



Interfacing's BPMN Modeler: Overview

Business Process Modeling
in Microsoft Visio®



interfacing.
www.interfacing.com

Modeling & Navigating

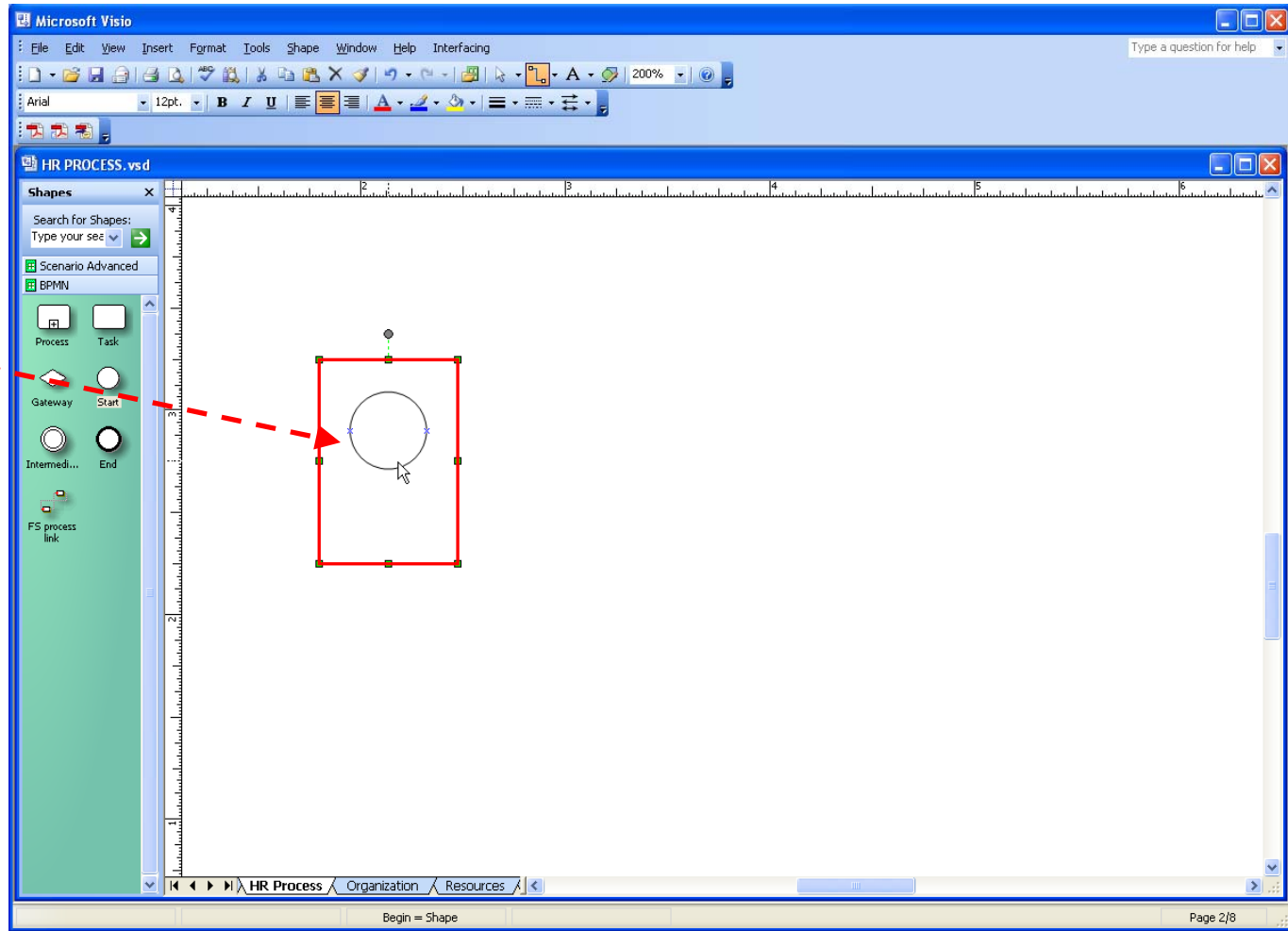


Here, process owners, analysts, and coordinators create and update processes and their links to people, procedures, applications and other important entities.

The following screen shots were taken from the process modeling page.

Mapping & Editor

Intuitive Drag
& Drop Mapping
Capability



Mapping & Editor

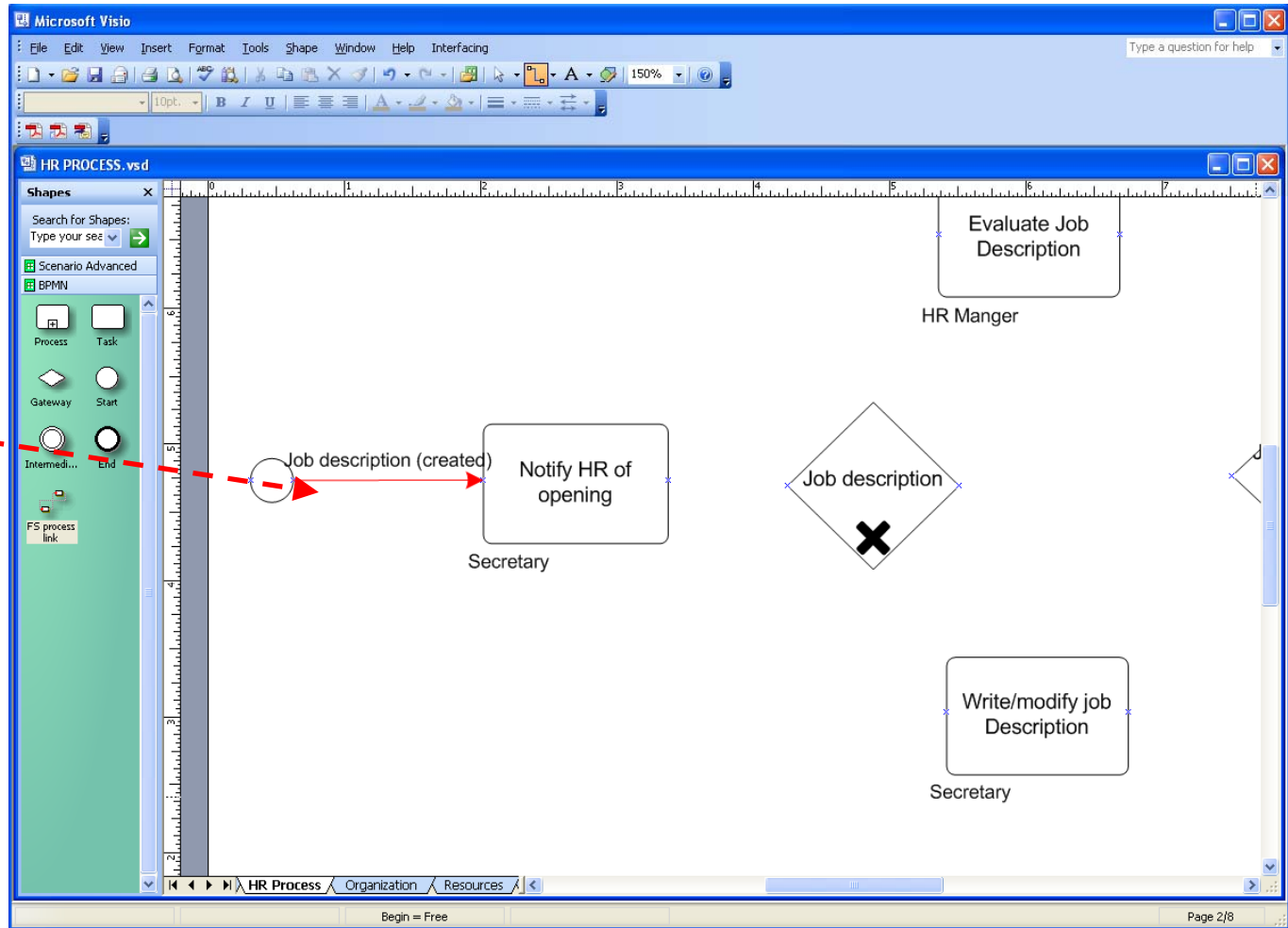
The screenshot shows a 'Custom Property Editor' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog contains the following elements:

- Name:** A text input field.
- Type:** A dropdown menu currently set to 'Trigger', followed by an ellipsis button (...).
- Sequence Number:** A text input field.
- Tabbed Interface:** A row of tabs including 'Basic', 'Advanced', 'Notes', 'Languages', 'Categories', and 'History'. The 'Basic' tab is selected.
- Allocated Resources:** A section with a text input field, an 'Assign...' button, and a 'Delete' button.
- Output Material:** A table with the following columns: 'Mat. name', 'State', 'Type', 'Qty Min', and 'Qty Max'. The table is currently empty.
- Buttons:** At the bottom, there are four buttons: 'Modify Another', 'OK', 'Cancel', and 'Apply'.

When a shape is dropped, the property editor opens. This captures the activity details (performers, KPI, description, documents, goal, etc.)

Linking & Editor

Easily link objects



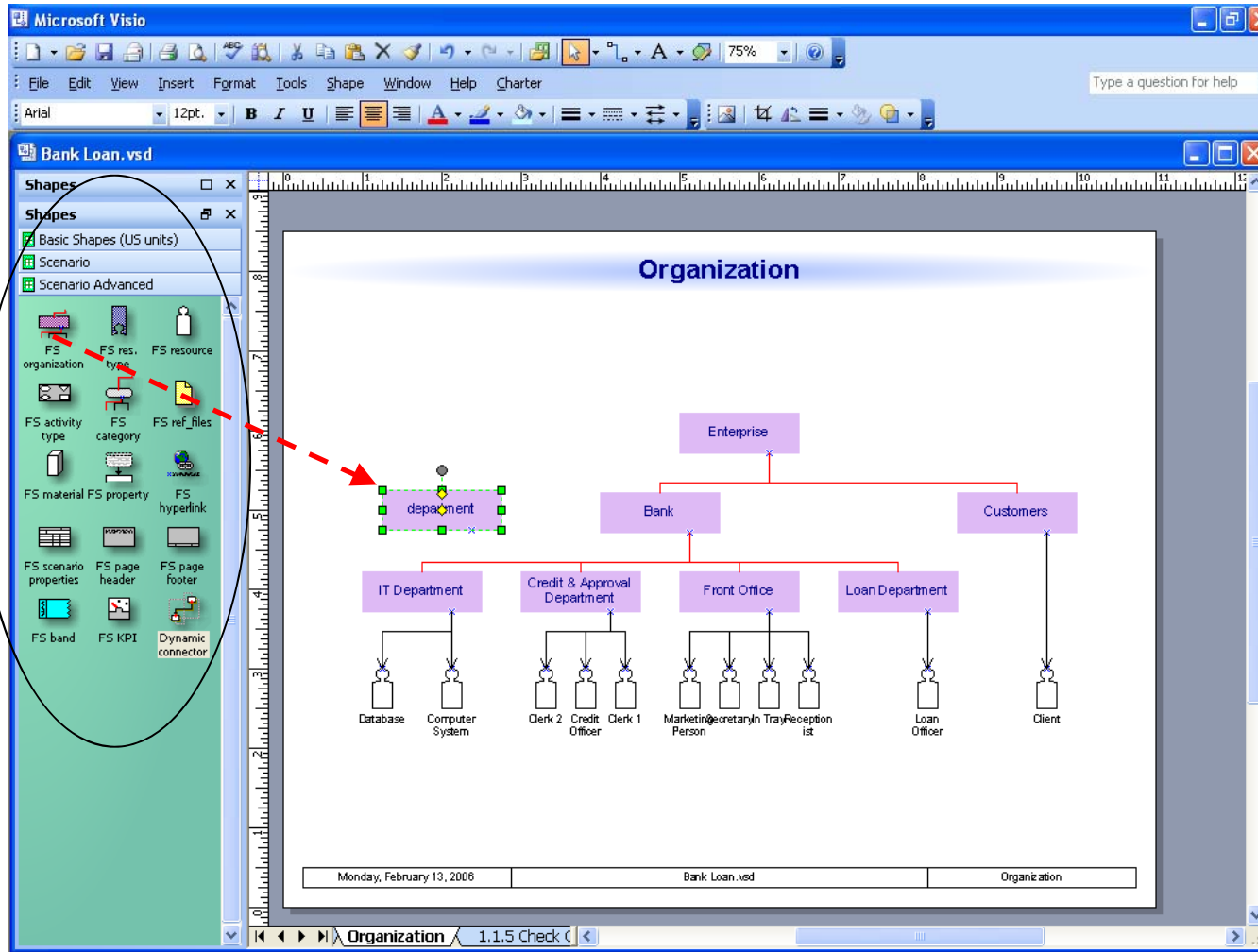
Linking & Editor

The screenshot shows a dialog box titled "Custom Property Editor" with a blue title bar and a close button. It features two tabs: "Material on Link" (selected) and "History". The "Material on Link" tab contains a "Material Name" text field with an "Assign..." button to its right. Below this is an "Inter Model Link" section with a "Link to another model..." button. At the bottom of the dialog, there are four buttons: "Modify Another", "OK", "Cancel", and "Apply".

