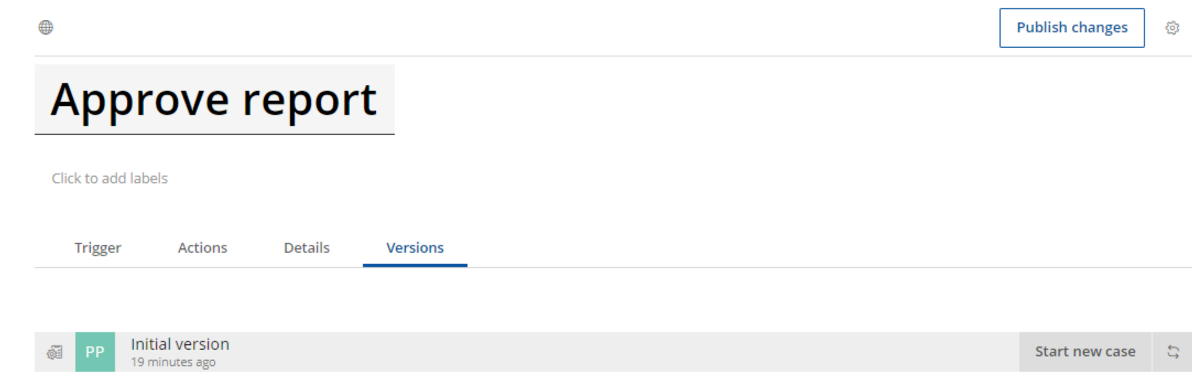
Next select the start event, user task and end event in turn, and use the configuration panel to set their names to *draft for review*, *Approve report* and *report approved*, respectively.



The Actions tab, after adding a single Approve report action to a process

This simple process model only contains a single task, to approve the report. Models don't have to contain start and end events, but their names help clarify the start and end statuses. Later, you can improve the workflow in various ways, but first you should run the process that you have defined so far, so you can see how it works.

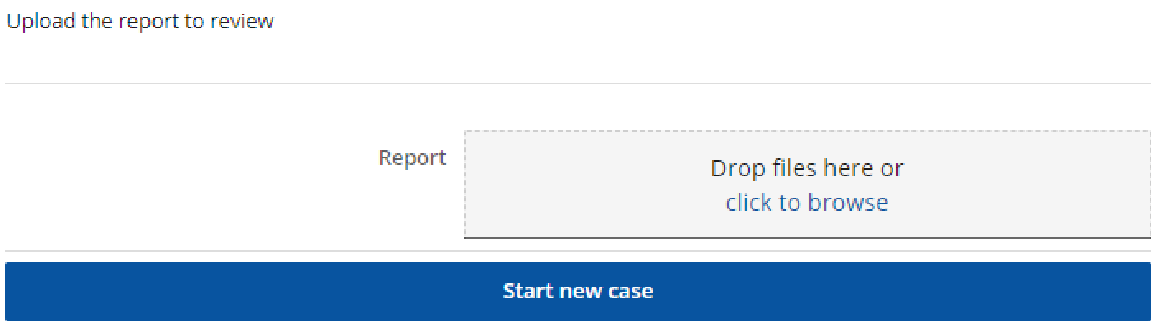
Select *Publish to run this process*. This creates a published version of the process, and shows the *Versions* tab, with this initial version.



