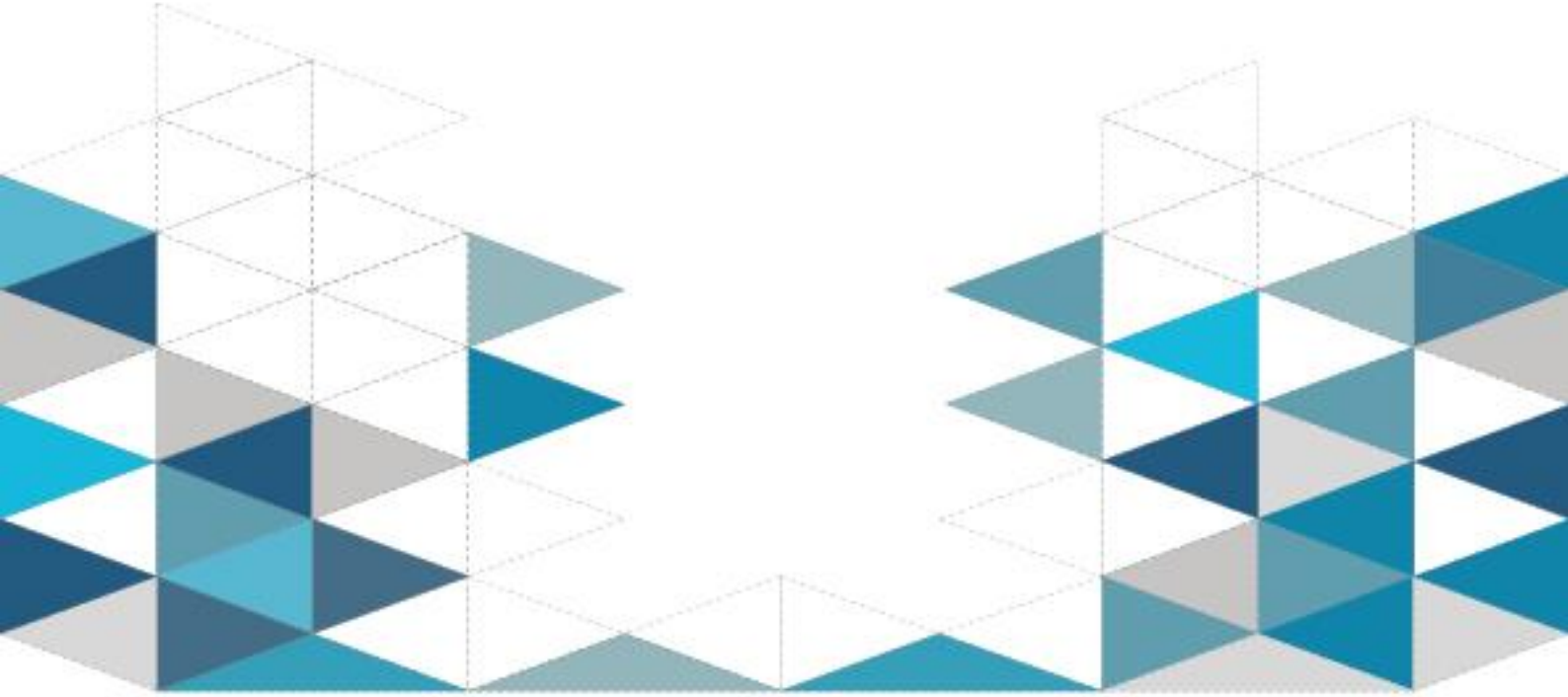
WissIntra NG



User Manual
Process Manager

You cannot simplify complex facts at will. However, the way to find the required information must be as simple as possible.

Arne Klein, Head of Software Engineering

User Manual Process Manager WissIntra® NG

For further information and manuals, simply scan the QR code or click the following link:

https://www.kuk-is.de/kundenzentrum.html

Last updated: 2023_11_16_V01

Imprint

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1 About this manual

This manual contains important hints that will help you to work with WissIntra NG and will support you to reach your goal faster. It is an essential aid for safe operation.

If you still have questions not answered in this manual, please refer to our service desk. You find the details at the end of this manual. For further questions or suggestions, please do not hesitate to contact us.

Gender-specific terms

Since using gender-specific differentiation of female and male terms makes texts hard to read, we will continue without it. By using the generic masculine, we refer to both genders. Therefore, all of these terms should be regarded as gender-neutral in the sense of the Equal Treatment Act.

Intended use

This manual is valid for the software version mentioned here and is not subject to the manufacturer's modification service. It only describes the specific module. For further information, which is necessary for the use of the different modules of WissIntra NG, you will receive the corresponding manuals for the respective modules.

This manual does not claim to provide a full description. Any use other than described herein is considered improper. The manufacturer shall not be liable for damages caused by incorrect usage of the software, insufficient knowledge of the provided documentation, reasonably foreseeable misuse or other inappropriate actions.

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Instructions for use

This manual contains numerous tips, suggestions and instructions. These text elements are represented as follows:

- **Bold**: Prompts and important information are highlighted in **colour and bold**.
- UPPERCASE LETTERS: Uppercase letters (e.g., CTRL + S) indicate shortcuts.
- Bullet-Point: A bullet point • represents instructions and input prompts.

Note: Useful information is marked with a frame and the word Note. This provides helpful information and tips.

Caution: Warnings are marked with a grey background and the word Caution. This identifies possible risks.

Definition: Technical terms are marked with a frame and the word Definition. This indicates the explanation of terms.

2 Getting Started

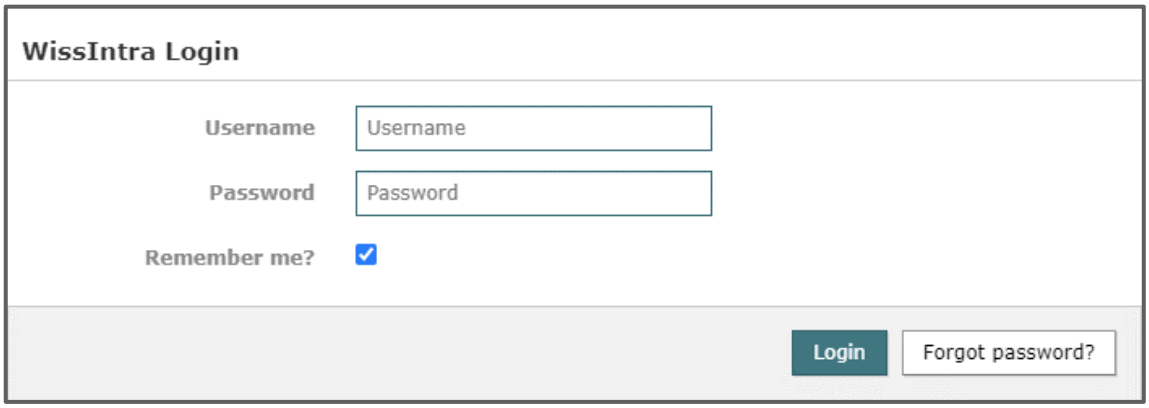
This chapter provides information about the following topics:

- Login to WissIntra NG
- Structure of the operating concept of WissIntra NG
- Handling of the cockpit of WissIntra NG
- Options for the profile settings
- Using the lexicon
- Permission concept

2.1 Login

- Open WissIntra NG in a web browser, such as: the latest Google Chrome, Mozilla Firefox, or Microsoft Chromium Edge.

The following WissIntra NG login opens:



- Enter your **Username** and **Password** and click **Login**.

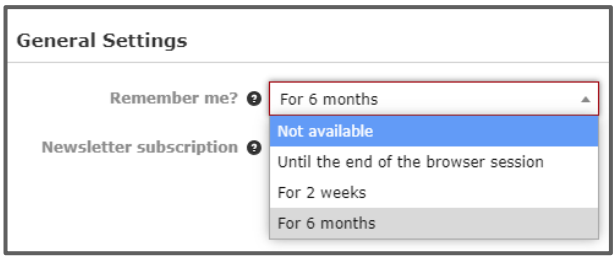
Note: If your user was created via the LDAP interface, please us your Windows password.

Remember me?

- By selecting this check box, you will be logged in automatically the next time you open WissIntra NG.
- The permanent login time can be set up to a maximum of 6 months.

Note: When you delete your browser cookies, you cancel the **Remember me?** in WissIntra NG. You have to login again with the correct data.

- As administrator you can select the duration of the **Remember me?** option. To do this, navigate via the **User** in the navigation bar to the **Settings** and click on **User Settings / Functions**. In the **General settings**, you can select the duration.



Note: After a user has been inactive in WissIntra NG for 20 minutes, a session timeout occurs and the user is temporarily logged out. This will make the previously used licence available for the next user.
The same happens when you log off from your browser by clicking on . The licence will be blocked by the user for additional 20 minutes. You can avoid this by logging out from WissIntra NG.

Forgot password?

If you have forgotten your password, you can request a new password:

- Click on **Forgot password?**
- The following dialog box appears:

- Enter your e-mail address and click on **Send**.
- The new password is sent by e-mail when you are registered as an active user. If your user is inactive, WissIntra NG also informs you about this and refers to your system administrator.

Note: This does not apply to LDAP users and group users.

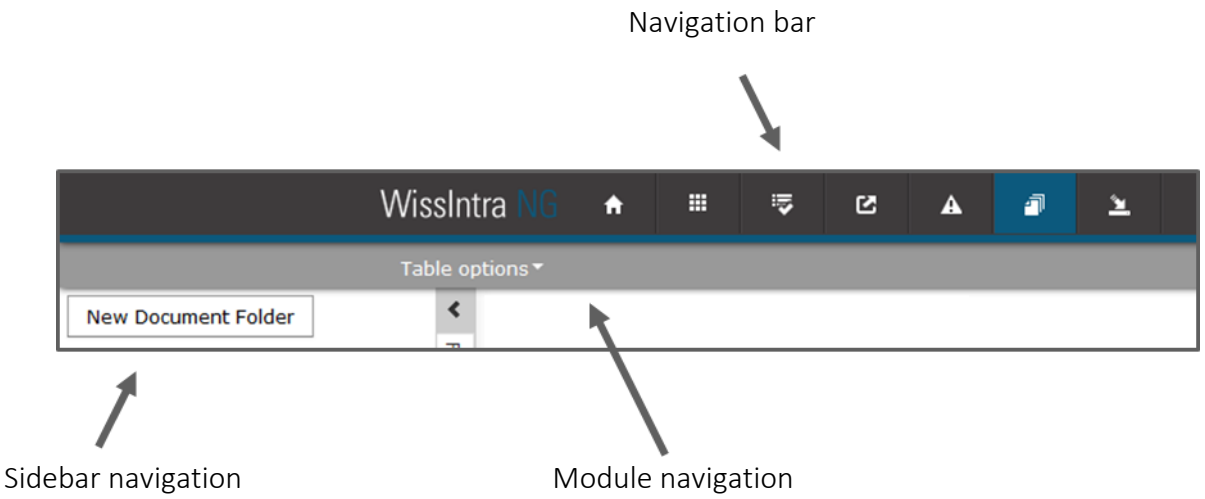
2.2 Operating concept

WissIntra NG has a new, consistent and user-friendly operating concept, which also allows inexperienced users to work quickly and securely with the software.

Since WissIntra NG opens directly in a web browser, no separate installation is required for individual users. The software works as intuitively as you are used to by surfing the web.

In WissIntra NG information is displayed in different navigation levels.

1. Navigation bar — This is where the user navigates between the modules (top level).
2. Module navigation — Here the user navigates within the respective module and selects between different views.
3. Sidebar navigation / Explorer — Here the user navigates within a tree view structure between different lists and tables.

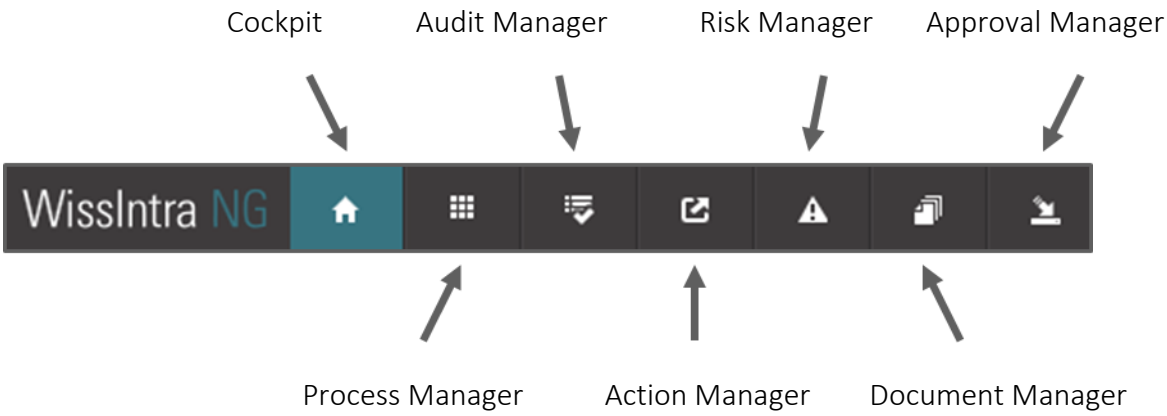


Modules

The various software applications, such as the Process Manager or the Audit Manager, are called modules.

You can access the modules directly in the navigation bar. The appearance may vary depending on which modules you have purchased. The basic module, the Document Manager and the Approval Manager are always included.

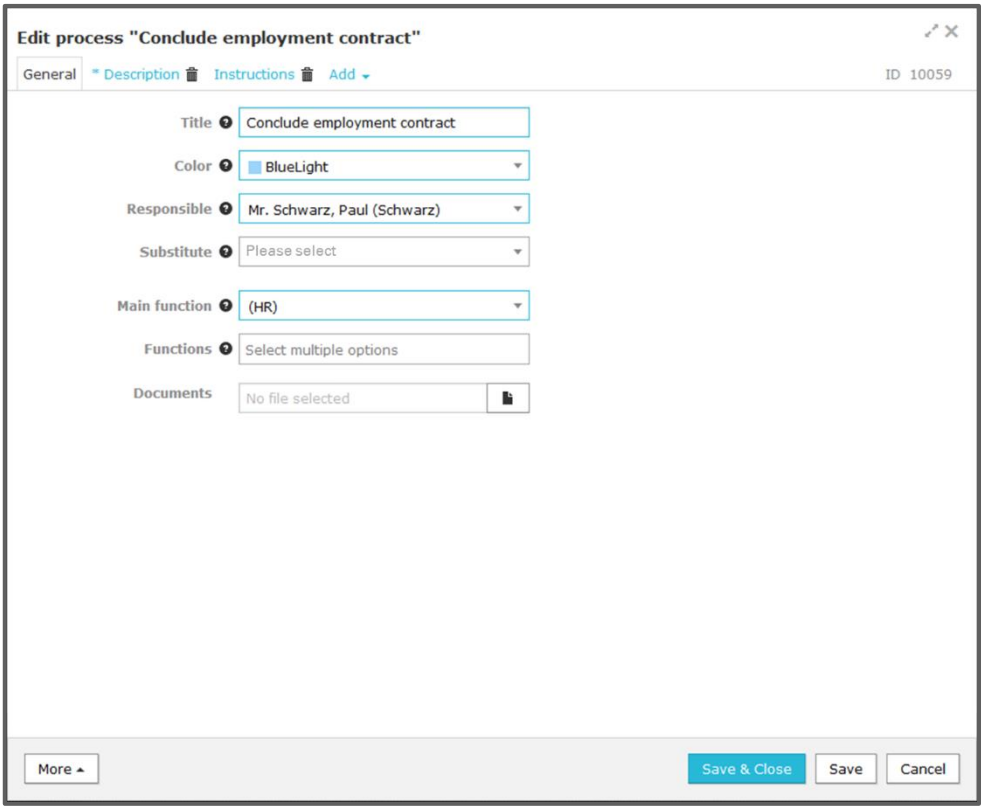
The graphic below shows the Cockpit, the Process Manager, the Audit Manager, the Action Manager, the Document Manager and the Approval Manager from left to right.



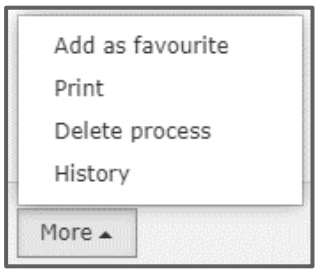
By clicking the respective symbol, the corresponding module opens. You can also click on the name of the module in the drop-down that appears on mouse-over.

Modals

Dialog windows, which block the background, are called modals. They are usually split into different tabs which can be added for further input.



Note: If changes in a modal have not been saved, the corresponding tabs are marked with a "*". Validation errors are marked by underlining the tab name in red.
When uploading documents that are subject to an approval workflow, the tab name is underlined in purple, and the document itself is displayed in purple, as long as the approval has not been given.

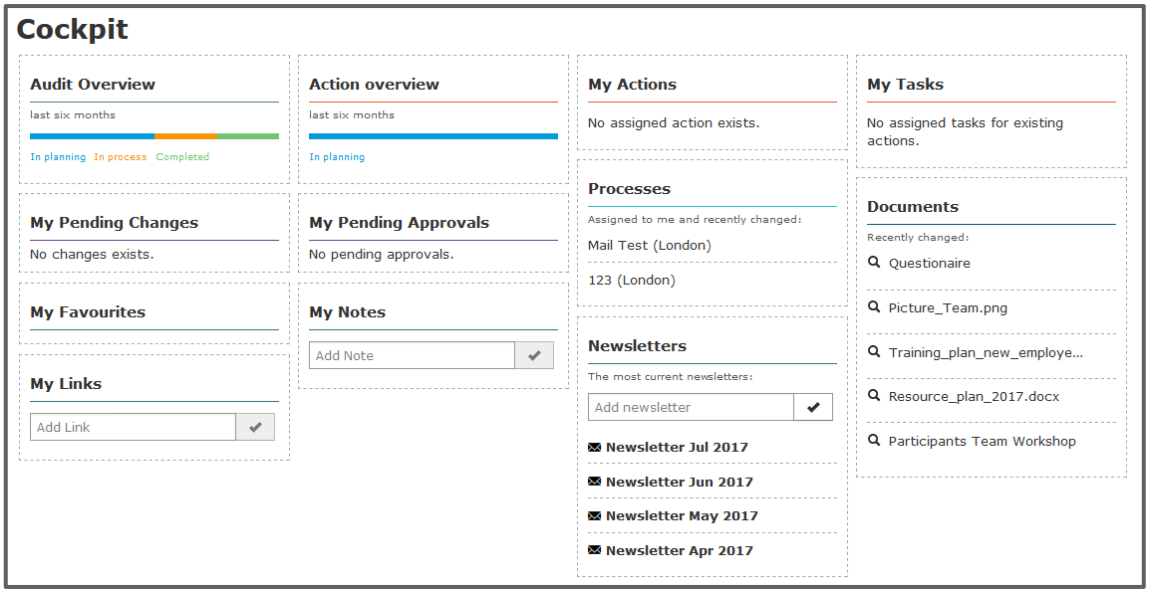


Most modals have the button More at the bottom left. Here you can find additional functions that you can use in the current context.

2.3 Cockpit

The cockpit is the start page of WissIntra NG, which opens after login.

The cockpit represents the control centre with quick access options that you can assemble and adapt yourself. By clicking on the corresponding links, you can directly access the desired object or process.



Note: The display of the boxes can vary depending on the modules you purchased. The **Documents**, **My Notes**, **My Pending Changes**, **My Pending Approvals** and **My Favourites** are shown all the time.

Navigation bar and cockpit offer the following functions:

Symbol	Name	Explanation
	Process Manager	You can use the Process Manager module to organize your processes. For more information, please refer to the WissIntra NG Process Manager manual.
	Audit Manager	You can use the Audit Manager module to organize your audits. For more information, please refer to the WissIntra NG Audit Manager manual.
	Action Manager	You can use the Action Manager module to organize your activities. For more information, please refer to the WissIntra NG Action Manager manual.
	Risk Manager	You can use the Risk Manager module to organize your risks. For more information, please refer to the WissIntra NG Risk Manager manual.
	Document Manager	You can use the Document Manager module to organize your documents. For more information, please refer to the WissIntra NG Document Manager manual.
	Approval Manager	You can use the Approval Manager for documents to manage changesets that need to be approved.
	Profile settings	Use this icon to access your user profile. There you can set your password, the colour theme, the default folder and default location. You can also see your assigned roles and functions.
	Language	This icon will take you to the selection where of the interface and content language. This is only possible if other languages have been purchased.
	Location	Use this icon to select the location within the drop-down menu. This is only possible if your system has different locations.
	Help	This icon gives you access to the WissIntra NG manuals and information about the program version and Release Notes.
Suche	**Search**	Using the search mask, you can search for terms in all modules.

	Processes	Here you can see all modified processes assigned to you. With one click, you can access these processes directly.
	Documents	Here the last five documents that have recently been modified are shown. Clicking on it, you can download these documents. A click on the magnifying glass opens the modal with the details for the document.
	Audit Overview	Here all the audits of the last six months are shown unfiltered in their respective statuses. With one click, you can access this overview directly.
	Action Overview	Here, all the actions of the last six months are shown in their respective statuses. With one click, you can access this overview directly.
	My Actions	Here all the actions of the last six months that have been assigned to you are shown. With one click, you can access this overview directly.
	My Tasks	Here all the tasks assigned to you for existing actions are shown. With one click, you can access the tasks directly.
	My Pending Changes	All the user's change packages are listed here. The change packages here refer to documents.
	My Pending Approvals	Here all the approvals for documents that are waiting for your decision are shown.
	My Notes	Here you can enter personal notes by using the text field. These notes are only visible for you.
	My Links	Here you can enter personal links by using the text field. These links are only visible for you.
	My Favourites	Here you can see all the favourites you have created. With one click you can access your favourites directly.
	Newsletters	Company-internal information, such as newsletters, can be stored here by the administrator and are visible for each user.

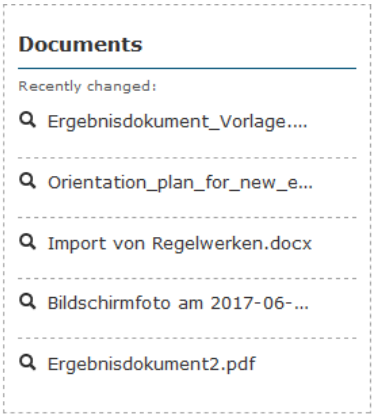
2.3.1 Cockpit boxes

Processes

The **Processes** box displays your 5 last modified processes. This means the 5 processes that have recently been changed and to which you are assigned to as process responsible or substitute.