	Min.	Max.
Predecessor Output Quantity	1	1
Successor Input Quantity	1	1

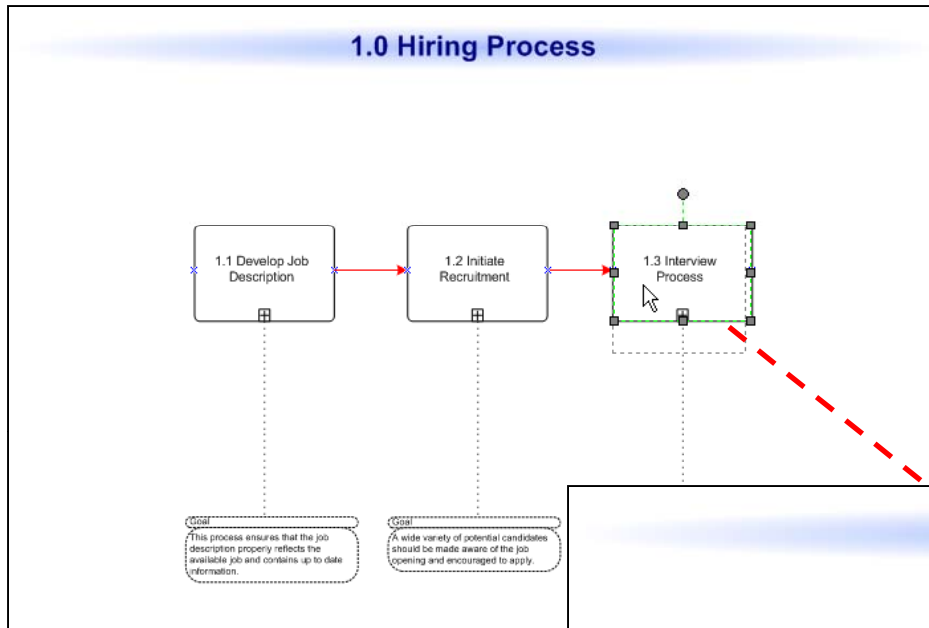
When a link is dropped, the property editor opens. This captures the details related to that link (input/output materials, quantity minimums and maximums, etc.)

Organization

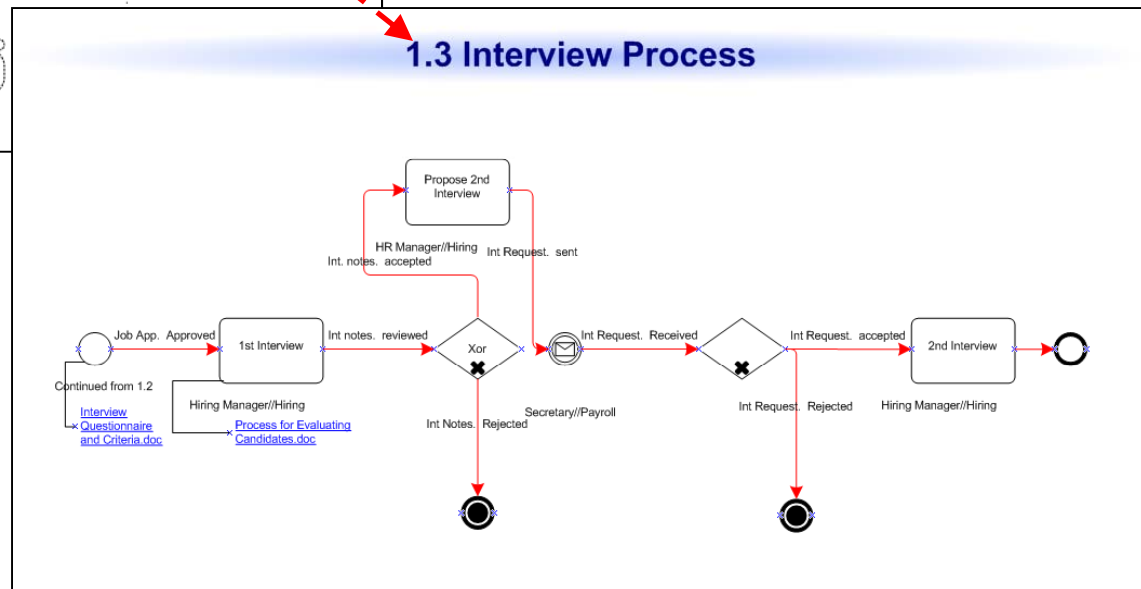


Simple Drag & Drop is used to build advanced pages, as well (e.g. Org. Roles, Resources, Materials, etc.)

“Drill Down” Capability

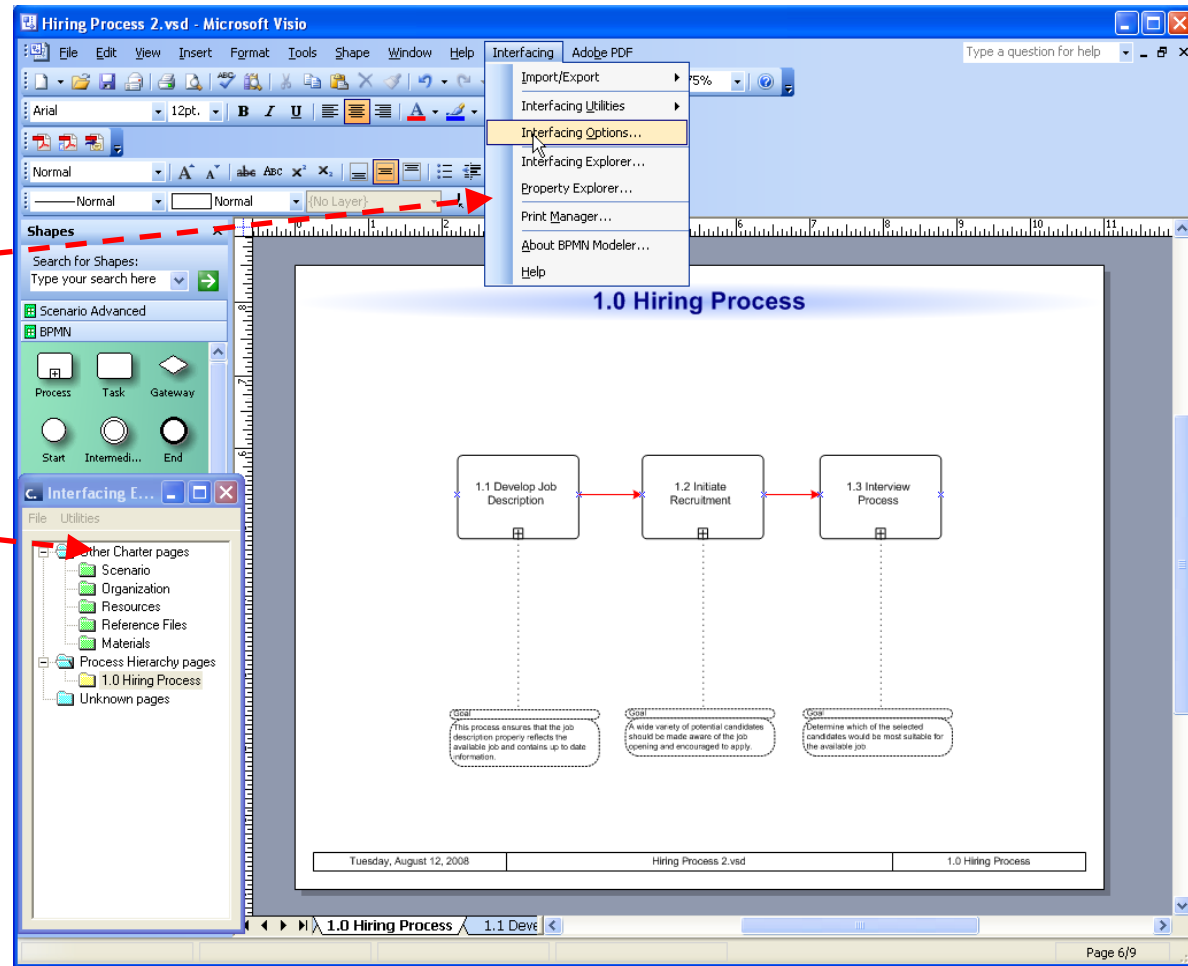


Drill down through processes and sub-processes to view lower-level activities. A top-down approach to modeling allows for a truly holistic view of your company.



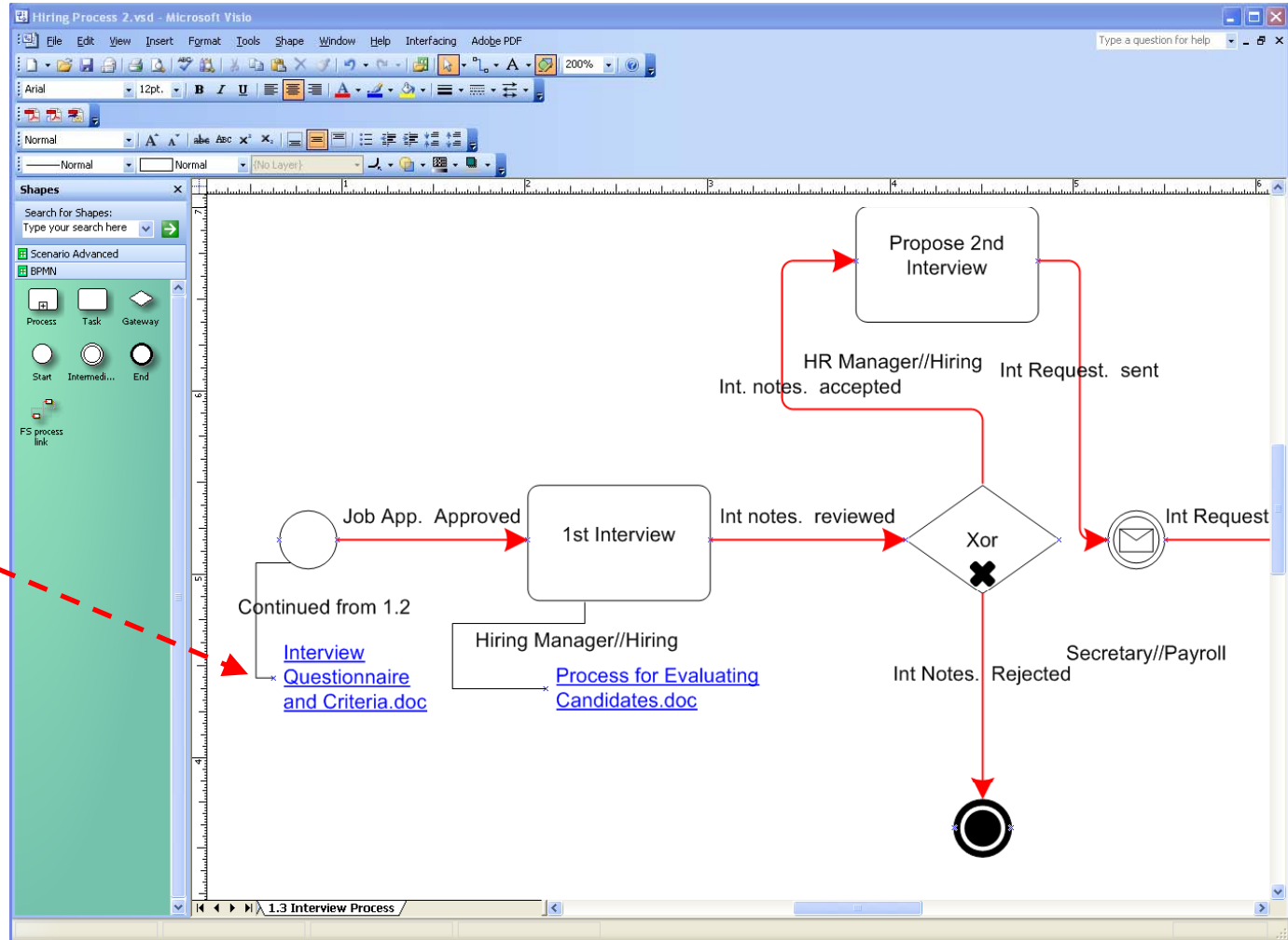
Explorer Navigating

The BPMN Modeler Explorer allows you to navigate up and down through your process hierarchy in a user-friendly “tree” view.