The Versions tab, after publishing the first version of a process

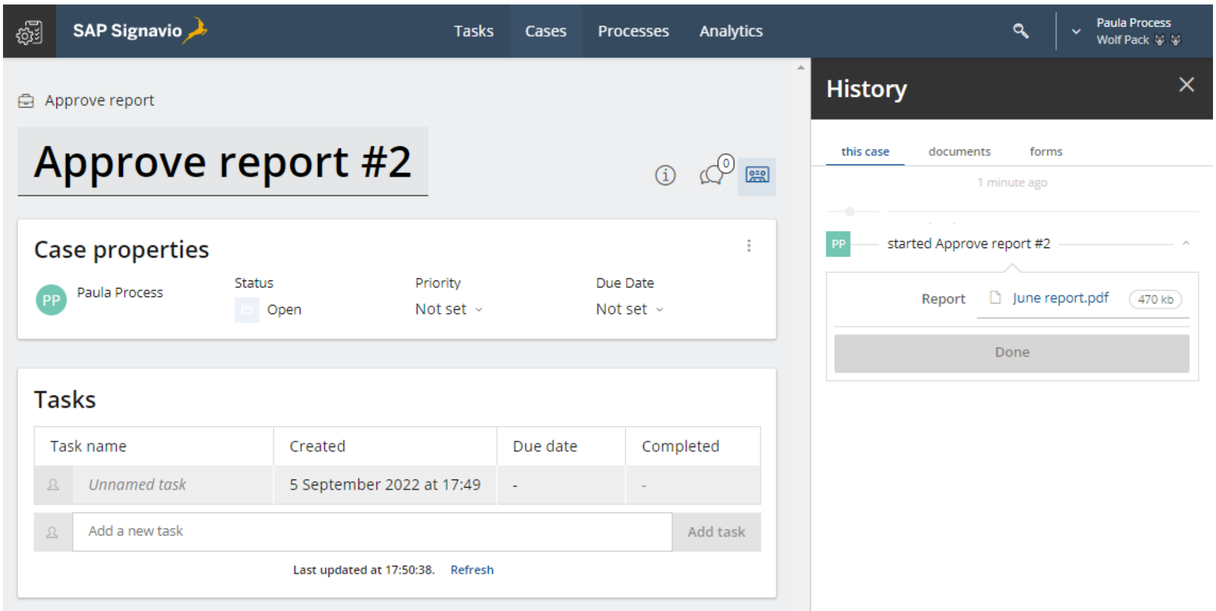
Now that you have published the process, you can use it as a template to create the first *case* for approving a document.

Select *Start new case* to start a new case. This shows the trigger form you set-up earlier, which consists of a file upload field and a submit button. Select the file field, and choose a *June report.pdf* file to attach to the case.



Running the process - using the trigger form to start a new case

Select *Start new case* to finish starting the new case. This creates the case, and shows the case details view where you already see the process's *Approve report* task in the task list on the left. The first entry in the event stream, on the bottom-right, shows the the trigger form data, including the uploaded file, which you can select to open.



The case details view, after starting a new case

Now you have created an run your process for the first time, you can repeat the same steps to develop your process further: select *Processes*, select the process from the list, make changes to the process model in the process editor, publish a new version and then start a new case to try out the updated process.

> ⓘ Note
>
> After creating and running a simple approval process, you can enhance it in several ways. Next steps include the following.
>
> - Adding an explicit approval decision using an exclusive gateway.
> - Adding a result notification using the send email action.
> - Using organization groups to define task candidates.

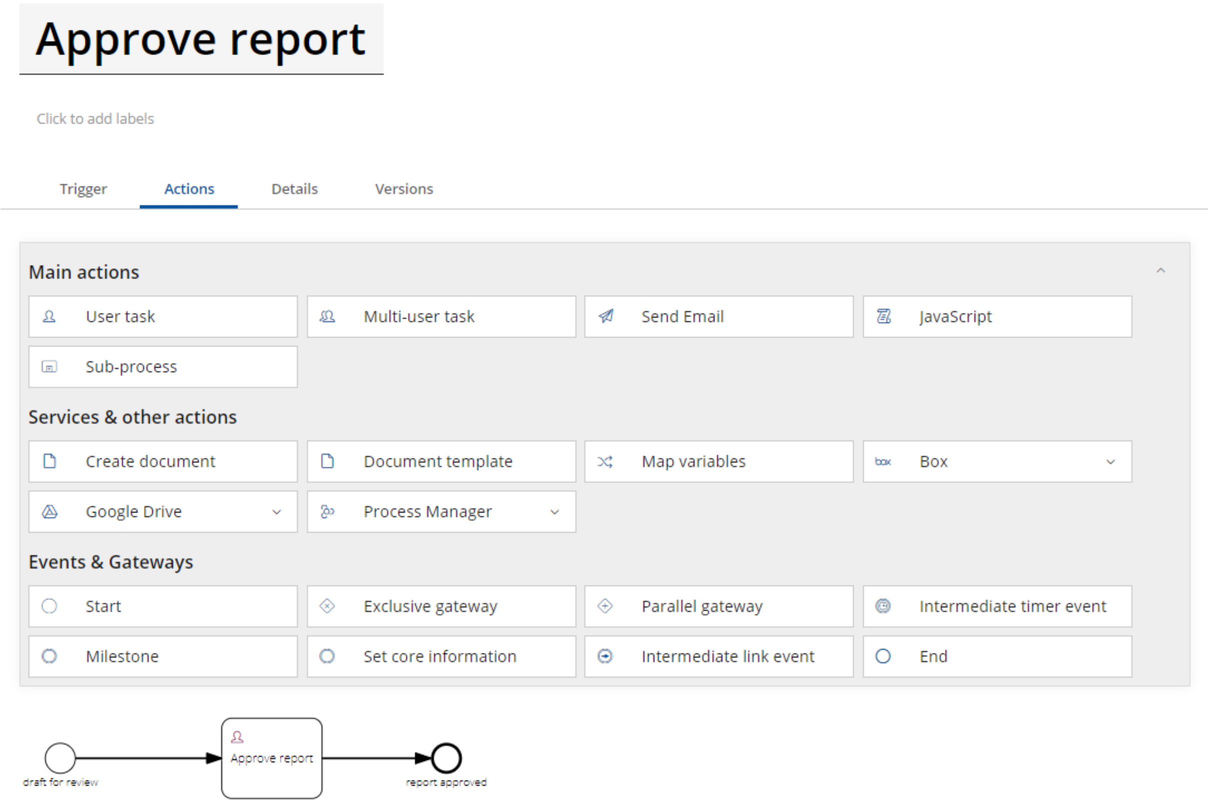
- Using process roles to automatically assign tasks.
- Using access control to restrict process actions.