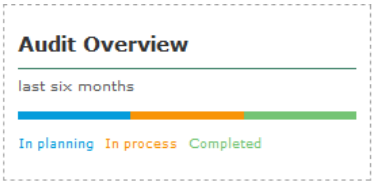
Documents

The box **Documents** shows a list of all recently changed documents for which the user has the appropriate permission. It displays the last five effective changes.



Audit Overview

In the box **Audit Overview** you can see all audits for the current location with their corresponding statuses in a colour bar. You can see all audits that have been completed in the last six months. Audits in planning or in process are shown without any time restriction.



- In planning (blue)
- In process (orange)
- Completed (light green)

Action Overview

This **Action Overview** shows all actions for the appropriate location with their corresponding statuses. You can see all actions that have been checked for effectiveness from the past 6 months. Actions from a different status are shown no matter, which start date they have. For a better overview, they are displayed in a colour bar.

WissIntra NG differentiates the following statuses:

- In planning (blue)
- In process (orange)
- Completed (light green)
- Checked for effectiveness (dark green)

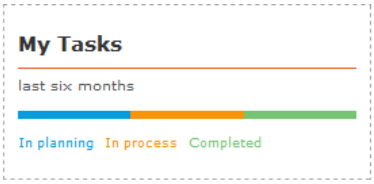
My Actions

In the box **My Actions**, all actions related to the user are listed. This allows a quick and uncomplicated overview of upcoming actions. In addition, here the colour bar also appears for an easier overview:

- In planning (blue)
- In process (orange)
- Completed (light green)
- Checked for effectiveness (dark green)

My Tasks

The **My Tasks** box gives you an easy overview about your tasks from the last 6 months as well as future tasks. A colour bar indicates the progress of the tasks:

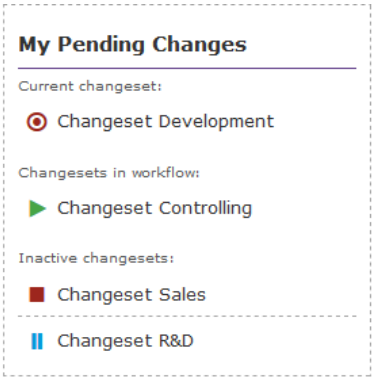


- In planning (blue)
- In process (orange)
- Completed (light green)

My Pending Changes

The Box **My Pending Changes** shows all of the user's changesets, divided in:

- Current changeset
- Changeset in workflow
- Inactive changeset



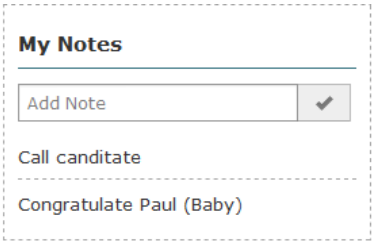
My Pending Approvals

In the Box **My Pending Approvals**, all changesets are listed that still await a decision by the user whether the approval is granted or not.

My Notes

In the box **My Notes**, you can save personal notes.

- Enter your note in the text field.
- Click the checkmark. The note appears under the text field.
- Repeat the procedure to save additional notes.
- Click the pencil icon to edit the note.
- Click on the recycle bin icon to delete the notes.



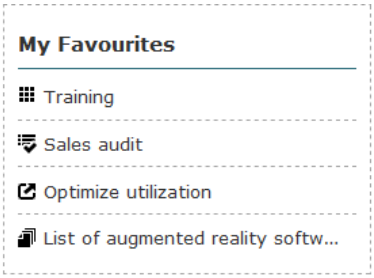
My Links

You can add personal links using the text field **Add Link**.

- Enter the link in the text field.
- Click the checkmark. The link appears under the text field.
- Repeat the procedure to save additional links.
- Click the pencil icon to edit the link.
- Click on the recycle bin icon to delete the link.

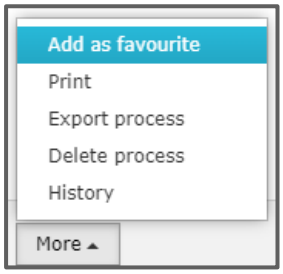
My Favourites

The **My Favourites** box allows you to place links out of processes, audits, actions, risks and documents for direct access.



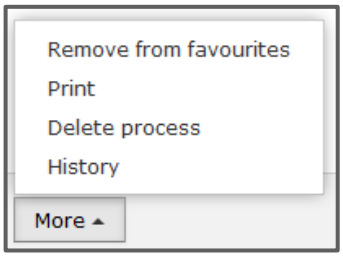
Add as favourite

- Open the process, audit, action, risk or document modal which you want to save as favourite.
- Clicking on the button More opens additional functions.
- Click on **Add as favourite**. A short message confirms that a new favourite has been successfully added to your favourites list in the cockpit.
-



Remove from favourites

- Open the detailed view of the object and navigate to More.
- Click **Remove from favourites**.
- Alternatively, you can also remove the saved favourites directly in the cockpit by clicking on the recycle bin icon .



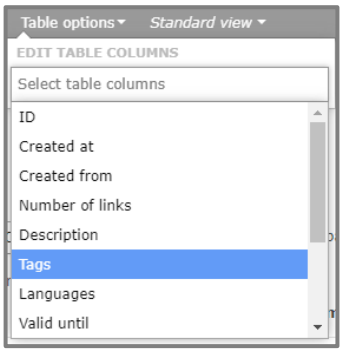
Newsletters

In the box **Newsletters**, company-wide information such as newsletters can be added. This box, if filled, is visible to all WissIntra NG users and is managed by the administrators. The maximum number of entries displayed is limited to five.

2.4 Table options, filters and views

Table options

ithin the different WissIntra NG modules, where there are table overview pages, you have the possibility to adjust all columns of the tables.



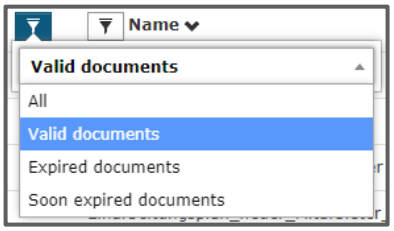
- In the module navigation (submenu), click on **Table options** and select the columns to be displayed. Furthermore, you can deselect all columns that are irrelevant for you.
- using drag and drop, you can arrange the columns within the table.

On the right you see the example of the selection for the table columns in the Document Manager.

Filter

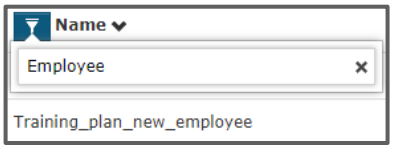
Each column in a table view can be filtered.

Columns with fixed values:



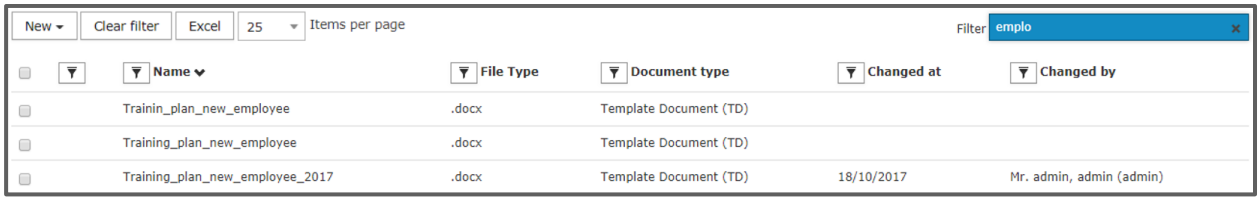
- Click on the filter icon and select a value from the drop-down list.
-

Columns with free content:



- Click on the filter icon and enter the term, number or date by which you want to filter in the free text field.

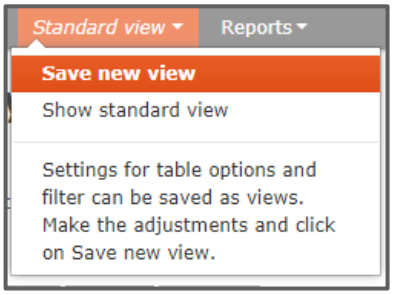
You can also filter across all columns using the general free text field on the right above the table.



Views

The table columns and filters you have set are automatically saved by WissIntra NG for similar table views, so that, for example, when you switch between different document folders, the same columns are always displayed.

If you have not made any adjustments to the table columns or filters, you see the table in the **Standard view**.



Show standard view

- Move the mouse in the submenu to **Standard view** and click on **Show standard view** to reset all additionally selected table columns and filters.

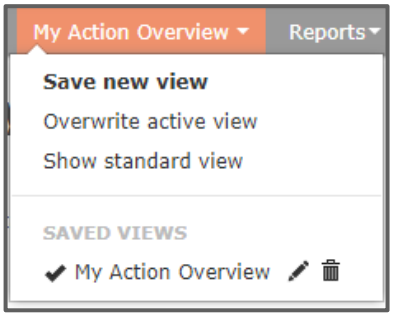
Save new view

You can also save your own views for similar tables.

- To do this, select the columns that you want to display in a table and/or filter for one or more values.
- Go to ***Standard view*** and click on **Save new view**.
- Enter a name and **Save** the view.

The view you have saved is immediately active and accessible via the submenu.

You can rename the view using the pencil icon and delete it with the recycle bin icon .



Overwrite active view

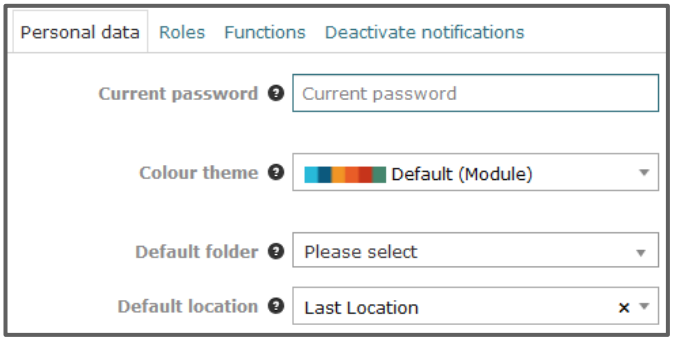
If you want to change a view that has already been saved, you can overwrite the view.

- Activate the saved view and make the desired changes to the table columns and filters.
- Click on **Overwrite active view**.
- If necessary, rename the view and click on **Save**.

2.5 Profile settings

Use the icon to access the profile settings.

- By clicking on **Profile settings** the following modal opens.



In this modal, you will find three or four tabs.

In the first tab **Personal data** you can make the settings for **Password**, **Colour theme**, **Default folder** and **Default location**.

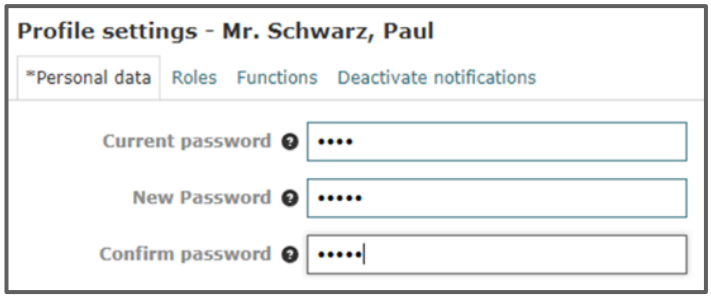
In the tabs **Roles** and **Functions**, the user can see which roles or functions are assigned to him within the respective locations.

In the tab **Deactivate notifications**, you have the option to deactivate the e-mail notifications sent out by WissIntra NG. You can see this tab only if your administrator has activated this feature. You can do this setting for each module separately by selecting the check box of the module from which you do not want to receive any notifications any more.

Note: If the tab **Deactivate notifications** is not available, contact your administrator.

Change password

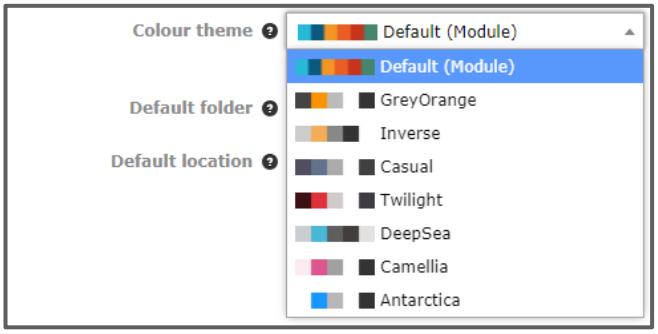
- By clicking on **Current password** two new fields appear: **New password** and **Confirm password**.
- Fill out the fields with the current password and a new password.
- Save your change.



Note: This does not apply to LDAP users since they use the Windows password to login. This also does not apply to group users, since this password is always assigned by the administrator.

Set the colour theme

WissIntra NG offers you a selection of different colour themes. By using the colour theme, each user can customize his own interface.



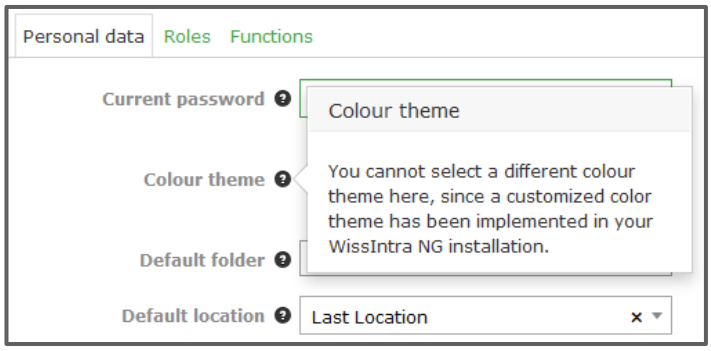
- Select the desired colour theme in the drop-down menu.
- **Save** your choice.

Note: The **Default (Module)** is selected from the beginning. Here each module has its own colour.

Customizing the WissIntra NG user interface

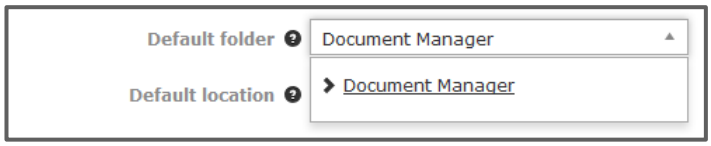
We offer you the possibility to customize the WissIntra NG user interface according to your wishes. You can find the information in the corresponding PDF in our Customer Centre.

Once you use your own customized colour theme, users of your system will no longer be able to select another colour theme.



Select Default folder

You have the option to change the default folder "Document Manager" which is set by WissIntra. This folder always opens the folder you have selected, both when starting the Document Manager and when selecting or uploading documents. This will help you navigate faster within the document manager.



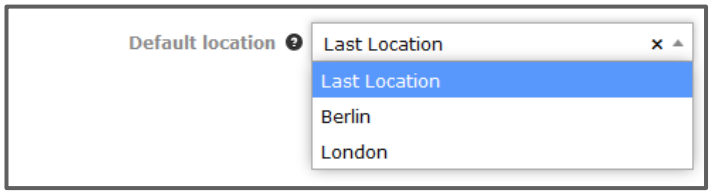
- Open the drop-down menu and navigate with ❯ to the desired folder.
- **Save** your selection.

Note: For group users, the default folder can only be set by the administrator. If you are working with a group user in WissIntra NG, you can see in the profile settings which folder was chosen by your administrator.

Note: Once the selected default folder is deleted, the root folder **Document Manager** is automatically set as the default folder.

Note: The ability to select a different folder as the default folder is only available if you have sufficient permissions in the document manager.

Select the default location

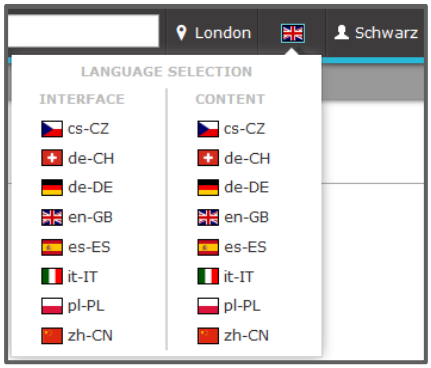


If you are able to access multiple locations in your system, you have the option to select a default location that will be opened each time you log in. Alternatively, you can choose that WissIntra NG always opens the location that was used at last.

- Select the desired location from the drop-down menu.
- **Save** your selection.

Note: If a default location is deleted, the option **Last Location** is automatically set here.

2.6 Language

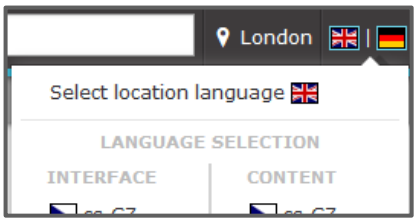


Use the flag icon to access the language selection.

You have the option to select both, the language for the interface and the content.

This option is useful if, for example, a company has one location in Germany and one in England. Thus, an employee of the German location can display the content of the English location but continue working in the German interface language.

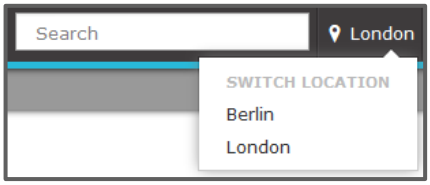
As soon as you have made such a selection, the option **Select location language** is displayed. This option changes both, interface and content to the language assigned to the specific location.



Note: The languages displayed here depend on your purchased licence.

2.7 Location

When you move the mouse over the current location, a drop-down menu appears. You can **switch location** if you have multiple ones and if you have the permission to see them.

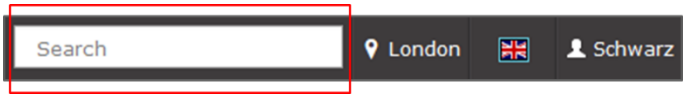


- Click on the desired location.

Note: Changing location is only available if you have several locations. This depends on your purchased licence. The administrator sets the parameters for the location.

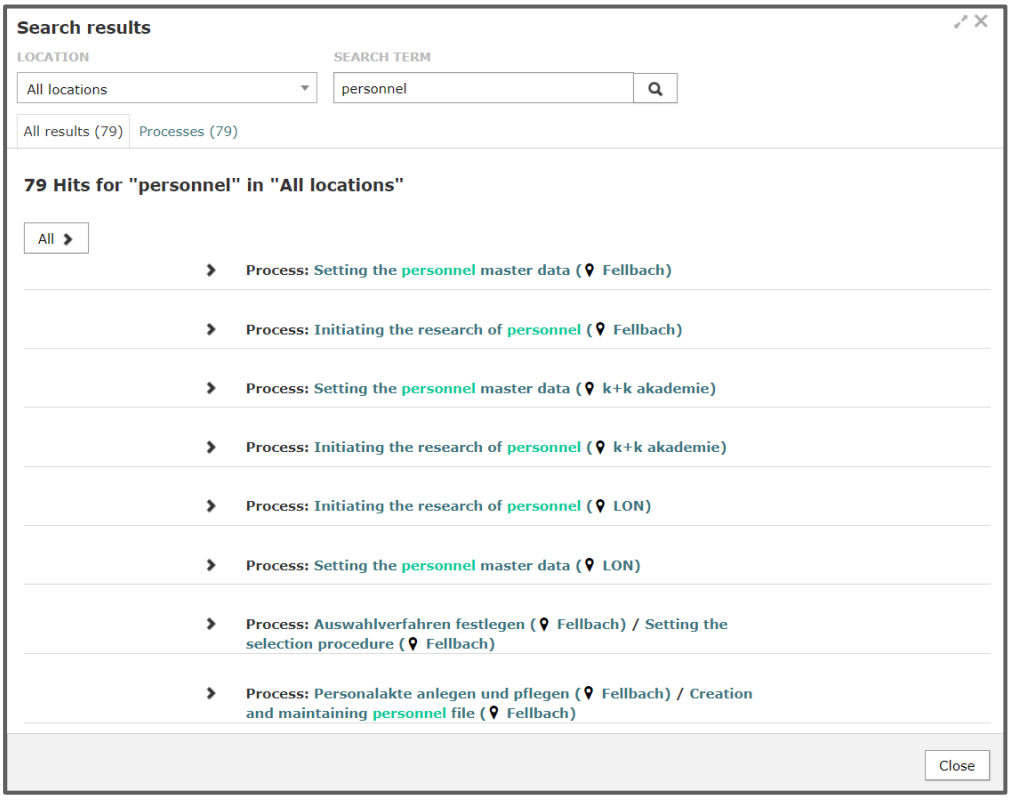
2.8 Search

The **Search** in the navigation bar allows you to search for terms across all modules and locations in which you have the permission to work.



- Enter the desired term in the search field.
- Confirm by pressing **Enter**.

A modal opens where the search results are displayed and the term you searched for is highlighted in green. You can use the tabs to select whether you want to see **All results** or only those for one of the modules.
Here, e.g. the modal with the results for the search term “personnel”.



Note: The search term must contain at a minimum 3 characters.

The search can be further refined. You can choose between the following three options:

1. Wildcard search

The wildcard search uses placeholders for single or multiple characters within the terms.

- Single character search with "?":
  Here the "?" is used as a placeholder. For example, if you search for the terms "test", "text" or "tester", use the search term "te?t"
- Multiple character search with "*":
  Here the "*" is used as a placeholder when you search for one or more characters. For example, if you search for "process*" you will get terms like "process", "process description" or "process step"; if you search for "*process" you will also get "process" as well as terms like "main process".
  When you use the placeholder before and after the search term, e.g. "*process*", you will find all composite terms no matter if the additive term is before or after the search term.

2. Fuzzy search

The fuzzy search is based on the Levenshtein algorithm. To use this search, use "~" at the end of a single word.

Note: Press ALT GR + */+/~ to generate the tilde symbol (~).

- If you search for example for a term that sounds like „teacher", you can use the Fuzzy search with "teacher~". The search result contains terms like "teacher", "teaching", etc. The desired similarity can be specified with a value between 0 and 1. The closer the value is to 1, the more similar the terms will be.
  If nothing is specified, the default setting is 0.5.

3. Booster search

When searching for several words, a term can be boosted. The booster search allows you to control the relevance of a word. The higher the boost, the more relevant the search term is.

To boost a term, use the "^" symbol and a boost factor at the end of the term.

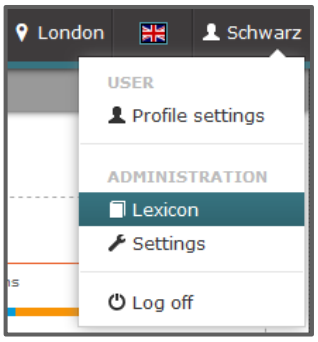
- For example, you search for "satisfied customer" and you want to increase the relevance of the term "satisfied", you can boost it with the "^" symbol and a boost factor, e.g. "satisfied^4". Thus, "satisfied" is 4 times more relevant for the search than "customer". The boost factor has to be always positive (>0).