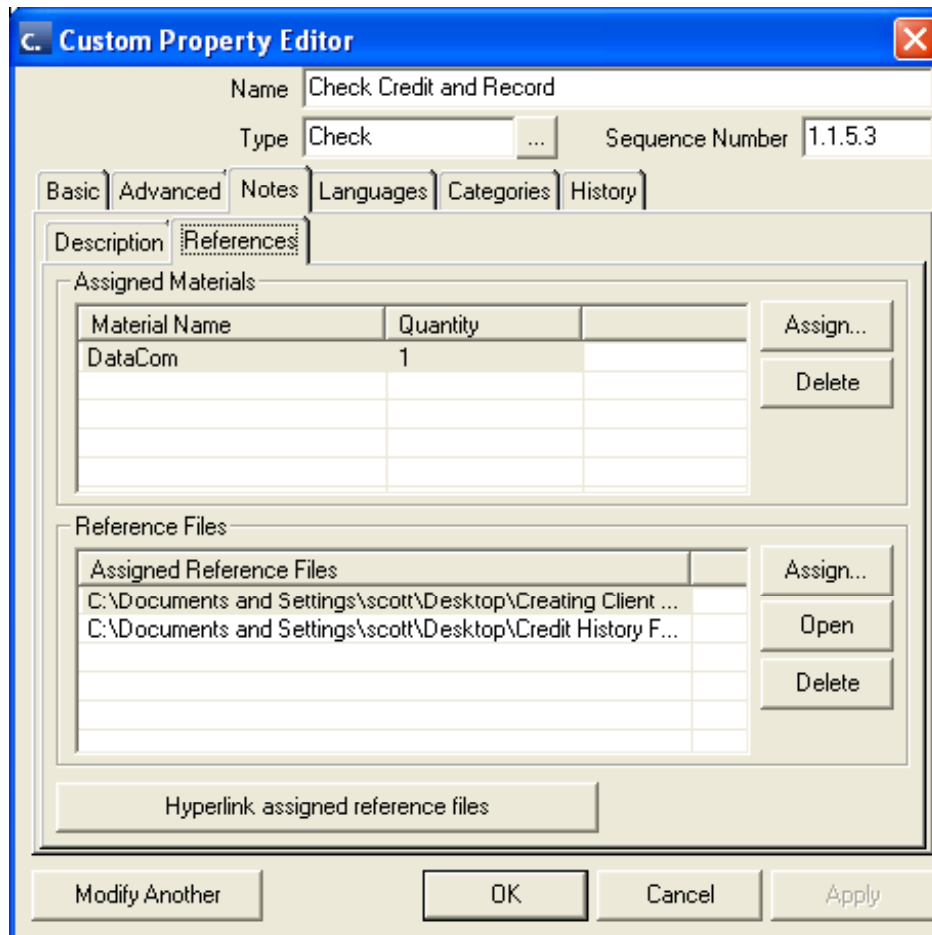


Attach Documentation

Attach relevant documentation to activities within your process (e.g. Procedures, Forms, Regulations, direct links within a system, etc.).

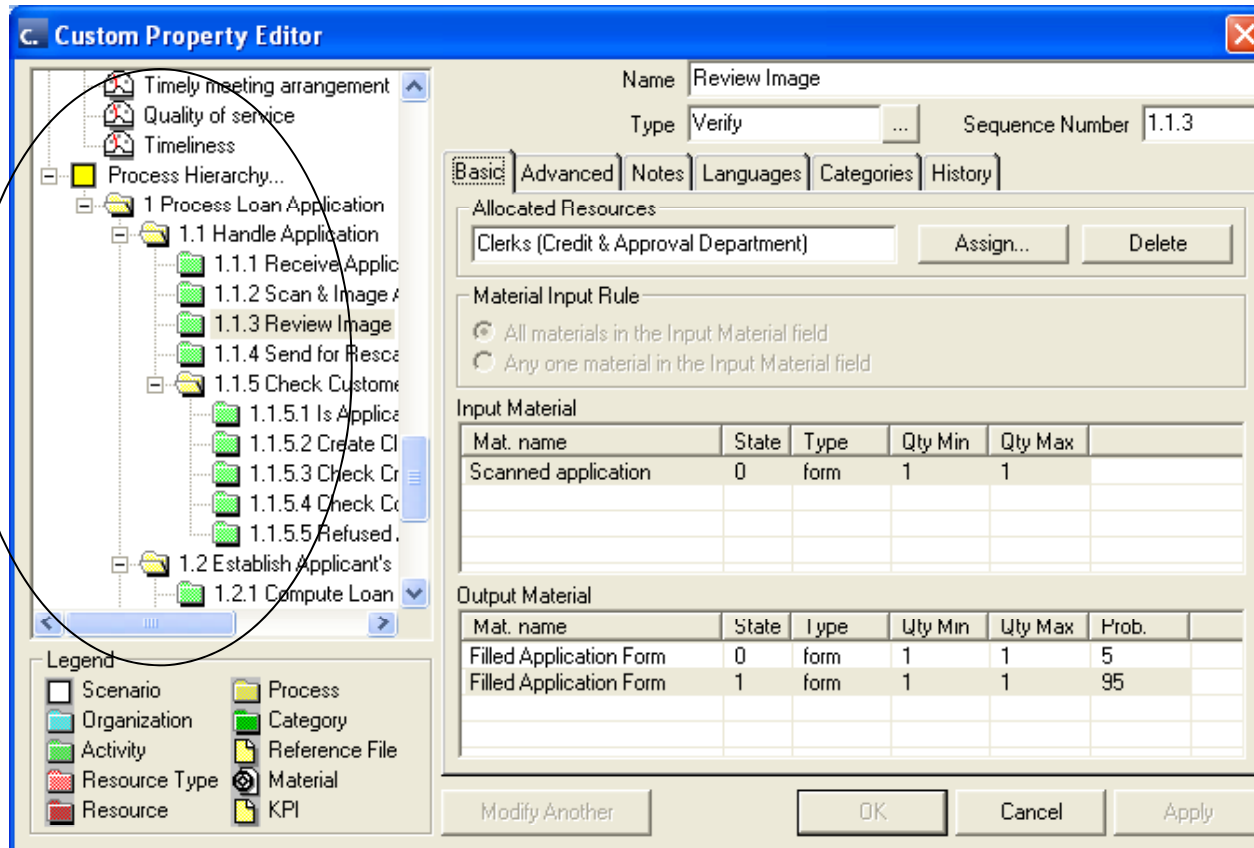


Attach Documentation



Allows users to standardize both processes and related documentation

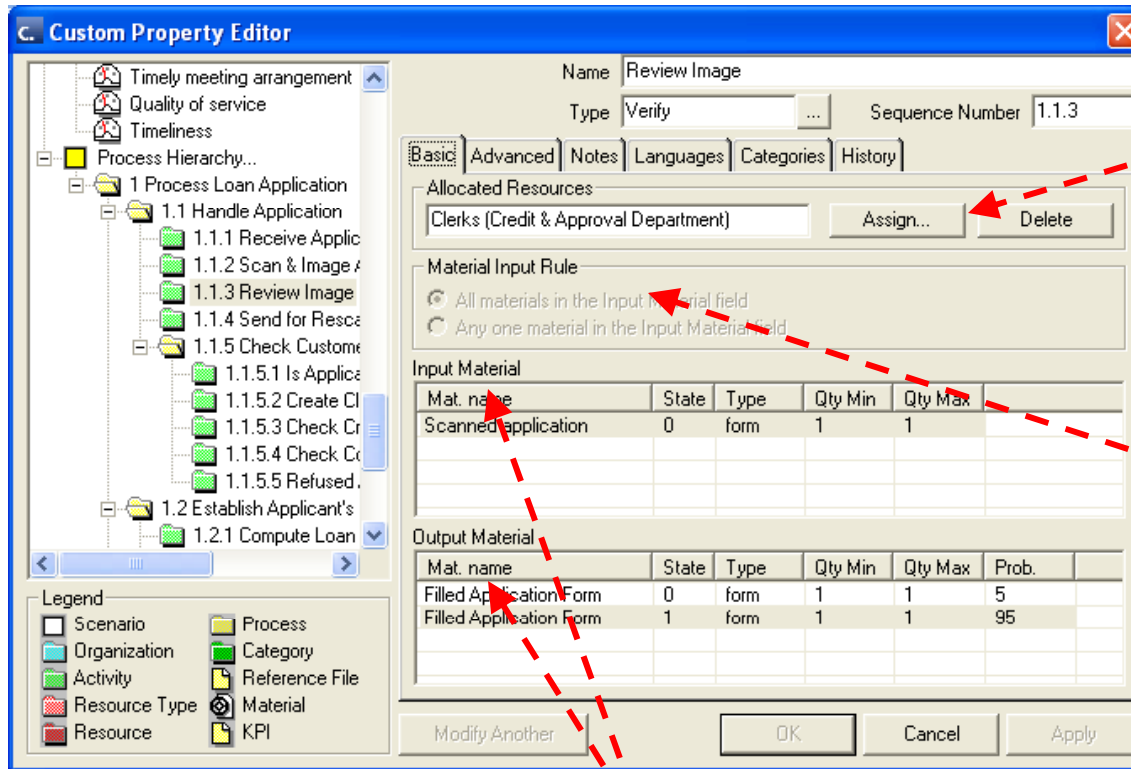
Property Editor



The property editor allows you to quickly add details to all activities, rather than having to input each section whenever a shape is dropped on the map. It's very quick to navigate the hierarchy tree on the left and enter details on the right side of the editor.

NOTE: A trick is to use the Model Wizard to quickly build your process and organizational hierarchies, then use the property editor to add the relevant details behind each shape. A complete model can be built in minutes without ever working on the map.

