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SAP Signavio Process Manager Workspace Admin Guide

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THE BEST RUN

Content

1 Workspace Administration

Workspace administrators have several tasks:

- managing workspace settings and user access
- enabling features
- integrating third party systems

The first user registering for a workspace is by default an administrator.

Administrator Profile

Workspace administrators have extensive rights and can make profound changes to the workspace. We recommend to grant this role to users with solid IT skills who are familiar with both the SAP Signavio products and BPMN.

Only users with a license for SAP Signavio Process Manager can create administrator accountss.

It is important to communicate and document changes in workspace settings among your administrative team, so that all administrators are up to date and can give accurate responses to user queries.

Add Administrators

To add or remove administrator permissions, add or remove the user to or from the user group *Administrators*. Read more in section Create workspace administrators.

Get Started

To get started as a workspace administrator, see section Prepare your workspace - overview [page 7].

You find an overview of the most popular integration scenarios at System integration scenarios [page 152].

An overview of the SAP Signavio Process Manager APIs is available in section API access to SAP Signavio Process Manager [page 157].

You can learn how to view reports analyzing your workspace and process model usage in section Process Model Dashboards.

Next steps

- Prepare your workspace - overview [page 7]
- Create workspace administrators
- System integration scenarios [page 152]

Related Information

Prepare the workspace - overview
User Administration, Authentication, and Authorization
System Integration Scenarios

2 Prepare the Workspace - Overview

This section guides you through the configuration settings of the SAP Signavio Process Manager workspace.

Since some settings depend on each other, we recommend that you follow the steps in order for the initial setup. You can adjust the settings later if necessary.

You can access the settings from the *Setup* menu in the explorer.

1. Configure general software settings [page 46]
   Configure the name of your workspace and the workspace owning organization, as well as currency settings. You can also activate a set of links to help and training resources, or add custom links.
2. Configuring language settings for all users [page 49]
   To manage content in multiple languages, you need to configure these languages in your workspace settings.
3. Add and manage notation subsets [page 92]
   To control complexity in your diagrams, you can create and manage subsets of modeling elements.
4. Add and manage custom attributes [page 84]
   Define custom attributes to add additional information to modeling elements.
5. Add custom categories for dictionary entries [page 69]
   In the dictionary you manage definitions for objects like documents and IT systems to reuse them throughout your process landscape. Create your own dictionary categories that help you structure the dictionary entries.
6. Managing modeling conventions [page 99]
   SAP Signavio Process Manager can check automatically if your process and decision diagrams follow specific modeling conventions. Configure these conventions to fit your organization's requirements.
7. Manage attribute overlays [page 96]
   With attribute overlays, also called attribute visualization layers, modelers can display attributes directly on the diagram canvas. You can configure custom rules for displaying attribute overlays.
8. SAP Signavio Process Collaboration Hub Settings
   SAP Signavio Process Collaboration Hub provides an interface for users to view and comment on diagrams. You can adapt the design, set up personalized launchpads for different user groups, and manage attribute visibility.
9. Creating and managing process documentation templates [page 109]
   With process documentation reports you can generate a comprehensive overview of your process landscape as a PDF document, for example to provide documentation to external stakeholders like auditors. You can create templates for these reports to specify what information you want to include and how to present it.
   SAP Signavio Process Manager provides various customizable reports as spreadsheets or PDF files. See section Creating reports.
10. Managing approval workflows [page 55]
    If you are using SAP Signavio Process Manager together with SAP Signavio Process Governance ➦ , you can configure approval workflows to ensure that diagrams have been reviewed before they are published in SAP Signavio Process Collaboration Hub or made available to specific stakeholders or systems like workflow engines.
11. Manage security settings [page 32]
    You can set up an allowlist for IP addresses, add trusted domains, and configure password policies.

12. Manage Access Rights [page 17]
    Create and implement an access management concept.

3 Find the Workspace ID

Learn how to find the tenant ID in the different products.

For some configurations or when contacting our support team, you need the ID of your workspace.

For SAP Signavio Process Governance, there is no ID. Our support team might need different information, depending on the problem you report.

Workspace ID in SAP Signavio Process Manager

Open the explorer and choose ▶ *Help* ▶ *Workspace information* ◀. The workspace ID is displayed together with the software version and the name of the workspace.

Workspace ID in SAP Signavio Process Collaboration Hub

On the launchpad, choose ? (*help*). A menu displays the workspace ID as the last entry.

Workspace ID in SAP Signavio Process Intelligence

Select a process and open the process settings. On the *API* tab, the workspace ID is under *Tenant ID*.

4 Manage Users and Access Rights

SAP Signavio Process Manager has extensive user and access right management options. The following sections describes user management, user group management and access rights in detail.

