Module Process Management

This standard is used by:

CERRIX B.V.

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Cerrix Versie	6.1
Document Versie	1.0
Datum	21-03-2021
Classificatie	Confidential
Auteurs	Ruben Andeweg

Inhoud

1. Module Process Management

Process Management can be accessed via three navigators:

1. Navigator – Business Dimension
2. Navigator – Process Overview
3. Navigator – Process Editor

The Navigator - Business Dimension is an overview of all seperate elements that have links with organisations and Business Dimensions, like risks and controls, but also process drawings. The process drawings in the Navigator - Business Dimension are only viewed.

Figure 1: Module Navigator - Business Dimensions

The Navigator – Process overview has also just a view of the process. Proces (un)restricted viewers have access to this module.
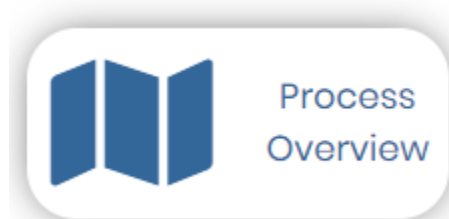

Figure 2: Module Navigator – Process Overview

The Navigator – Process Editor is the create and edit module for processes. Only user with Process Admin or Process editor (un)restricted role have access to this module.

Figure 3: Module Navigator – Process Editor

1.1 Process diagram

Before a process scan be drawn, the correct organization and business dimension structures should be registered in CERRIX.

This is because all process that can be drawn are based on the business dimension structure. And users can only see the correct process if the organization structure is correctly linked to the business dimensions.

Organization and business dimensions structures can be found in 'Standing Data', and can only be maintained by the Application Admin.
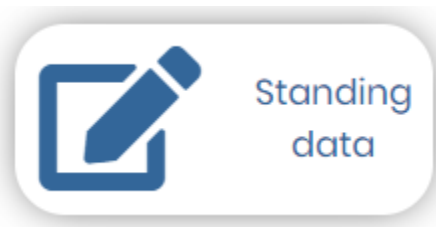

Figure 4: Standing data

1.1.1 Drawing process diagram

To draw a process, first the organization and business dimension have to be selected. These can be selected on the right top. Deze kunt u aan de linkerkant van het scherm selecteren door dubbel te klikken op de gewenste dimensie / organisatie (see "A" figure 2).
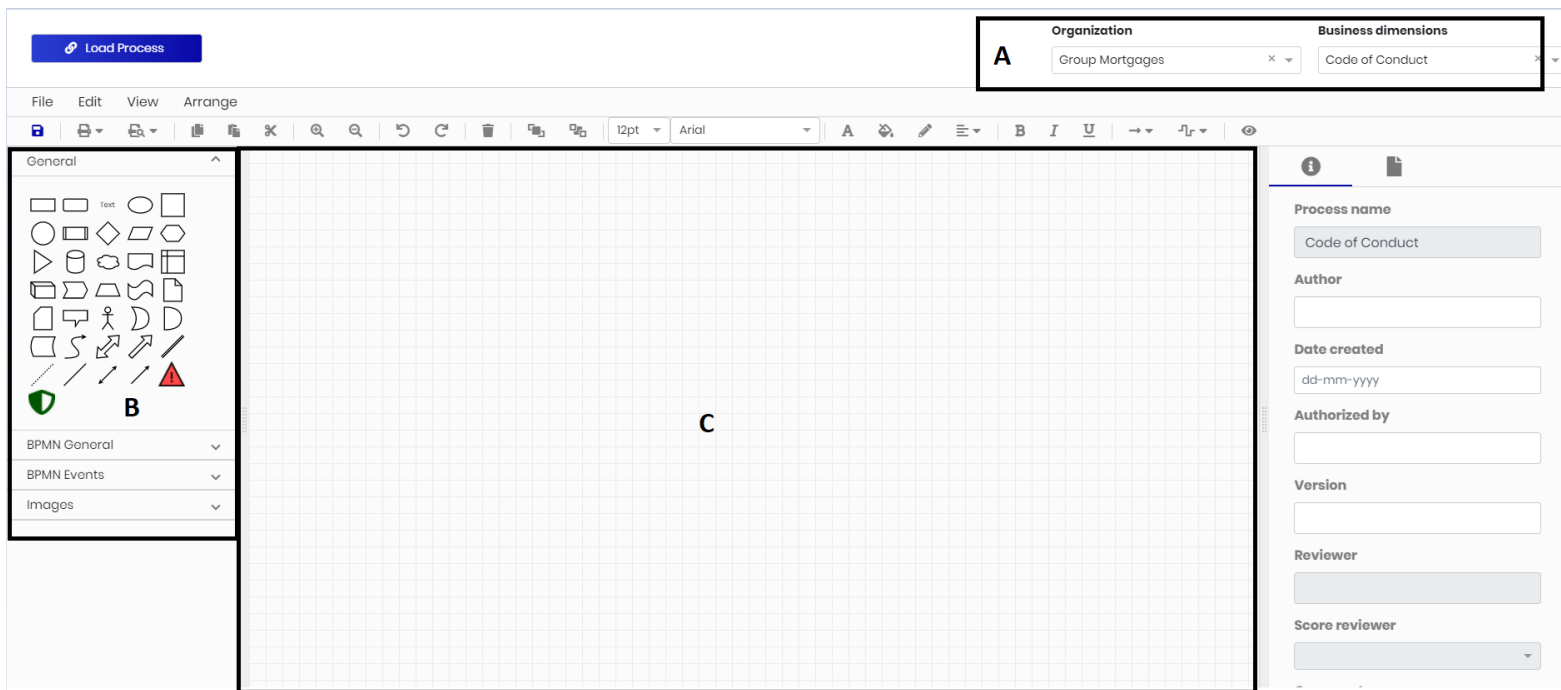