Property Editor

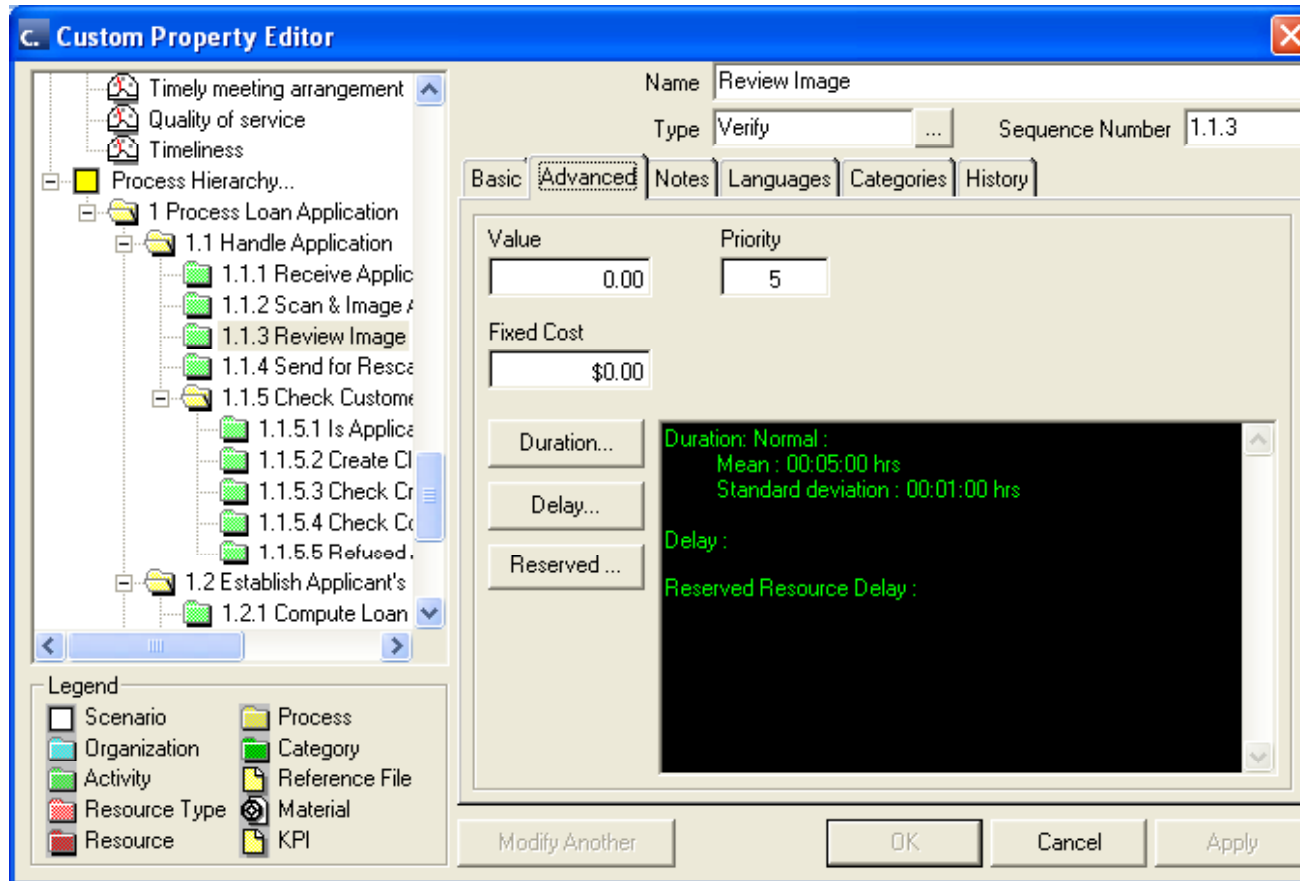


Attach Accountabilities to tasks

Set rules for your workflows to follow. The same rules can also be applied for simulation and analysis.

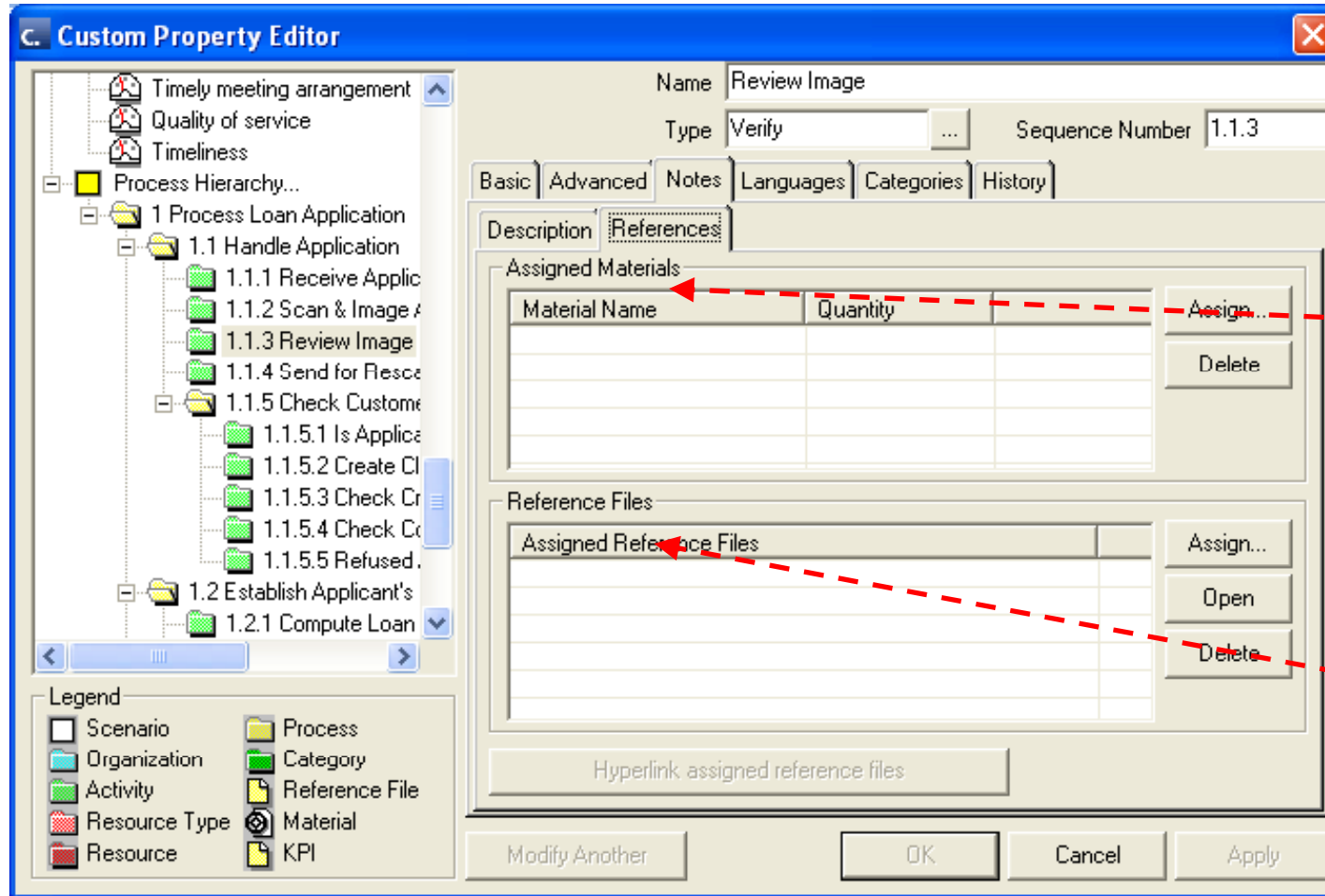
Identifying the inputs and outputs across activities and processes allows business users to understand what is needed to begin a task and what needs to be produced.

Property Editor



Capture advanced information about your process flows and export this information into Designer in order to run simulations and analyses.

Property Editor



Assign reference materials to activities (e.g. user manual, company handbook, etc.)

Link reference files to activities (e.g. forms, procedures, regulations, etc.)



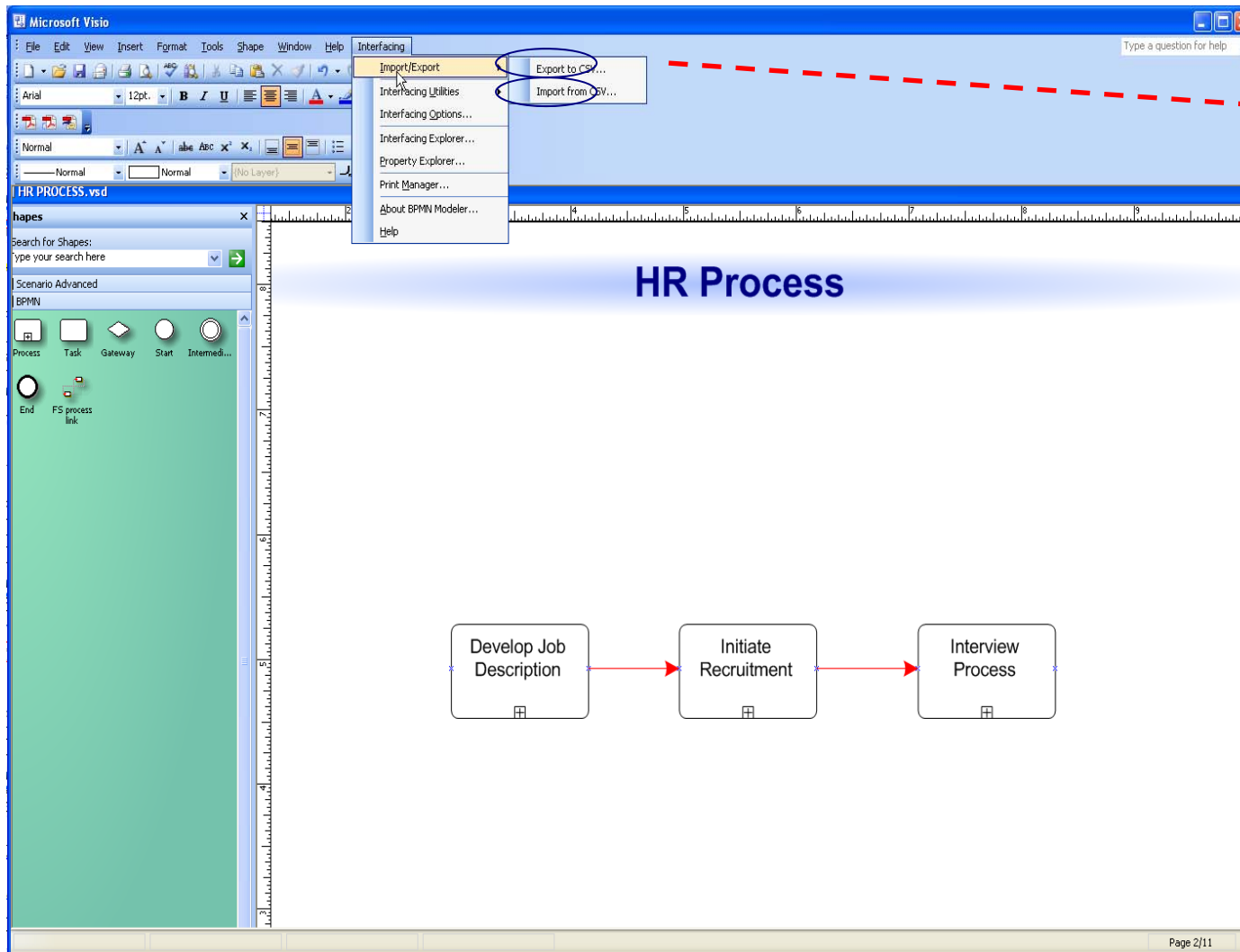
Additional Features



The following screen shots provide details of the additional features in the BPMN Modeler that enhance Visio's functionality.