Note: As of October 2021, the default search behaviour in WissIntra NG changed in a way that the system does not open a modal dialog directly when there is only one search result found. Only when that result exactly matches the ID of e.g. a process, the process modal will be opened immediately. In all other cases, the system displays the usual search results page.

Note: If your search yields no results, you can try to change location and retry.

Note: Search terms with special characters like "-", "+" or "_" can be found in the search now. WissIntra is able to search for the complete word combination (e.g., “kick-off”) and display the correct search result. Working with two special characters, for example "task-*", is also possible.

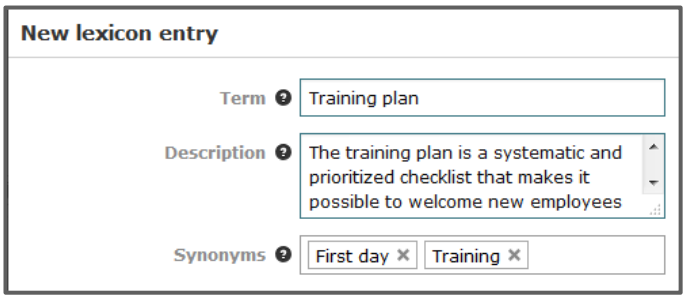
2.9 Lexicon



In WissIntra NG, all users with a Power User licence can create terms in the lexicon. Users with Read User licence can only read the lexicon. Terms that are inserted in the lexicon appear in dotted underline in free text fields. If you move your mouse over the term, the description appears.

There are two ways of creating a lexicon term:

- Navigate to the user and open the lexicon.
- You will see an overview of all existing terms in WissIntra NG.
- Use the button Excel to export all terms into an Excel list.
- Use the button New to create a new term.
- Enter the term or an abbreviation, such as e.g. “CIP“ in the field **Term**. In the **Description**, insert the text you want to appear on mouse-over. In the field **Synonyms**, you can enter terms which have the same meaning or similar use. The same description will be shown on mouse-over as well for these terms.



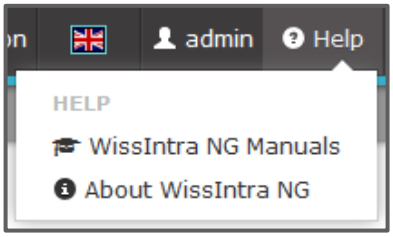
Alternatively, a lexicon entry can be made directly via each free text field:

- In the toolbar of free text fields, you can directly insert a term by clicking on the left icon shown here. By clicking on the right icon, you access the lexicon where you can proceed as described above.

Note: Please note that the lexicon is language-specific. The terms have to be maintained separately for each content language.

2.10 Help

The **Help** button in the navigation bar gives you direct access to the WissIntra NG manuals as well as to information about your version and the latest version of the program.

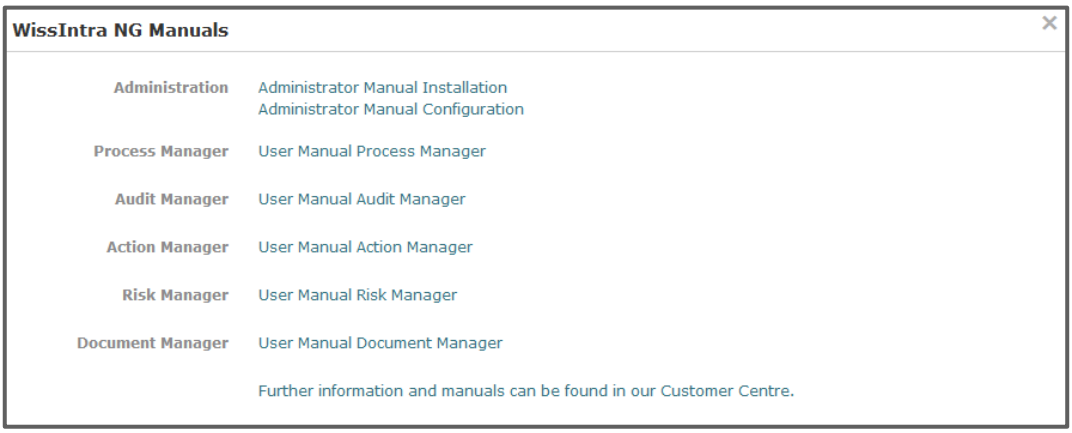


WissIntra NG Manuals

- Navigate to **Help** and click on **WissIntra NG Manuals**.

A modal opens in which you will find all manuals for the WissIntra NG modules and for administrators.

You can find further information if you follow the link to our Customer Centre.

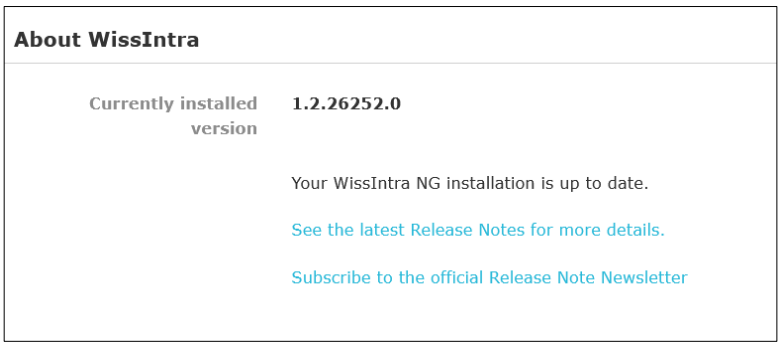


About WissIntra NG

- Navigate to **Help** and click on **About WissIntra NG**.

A modal opens with information about the currently installed version and whether newer versions of WissIntra NG are available.

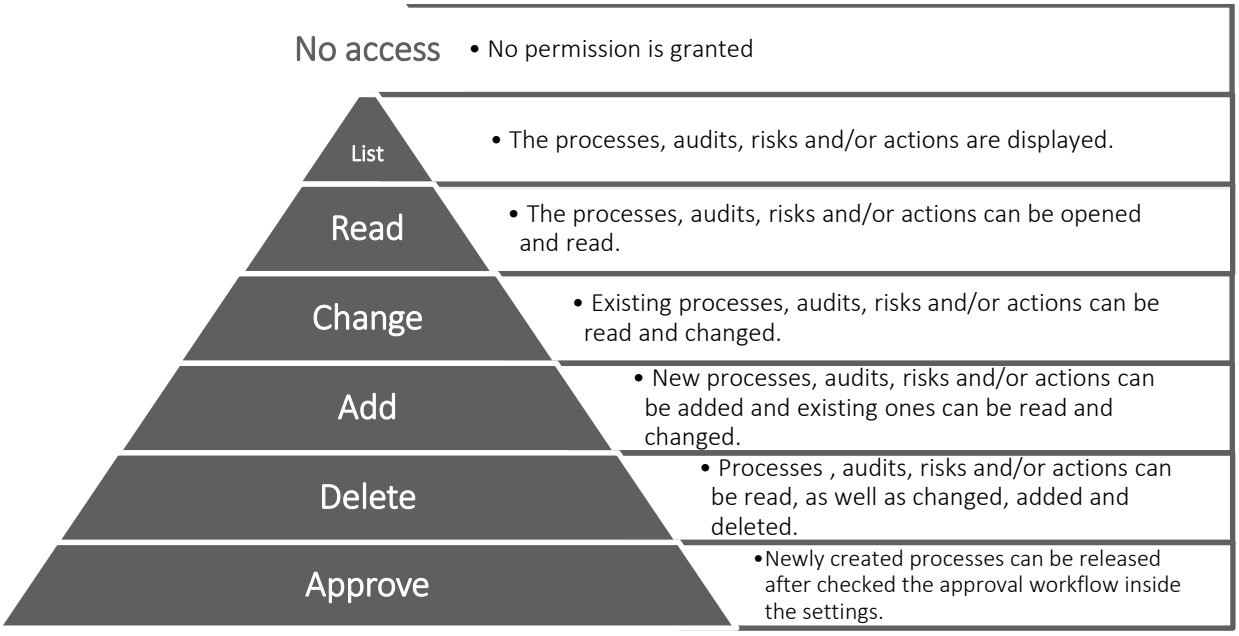
In addition, a link will take you directly to the current Release Notes. If your administrator activated **Newsletter Subscription** option in User Settings, a link will show enabling you to subscribe to the official Release Notes Newsletter.



Note: If you cannot see the link enabling subscription to the official release notes newsletter, please contact your administrator.

2.11 Permission concept

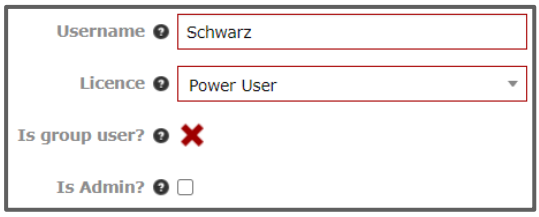
Access to WissIntra is given via permissions. There are six independent module permissions. The pyramid describes the increasing permissions from top to bottom:



Note: Permissions are assigned independently. Consider that the permission **Delete** requires at least the permission **List** and **Read**.

WissIntra NG distinguishes between Read User and Power User licence. They allow different access to the modules. As an administrator you can select the corresponding licence in the user administration and control the assignment:

If you select the **Read User**, the user is given access to WissIntra NG with a Read User licence. By selecting **Power User** he will log in with a Power User licence.



In the user administration, the user is granted a global permission without restriction by clicking the check box **Is Admin?**. The prerequisite for this is the access via Power User licence.

The following graphic gives an overview of the possible accesses:

ith a read user license, the user with appropriate authorization sees the objects listed in the process manager, risk manager and the audit manager in the standard setting, and can open them.

With a Power User licence, the user can initially get all permissions.

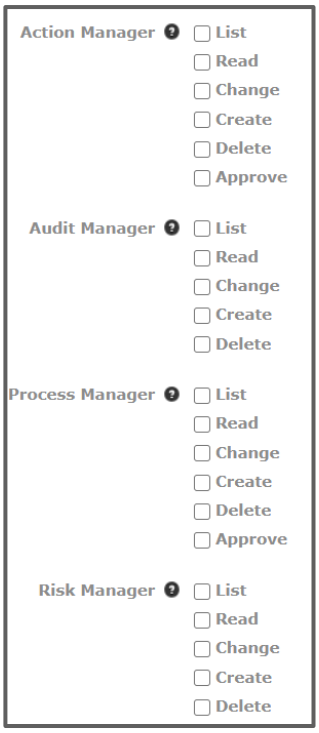
Therefore, you should develop an individual permission concept, which meets your company-specific requirements.

Note: Permissions are given by assigning users to specific roles.

By defining roles, you control the access to the modules and the locations.

To grant permissions, you first need to create a role that you can name freely. Subsequently, the required permissions are granted to this role for each module. The permissions are not ordered hierarchically and are independent from each other.

This role can be assigned to users at one or more locations. It is always assigned individually. This also applies to group and LDAP users.



Note: The permissions are granted by the administrator.

You can see two examples here for clarification:

- The role „viewer“ with permission to read within the Process Manager can for example be given to all users that have a Read User licence access to WissIntra NG and only need to read processes.
- Another role could be the „action planner“ who can create actions but cannot further edit them.

Note: If a user is responsible for a process in WissIntra NG, he can edit and delete it or create new processes in a deeper level. This is possible if the user has a Power User licence but has only received a read permission for this module.

- If you create a role „process keeper” with the permission to list, read and change within the Process Manager, the user assigned to this role can access the Process Manager and change processes. For further modules, this role has no other permission. Thus, the user has no access to other modules.
  Here the process responsible has a special permission. He can also create underlying levels and has all permissions for the child processes.
- While creating roles, please consider that not every combination of access rights is useful, like e.g. a role named “delete” with the permission to delete but without permission to read.

Note: Before migrating / installing WissIntra NG, please develop an individual permission concept that meets your requirements. If you have any questions, please do not hesitate to contact us.

Note: In the following manual, it is assumed that the respective user has the appropriate permission.

3 Short introduction Process Manager

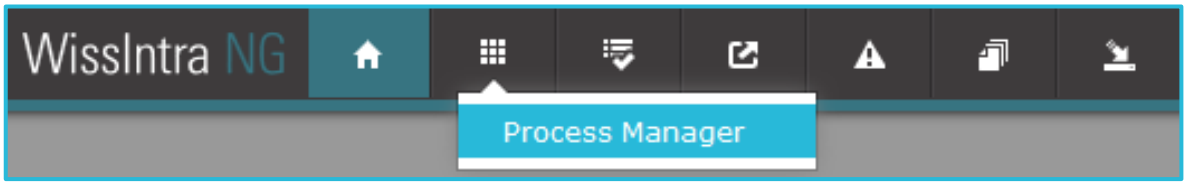
In this chapter, you will find in short:

- How to start the Process Manager
- How the Process Manager works in WissIntra NG
- How processes are displayed in WissIntra NG
- Which setting options you have

How to start the Process Manager

- Click on the Process Manager icon in the navigation bar, or click on the drop-down with the module name which appears on mouse-over.

The Process Manager is started and you can work with it.



How the Process Manager works

The WissIntra NG Process Manager is designed to organize your business processes. While creating processes you can link the audit criteria lists and the associated criteria directly to the process or the individual process steps. The central component of the Process Manager is the process card. It allows you to build processes and describe a process step with all its details.

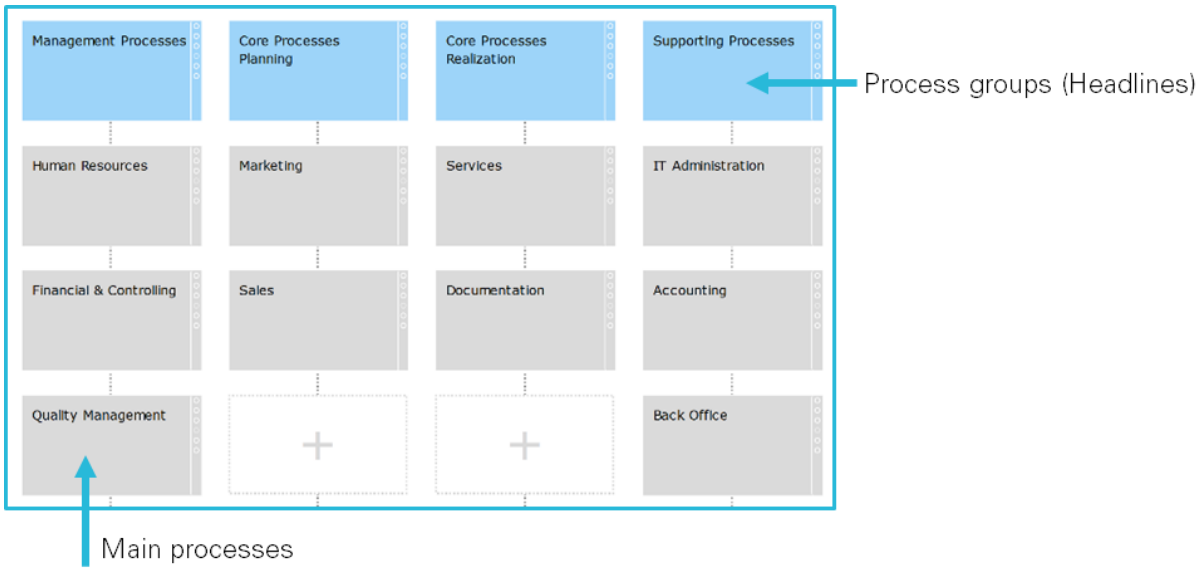
Structured and clear, the WissIntra NG Process Manager at a glance:

- Direct link to audit criteria lists
- Connection to related documents (also from external)
- Suitable for Certifications and Audits
- Up to 100 levels for complete design freedom
- Complete and comprehensive mapping of management, core and support processes
- Freely definable interface types
- Automatic information of employees when a change occurs
- Free definition of central specifications and specific characteristics across different organizations units and languages.

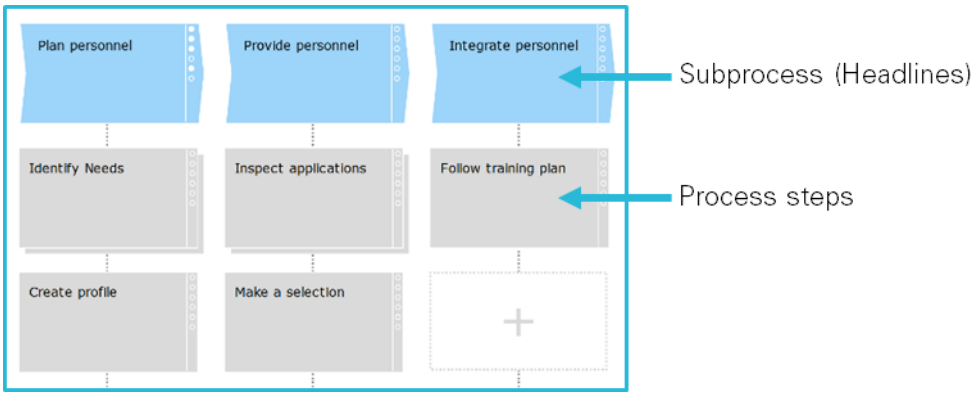
How processes are displayed in WissIntra NG

„Who does what, when, how and with what?“ This does not sound so complicated, but in reality it often fails due to the complexity of structures. With the Process Manager you will become a successful architect of a living process landscape.

The following graphs show how the company’s knowledge can be used to build company processes with the Process Manager.



The Process Manager differentiates between process groups and main processes. The process groups are stored on the uppermost horizontal level. Underneath, the associated main processes are assigned vertically. That means that each process group is assigned to main processes and that each main process is arranged under the corresponding process group.



Subprocesses are assigned to the individual main processes in a subordinate level. Further process steps can be created under the subprocesses.

The WissIntra NG Process Manager offers you a variety of different settings that are listed below.

For more information, please refer to the Administrator Manual Configuration, as these settings must be done by your administrator.

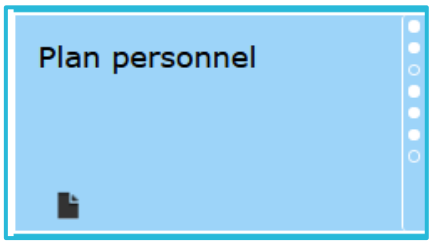
Setting options for the Process Manager

Settings	Description
Notification	It is possible to send notifications by WissIntra NG when generating, adding, changing and/or deleting processes. These notifications can be sent to a given role or to individual users.
Matrix dimensions	The maximum numbers of matrix dimensions are: • Columns (up to 50), • Rows (up to 50), and • Levels (up to 100) We recommend to set the maximum numbers as follows: • Culumns: 15-20 • Rows: 20-25 • Levels: 3-5 Here, you can also choose whether the users can use the Swimlane or not.
Number of persons responsible	It is possible to extend the number of persons responsible to up to 50 persons. The default value for the responsible persons is 7.
Interface types	Here, the different interfaces types that exist in your company are managed. That means the ways in which information is transferred from one process to another, e.g. by e-mail, by document or similar.
Process history	All changes that have been made in the Process Manager since installation are listed here.
Replacement of the process responsible	In WissIntra NG you can perform a bulk modification of the process responsible. The individual user can be replaced location-specifically at a defined point in time.
Replacement of the process function	The bulk modification of process functions is possible at specific locations at a defined point in time.
Process graphics	Create and edit individual process graphics as an entry-point to the available locations or processes with sublevels.

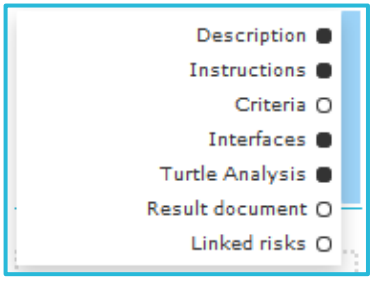
4 The process card

The central component of the Process Manager is the process card, which describes a process step in detail. With this, a holistic definition of all relevant characteristics and information, as well as the responsibilities, is provided.

The process card provides a schematic overview of the process step. It represents a central source of knowledge to which all users have easy access due to the web-based implementation.



With the process card, you can build even complex processes in a short time. When you move your mouse over the process card, you see a bar with partially filled bullet points on the right.



If the mouse is on that bar, you see the description of the bullet points, indicating the content behind the process card. The filled bullet points show that the corresponding information is available, the empty ones indicates that the tab is not (yet) filled. As a user, you can click on the card to open the detail view of the process card. When you click on one of the filled bullet points you get directly to the corresponding information within the process card.

Note: Within the process landscape, the process card that you have opened at last is marked with two blue lines. That allows you to navigate also via keyboard.

4.1 Create a process card

The Process cards in WissIntra NG are built according to the following definition.

Definition: A process is a sequence of logically related activities that contribute to the success of a company. Processes have a defined beginning and a defined end and aim to transform the process input into a value-adding output.

In order to have informational and relevant content in a process card, you should follow some rules:

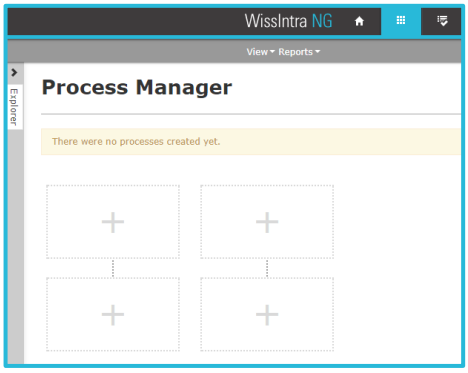
Rules

- Processes must always involve customer and suppliers (stakeholders). Consider the relevance of the process order. Is the previous process step actually the supplier? Is the following one the (internal) customer?
- Always use a noun in combination with a verb when creating a title since this is the best way to describe the activity.
- Be sure to follow the correct sequence of process steps throughout the entire process landscape.
- Remove unnecessary processes / process steps.

Note: To ensure compliance with the Continuous Improvement Process (CIP), use the Action Manager if available.

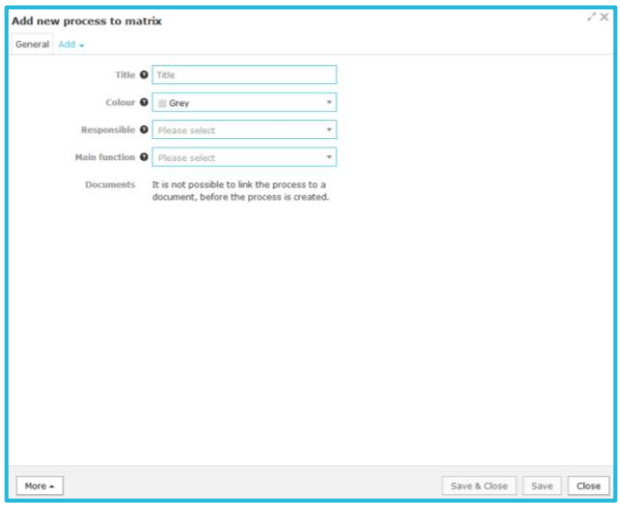
Create a process card

- To create a process card, click on any empty field in the process landscape.
- A modal opens which you can fill with content.