Figure 5: Process Editor

When u have selected organization / business dimension, the process screen will be available. (A and B figure 5). This is where you start drawing. The library ("B" figure 5) contains symbols that can be dragged into the process(see "C" figure 5) anywhere you like. The basis for all symbols the international BPMN-standard(Business Process Modeling Notation). This works the same as e.g. MS Visio.

Linking shapes

Within a process, process steps should always be linked to each other. Process steps can be linked to each other by drawing a line between the steps. To do this, hover on a process step, 4 blue arrows will be shown.
 (see figure 6). Click on one of the arrows and drag the arrow towards the process step you want to link the process to. A new blue line will be created automatically.
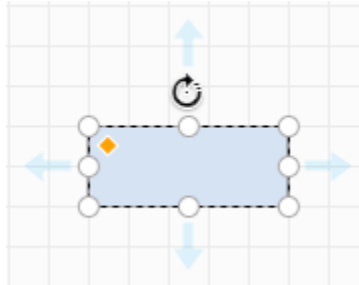

Figure 6: Processtap

Alignment help

The system has multiple functionalities integrated to support the user with building a process in the diagram. For example to continue building after a shape has been added, click on the highlighted blue arrow. Then a new shaped is automatically linked (see figure 7).
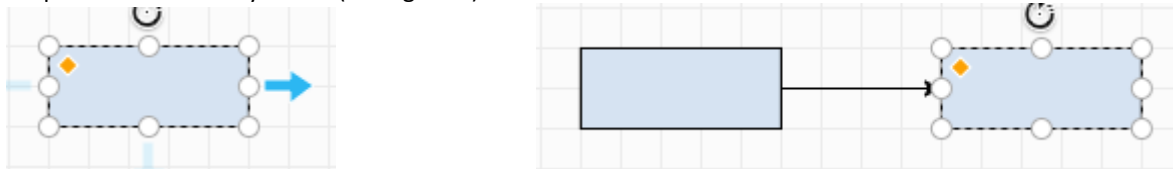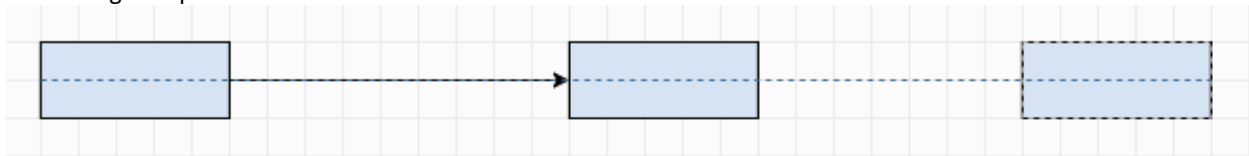

Figure 7: Continue buildiing

And to align shapes.