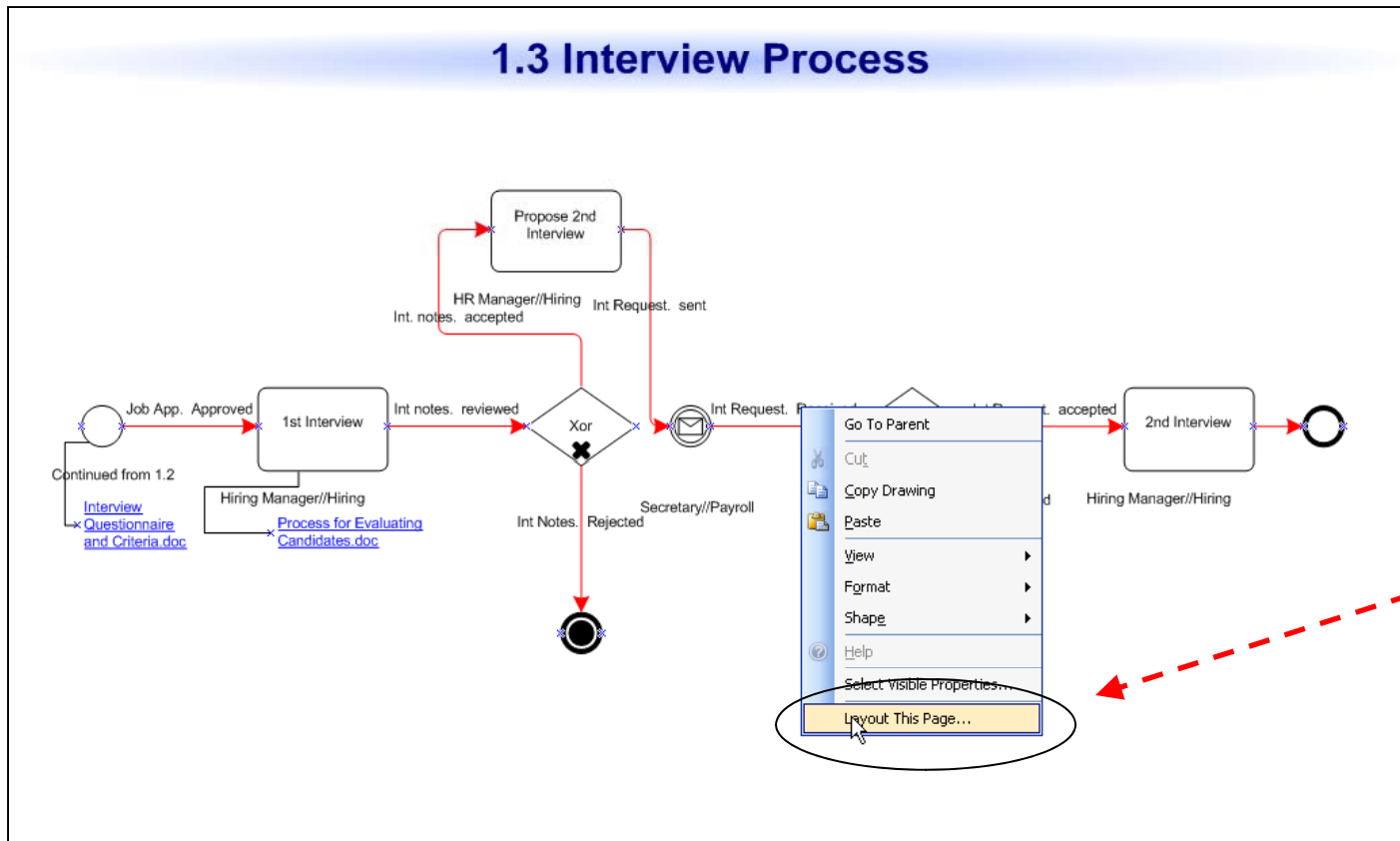
These user-friendly features are highly valued by business users.

Import / Export



Import/Export to CSV for Excel Reporting and integration with other solutions.

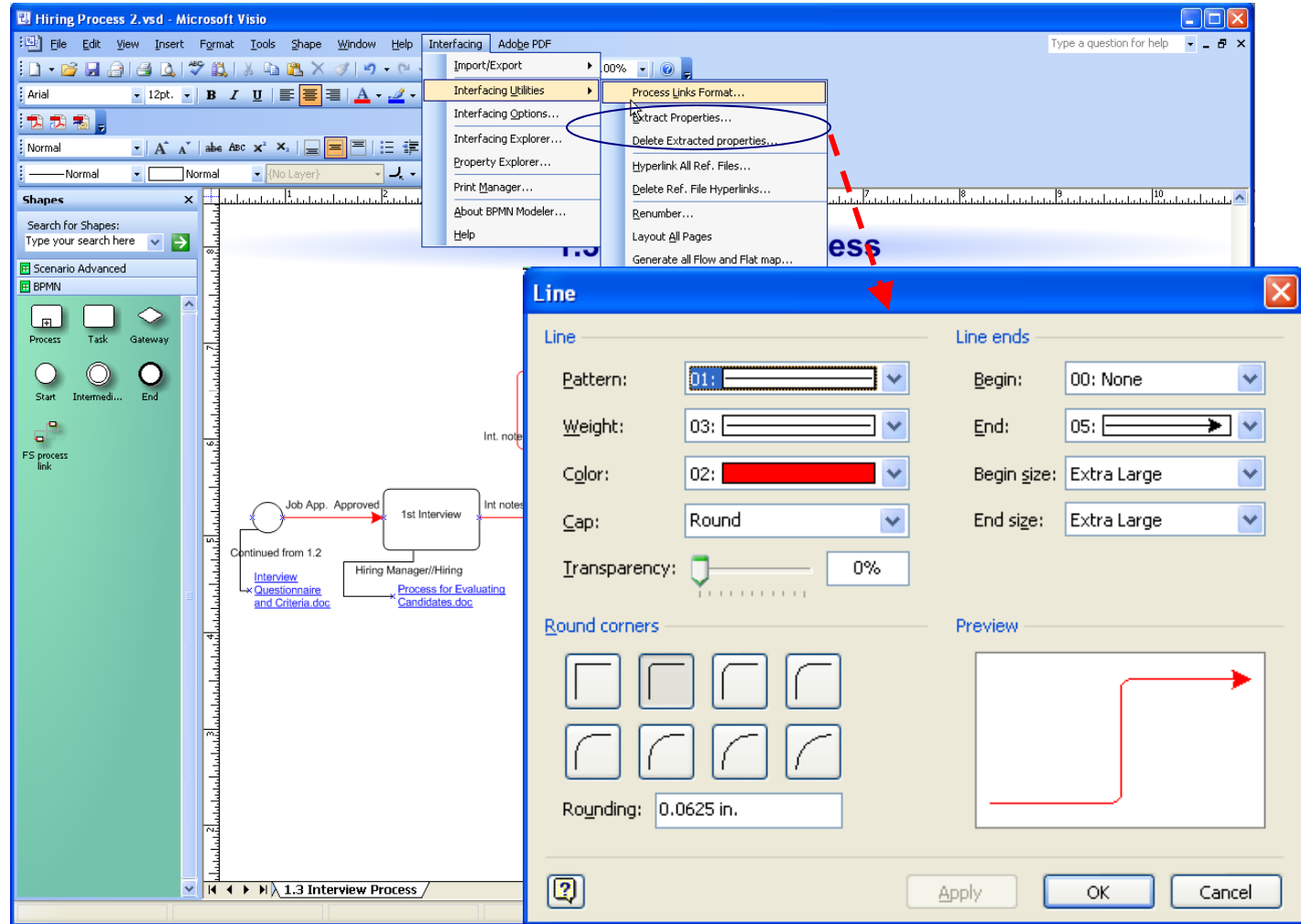
Auto-Layout



Right-click to “auto-layout” and let the software place your objects for you so that they appear clean and clear on the map.

Utilities

Customize standard formatting of your inter-process & activity links (color, size, style, etc.)

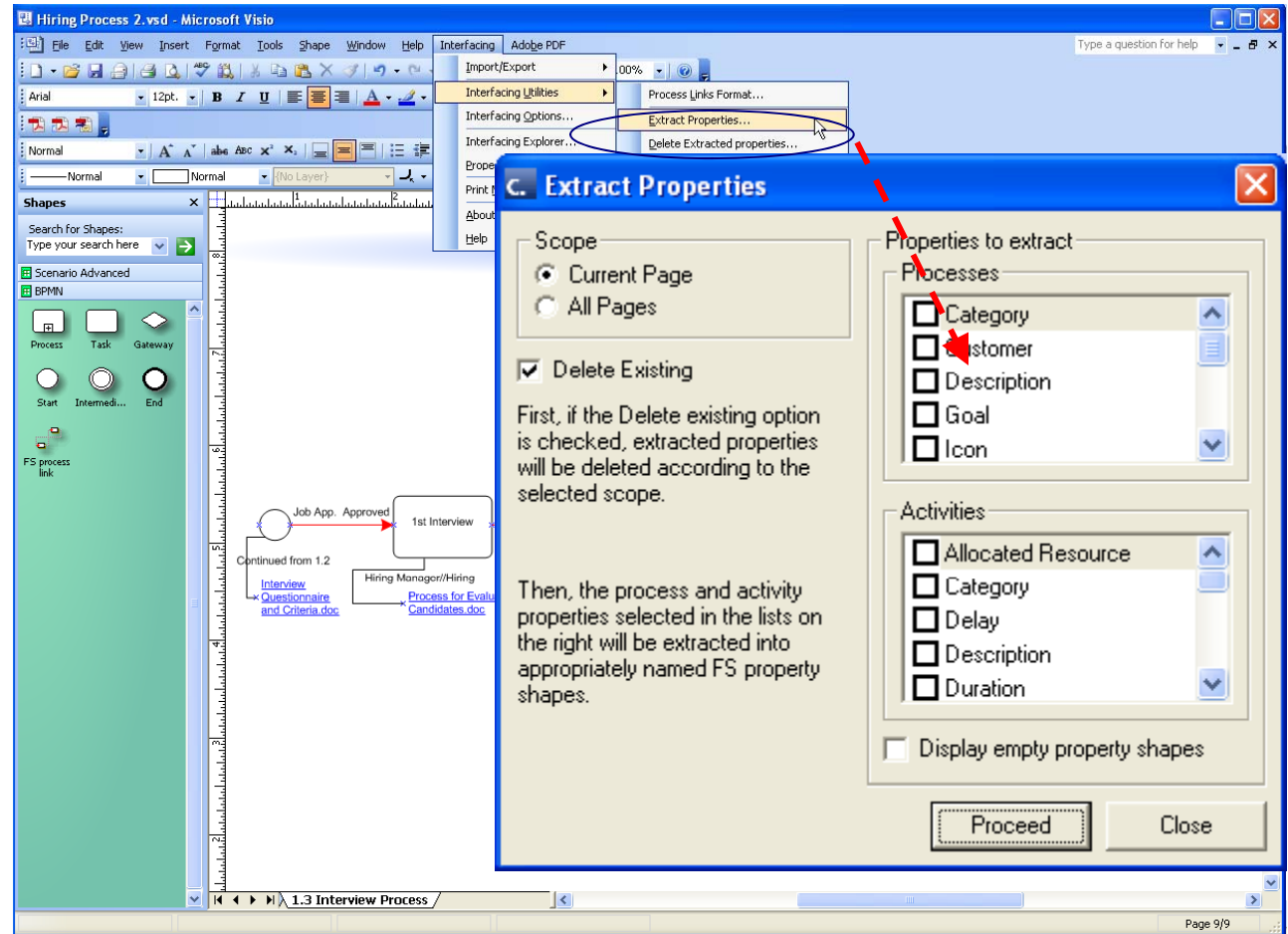


Important: make sure all users follow the same standard.