Fill out a process card

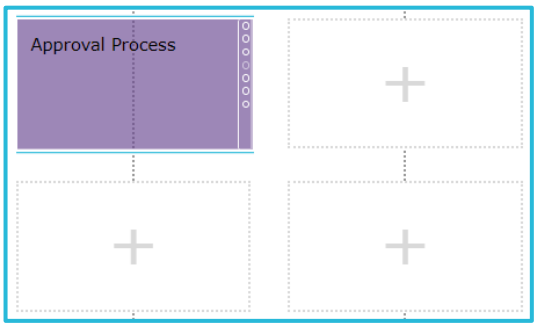
- The highlighted fields are mandatory fields. These must be completed.
- If you move the mouse over the icon ? , a tooltip appears. It shows you the meaning or the required content of the field.
- Fill in the mandatory fields:
  Responsible: it contains the person who is responsible for the compliance of the process.
  Main function: this contains the function that is responsible for executing the process. The assignment of functions is location-specific. Thus, one user can be assigned to one main function per location and to several secondary functions. This is because WissIntra NG allows a separate assignment of processes to persons and functions.
- After you selected a Responsible and a Main function the fields **Substitute** and **Functions** appear to add more persons and functions.



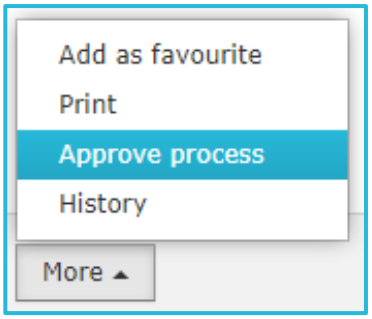
4.2 Process approval

Note: This function has to be activated in the settings by a system administrator. After setting the check mark, all new processes must be released by a process approver.

- For users having the permissions of **List** or **Read** only a newly created process is invisible.
- For users having the permissions of **Change**, **Create** and/or **Delete** the process card is slightly transparent and colored purple.
- Only users having the role **Approve** are allowed to release a process.



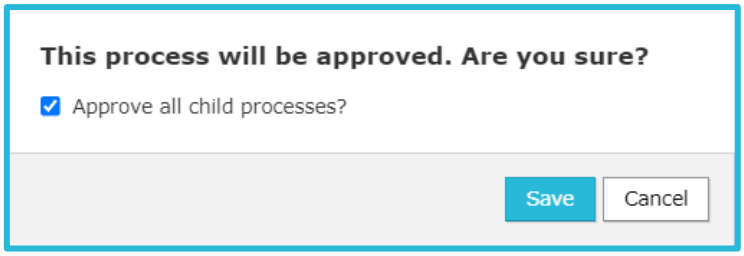
- By navigating to the button **More** and after clicking on **Approve process** the process will be released and visible for all users.
- The approval will be documented inside the **History**.



Approval of unreleased child processes (subprocesses)

If there are also unreleased processes in lower levels of an unreleased process, it is possible to release all in one step.

- Open the unreleased process card which contains unreleased subprocesses.
- Navigate to the button More and select **Approve process**.
- Now, set the checkmark at **Approve all child processes?**



- After approval, the process including all child processes are released.

Note: If the check mark "Approve all child processes?" has not been set, only the parent process has been released and each single child process must be released seperatly.

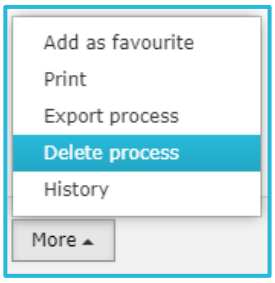
4.3 Edit a process card

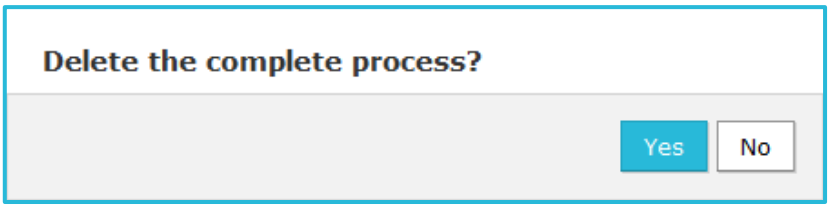
- Click on the process card you want to edit. The modal opens in read mode.
- To **Edit**, please click on the button Edit at the bottom right.
- Now you can edit the process card.

Note: If the Edit button does not appear, check your licence and permissions. If you only have a Read User permission, you cannot edit process cards.

4.4 Delete a process card

- To delete a process card open it by clicking on the card.
- The button More ▲ appears at the bottom left of the modal.
- When you on click it, a small window opens.
- Click on **Delete**.
- Before you can actually delete, you will be asked to confirm that the entire process including all sub-levels and interfaces should be deleted.

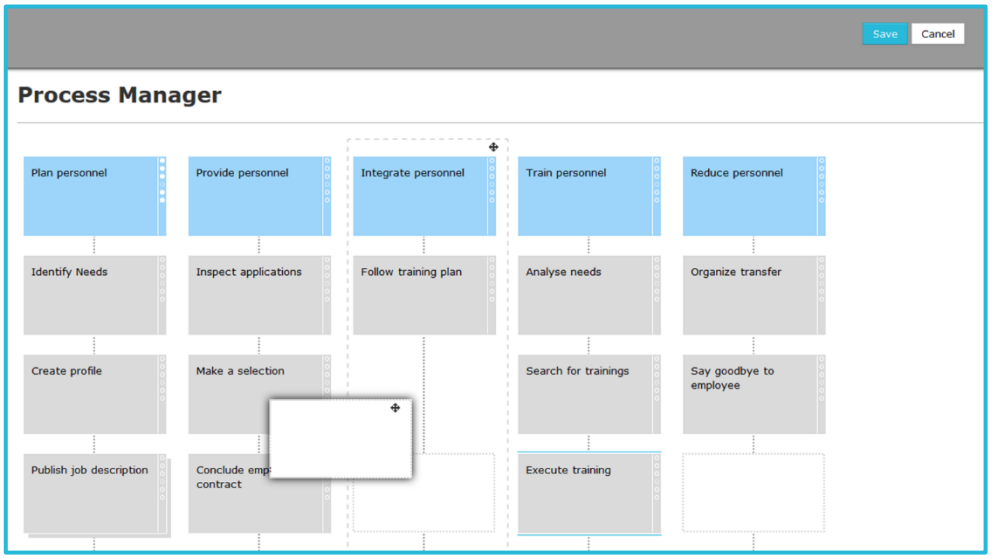




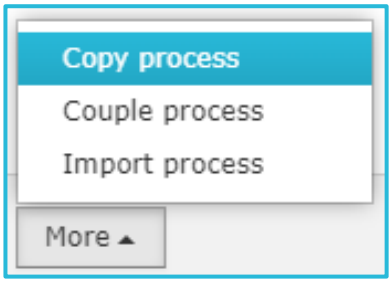
4.5 Move a process card

You can move process cards easily in WissIntra NG. However, this does not apply to the process cards in the top row. These can only be moved with the entire underlying column. To move, please proceed as follows:

- Move the mouse over the process card that you want to move.
- A cursor ✥ appears in the upper right corner of the card.
- Click on the cursor, hold the mouse button and move the process card to the desired position that can even be in-between already filled process cards.
- The cursor that appears at the top right of the topmost process card allows you to move the entire column in the same way.
- After moving, a grey bar appears at the top. Click on **Save** to complete the operation.

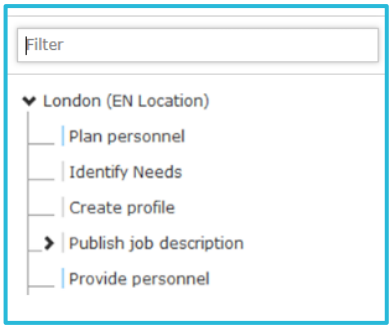


4.6 Copy a process card



There are processes that can occur repeatedly in the process landscape. Thus, you would have to create these identical, or even slightly modified, processes several times. In order to facilitate your work, you can easily copy processes in WissIntra NG. Please proceed as follows:

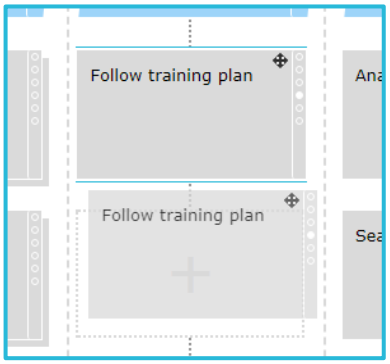
- Click on an empty process card.
- The modal to create a process card opens.
- Navigate to the bottom left and click on **More**. You will get the following options: **Copy process** and **Couple process**.
- Click on **Copy process**. A sorted list of all existing processes appears on the right. For a quick search, use the filter.
- Select the desired process.
- A modal with the further copy options appears where you choose to **Copy all child processes**.
- Click on **Save** to complete the copying. You will see the copied process card in edit mode.
- Click on **Close** to return to the process landscape.



Copy a process card via drag & drop

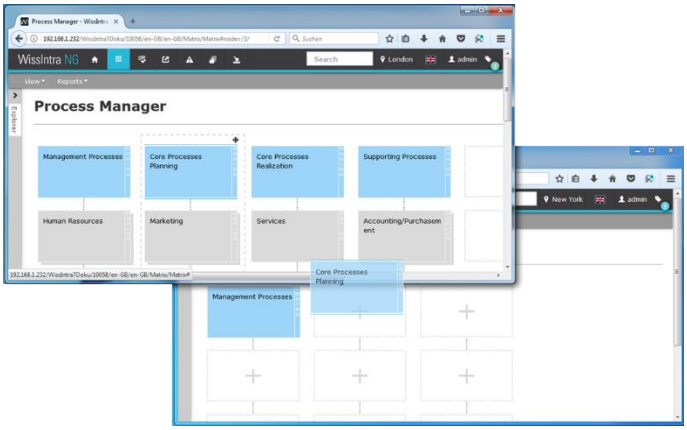
WissIntra NG offers you another quick and easy way to copy process cards.

- Click on the process card (not on the cursor ✥!) and hold the mouse button.
- Drag the process card to the desired position in the process landscape.
- Drop the process card
- You will be asked if you want to copy the process.
- Confirm with **Yes** to complete the copy process.



You can also copy a process card with drag & drop across browser tabs or windows, e.g. if you want to copy a process from one location to another.

In the Internet Explorer this option may not be available due to given security settings.



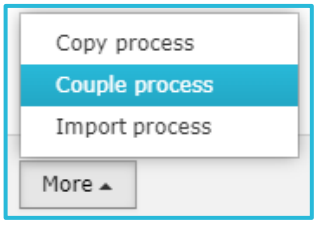
4.7 Couple a process card

WissIntra NG also allows you to couple processes. This can be useful if you maintain processes that are valid at multiple locations. By coupling processes, you can reduce the maintenance effort, since you only have to edit the process at the original location and all the changes are automatically transferred to all coupled processes.

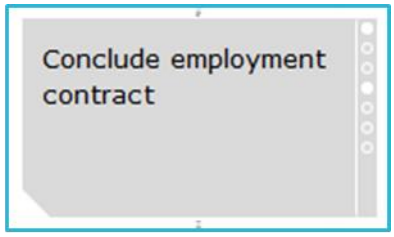
Note: A coupled process is similar to its original. If the original is changed, the changes are also made in the coupled process. A coupled process cannot be modified. It can only be extended.

Note: You find an indication of the position of the Original Process within the coupled process. If you move the mouse over the name of the original process, a tooltip with the path to the original process appears. Clicking on it takes you to the original process (if you have permission to).
Reversely, you see the existing couplings within the original process.

To couple a process card, proceed as follows:

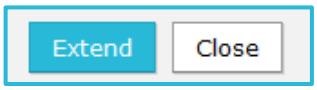


- Click on an empty process card, navigate to **More** at the bottom left and click on it. You will get the following selection options: **Copy process** and **Couple process**.
- Click on **Couple process**. A sorted list of all existing processes appears on the right. For a quick search, use the filter.
- Select the desired process.
- A modal with information about the coupling is displayed. The underlying processes are automatically included.
- The coupled process card which now appears in your Matrix is marked as a coupled process by the missing bottom left corner.

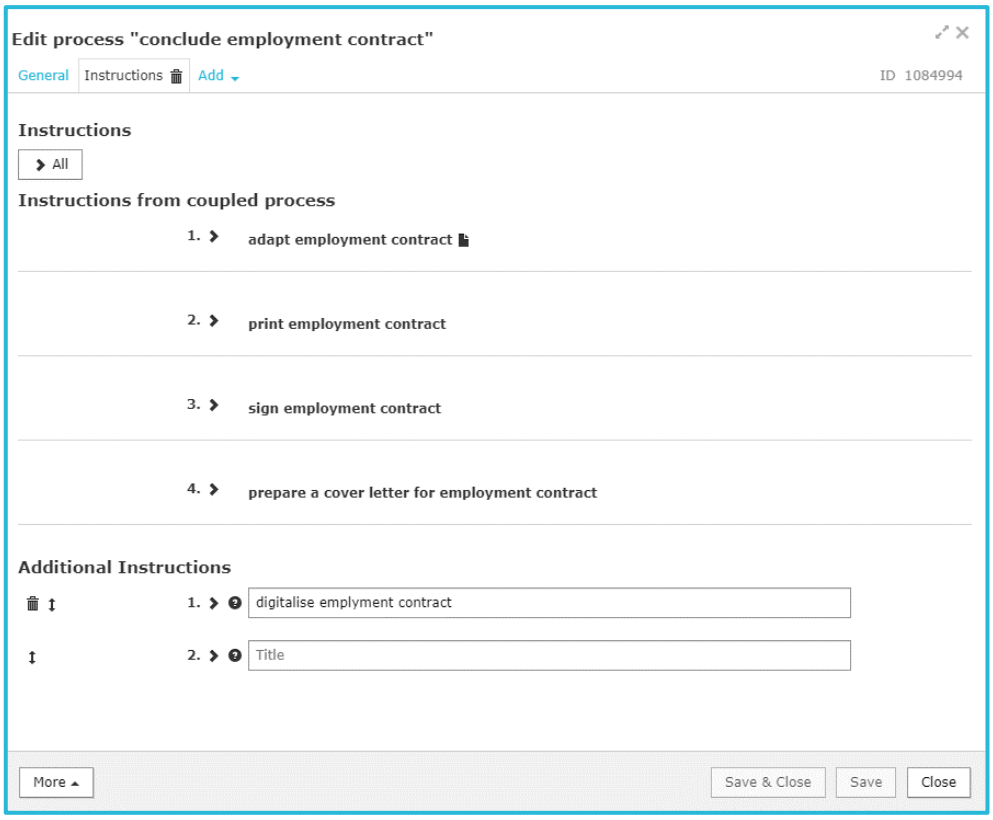


Extend a coupled process

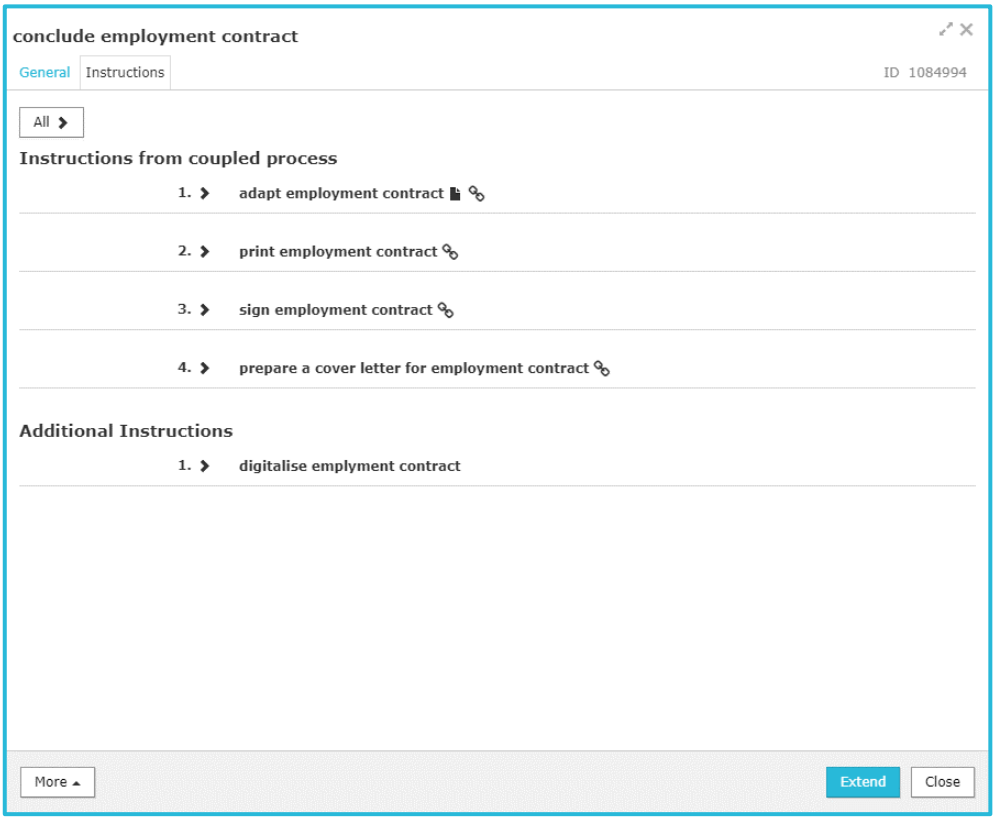
As described above, you cannot modify coupled processes but it is possible to extend them with instructions and documents. To do so, proceed as follows:



- Open the coupled process. Click on **Extend** at the bottom right. Now you can extend the process with instructions and result documents as you can read in chapters **5.2 Instructions** and **5.5 Result Document**.

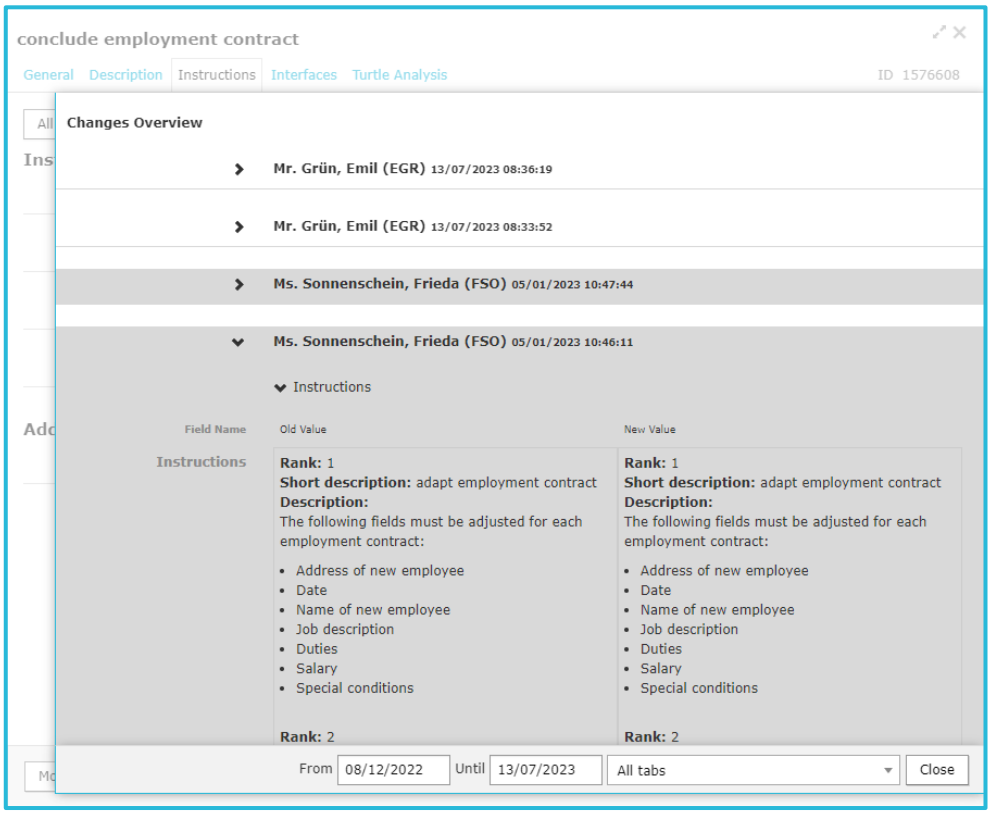


Note: The extensions of coupled processes only affect the coupled process and have no effect on the original process.



Coupled instructions are marked with the - symbol in the read view.

In the history of the coupled process card, the entries of the original process are also displayed and are greyed out.

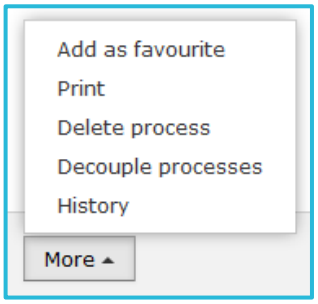


Restrictions on couplings

When assigning responsibilities, it is important to remember that the responsible function remains with the coupled processes, as well as the responsible persons. For functions, this has no further consequences. However, you need to consider that the responsibilities for persons are valid globally, thus also across locations. In this matter, the corresponding permissions must always be considered.

Decouple a process

There are two possibilities to disconnect the coupled process from the original process. You can either decouple or delete.



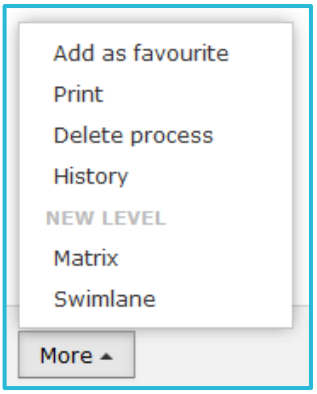
- Open the coupled process
- Navigate to the bottom left and click on **More**. You will get the following options:
- **Delete**: deletes the coupled process completely
- **Decouple processes**: removes the coupling. The coupled process will now be independent. It changes the coupling to be a copy of the process and can be modified individually.

4.8 Add a new level

To present more details in your process landscape, you can add this information in a new, lower level. If you want to create a new level in WissIntra NG you can choose between Matrix and Swimlane mode as long as the administrator has done the appropriate settings to allow the Swimlane.