21.2 Adding a Decision to an Approval Process

An approval process such as a document approval requires a clear decision, such as whether to *Approve* or *Reject* a document. This tutorial continues the document approval process example from the previous tutorial and shows you how to add a manual decision to a user task form.

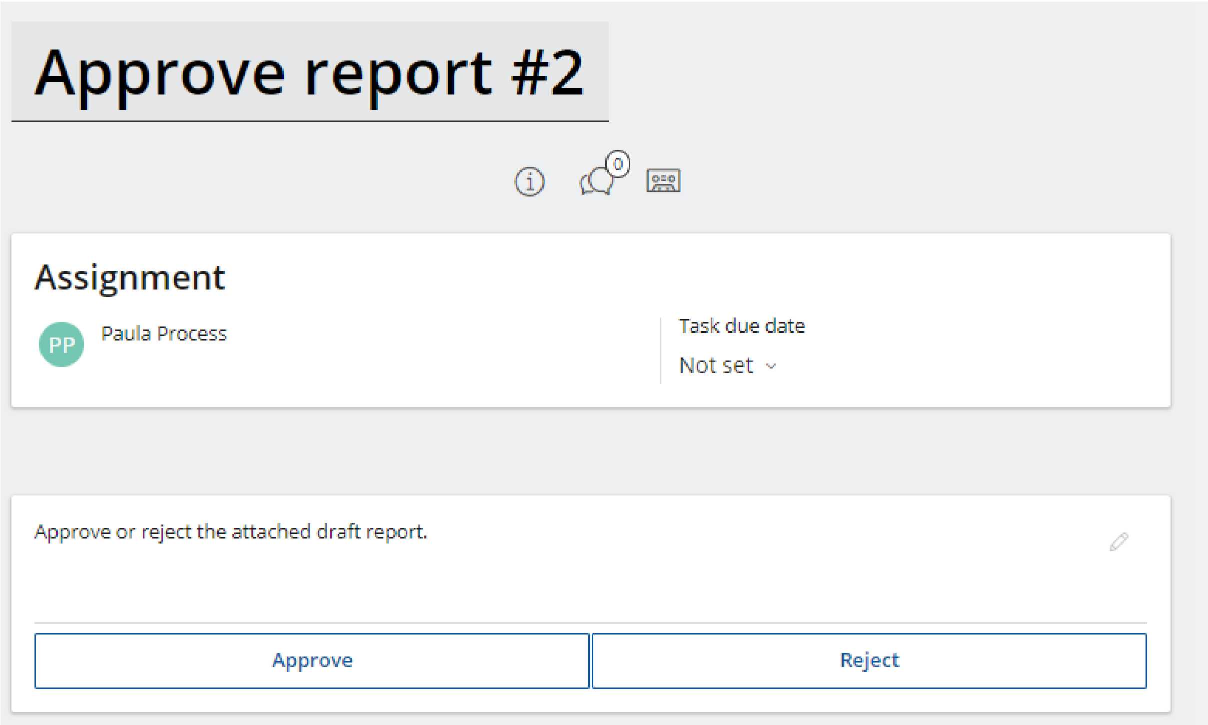
> ⓘ Note
>
> To set up an approval process specifically for journey models, see Starting an Approval Workflow from Journey Modeler.