- Manage Users and Groups [page 10]
- Manage Access Rights [page 17]
- Activating Feature Sets [page 25]
  Learn how to activate specific feature sets for user groups. Feature sets are for different SAP Signavio products, but are always activated in SAP Signavio Process Manager.
- About Licenses [page 29]
- Possible Issues: JavaScript and Cookies [page 31]
- Editing the Security Configuration [page 32]
  Here you can manage the security settings for your workspace.
- Single Sign-on Using SAML [page 35]
- Managing Access to SAP Signavio Process Collaboration Hub for Active Directory Services [page 43]

Related Information

Manage Users and Groups [page 10]
Manage Access Rights [page 17]
Activating Feature Sets [page 25]

4.1 Manage Users and Groups

User accounts are created by invitation: You invite users to your workspace by email, provide them with a license and access rights, and manage their accounts.

In addition, SAP Signavio Process Manager users can invite internal and external process stakeholders to review and comment on diagrams. Internal users already have a SAP Signavio account. Externals need to create an account to log in.

> ⓘ Note
>
> If invited users can't access SAP Signavio, check the IP filtering settings of the workspace. Read more in section Set up IP address filtering [page 32].

With groups, you can effectively manage a large number of users and their access rights by creating a group for each organizational role and setting up a group hierarchy. This simplifies assigning access rights and feature sets to users.

To open the user management, click *Settings* in the sidebar of SAP Signavio Process Collaboration Hub and open the *User management* tab.

> ⓘ Note
>
> The email address you use to sign up cannot contain the German umlauts (such as ä, ö, ü) as special characters.

Users Invited for Feedback

Internal users

When users who already have an account and a license for this workspace are invited to review and comment on diagrams, they use their existing email address and password combination to log in.

Internal users are managed with the user management.

External Users

When external users are invited to comment on diagrams, they must create an account using the link in the invitation email. They can then sign in to SAP Signavio Process Collaboration Hub and view the diagram, for which they have received an invitation. Instead of a paid license, they are assigned a commenting license so that they can view and add comments.

The user accounts created in this way are like those created with the user management, but the following restrictions apply:

- Users can't see any other diagram then the one they were invited to.
- Users aren't assigned to any user group, not even the default groups.
- Users can't access any other SAP Signavio component.

To revoke access, remove the account from the user management. When you just remove the licenses, external users can still sign in to SAP Signavio Process Collaboration Hub. They no longer see any diagram, instead they are informed that their trial has expired.

If needed, you can keep the account and manage it like any other account, for example assign more licenses and provide more access rights.

Users Invited to a Workspace

In the user management, you invite new users to your workspace. You also select the license type and the user groups you want to assign to the new user.

The license for a new user is bound to the email address to which you send an invitation. The new user has to register with the same email address to use the license.

New users are automatically added to the user management once they have accepted the invitation and logged in to the workspace. You can then manage their access rights.

If users are not members of any group initially, they are able to read, write, delete, or publish in all folders and models in the *Shared documents* folder.

If you want users to manage the workspace, you add them to the *Administrators* group.

Create Accounts

> ⓘ Note
>
> If you want to set up auto-provisioning for your workspace so that user accounts are created automatically on login, read more in section Single Sign-on Using SAML [page 35].

You have the following options to add users to your workspace:

- Create accounts with bulk invites. The accounts are created when users log in for the first time. Only then can you change users' access rights.
- Create user accounts instantly. With this option, you can change users' access rights immediately after you've created the accounts.

Every user you invite to your workspace has the following default permissions. Note that you can change these permissions by adding users to user groups.

- Viewing and editing diagrams in the folder *Shared documents*
- Viewing and editing dictionary entries

You can change users' permission in *Setup > Manage access rights* in the explorer of SAP Signavio Process Manager.

Create Accounts with Bulk Invites

> ⓘ Note
>
> Note that you can change users' access rights only after they have logged in for the first time.

Follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Invites*.
3. Paste the email addresses to the field. Email addresses must be separated by a whitespace.
4. Select one or more licenses from the drop-down list. Each user you invite will receive the selected licenses.

5. Optionally, you can assign each user to a user group from the drop-down list. When you create users groups, you can assign licenses that will be applied to each user of the group.
6. Choose *Send invites*.
   Email invitations with a link to the registration page are sent.