Caution: Please note that your decision is binding. After creating the processes, you cannot switch from Matrix to Swimlane or vice versa. If you decide to use the other mode later, you will have to recreate all processes.

To create a new level, proceed as follows:



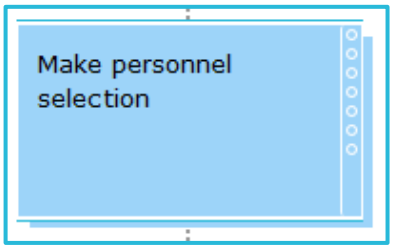
- Select a process and open the process card.
- The modal opens in read mode.
- Click on **More** at the bottom left to open the following window:
- Under **New Level** you can choose between **Matrix** and **Swimlane**.
- A process card opens and you can create the process as usual.
- This first process card now appears on the top left of the new level. In the Matrix mode you can move the corresponding column to another position if needed.

Note: If the Swimlane does not appear, it is deactivated in the settings. If you want to use it, please contact your administrator.

Note: In the Matrix mode you cannot create a new level under the very top row. In the Swimlane mode you cannot create new levels under the first column. These levels are superordinate and allow a detailed process mapping in the underlying rows or columns.

Note: If you cannot see the option to add a new level, it may be because your administrator has restricted the number of sub-levels. If necessary, please contact your administrator.

You can recognize the second process level by a back-shifted process card. This applies for the Matrix as well as for the Swimlane mode.

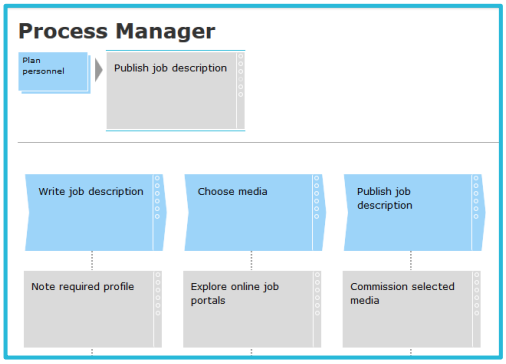


4.8.1 Matrix

In the Matrix mode processes are displayed in a table-like arrangement to provide a clear structure.

In the top line the process is read from left to right. The individual process steps are shown in detail from top to bottom.

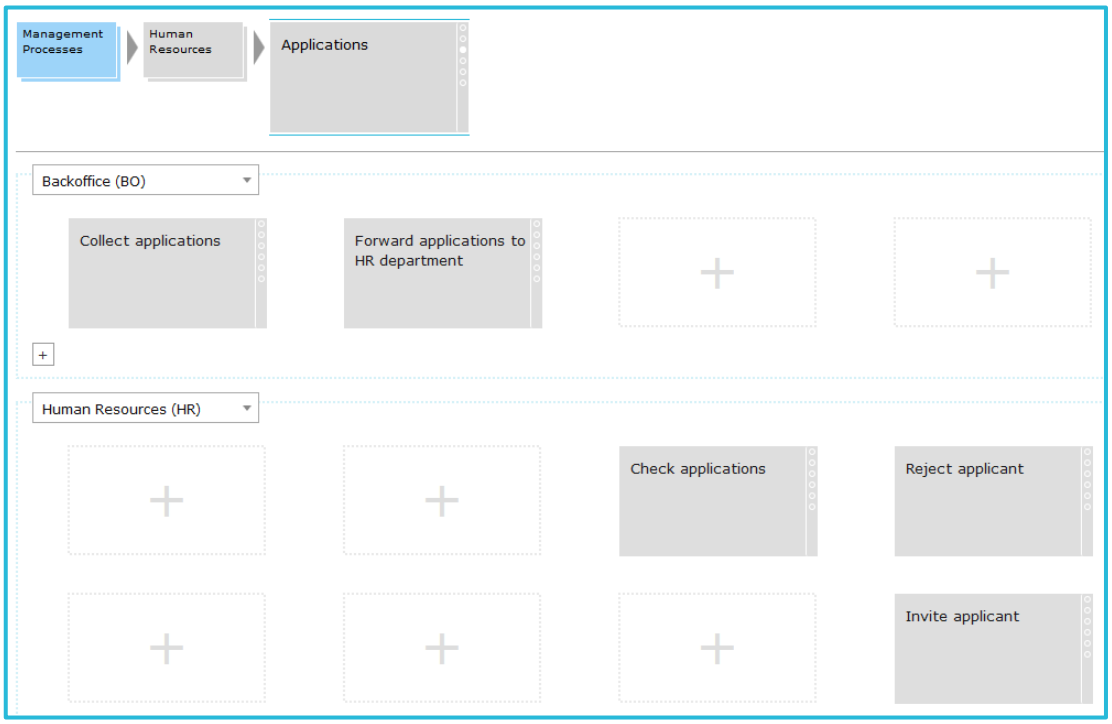
Create the process cards as described in 4.1 Create a process card.



4.8.2 Swimlane

To display a process flow in a Swimlane, proceed as follows:

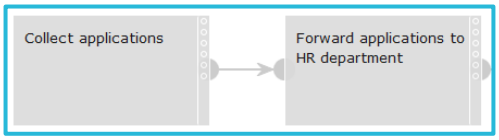
- After selecting the Swimlane mode, a process card opens and you can fill it in as usual. **Save and close** the process and you will get to the Swimlane view.
- Now you can create the necessary process cards by clicking on an empty process card and create a new one.
- The symbol [+] at the bottom left of a function lane allows you to create additional lanes within the same function.
- To create a new function lane, create a process in a new path and select one of the available main functions.

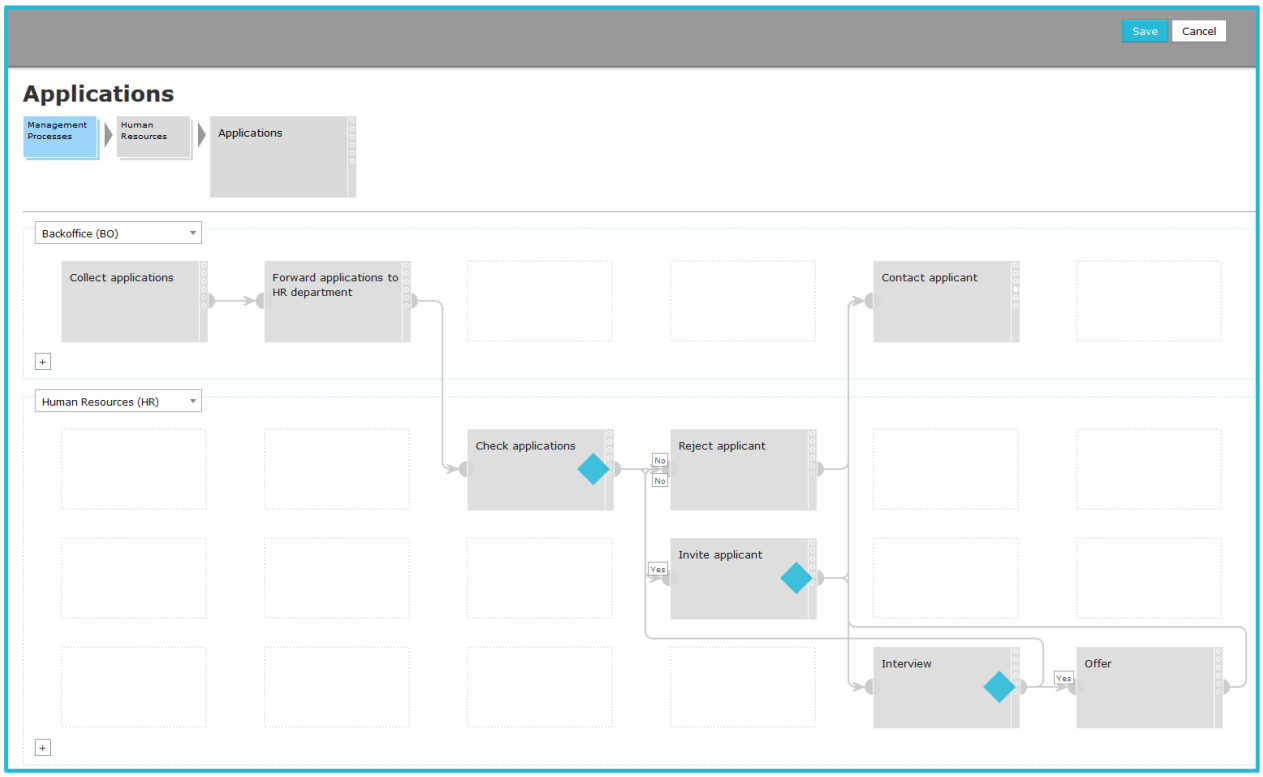


Note: You can flexibly position the processes within the Swimlane view. However, we recommend that you begin with one start process at the top left and create the following process steps to the right across the various functions.

Swimlane Connections

- After creating process cards, you can connect them. Thereby it does not matter where the process cards are placed.
- Move the mouse over the right bar in the process card that you want to link. The ⊕ symbol appears.
- Click on it and hold the mouse button.
- Now drag the connection into the desired process card. A grey bar with **Save** and **Cancel** appears at the top of the screen. Select Save to connect both process steps.





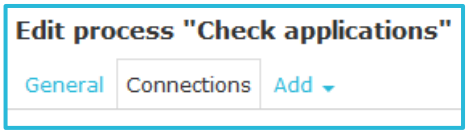
- You can also connect a process card to several process cards.
- As soon as more than one connection has been created, a diamond appears at the connection point.
- If you move the mouse over a connection line, you can see the exact course of the connection.
- If the mouse pointer is positioned over a process card with one or more connections, all connected process cards are marked with a blue-dashed frame.
- To delete a connection, move the mouse pointer over the connection line until it turns blue and double-click.
- Confirm your changes by clicking on **Save** at the top of the screen.

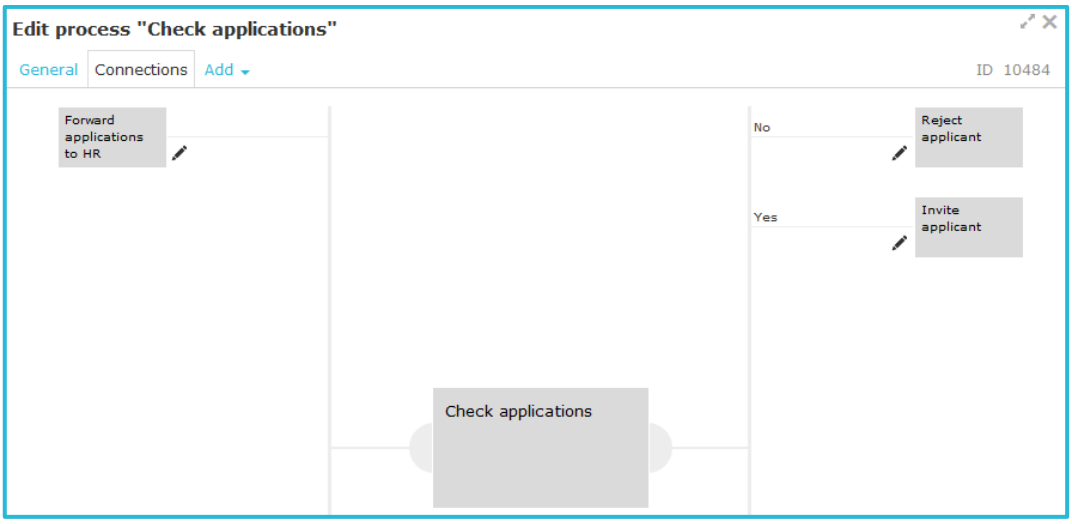
Note: for better orientation, connections, connection texts and processes are colour-highlightedas soon as you move the mouse over any process.

Label Swimlane connections

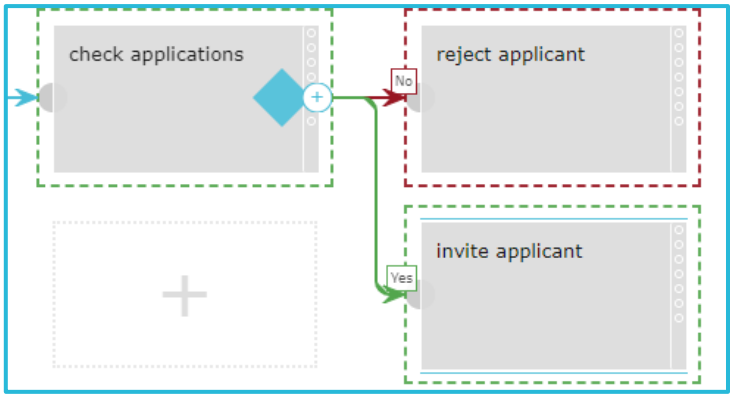
As soon as a connection was created between two process cards in the Swimlane, the tab Connections appears in both process cards. Here you can label the connection as follows:

- Open the appropriate Swimlane process card and switch to **Edit** mode. Open the tab **Connections**.





- The icon ✎ now appears underneath the connections. Click on that icon and label the connection. You can insert both either/or decisions as well as transfers.
- In our Swimlane example, you get the following view.

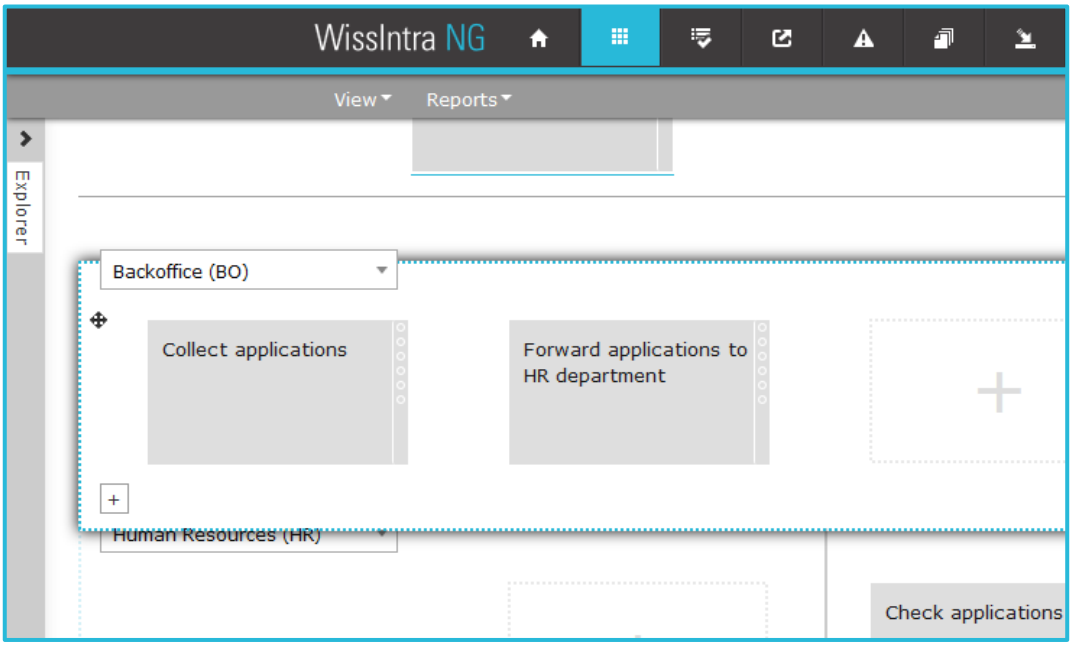


Moving process cards and function lanes

As described in chapter 4.4 Move a process card, you can also move all process cards within the Swimlane. The created connections are correctly transferred and updated.

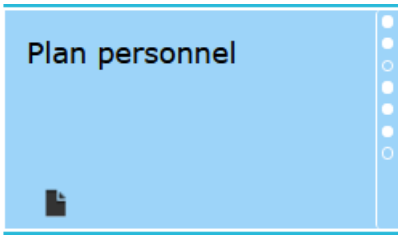
Furthermore, you can also move entire function lanes in the Swimlane.

- To do this, move the mouse pointer to the corresponding function lane until the cursor appears.
- Drag the function lane at this cursor to the desired position within the Swimlane.
- As soon as you drop the function lane, a grey bar appears at the top. Click on **Save** to complete the operation.



4.9 Attach documents

WissIntra NG indicates the presence of the attached documents with a document icon displayed at the bottom left corner of the process card. The icon indicator will be shown regardless of where the documents had been attached – either directly to the process, as a resulting document, to one or more instructions, process description, etc.

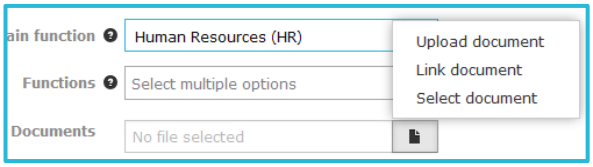


It is often useful to attach a document directly to the process. WissIntra NG offers different document types:

- Template Document (TD)
- Guideline (GU)
- External Document (ED)
- Legal Text (LT)
- Internal Guideline (ID)
- Miscellaneous (Misc)

Note: The listed document types are only suggestions. Your administrator can modify, rename or extend it. The only type that cannot be changed is the Result Document.

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



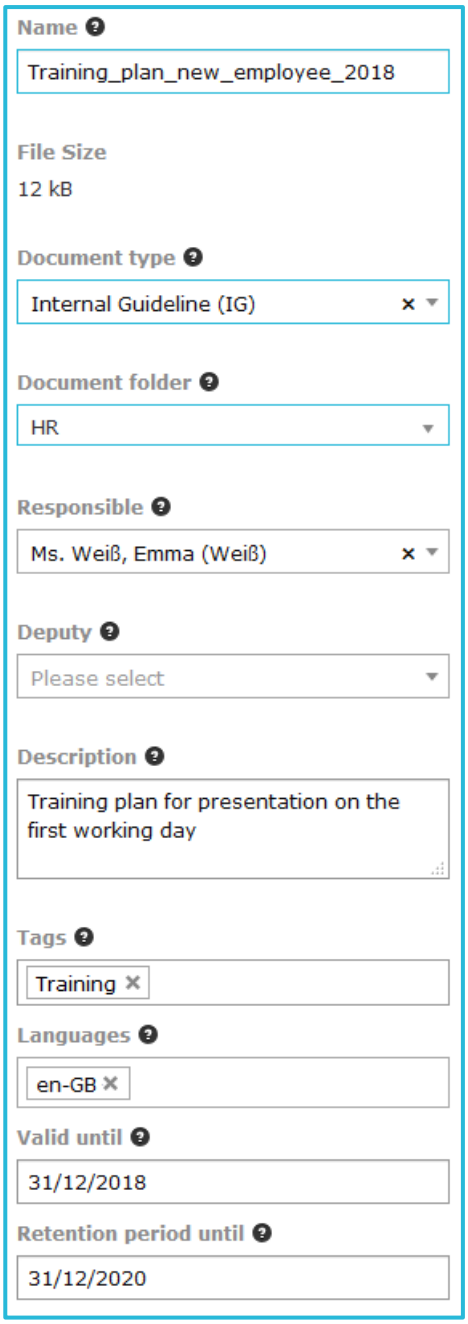
- Open the desired object and switch to **Edit** mode.
- In the field Documents, click on and choose the preferred option.

Upload document

If the document has not been stored in WissIntra NG yet, you can upload it with this option.

- Select the desired document in the opening Explorer window.

A submodal opens with the following information:



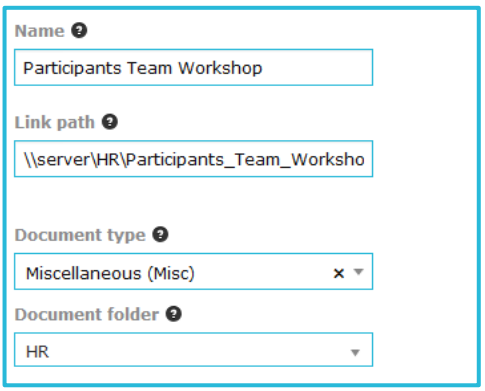
- The **Name** of the selected document appears in the first field. You can change it here.
- The **File Size** is displayed.
- In the field **Document Type** you have to select the appropriate option from the drop-down menu.
- Select the storage location in the field **Document Folder**. To do this, open the drop-down menu and navigate via ❯ .
- In the field **Responsible**, you can select a user who should be responsible for maintaining and validating the document.
- As soon as you have defined a responsible user, the field **Deputy** appears. Here you can select another user who should be responsible for this document as a substitute.
- In the **Description**, you can make a short classification of the document.
- In the field **Tags** you can assign keywords to the document. With these you can later find the document more easily by using a filter.
- The **Language** is an optional field that can also facilitate filtering. It is also useful to specify the language of the document when documents are created in several languages.
- An expiration date for the document can be entered under **Valid until**. You will recognize then by a marker in yellow that the document will soon expire and in red that the document has already expired. This is a very useful way to avoid old and unused documents.
- In the field **Retention period until**, you can specify the date up to which the uploaded document has to be retained.
- If you choose the checkbox **Access restricted?**, you only allow users to see the document who actually have access to one of its associated objects. If the document is not linked to any object, this checkbox has no effect.
- Click on **Save** to store the document in WissIntra NG.

Note: This option is recommended, since this is the only way that allows document versioning.

Note: Certain document types can be subject to an approval workflow (depending on the settings made by your administrator). After the upload, the document is then only visible to the current user and listed in the process card with purple background until the approval is given. After the approval, all users with the appropriate permission can see the document.

Link document

You can also attach documents uploading them to the system. The document itself remains at its original location and you access it via the link. Keep in mind that as soon as the document path changes, access is no longer possible.



- In the submodal, you have to enter a **Name** and the **Link path** to the document.
- Fill in the other information as described for Upload document.

Note: Document paths should preferably be http or ftp links. You could also use UNC paths. But when using network paths or local paths, there is a risk that users may not be able to access them. The preferred paths should look as follows:
http://address
FTP://address
UNC: **\\server_name\share_name\path**

Linked documents are also saved as dataset within the Document Manager. You can recognize them by the fact, that they do not have a File Type.

In the detail view of a linked document the **Name** is linked to the corresponding file.

Note: If you use this option, you can additionally use the Windows permissions of your company to control the access of individual employees. Please note that the permissions of the underlying system apply to links.

Select document

If you have already uploaded documents in the Document Manager, you can attach them by using this option at the appropriate position.

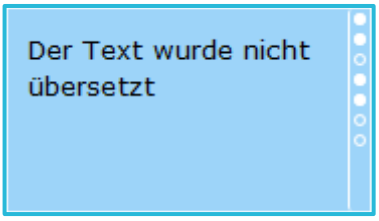
- In the opening submodal, you can navigate to the desired document using the folder structure or click on **All Documents**. You can also use the search filter below to reduce the list of documents.
- Click on the relevant document to attach it to the object.