To start, create a basic approval process with a single user task, as in the Your First Document Approval Process [page 132] tutorial:



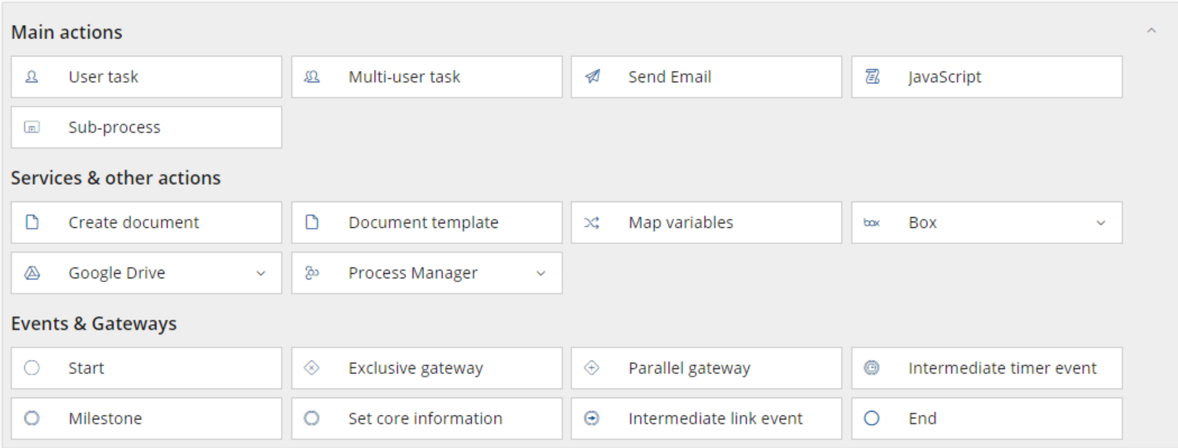
A basic approval process with a single task

This basic process already includes the task for making an approval decision, but it doesn't give any guidance for making the decision. You can improve this process so that the approval task's form has *Approve* and *Reject* buttons, like this:



The result of adding a decision - a task form with Approve and Reject buttons

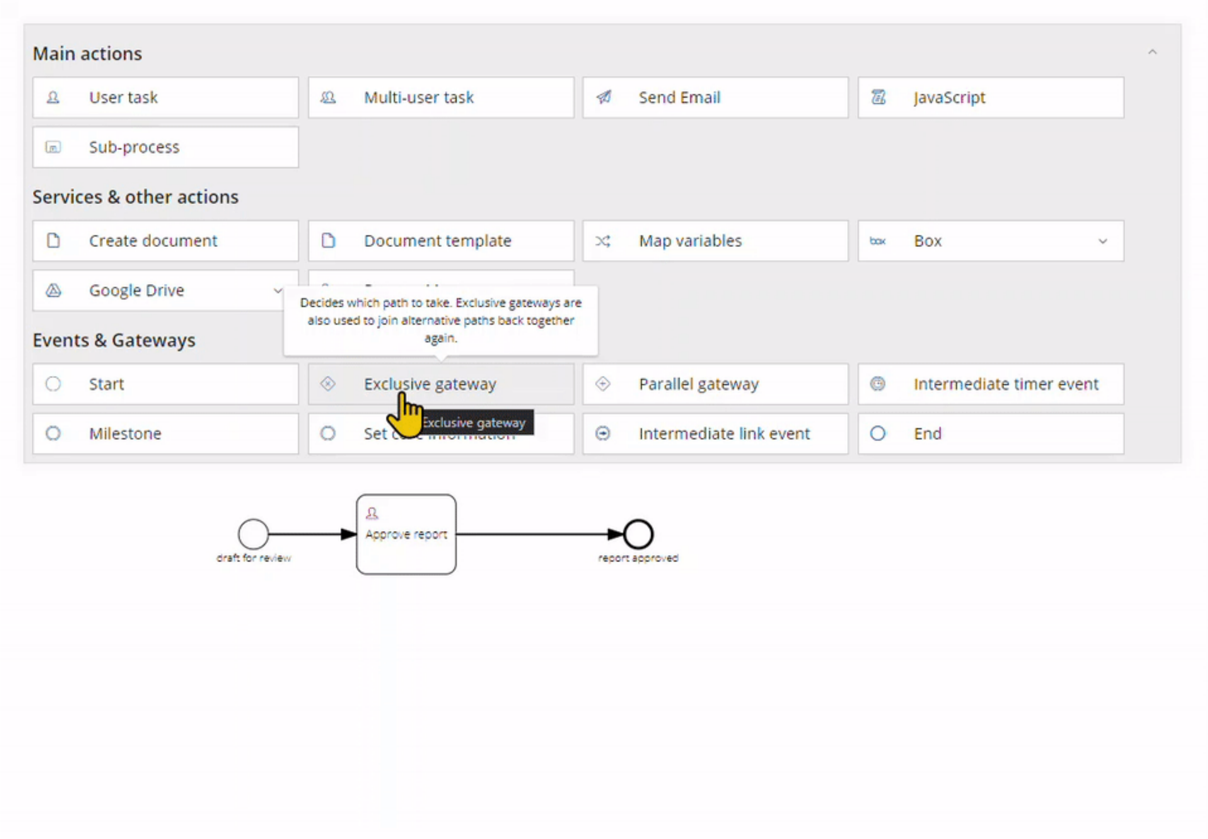
In the process model, an Exclusive Gateway [page 104] after the user task will represent the decision. To add the gateway to the model, select the *Exclusive gateway* button in the tool palette. This adds the diamond shape with an X to the diagram.



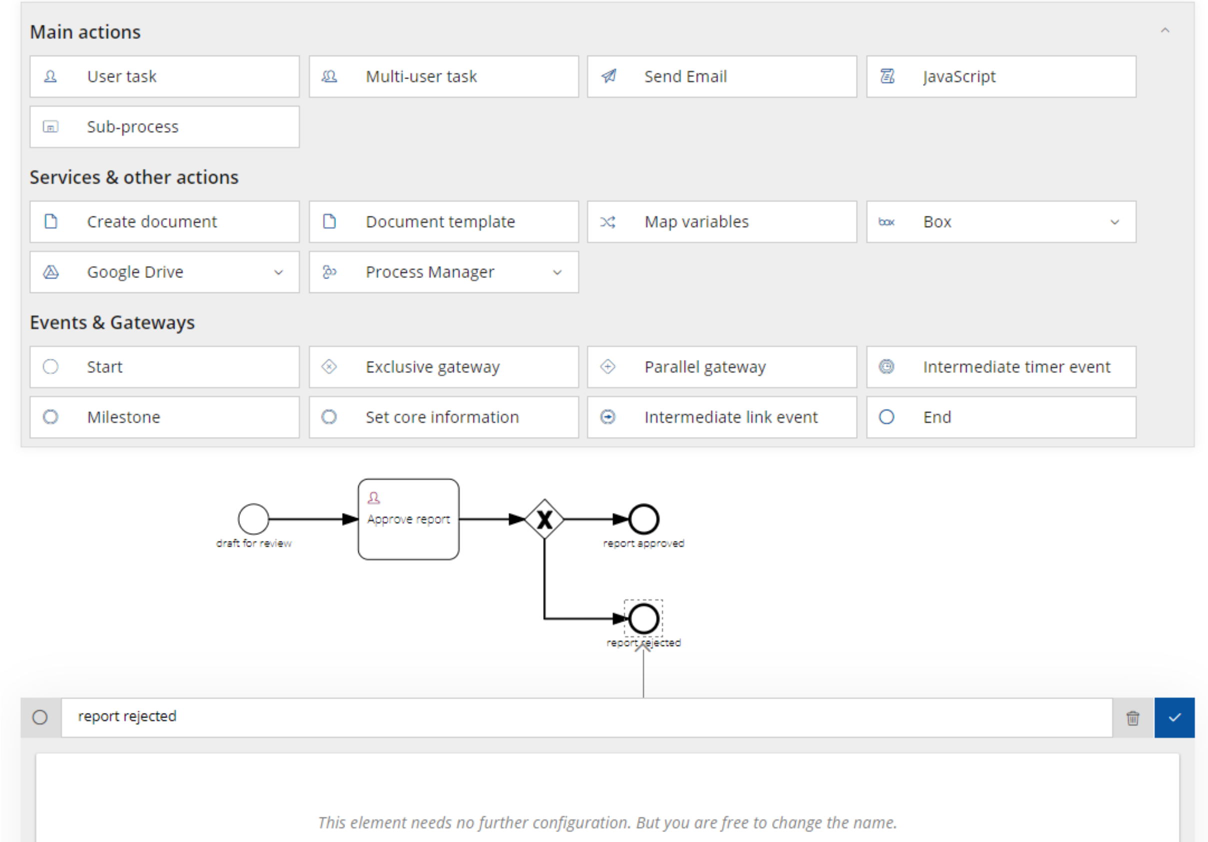
Adding an exclusive gateway to the process model