Figure 8: Alignment help

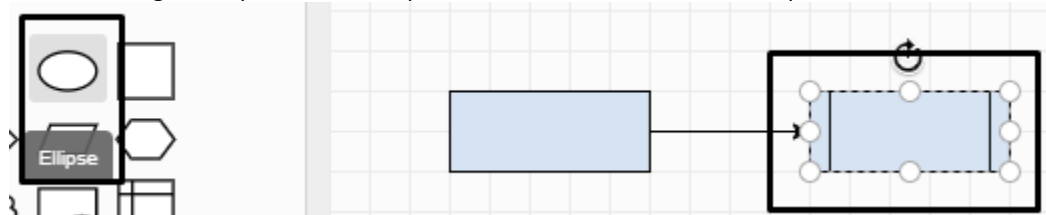Or if you want to change a shape. Select a shape and click on 'Shift + the new shape'.

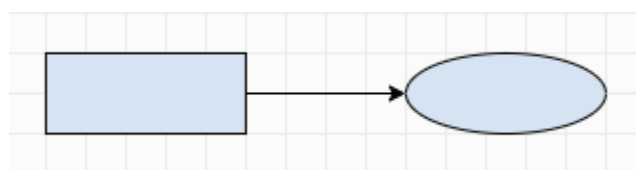Figure 9: Alignment help

Than the new shape is shown.

Figure 10: Alignment help

Cosmetics
There are multiple tools to help you illustrate the process better. There are tools to determine the font size, letter type and colour of the selected text (see "A" figure 11). You can also choose to align text, or make text bold, italic or underline.
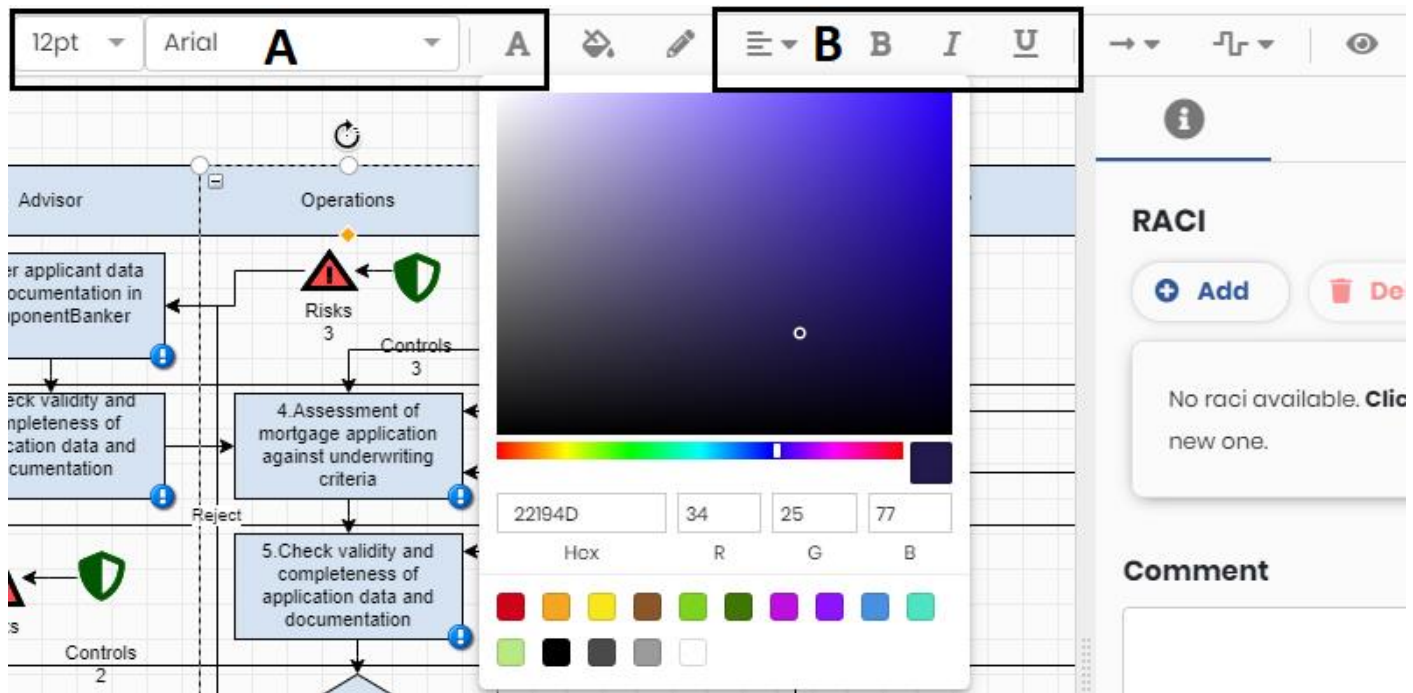