Note: Within the process card, you can attach all document types, except the result document. These documents are added directly within the tab **Result Document** and are automatically attached to the process.

4.10 Translate a process card

If you have purchased another language, you can already see the interface texts in this language. To translate the content, proceed as follows:

- Go to your process landscape and switch to a language that is not the location language.
- You will see the process cards as follows:
- Click on a process card to open the detail view.
- Click on Translate and the translation mode will open
- Now you can translate the process card manually.



Note: The button Translate appears in the respective language.

Note: You cannot change the properties of the process card. This can only be done in the original language.

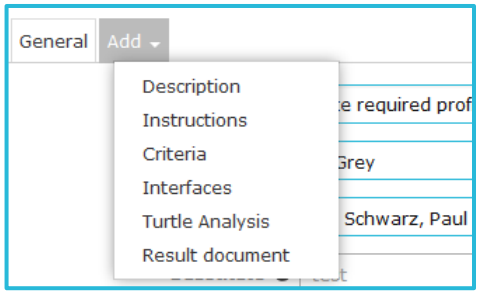
Note: The following languages for interface texts are currently available:

German	Chinese	Croatian	Slovak	Dutch	Swiss German
English	Polish	Spanish	French	Portuguese	Czech
Greek	Romanian	Hungarian	Italian	Russian	Swedish

5 Tabs

Tabs can be added to display various information in a clear way. When you click on a tab, it opens and a new dialog box appears.

When you create a process card, the tab **General** appears from the beginning.

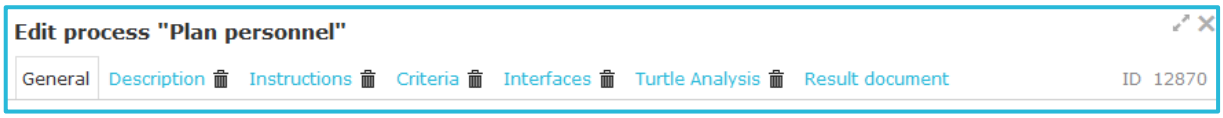


- After you click on **Save** you can create additional tabs by clicking on coloured tab **Add**.

When you open the process card again, all filled tabs appear in the tab bar so you can navigate to the corresponding information.

Note: The administrator can set the tab that shall always appear first when opening a process card. This adjustment is done in the **General Settings** of the Process Manager. The tab **General** is displayed by default.

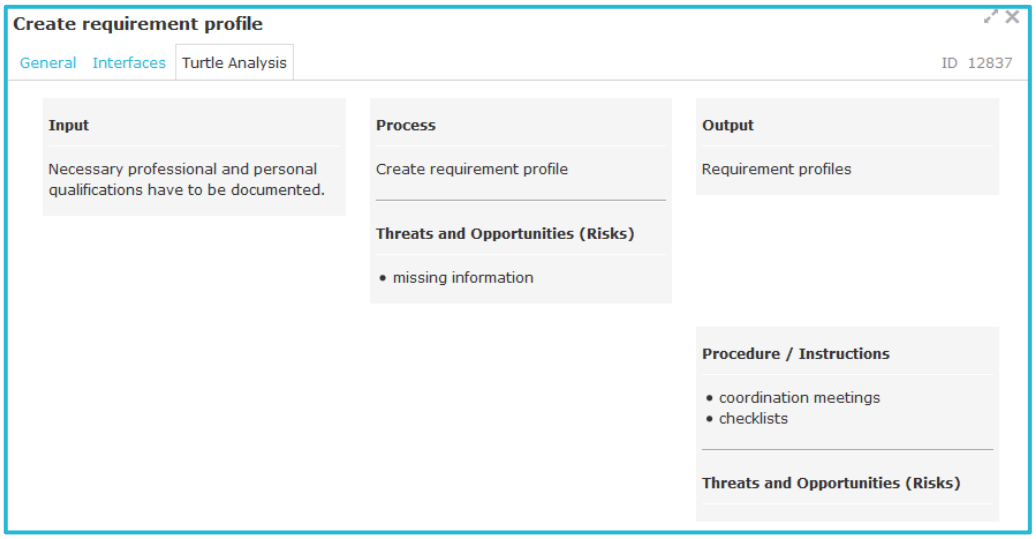
- To delete a tab, open the process card and switch to **Edit** mode. The recycle bin symbol appears 🗑 in each tab. Click on this to delete the entire tab.



Hide empty fields (optional)

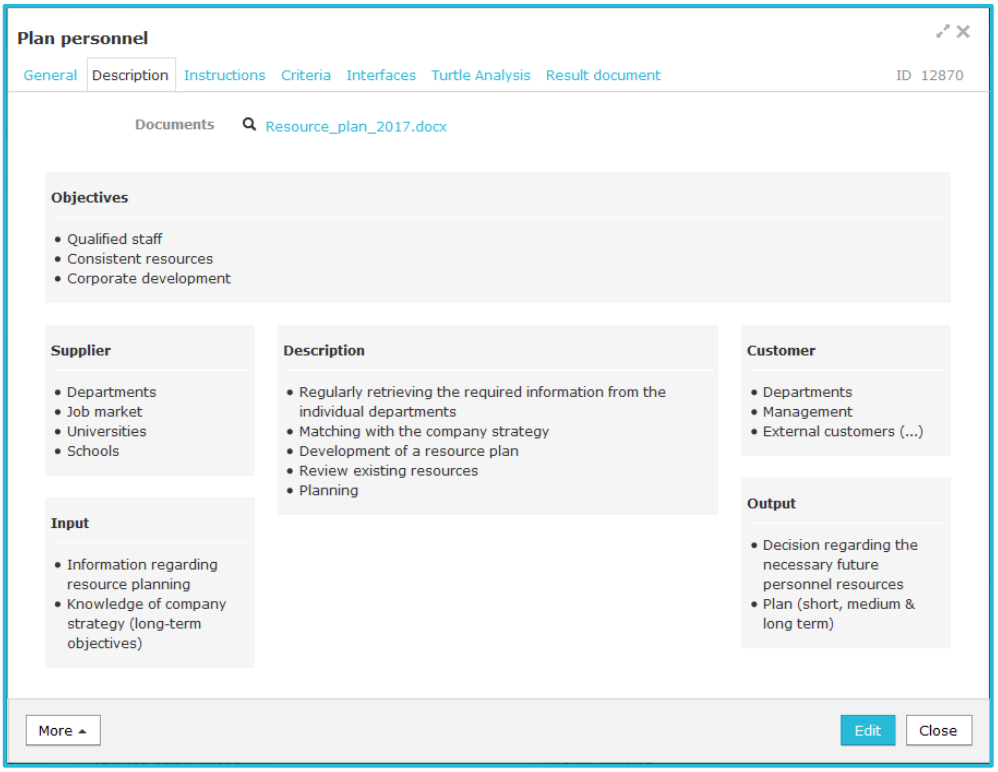
You have the possibility of having your administrator activate the **Hide empty fields?** option in the settings for the Process Manager.

With this, the fields in the tabs **Description** and **Turtle Analysis** that are not filled are completely hidden and the filled fields are arranged accordingly. This option also applies to the print functions in the Process Manager.



5.1 Description

Use the tab **Add** to create the **Description** tab. Below you find an example of a filled in description:



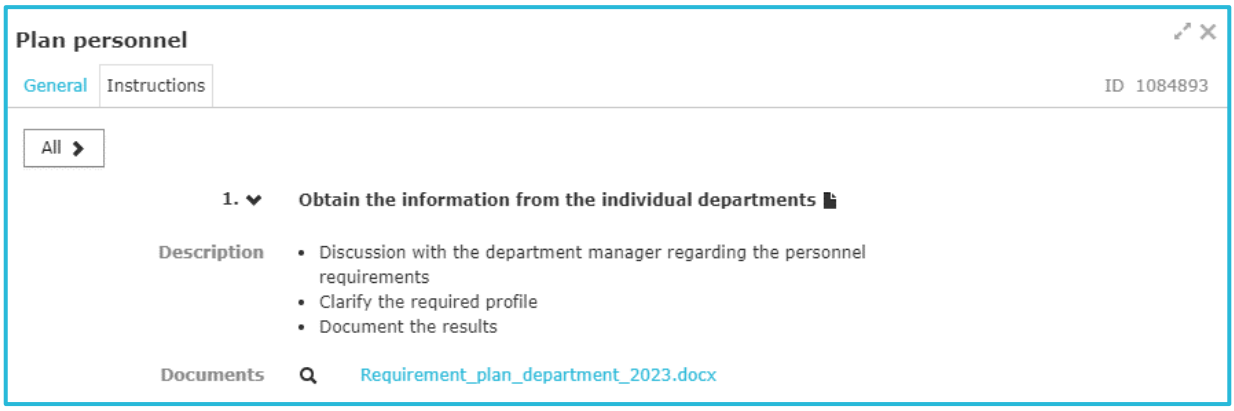
You can fill in the following fields. These are optional mandatory fields, but it is very useful to fill all the fields in order to present a complete picture of the process.

- **Documents**: If necessary, store or link a document in the process card.
- **Goals**: Enter what the process is doing or what you want to achieve with this process step.
- **Supplier** (interested parties): Who provides information for the process? And what are they doing? Enter internal or external customers here.
- **Input**: Describe the prerequisites required for the process to be successful.
- **Description**: Explain the detailed procedure of the process
- **Customer** (interested parties): Who processes the result further? Enter the internal or external customer here.
- **Output**: Enter a measurable result of the process.

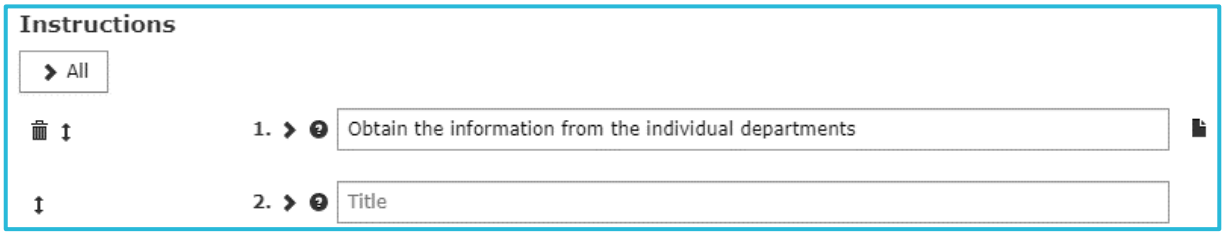
5.2 Instructions

Next, you can create the tab **Instructions**. These can be useful if several steps have to be executed in a process. You have the option to store several instructions. With All you open all instructions to have an overview.

- Open the instruction via
- **Title**: Specify the title of the instruction
- **Description**: Enter the information which are necessary to follow the instruction
- **Documents**: If required, you can store documents here



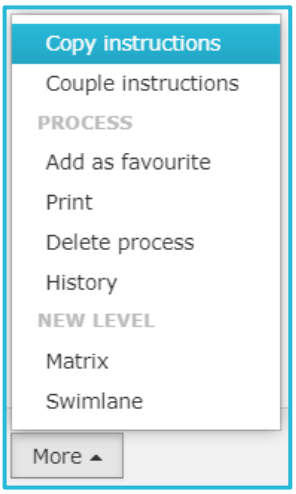
- To edit instructions, switch to **Edit** mode. You can use the icon ↕ to sort instructions
- With the icon 🗑 you can delete them individually.



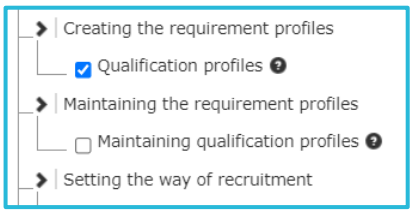
Copy instructions

There are instructions that can occur repeatedly in the process landscape. So, you would have to create these identically, or even modify slightly. To facilitate your work, you can easily copy instructions. Please proceed as follows:

- Click on a process card and open the tab **instructions**.
- Navigate to the bottom left and click on **More**. You will get the following options: **Copy instructions** and **Couple instructions**.
- Click on **Copy instructions**.



- A sorted list of all existing processes appears. For a quick search, use the filter.
- Select the desired instructions.
- To get information about the description of the instructions, move over the ❓-symbol.
- Click on **Copy selected instructions** to complete the copying.



You will see the copied instruction in edit mode.

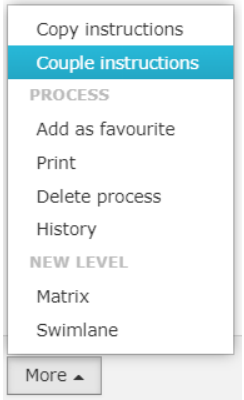
Couple instructions

WissIntra NG also allows to couple instructions. By coupling instructions, you can reduce the maintenance effort. You only have to edit the instruction once and all the changes are automatically transferred to all coupled instructions.

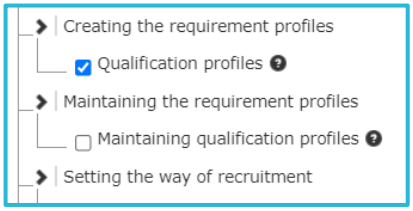
Note: All coupled instructions are similarly to the original. These instructions are now dependent on each other. As soon as one of these instructions (coupled or original) will be changed, all dependent instructions are automatically changed accordingly.

To couple a process card, proceed as follows:

- Click on a process card and open the tab **instructions**.
- Navigate to the bottom left and click on **More**. You will get the following options: **Copy instructions** and **Couple instructions**.
- Click on **Couple instructions**.



- A sorted list of all existing processes appears. For a quick search, use the filter.
- Select the desired instructions.
- To get information about the description of the instructions, move over the ❓-symbol.
- Click on **Couple selected instructions**.



You will see the coupled instruction in edit mode. A coupled instruction is indicated by the symbol of . By clicking on the symbol and successful confirmation, the couple is released again

and continues to exist as a copied instruction. This means that there is no longer any dependence on other instructions.

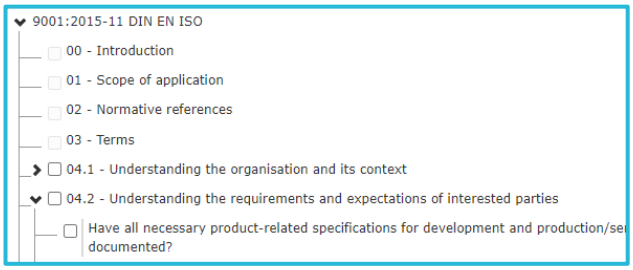
5.3 Criteria

Audit criteria are managed in the settings. If you have purchased the Audit Manager, you have the option to add your audit criteria lists within the settings of the Audit Manager. There you can find the lists containing the questions relevant for audits. If you have only purchased the Process Manager, the criteria can be managed in the settings of the Process Manager.

Note: Only an administrator has the permission to change or extend the guidelines with your own criteria.

To link criteria to a process, follow these steps:

- Open the tab **Add** and select the **Criteria**.
- Click on the button New to show all your audit criteria lists.



The following example shows the audit criteria list for DIN EN ISO 9001:2015.

Note: The symbol > allows you to select the questions of individual chapters.

- Navigate to the criteria relevant for this process. In the example above, among other things, the “Scope of application” is decisive.
- Save your selection with Save and assign the criteria to your process.

Note: For further explanations, please refer to the User Manual Audit Manager

Note: For more information, especially regarding the update of audit criteria lists that have not been exported from WissIntra, please refer to the Administrator Manual Configuration.

Filter criteria

Within the tab **Criteria**, you can filter the list of criteria by clicking on in the top right corner.

You can search for a keyword within the criteria or use the drop-downs to filter for guidelines as well as for chapters.

- To remove single filter values, click on the “x” next to the value. To remove the entire filter, click on .

5.4 Turtle Analysis

The Turtle Analysis is an effective method for identifying process-relevant factors. The goal is to present a clear picture of the processes taking place in a company.

This approach can draw the attention of employees to interfaces; it shows dependencies and ensures transparency. Potential weaknesses and risks within the processes can be identified and thus solutions can be found quickly.

The advantages of this method are obvious. The Turtle Analysis can provide a basis for management decisions and is used to prepare and carry out internal and external audits. The ability to identify and assign risks helps to promote a Continuous Improvement Process. In addition, the Turtle Analysis can be used as a proof for risk-preventing actions.

The Turtle Analysis can help you meet the requirements of VDA and DIN EN ISO 9001:2015.

In the tab **Turtle Analysis** you can fill in the following fields:

In the middle of the turtle, you could say in the turtle shell, the central aspect of the analysis, namely the **Process** itself is presented. Here the central question is: What has to be done in this process?

The associated risks of the process can be listed directly afterwards. Thus, all relevant process information can be seen at a glance.

All influencing factors relevant for the process are listed in the field **Input**, which represents the head of the turtle. The trigger, the goals and the corresponding periods are considered relevant here. The central question is: Why is something done and when?

Now, several other factors influence the process that can (or may) affect its result. The extremities of the turtle represent these different factors.

First, you examine the **Resources/Methods** that influence the process. The existing work equipment and the available personnel resources are considered here. The main question is: What do you need to carry out the process?

Directly below this, the associated risks are shown, which could have a negative impact on the Resources/Methods.

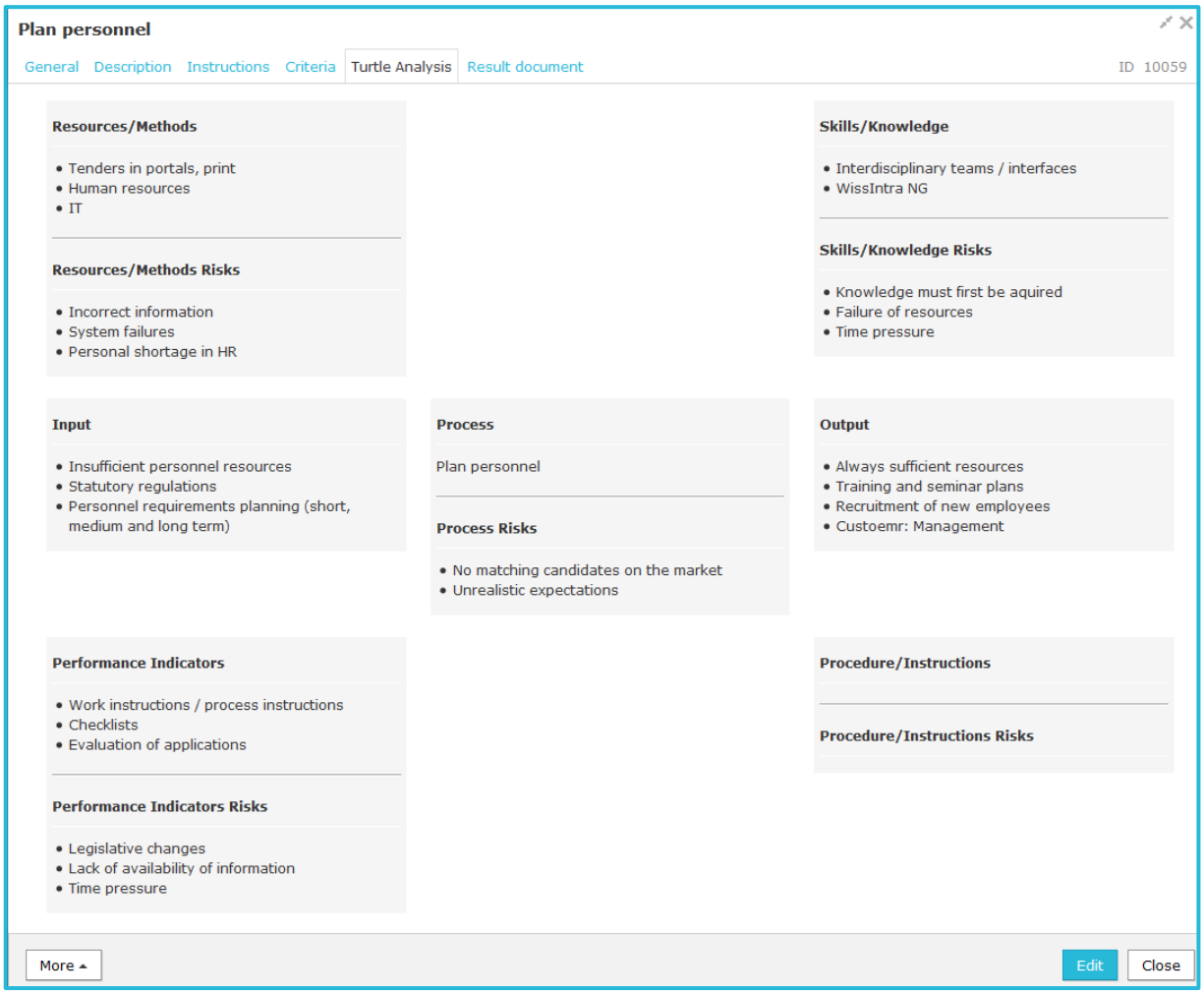
Furthermore, the factors that relate to the **Skills/Knowledge** of a process are listed. This is mainly about the persons performing the work and the knowledge they have. They can be employees, supporters or interfaces. The questions that can help here are: Who is going through the process and who is involved? Again the corresponding risks of Skills/Knowledge are added afterwards.

The field **Procedure/Instructions** lists factors that describe the process. The key question is: How is the process carried out? Accordingly, you can add the associated risks here again.

In the field **Performance Indicators**, company-specific process indicators (KPIs) can be entered. The key question here is: How do you measure the quality of the process?

Directly below the corresponding risks can be entered as well.

The process result is the **Output**, which represents the tail of the turtle. In this field you can insert the expected results of the process. For example, see the following Turtle Analysis:



5.4.1 Create risk from Turtle Analysis

If you have permissions for the Risk Manager, you can trigger risks directly from the Turtle Analysis.

- Open the Turtle Analysis of the required process in edit mode.

Below the text fields **Threats and Opportunities (Risks)** you will find the button **Create Risk**.

- Click on the button below the field for which you want to create a risk.

The Risk Manager opens and a new risk appears, in which the text from the corresponding field **Threats and Opportunities (Risks)** is transferred to the field **Description** in the General tab.

Note: Before triggering a risk, make sure that at least one risk area and one evaluation period have already been created. This information can then be used to create risks.

5.5 Result document

In this tab, WissIntra NG offers the possibility to link result documents in an uncomplicated and permanent way with the appropriate process.