Next, drag the end event to the right, to make room for the gateway, and drag the gateway symbol onto the transition from the user task to the end event as shown:

For the next step, add a new path to the process that represents the decision to reject the document. This means adding a second transition from the exclusive gateway to a new end event. To do this, select the exclusive gateway, and drag the end event (circle) icon to where you want to new end event, as shown:

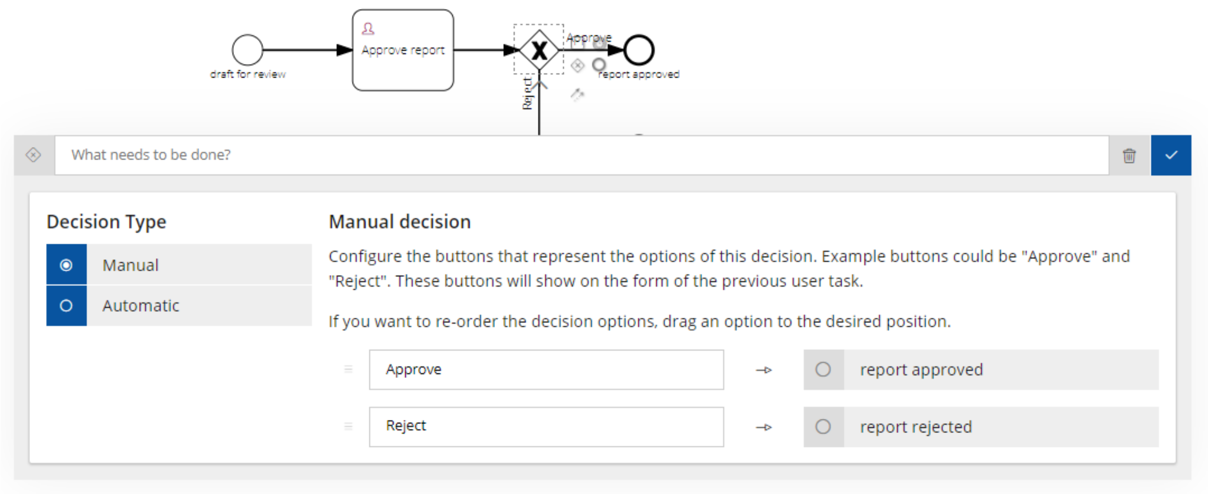


Name the new end event to describe the alternate end status, to make the diagram easier to understand. Select the event and enter the name *report rejected*.