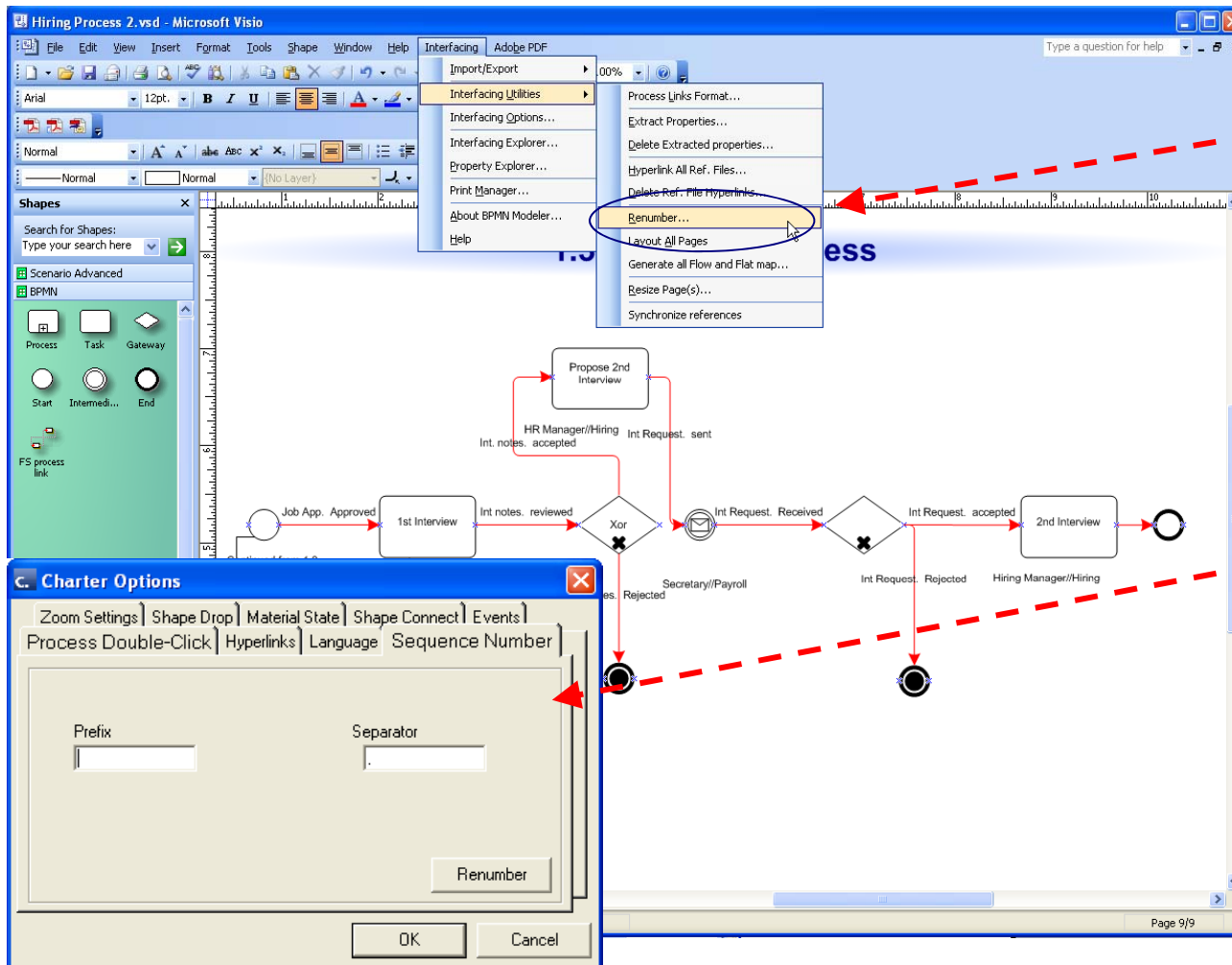
Utilities

The BPMN Modeler now saves the activity details behind each shape dynamically (rather than as simple text), so that users can customize what information will be displayed on the map what will remain only in the details panel.

NOTE: Keep information displayed on the map to a minimum. By including only the most important information, you prevent your maps from becoming cumbersome.



Utilities

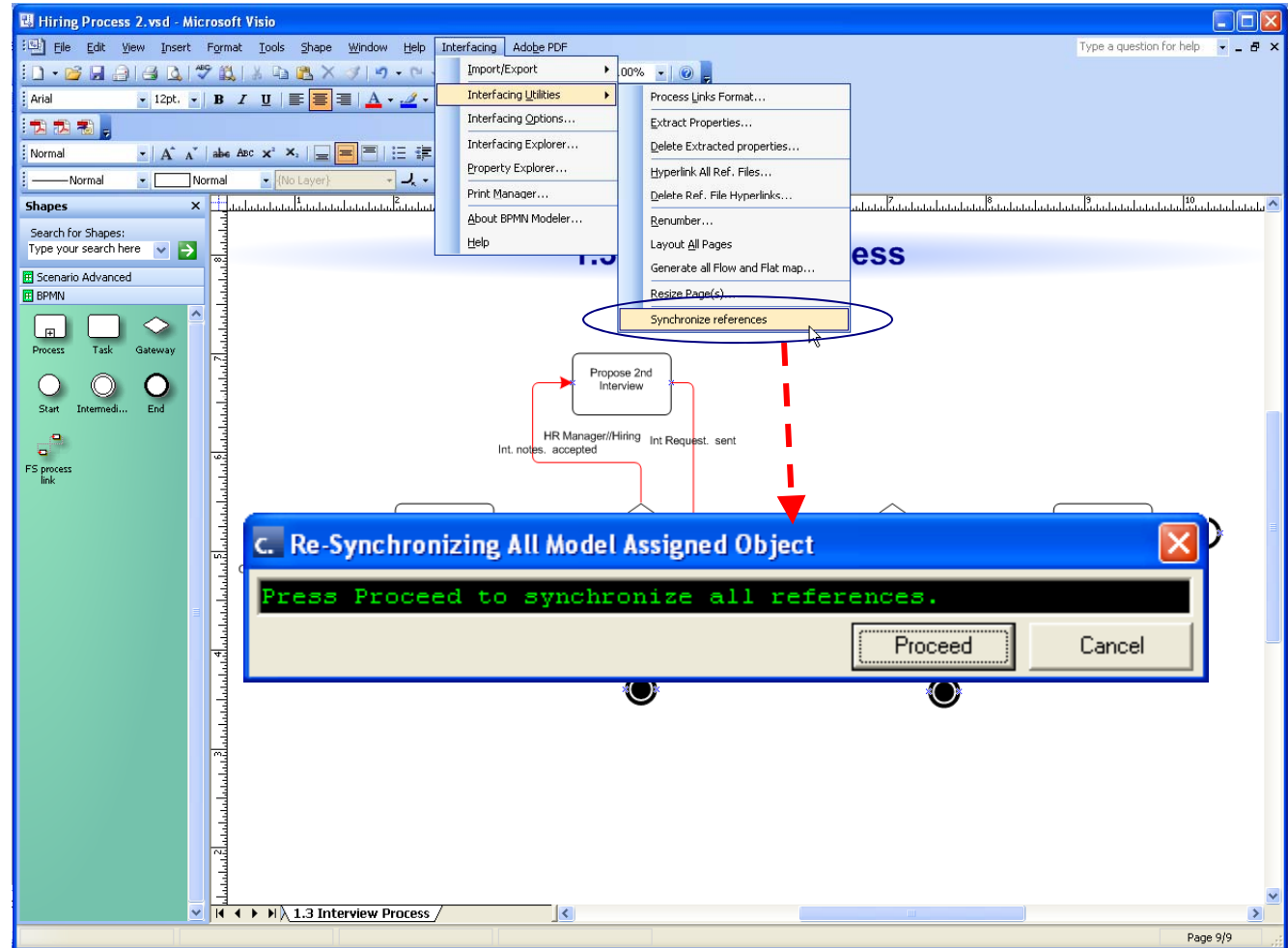


Automatically renumber all process/activity sequences when changes are made to your models.

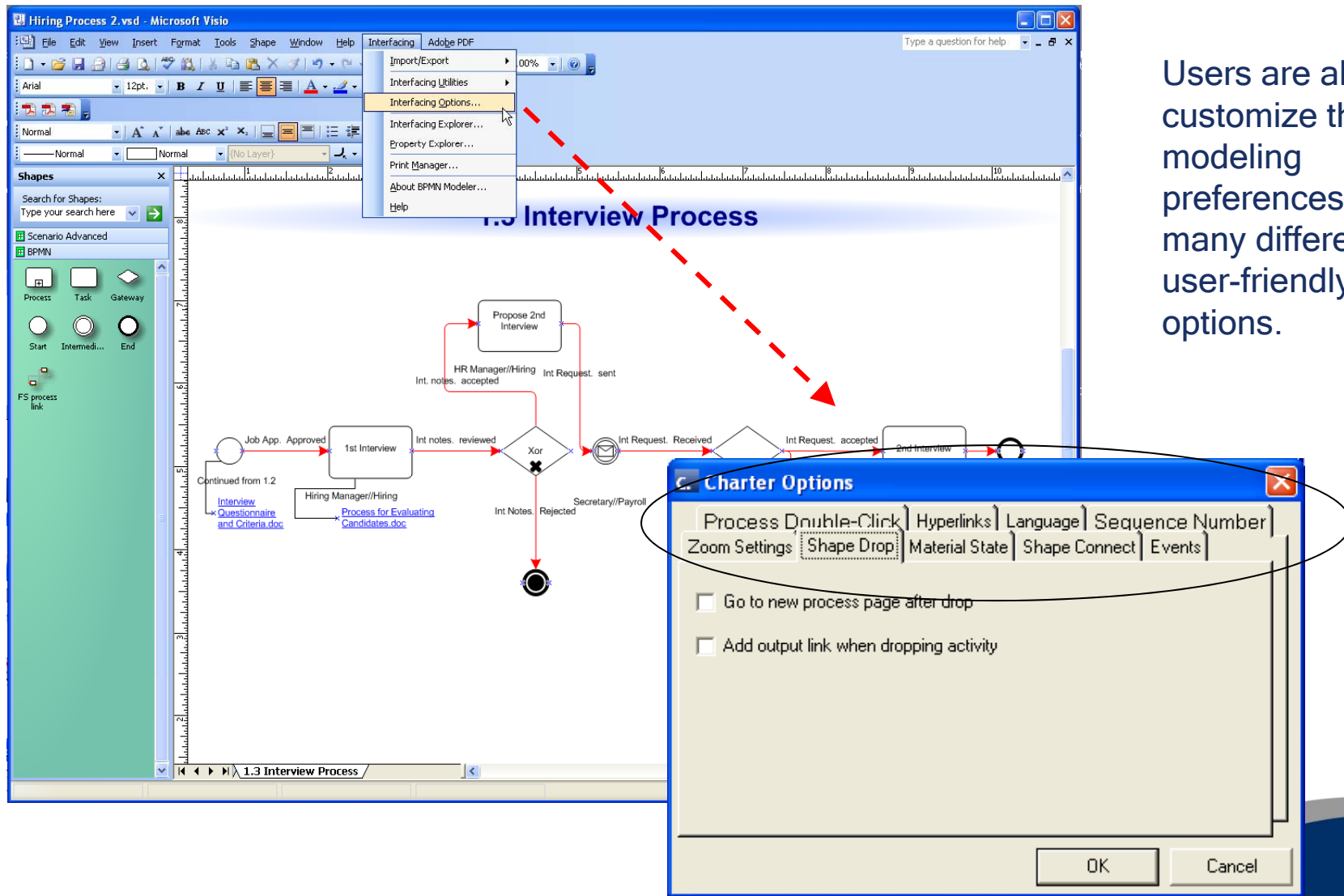
Auto-sequencing options allow you to define additional “non-numerical” sequencing standards (e.g. prefixes and separators).

Utilities

The auto-synchronize function allows you to easily maintain your model. Whenever objects are changed in the advanced scenario pages, the Synchronize function automatically updates all maps where these objects are referenced.



Options



Users are able to customize their modeling preferences with many different user-friendly options.

Print Manager

The screenshot displays the Microsoft Visio interface with a BPMN diagram titled "Interview Process". The diagram shows a flow starting with "Job App. Approved", leading to "1st Interview", then a decision point "Xor" with paths for "Int notes. reviewed" (leading to "Propose 2nd Interview") and "Int Notes. Rejected". From "Propose 2nd Interview", the flow goes to "Int Request. sent" and then to another decision point "Xor" with paths for "Int Request. Received" (leading to "2nd Interview") and "Int Request. Rejected".

The "Print Manager" dialog box is open in the top-left corner, showing a tree view of process elements. The "Print Manager..." option in the "Interfacing" menu is highlighted with a red dashed arrow pointing to the diagram.