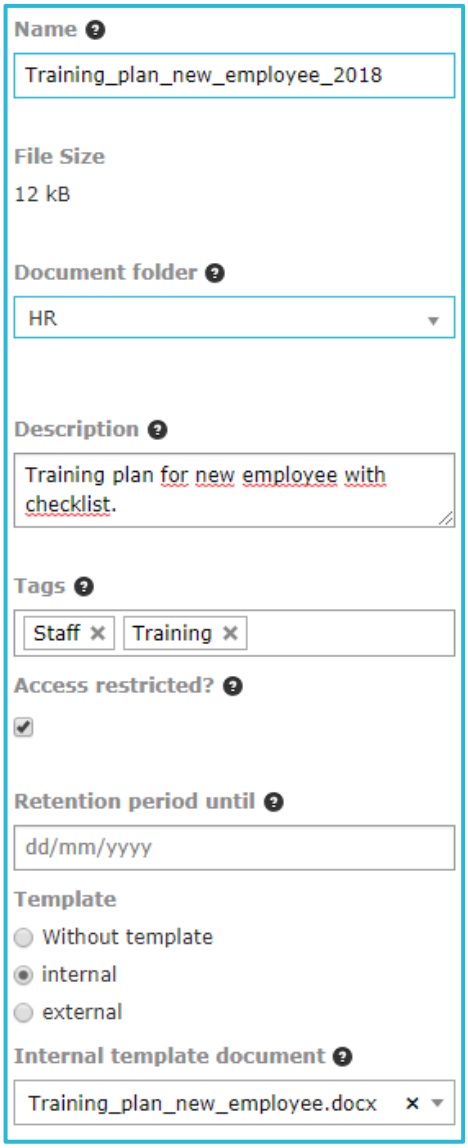
Definition: Processes have different types of documents. A Template Document for example, is a blank document for protocols etc. The Result document then is the completed template.

- Open the tab **Add** and navigate to **Result document**.
- Create the new tab and click on the button New in the following window.

This opens a dialog box for the file selection.

- Now select the relevant document and fill in the submodal.
- The title of the selected document appears in the field **Name**.
- The **File Size** is displayed directly below.
- In the field **Document Folder**, you can select the appropriate folder within the Document Manager.
- In addition, you have the possibility to add a **Description** and **Tags**.
- If the checkbox **Access restricted?** is set, this means that only those users with access to the related process can see the document.
- In the field **Retention period until**, you can specify the date up to which the uploaded document has to be retained.
- In the section **Template** you can select whether the document is a document without a template, with an internal template or an external template.

The uploaded document is now attached to the process.



Note: It is possible to deactivate documents by deleting them, but they are still stored in WissIntra NG's recycle bin due to retention obligation.

5.6 Interfaces

Interfaces are touch points inside and outside of a process. These interfaces can occur within a department or even across departments, as well as externally.

Note: In WissIntra NG, interfaces can by default only be created from the second process level (first sublevel) onwards, because the first level serves as the header level. If you want to use interfaces from the first level, your administrator can allow this option in the **General Settings** for the **Process Manager**.

Interfaces differ in their type, but not in their visualization. They are always considered as dependencies and represented as such.

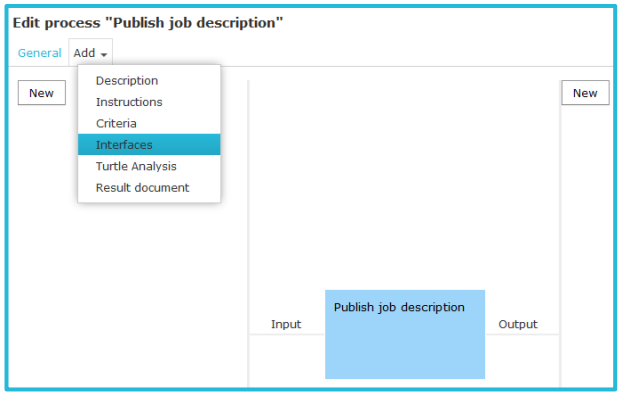
You have the option to create an unlimited number of interfaces between individual process steps, which means within a process level and between multiple process levels. The interfaces between processes are displayed in the interdependency table.

Note: For further information on interdependencies, please refer to chapter 6.4 Interdependencies.

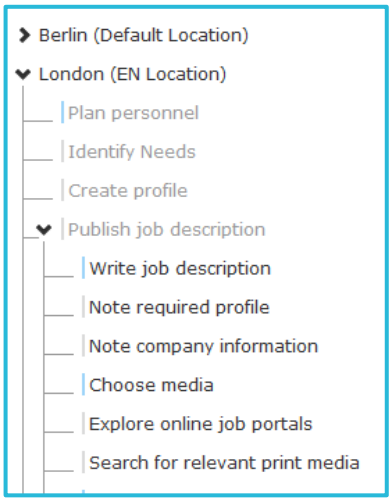
Create interfaces

To be able to create interfaces you have to be in the second (or lower) level. To create another level, please refer to 4.7 Add a new level.

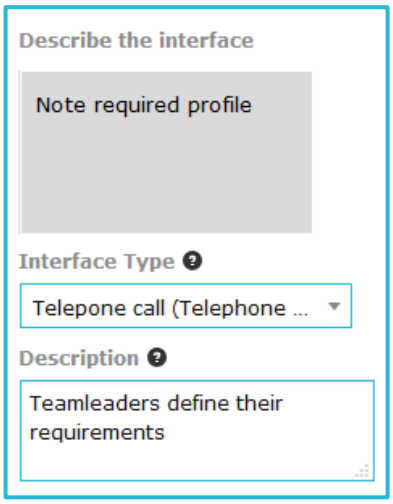
- Open the corresponding process card.
- Navigate to **Add** and select **Interfaces**.
- The **Input** appears on the left and the **Output** on the right hand side of the process.
- To create an incoming interface, click on the button New on the left.

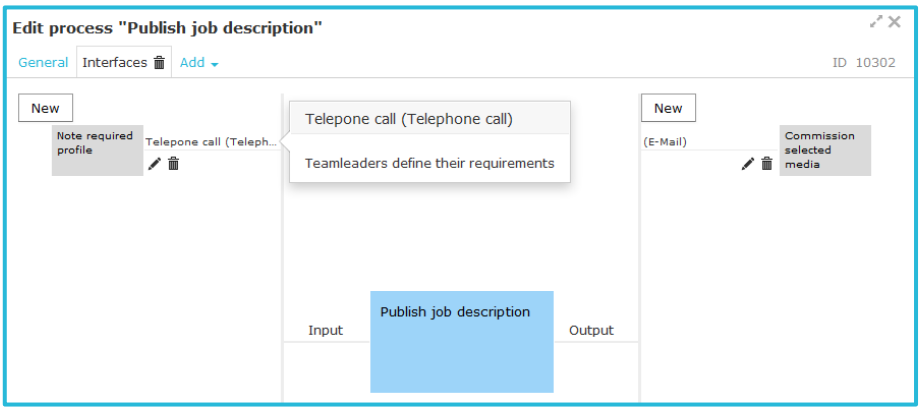


- A modal opens and shows the available processes.
- After selecting the desired process, you are asked to describe the interface.



- Select the appropriate **Interface Type**, i.e. the way in which the information is passed, and add a **Description** of the required information.
- Proceed accordingly with the process output.





Note: As an administrator, you can define the interface types in the settings.

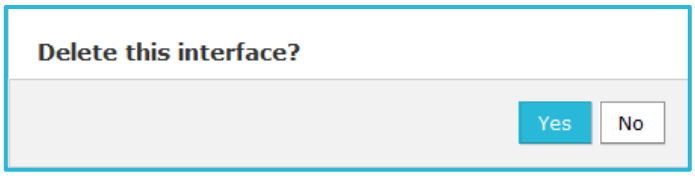
Edit interfaces

If you want to edit an interface, you have to open the corresponding process card and navigate to the tab **Interfaces**.

Switch to the **Edit** mode and click on the symbol to edit the interface. Both, the interface type as well as the description can be modified.

Delete interfaces

If you want to delete an interface, open the corresponding process card and the tab **Interfaces**. In the **Edit** mode, you can see the recycle bin icon next to the edit icon. Before you can actually delete the interface, you will be asked for confirmation.



5.7 Linked risks

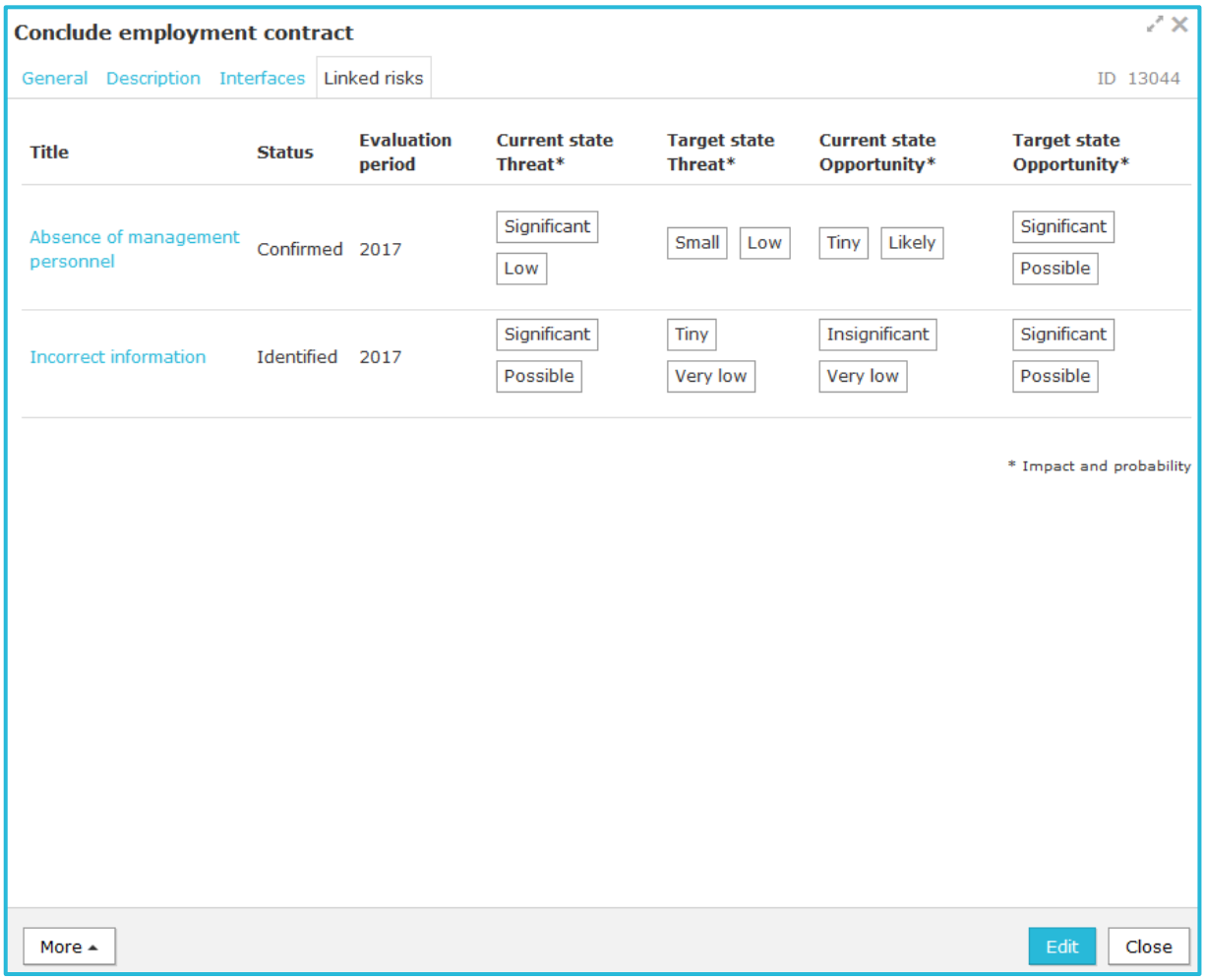
As soon as there is a link between a process and a risk in the Risk Manager, these are listed in the process card in the tab Linked risks.

This tab is automatically created by WissIntra NG and cannot be edited or deleted.

The table shows the title of the linked risk, its status and the evaluation period.

In addition, the impacts and probabilities of the threat and opportunity of the described risk are visible in the current state and the target state.

By clicking on the title you get to the corresponding risk.



6 Other functions

WissIntra NG offers further functionalities to make your work easier.

6.1 History

Due to legal requirements and especially with regard to a successful quality management, storage of data with its completeness and chronological sequence is very important for companies.

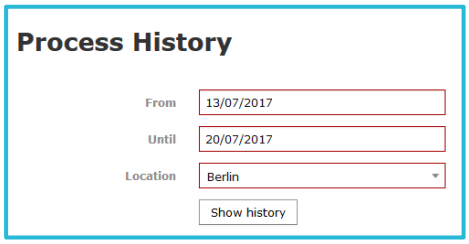
Note: WissIntra NG offers you two different ways to see all relevant data in a history. On the one hand, the history of each individual process or document. And on the other hand as administrator you can see the history of all processes or documents.

WissIntra NG supports you in handling the documentation of processes and documents very easily.

Process History

WissIntra NG gives you an insight into two different histories: the history of each process and the overall history of all processes.

To access the history of a single process card, open the corresponding process card. Click the button **More** at the bottom left and select **History**. Now all changes to this process card appear. You can use the icon > to open individual changes.



The **Process History** is the overview of the entire process changes of one location. Process approvals are documented here as well. As administrator you can access this in the **Settings** of the **Process Manager**. The entire **Process History** is displayed for each location in the chosen period.

Note: If a process has been coupled, the changes to the original process also appear in the history of the coupled process. These are greyed out in the list of changes. In the entire process history, changes to the original process are greyed out, if they are located at a different location.

Document History

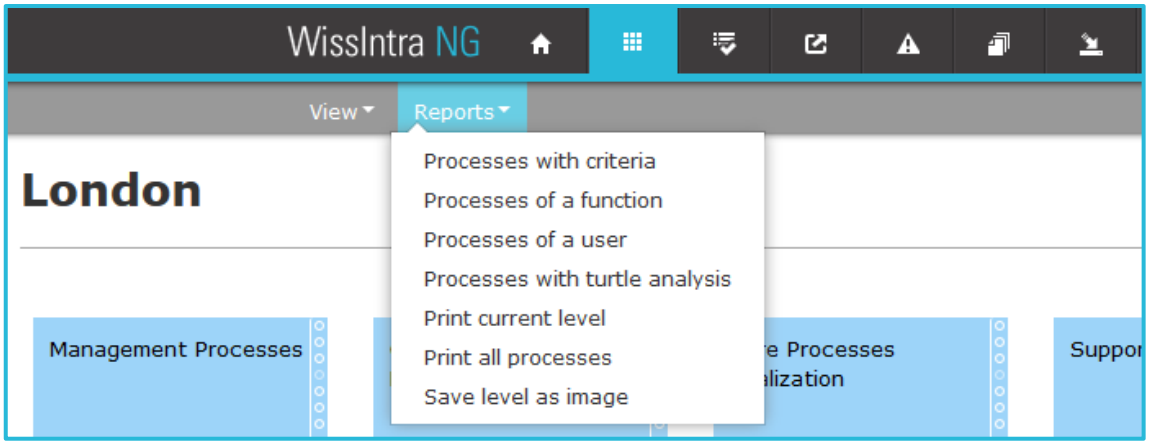
You can see the history of a single document by opening the document in the Document Manager and click on **More** and **History**.

The entire **Document History** is also available for administrators in the **Settings** under the section **Documents**. You can also limit the display by choosing a start and end date or by filtering.

6.2 Reports

With reports you have the possibility to generate evaluations about the created processes. You can choose between four different reports in the Process Manager:

- Processes with criteria
- Processes of a function
- Processes of a user
- Processes with Turtle Analysis

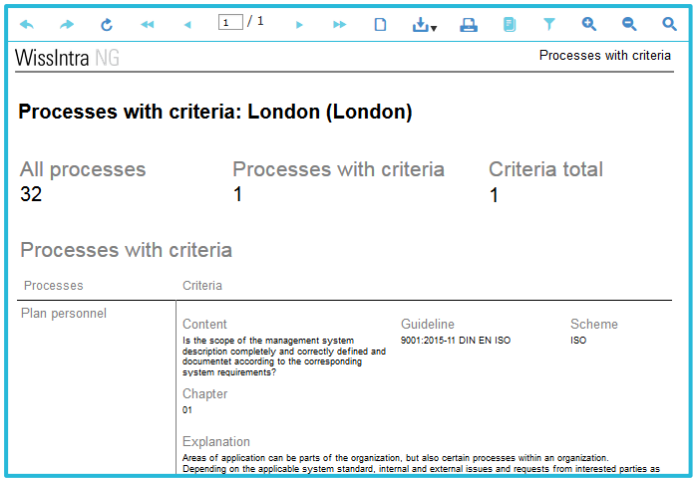


The structure of the reports is always the same. The top part of the report provides an overview of the key data, including the individual processes.

In addition, a control bar above the reports allows easy navigation and command execution. For example, you can select **Export Reports as PDF**.

> **Note:** Reports are always displayed in the currently selected language. If a process card has not been translated, the process field remains empty.

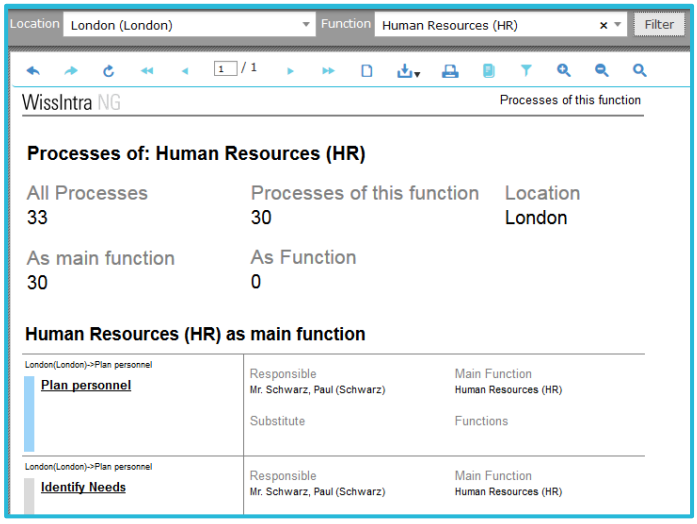
Processes with criteria



This report provides an overview of all processes at the selected location. The number of processes and criteria is listed, as well as the number of processes that are linked to criteria.

In the list you can see the content and the description of the criteria and also which rule set was used. In addition, the information about the schema (VDA/ISO) appears.

Processes of a function

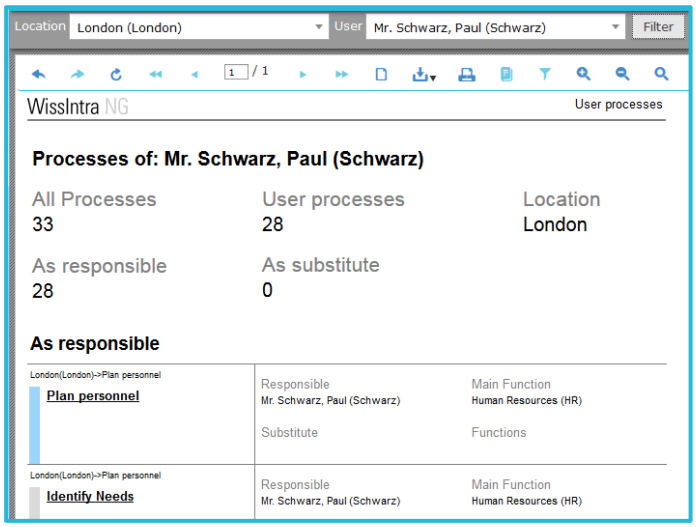


This report lists all the processes associated to a function directly or to a group of functions. Select the filter by choosing the desired locations and function.

The report provides an overview of the total number of processes at the selected location and the number of processes in which the selected function is involved. A distinction is made between main function and functions. The associated processes are shown as links that point the corresponding process card.

Note: You have the option to click on the respective process and access it directly.

Processes of a user

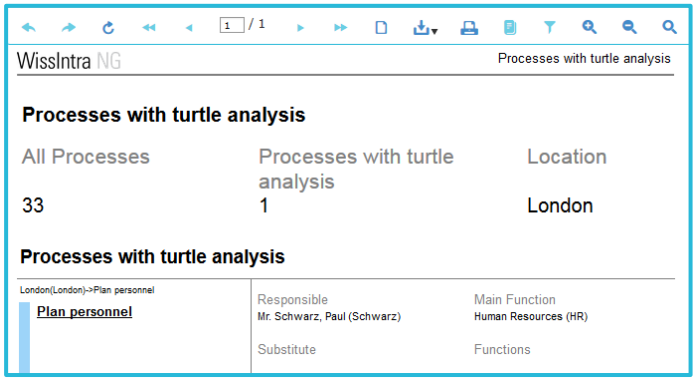


All processes in which the selected user is the main responsible or substitute are listed. Select the filter by choosing the desired location and user.

The report gives you an overview of the total number of processes at this location and the number of processes in which the selected user is involved. A distinction is made whether the selected user is responsible or substitute.

The associated processes are shown as links that point the corresponding process card.

Processes with Turtle Analysis



This report provides an overview of all the processes of the selected location which include a turtle analysis. It differentiates between the total number of all processes and the number of processes with turtle analysis.

The associated processes are shown as links that point the corresponding process card. In addition, the responsible person and the substitutes, as well as the main function and functions are listed.

Note: You have the option to click on the respective process and access it directly.

Note: You have the option to include your own logo in the header of the reports. For this procedure, please refer to the explanations in the Administrator Manual Configuration.

6.3 Print

In WissIntra NG you have a variety of print options. This allows you to print individual process cards with all their tabs, as well as an overview of the entire level or even all processes in the process landscape. In each case, different procedures are used.

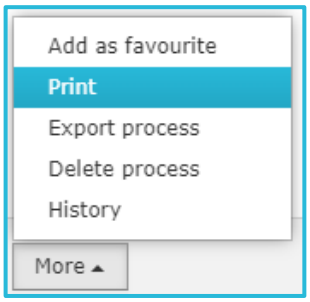
Caution: This Print option may take some loading time depending on the number of processes in your process landscape.

Print a process card

When printing a single process card, you have the option to print the entire process with all the information contained in it or to print the tabs you have selected. This gives you a general overview of the process step or all the information contained in the tabs, depending on your needs.

Proceed as follows:

- First open the process card to be printed.
- Navigate to the button More ▲.
- Click on **Print.**
- In the opening window you can select which tabs shall be printed.
- A new tab will appear in your browser.