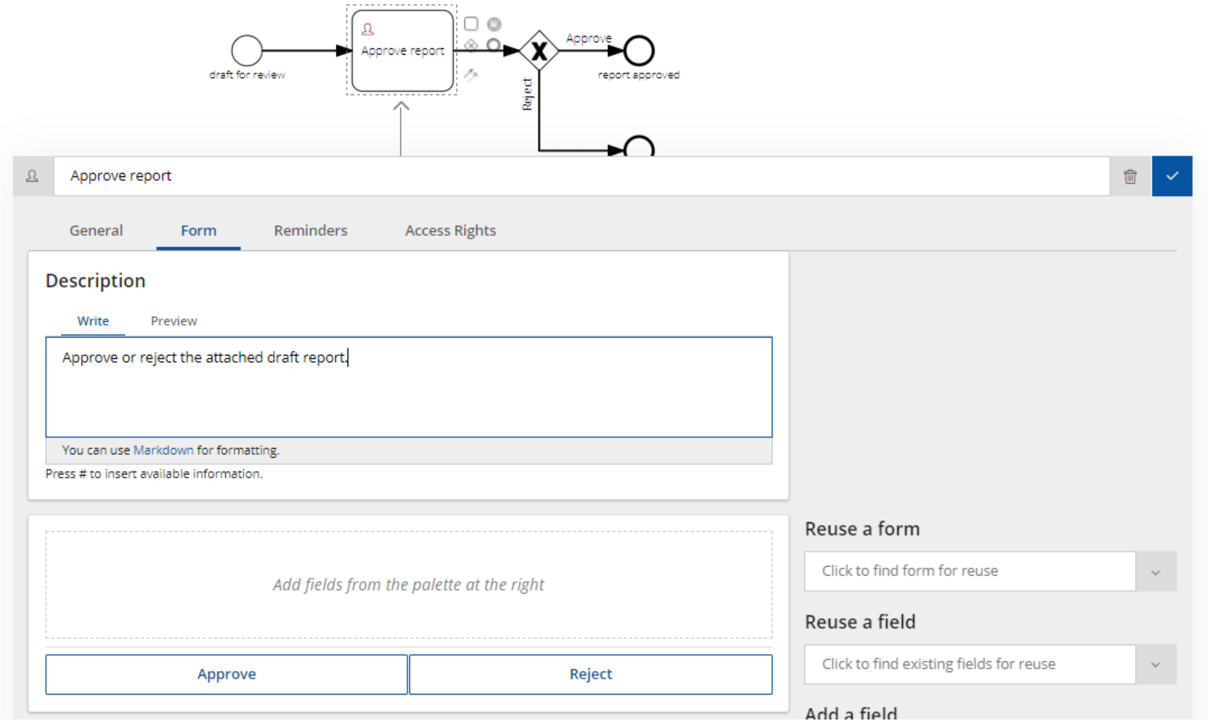
Naming the alternate end event with a different end status

Now you can configure the gateway with the decision. To use an exclusive gateway for a manual decision, it must have an incoming transition from a user task and more than one outgoing transition. Select the exclusive gateway to open its configuration pane, and enter the decision options *Approve* and *Reject*, using the end event names to get them the right way around.



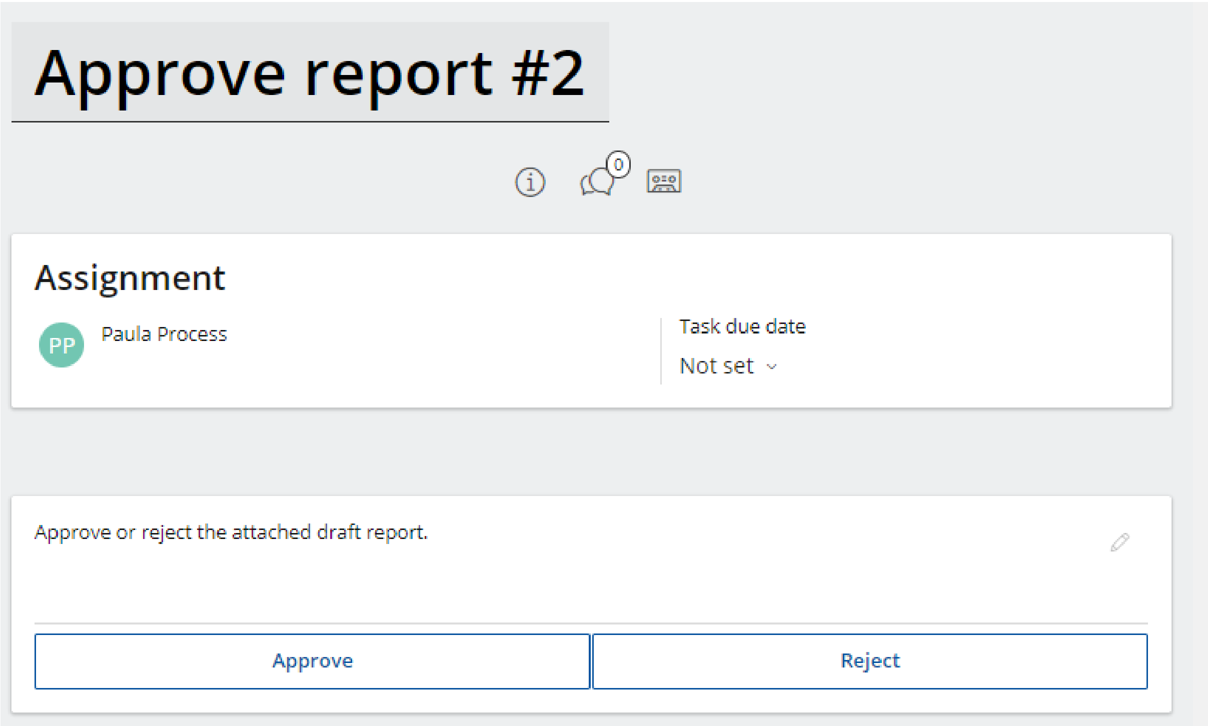
Configuring Approve and Reject decisions on an exclusive gateway