Figure 11: Font settings

To implement organizational standards regarding colours within a process, there are two options. You can determine the colour of the shapes and lines of the shapes (see "A" figure 12).
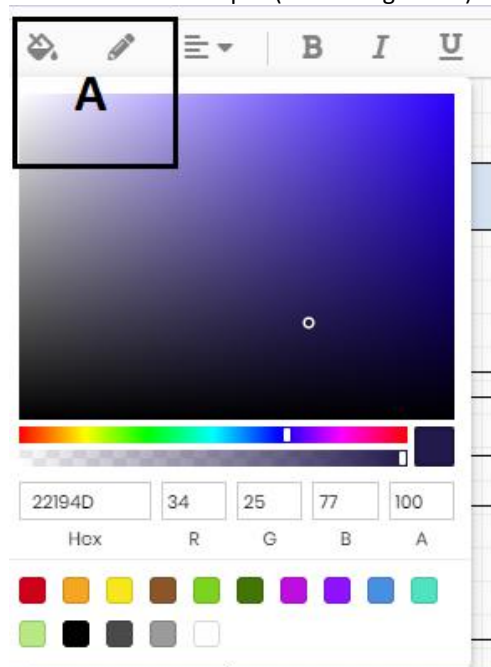

Figure 12: Font settings

There are two tools to help the user with the layout of linking shapes to each other. First there is "connection" to choose wat connector should be used. (see figure 13).
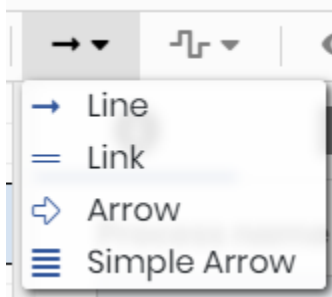

Figure 13: Font settings

With the other option "Waypoints" the user can decide how the line should be followed to the linked shaped (see figure 14).
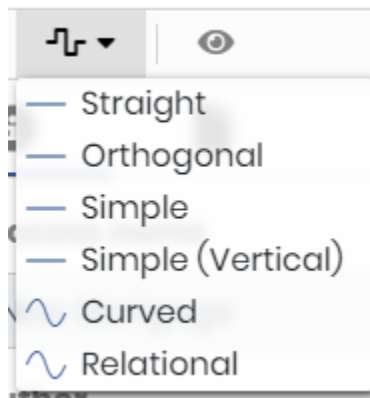

Figure 14: Font settings

1.1.2 Add information to process steps
Users can add information to the process shapes and lines. When selecting the shape, the screen on the right is shown. (see "B" figure 15). In this screen you can add RACI (roles and responsibilities), comments, linked processes and print sequence.