The printout appears, providing an overview of the following components:

- The logo of WissIntra NG and the title of the process appear in the header.
- In the footer, the date and time of the printout, as well as the indication that the document is an uncontrolled document, and the page number.
- Process title

When printing the tab General, you will get an overview of the following components in addition to the contents of this tab:

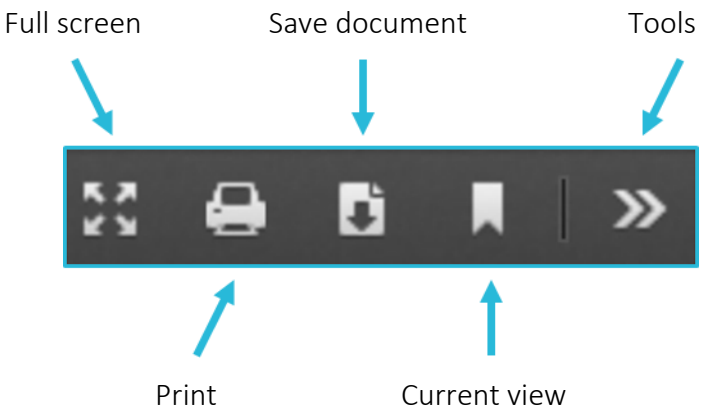
- Location
- Processpath (as a link within the PDF)

On the following pages, the content of the individual tabs is displayed, according to the order defined in WissIntra NG:

- Description
- Instructions
- Criteria
- Interfaces
- Turtle Analysis

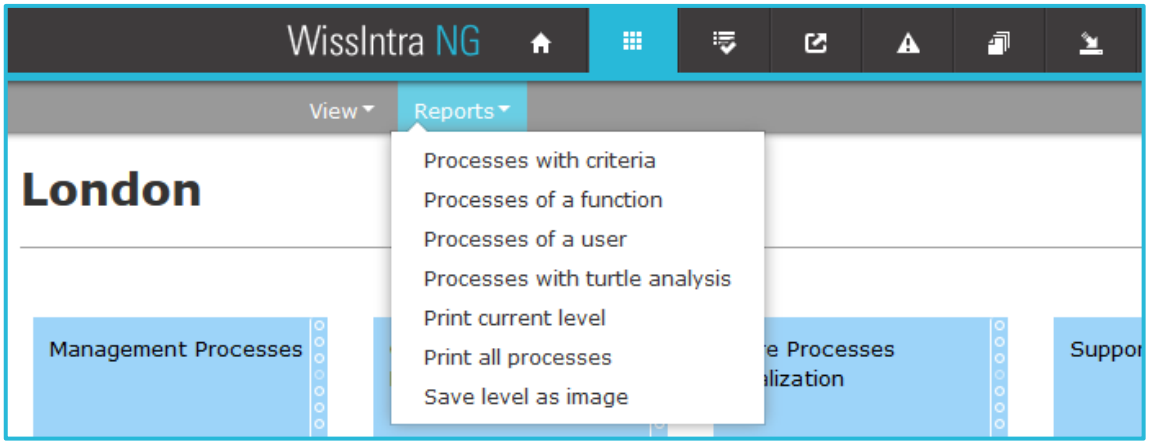
Note: If the selected process only has the General tab, the process is printed directly.

Work with the document or start printing by using the known icons (these may vary in different browsers).



Print current level

If you want to print not only a single process card but the entire level, you can find this option in the header of the Process Manager underneath **Reports**.



- Select **Print current level**.
- In the opening window you can select which tabs shall be printed.
- A new tab will appear in your browser.

The following components are listed:

- The logo of WissIntra NG and the title of the parent process card appear in the header.
- In the footer: the date and time of the print, the indication that the document is an uncontrolled document and the page number.
- Location
- Level of the process to be printed
- Processpath (as a link within the PDF)
- Content of Matrix or Swimlane process cards in the correct order

Print all processes

The print option for all processes of a location can also be found in the header underneath **Reports**.

- Select **Print all processes**
- The print appears in a new tab of your browser

The following components are shown:

- The logo of WissIntra NG and the location appears in the header
- In the footer: the date and time of the print, the indication that the document is an uncontrolled document and the page number
- Location
- Table of contents of the process landscape. An arrow behind process titles indicates a sublevel which is described on another page in the PDF. By clicking on the process you get directly to that page.

Save level as image

In addition to the print options described above, where the contents are displayed in a PDF, you can also save the current view as an image file.

This option is available for the Matrix and the Process graphic, as well as for the Swimlane and for the Interdependencies.

Note: Unfortunately, this function is not available for Internet Explorer 11 or Microsoft Edge.

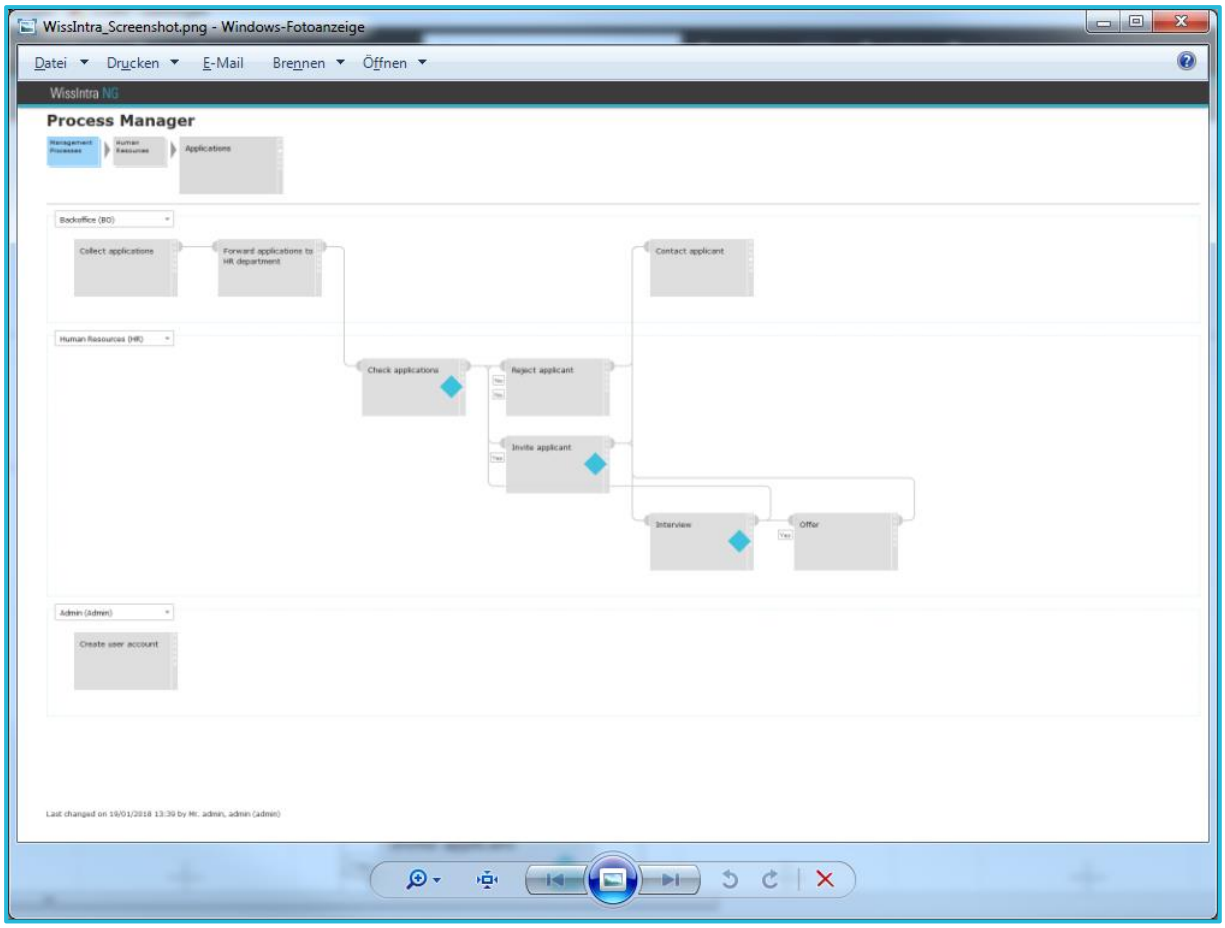
- Choose **Save level as image** underneath **Reports**.

In Google Chrome, a screenshot of the view is automatically downloaded as *.png. You will find the file at the bottom of your browser.

Firefox asks you whether you want to open or save the image file.

The image file contains the entire view of the Matrix, the Process graphic, the Swimlane or the Interdependencies.

Here is an example for the view of a Swimlane.



6.4 Process graphics

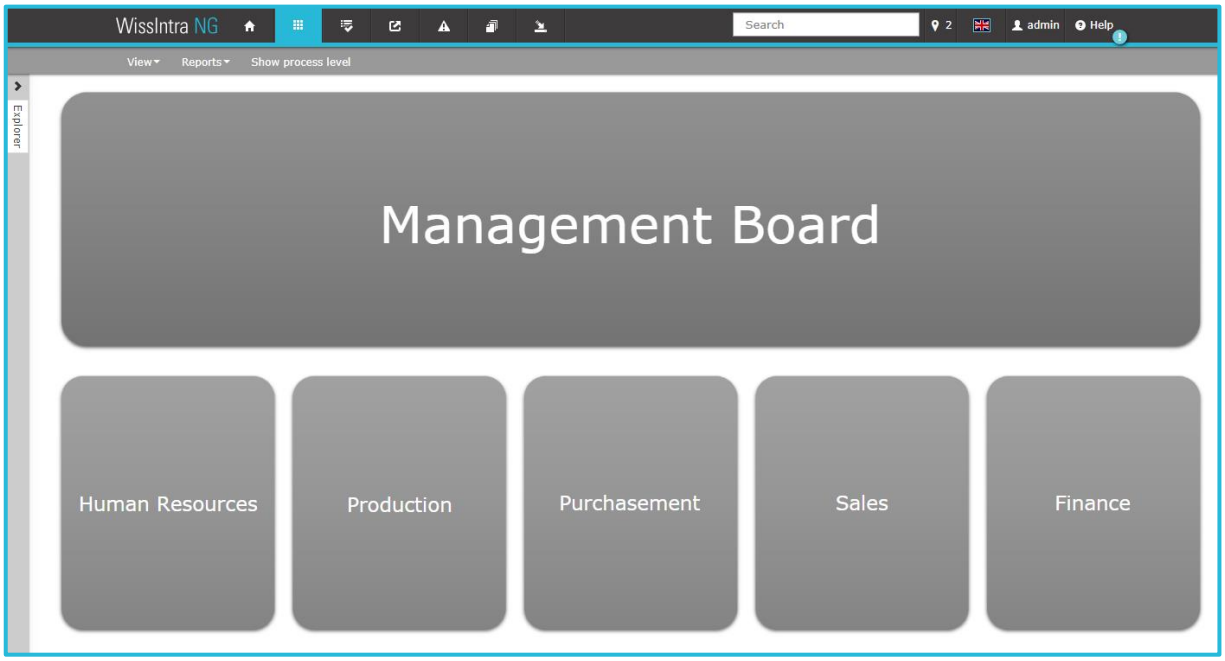
The process graphics provide you with a clear access to locations or processes.

As an administrator, you can define a process graphic for locations or processes with at least one sublevel in the Settings. This graphic is then displayed instead of the process matrix or the Swimlane.

By placing different elements on an arbitrary background image, it is possible to link from the process graphic to single processes, process levels, and also to web pages and folders (only possible with Internet Explorer 11) as well as to display texts.

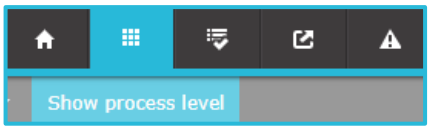
As a user you reach the process graphic as soon as you start the Process Manager or navigate to the corresponding process.

Here you can see a simple example of an organigram that provides a quick access to the process levels of the individual departments.

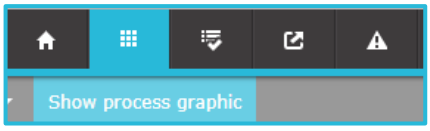


You can switch from the process graphic to the process matrix or Swimlane, for example, to edit processes, as long as you have permissions for this.

- Click on **Show process level** in the subnavigation of the Process Manager to switch to the process matrix or the Swimlane.



- To return to the process graphic, click on **Show process graphic**.



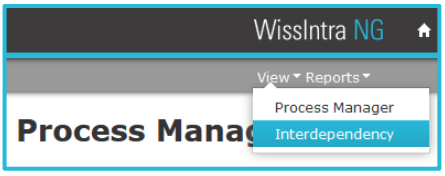
It is also possible to link to the process matrix using an element on the process graphic. For this, please contact your administrator.

Note: For information on how to create and edit the process graphic, see the **Administrator Manual Configuration**.

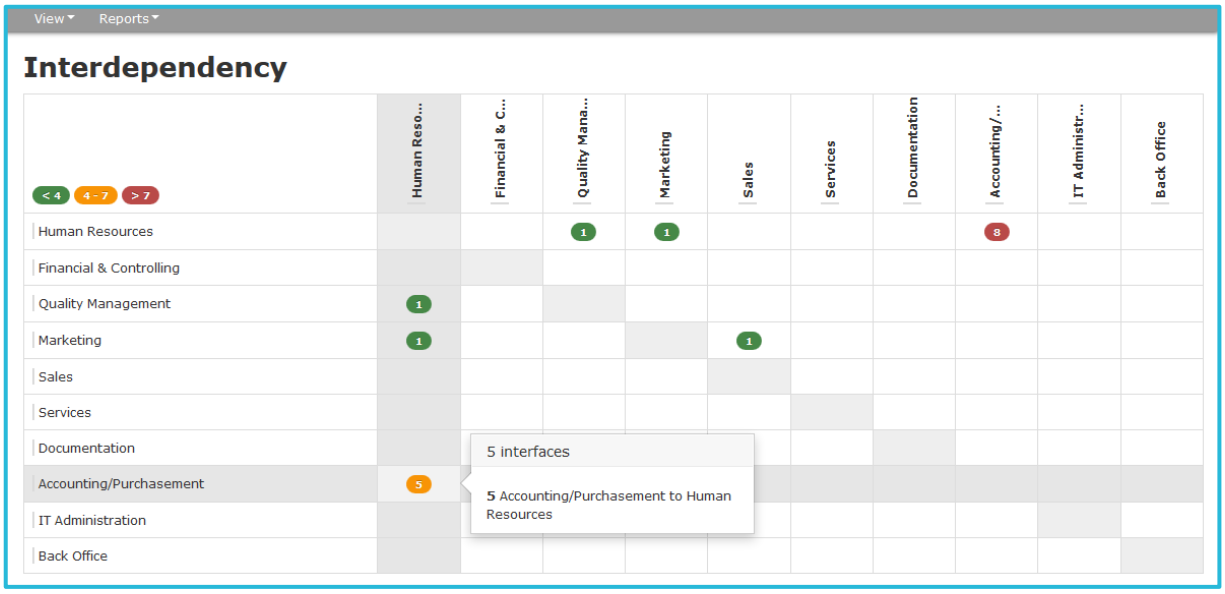
6.5 Interdependencies

WissIntra NG offers you the possibility to see the interdependencies between individual processes in an interdependencies overview. To access this view, please proceed as follows:

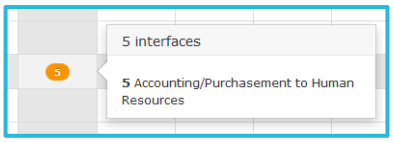
- Use the mouse to navigate to the grey control bar in the Process Manager and choose **View**
- Click on **Interdependencies** in the appearing drop-down menu

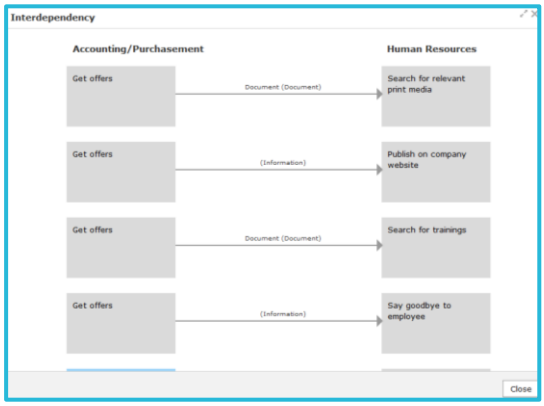


A table appears which shows the interfaces of the processes and categorizes the number by colour.



When you move the mouse over the table, you can identify a hair cross. A tooltip appears which shows the number of interfaces of the two processes.





If you click on it, another modal will appear which graphically displays the individual interdependencies. Here you can also detect the direction of the information flow.

In general, you have the possibility to create an unlimited number of interfaces, but WissIntra NG categorizes processes by their number of interfaces in a traffic light system.

Processes with fewer than four interfaces are shown in green, processes with four to seven interfaces are yellow, and all processes with more than seven interfaces are red.

This is due to the fact that a high number of interfaces leads to a higher risk, since the risk of errors increases. This is based on the assumption that the risk of information loss increases with an increasing number of interfaces.

7 Keyboard Shortcuts

General	
CTRL + SHIFT + UP	Navigates to the main navigation
CTRL + SHIFT + DOWN	Navigates to the breadcrumbs (mini-view of the process card)
CTRL + SHIFT + LEFT	Navigates to the first navigation sidebar entry
CTRL + SHIFT + RIGHT	Navigates to the main content (first process card or first table entry)

Modal	
CTRL + E	Opens Modal
CTRL + S	Saves the date in the modal
ESC	Closes the Edit / Detail modal
CTRL + ALT + 1	Opens the first tab
CTRL + ALT + 2	Opens the second tab
And so on.	

Depending on what has been activated, the navigation buttons have a different function:

Main navigation	
LEFT	Previous Module
RIGHT	Next Module
ENTER	Enters the module

Table	
UP	Cursor jumps back one line
DOWN	Cursor jumps to the next line
LEFT	Navigates to previous page
RIGHT	Navigates to next page
ENTER	Opens the modal
SPACE BAR	Opens the checkbox
ESC	Deactivates all checkboxes

Matrix/Function lane (matrix itself)	
UP	Navigates to the overlying process card
DOWN	Navigates to the underlying process card
LEFT	Navigates to the previous process card
RIGHT	Navigates to the next process card
ENTER	Opens the process card / navigates one level downwards
ESC	Undo the move

Matrix/Function lane (Breadcrumbs)	
LEFT	Navigates to the previous process card
RIGHT	Navigates to the next process card
ENTER	Opens the process card / navigates one level upwards

Treeview	
UP	Cursor jumps one element higher
DOWN	Cursor jumps one element lower
LEFT	Folds a branch
RIGHT	Unfolds a branch
ENTER	Opens or select the entry (modal opens)

8 FAQ – Frequently Asked Questions

In this chapter you will find answers to frequently asked question when working with WissIntra NG:

Why do some hyperlinks from MS Office documents not work correctly?

This problem may occur if the name of the page from which you want to create a hyperlink contains a hash character (#).

When you right-click a hyperlink in a Word document and use the Insert Hyperlink option, the hash sign is displayed incorrectly and the inserted link cannot be opened correctly.

Note: The hash sign (#) is a valid character when using file names, but is not accepted for hyperlinks in MS Office documents.

To avoid this problem, use on of the following methods:

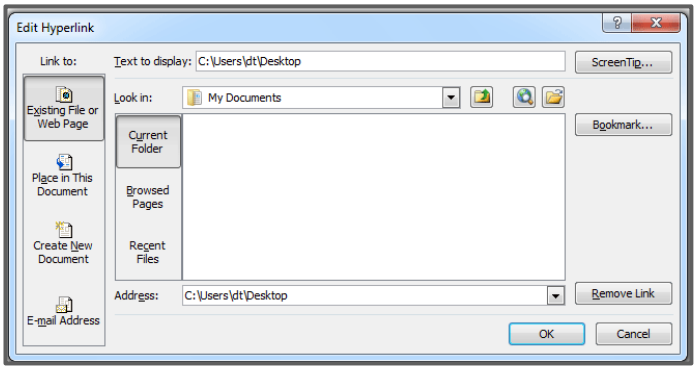
- Use CTRL + C to copy the address of the hyperlink and insert it into the Office document.
- Press **Enter** to automatically generate a link.

Or

- Right-click the corrupt link in the Office document.
- Click on **Edit Hyperlink**.

The following window will open:

- Insert the correct address of the hyperlink and click OK.



Note: For more information about this MS Office issue, visit Microsoft Support at: https://support.microsoft.com/de-de/kb/202261

The same problem can appear when creating a PDF with the integrated PDF tool in Office (PDF / XPS document). Again, the hyperlink may be displayed incorrectly and cannot be opened correctly.

To avoid this problem, we recommend using an alternative external tool for creating PDFs. For further questions about this issue, please contact Microsoft Support.

When opening a document, a login window appears. How can I avoid that?

If you are using a version of Microsoft Office 2010 or older and open WissIntra NG with the Internet Explorer, it may happen that a login window appears when you open Office documents in the Document Manager or within a modal, prompting you to log in with your Windows user data.

To solve this problem, please contact your administrator. **Chapter 4.3** in the **Administrator Manual Configuration** describes how to bypass this behaviour.

What is the difference between modules and modals?

The various software applications, such as the Process Manager or the Audit Manager are called modules.

The dialog windows are called modals where you can navigate in tabs and insert input.

9 Customer Support and Service Desk

Follow the instruction in this manual to make the best preparations for working with WissIntra NG. Should you still have any questions and you need support from our service team, please contact us under consideration of your service level.

We would be pleased to receive your feedback and suggestions.

We wish you a lot of success and pleasure working with WissIntra NG!

Customer Support

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https://www.kuk-is.de/wissintra.html

Service Desk

E-Mail: **Servicedesk@WissIntra.de**

Tel: +49 711 578813 -13

Monday to Friday from 9am – 12am and 1pm – 5pm (CET)

Note: Before you contact the Service Desk, please contact your internal WissIntra NG contact person to learn more about your service level and the resulting contract terms.

Note: Please let us know your current program version with each contact. You will find this on each WissIntra NG page at the lower right corner.

WissIntra Online Support via pcvisit:

With pcvisit, we switch directly to your screen.

This is how it works:

- Make an online support appointment.
- Download the guest module for pcvisit.
- Follow the step by step instructions.

For detailed instructions, please visit:

https://www.kuk-is.de/files/kuk-is/userfiles/Kundenzentrum/Support/kk_information_services_Anleitung_pc_visit.pdf

Our service staff will be available at any time to answer your questions.

.

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