The "Page Resizing Utilities" dialog box is open in the bottom-left corner, with a red dashed arrow pointing to the diagram. It contains the following text and controls:

Pages in Charter documents are sized in increments of printer paper size as of the creation of the page. The utilities on this form will allow you to resize pages in different manners. Please note that automatic layout will resize the pages to contain the automatically laid out data.

Resize All Pages To Printer
 Resize all pages to printer When changing printer paper size, the pages in the Charter document are not automatically resized in increments of paper size. This function allows you to automatically resize all pages.

Resize Current Page
 Resize current page Resize the current page in increments of current printer paper size

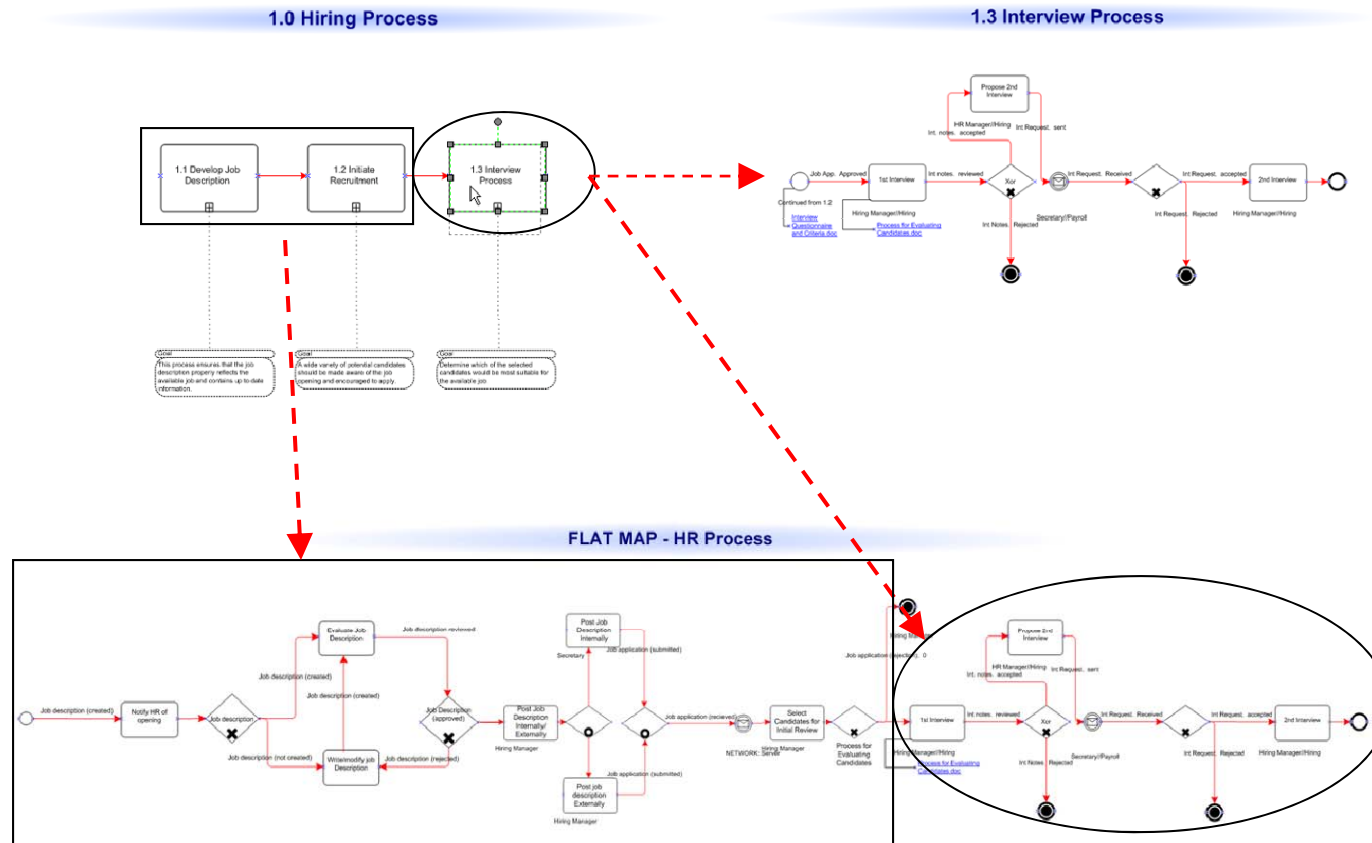
2 Pages wide by 1 pages height

Close

Print Manager allows you to easily select maps to print.

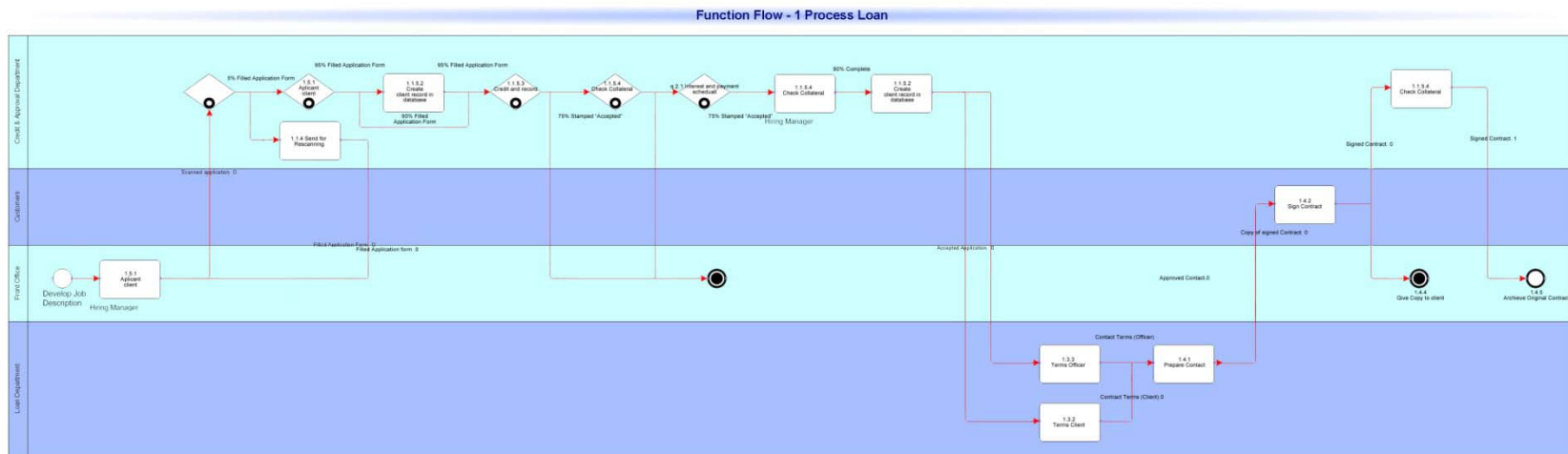
Automatically or manually adjust your map printouts to properly fit different paper sizes.

Flat Map



The Flat Map feature “explodes” all sub-processes (top-down approach), allowing users to generate an end-to-end activity map for the process. *Great for Printing*

Auto-Swimlanes



Auto-generate Swimlane views with one click. Swimlane views allow your users to clearly see the functional / departmental hand-offs within processes and sub-processes.

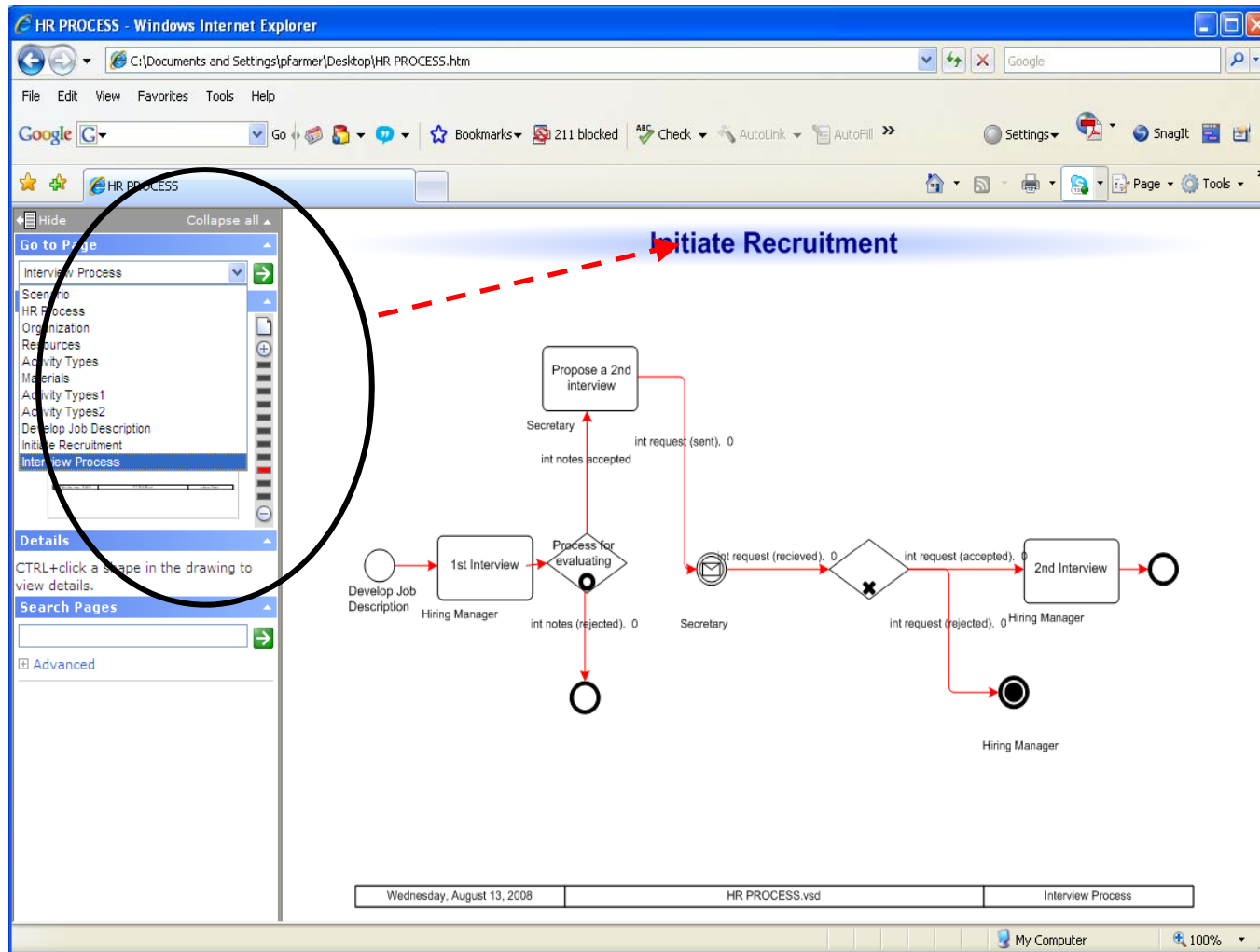
Publish Your Model



You can publish your Process Models to the Web, allowing other users to log in and access their processes and related documentation (including Swimlanes & Flat Maps, drill down, advanced scenario pages, etc.)