You can see the result of configuring the manual decision on the user task form. Select the user task, which opens its configuration pane's *Form* tab. At the bottom, underneath where any fields would appear, you now see the decision options as *Approve* and *Reject* buttons. In the form description field, enter instructions for making the decision: *Approve or reject the attached draft report*.



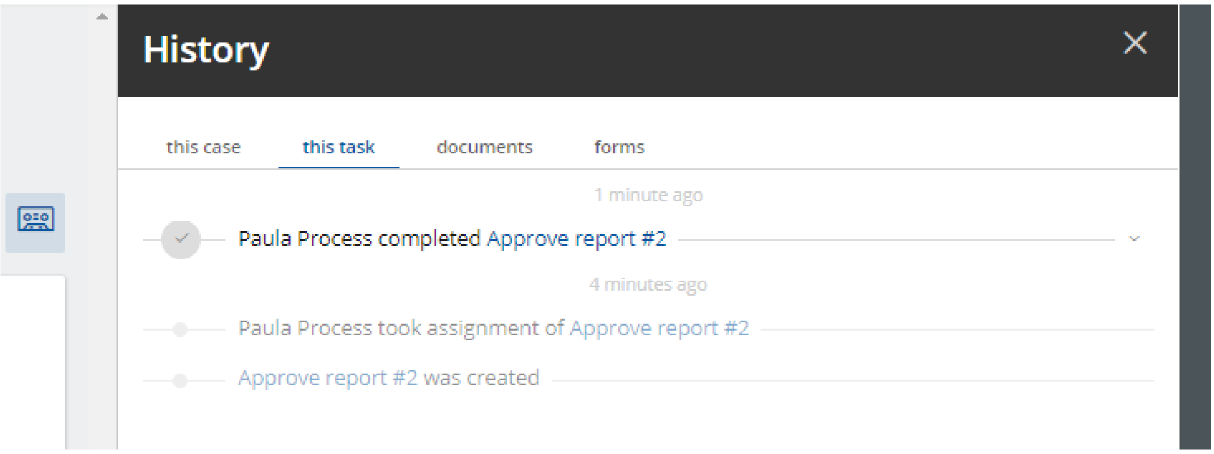
Adding a description to a task form that now shows Approve and Reject buttons

Now you can see the result of adding the decision to the process. Select the *Publish changes* button (top-right) to publish a new version of the process, then select *Start case* next to the latest version in the list. Start the case, completing the trigger form if you added one, and open the *Approve report* task. The task page shows the task form with the description you entered, and the decision buttons.



Running the process - the form for a manual decision with Approve and Reject buttons

Select *Approve* to record the decision and complete the user task. The case view history panel  now shows the *Approve* decision.



After completing the form, the history panel shows the Approve decision

Decisions like these don't only occur in document approval processes. In practice, many kinds of business processes use one or manual decisions that you can add in the same way.

Important Disclaimers and Legal Information

Hyperlinks

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