RACI stands for:
R – Responsible:
1. R is responsible for this process.
A – Accountable:
2. A is accountable for the responsible.
C – Consulted:
3. C is informed in advance about this proces.
I – Informed:
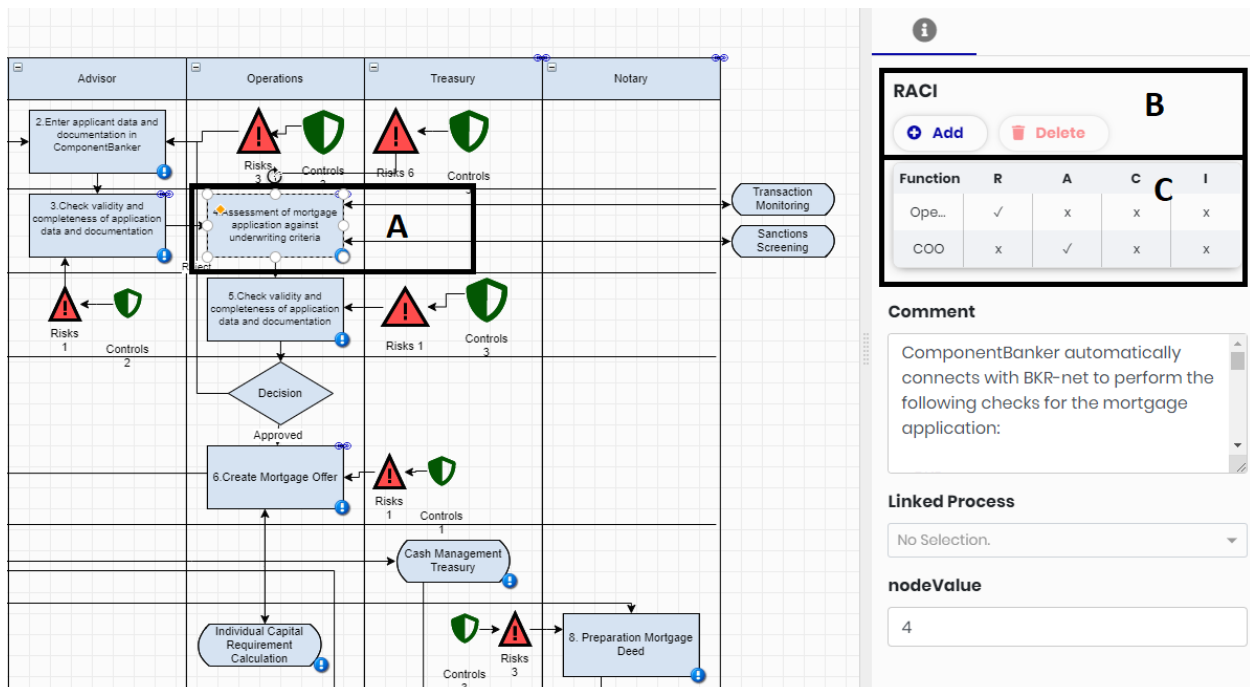4. I is the colleague that is informed about decisions afterwards regarding the process.

Figure 15: Add Information to process step

To add RACI, first select a process. (see "A" figure 16). Select the function[1] and then select the RACI that is applied to this function. Click on "**Apply changes**" to add the RACI.

Figure 16: Add RACI function

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[1] Functions are available in standing data for Controls

1.1.3 Add risks and controls

To add a risk or control in a process, you have to select the risk or control shape from the library. (see figure 17) and drag it into the process.

Figure 17: Symbolen "Risk" en "Controlemaatregel"

Than the risk should be linked to a process step. This works the same as linking process steps(see paragraph 1.1.1). When the risk symbol is added, risks can be linked or created.

To add a risk to the risk symbol, select the risk that has been dragged into the process. (see "A" figure 18). When a Risk symbol is selected, on the right new Risks can be created, deleted (see "B" figure 18) or existing risk can be linked (see "B" figure 18). Click on '**Add**' to go to the risk screen. (see "B" figure 18). If you want to link an existing risk, click on "**Link**".


Figure 18: Add risks in process

Figure 19: Link risk

The pop-up shows risks that are linked to the selected business dimension[2]. To link a risk, drag a risk from the right of the table to the left of the table. (see "A" figure 19). Click next of the pop up to close.

Follow the same steps to link a control. Only use a controls symbol.

1.1.4 Print process or save as PDF
If you want to print the process, select the Print symbol. (see figure 20). By selecting a PDF-printer, the process diagram including the description is saved in pdf-format.
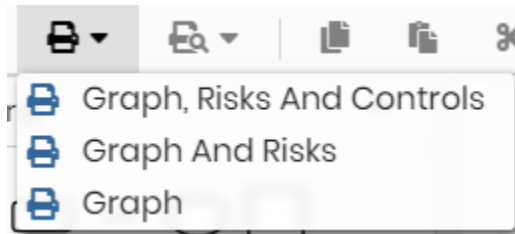
Figuur 20: Print Process diagram

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[2] See manual for Risk management