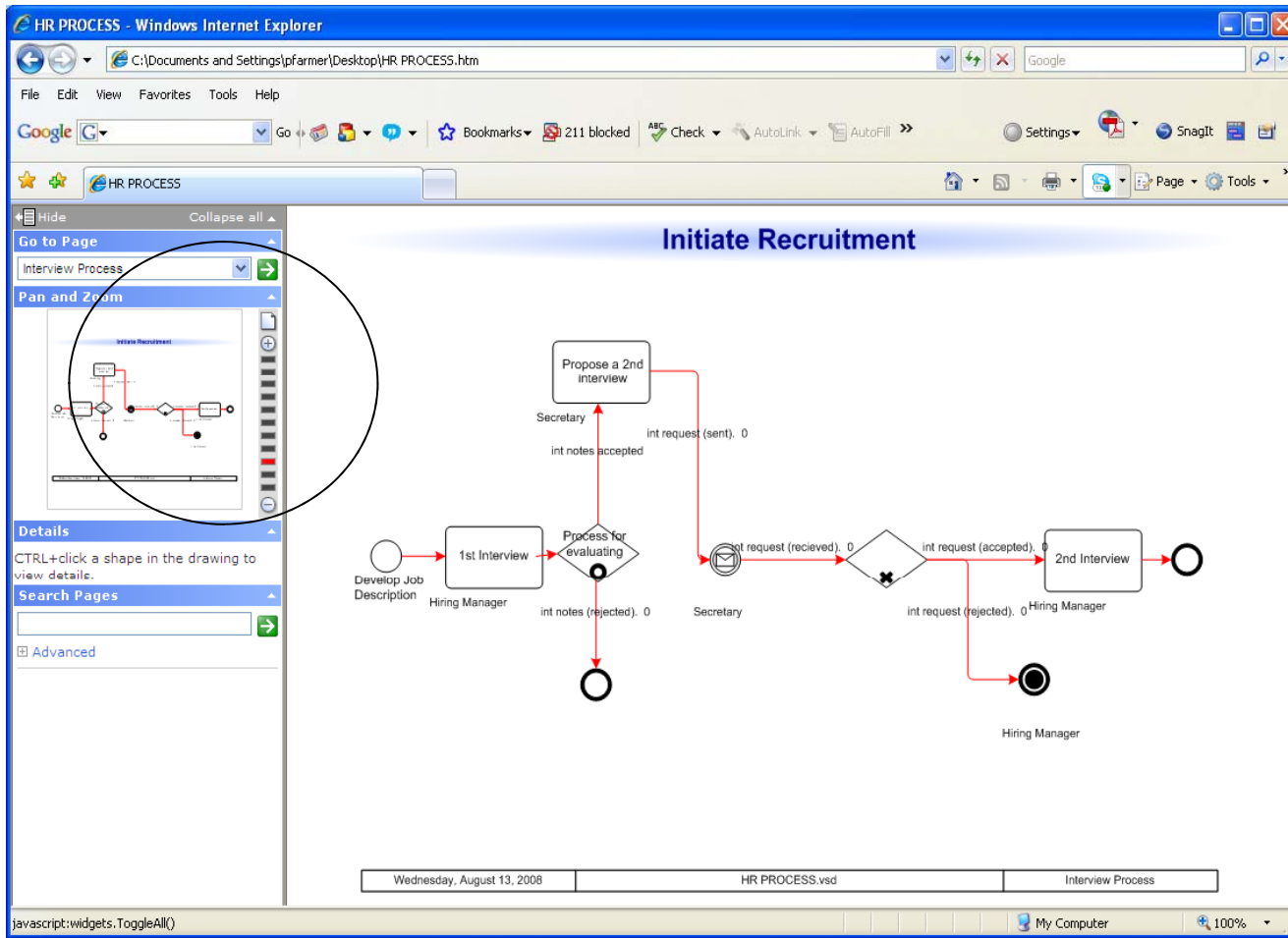
The following are additional features available on the HTML (web) output of a BPMN Modeler model.

Process Hierarchy



Jump to any process within your hierarchy using the “Go-To” feature.

Pan & Zoom



Easily zoom in on a certain area of your map with the "Pan & Zoom" feature.

Details Panel

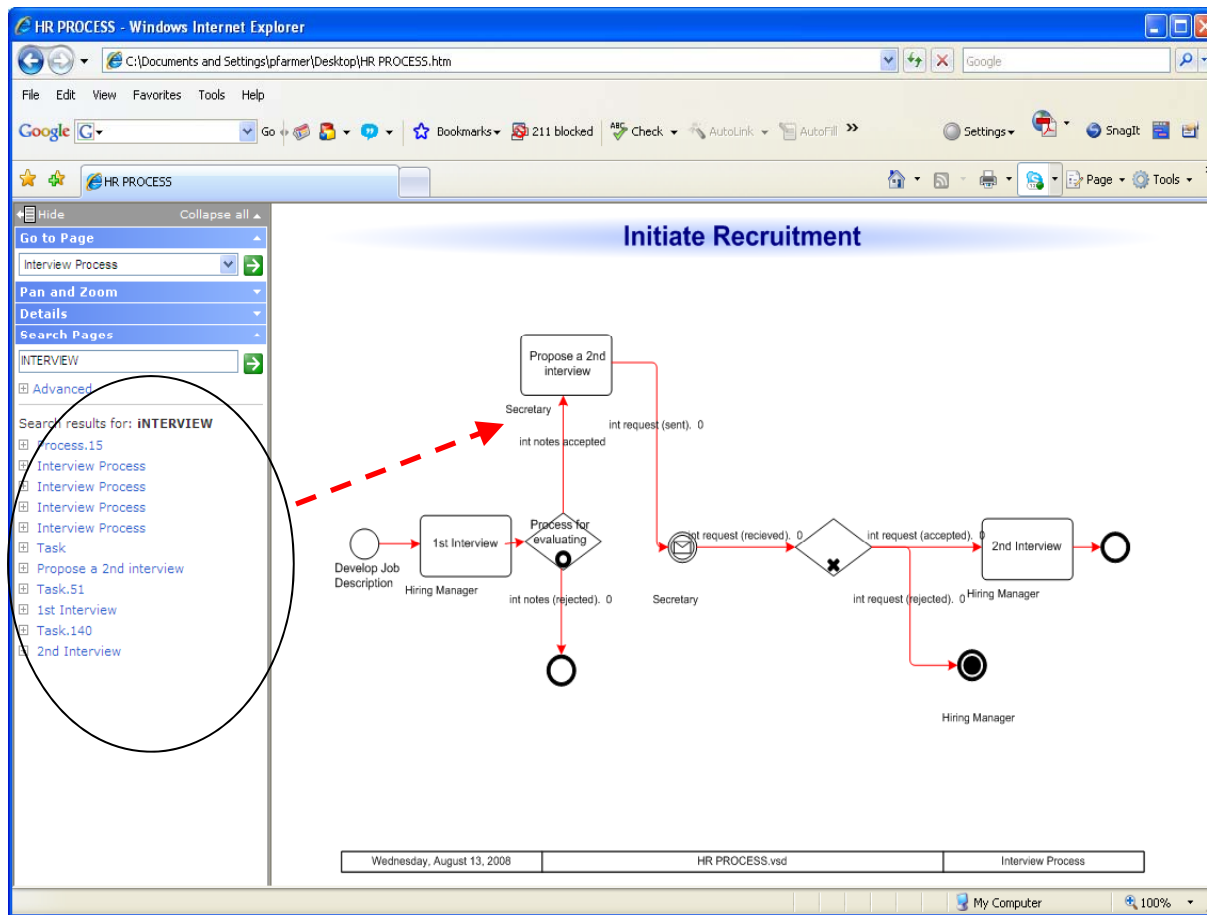
The screenshot displays the 'HR PROCESS' application in a Windows Internet Explorer browser. The main window shows a process flow diagram titled 'Initiate Recruitment'. The diagram includes activities like '1st Interview', 'Process for evaluating', '1.5.1 Propose a 2nd interview', and '2nd Interview', connected by arrows representing data flows. A details panel on the left is open, showing a table of properties for the selected activity. A red dashed arrow points from the '1.5.1 Propose a 2nd interview' activity in the diagram to the details panel.

Label	Value
Name	Process for Evaluating
Description	Screening Process
Allocated Resource	N/A
Sequence number	1.5.1
Type	Verify
Fixed cost	200.00 \$
Duration	3 hours
Priority	5
Value	5
Delay	.25 hours
Reference Material State 1	20
Reference Material Type 1	25
Reference Material Category 1	25
Icon	N/A
Material Input Rules	all
Reserved Resource Delay	9
TypeID	{d774f055-88d0-11d4-8b51-006097b176e9}

Click on any Activity/Process to view the details related to that item in the details panel.

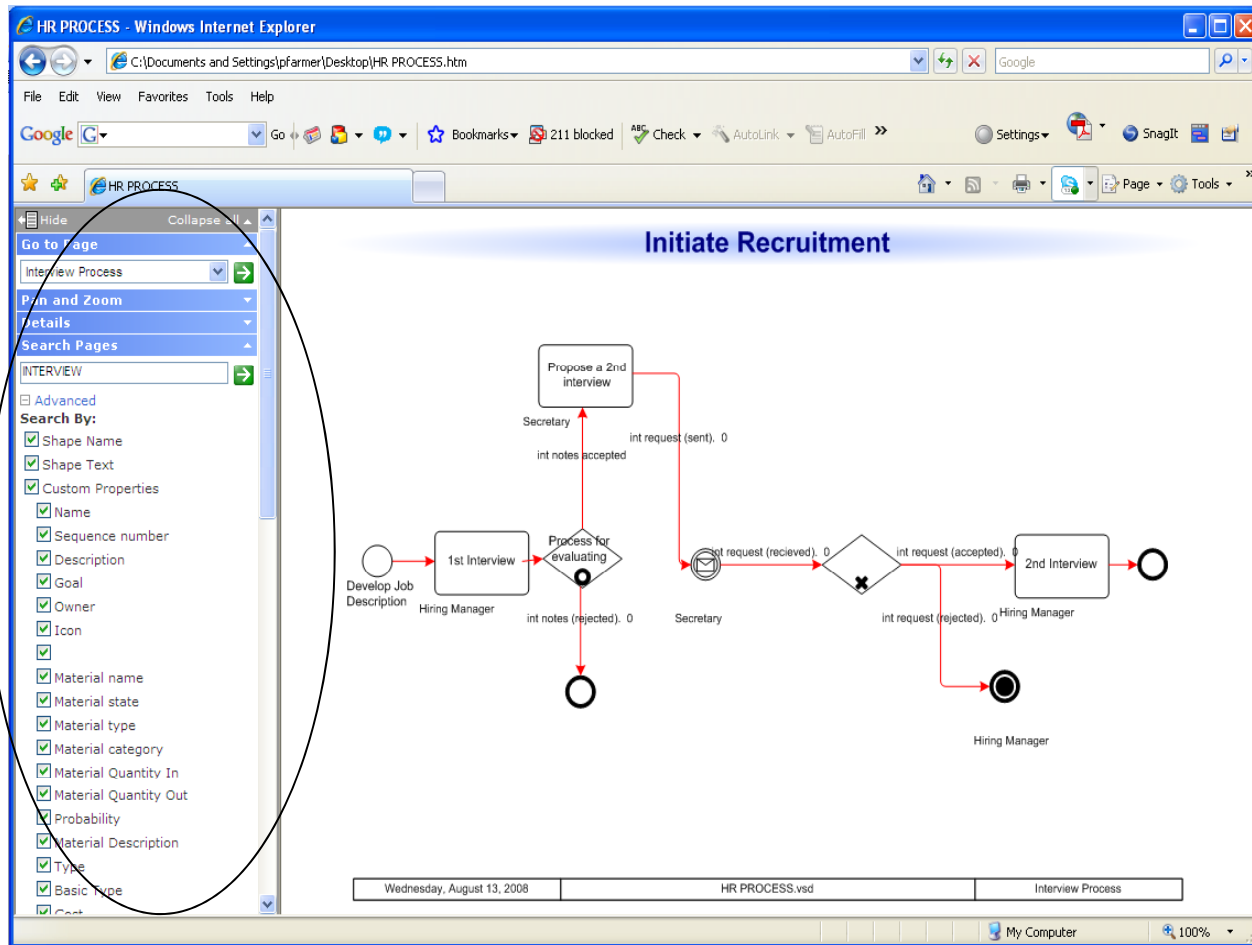
Search

Users can search their model to locate specific activities.



Advanced Search

Advanced Search allows users to search using different criteria.



Take The Next Step

You are Here



Visio® BPMN
Modeler



Enterprise
Process
Center®

Learn more about Interfacing and
our award-winning BPM software:

www.interfacing.com

Thank You.

sales@interfacing.com