Create Multiple Accounts Instantly

Follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and click the *User management* tab.
   The user management opens.
2. In the sidebar, click *Invites*.
3. Paste the email addresses to the field. Email addresses must be separated by a whitespace.
4. Select one or more licenses from the drop-down list. Each user you invite will receive the selected licenses.
5. Optionally, you can assign each user to a user group from the drop-down list. When you create users groups, you can select licenses that will be applied to each user of the group.
6. Decide whether to send emails or not:
   - To send no invitation email to the users when you create their accounts, select *Do not send invitation email*. Users then only receive an email asking them to change their password.
   - To send no email at all, select *Do not send change password email*.
     If service provider initiated authentication is enabled for the workspace, users are redirected to the identity provider, log in there, and enter the workspace. A SAP Signavio-specific password is not required.
     When SP-initiated authentication isn't enabled, users must reset their password by using the *I've forgotten my password* link on the login page.
     Read more in Single Sign-on Using SAML [page 35].
7. Choose *Create users*.
   User accounts are created instantly. To change the users' permission, go to the *Users* tab.

Delete pending email invitation

Follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Invites*.
3. Choose the user's email address.
4. On the right side, click *Cancel*. The link in the email invitation becomes invalid.

Resend email invitation

Follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Invites*.

3. Choose the user's email address.
4. On the right side, click *Resend*. An email invitation is sent again.

Delete a User Account

To remove a user from a workspace, you delete their account.

When you delete an account, all content in the *My Documents* folder is deleted as well. The content the user created in the *Shared documents* folder, their comments and changes, and the dictionary entries they created remain.

To remove a user, follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Users*.
3. Choose the user you want to remove from the workspace.
4. On the right panel, click *Delete*. The user's account is deleted and the user can no longer log in.

You can set how long personal data of deleted users is kept in the security settings, see section Editing the Security Configuration [page 32] for details.

Change User Settings

You can assign licenses to a user, assign users to groups, and reset the user's password. To do so, follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Users*.
3. Choose the user whose settings you want to change.
4. On the right panel, you have the following options to change user's settings:
   - *Licenses*: Assign a license by selecting a license form the drop-down list.
   - *Groups*: Assign user to a group by selecting a group from the drop-down list.
   - *Reset password*: Send a password reset email.
   - *Remove user*: Delete user account, see *Delete account*.

User Groups

Managing access rights for individual users becomes hard to manage with a large number of users and a lot of content. We recommend that you create user groups to manage access rights and access to features. With user groups, you can manage the permissions of multiple users at once.

Add user groups

To add a group, follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Groups*.
3. On the right panel, enter the group name and click *Add a new group*. The new group is added.

Delete user groups

Follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Groups*.
3. Choose the group you want to delete.
4. In the right panel, click *Delete*.
5. Confirm with *Yes, delete this group*. The group is deleted. Users that are members of this group are not deleted.

Change User Group Settings

Follow these steps:

1. In SAP Signavio Process Collaboration Hub, click *Settings* in the sidebar and open the *User management* tab.
   The user management opens.
2. In the sidebar, click *Groups*.
3. Choose the group which settings you want to change.

You have the following options to change the group's settings:

- *Name*: Edit the name of the group.
- *Add new users to this group automatically*: Decide whether to define this group as the default group.
- *Select a group as member*: Create a group hierarchy by adding another group.
- *Users*: Remove users from the group by clicking *X*.
- *Select a user to add as a member*: Select a user from the drop-down list to add to group.

Default User Groups

When customizing user groups, you can set one or more groups as default groups. For example, you can use a default group to provide new users with a basic set of access rights.

To define a group as a default group, activate the option *Add new users to this group automatically* in the group settings.

Each user invited through the user management is assigned to all default groups by default.

To assign the user you want to invite to another group, you can assign user-specific user groups in the user management dialog when you set up the invitation.

Users created with SAML or CSV API are also assigned to the default groups, unless you specify other user groups by configuration.

Create Workspace Administrators

In SAP Signavio Process Manager, administrators have extensive permissions to manage workspace settings and user access. The only thing they can't access or manage is the content in a modelers *My documents* folders.

> ⚠ Caution
>
> - Administrators can make far-reaching changes to your workspace. For this reason, we recommend enabling people with tool-specific knowledge and experiences in business process management and process modeling.
> - Every workspace administrator has full access to content in a workspace. The only thing administrators can't access or manage is the content in a modeler's *My documents* folders.
> - Only users with a license for SAP Signavio Process Manager can create administrator accounts.

To create an administrator account, follow these steps:

1. Create a user account.
2. In the explorer, go to ▶ *Setup* ▶ *Manage access rights* ▶. The user management dialog opens.
3. Open the *User groups* tab.
4. Select the group *Administrators*.
5. In the section *Add user/group*, select the user from the drop-down list.
6. Confirm with *Add*. The user now has administrative rights for your workspace.

- To revoke administrative rights, remove the user from the *Administrators* group.

Related Information

Manage Users and Access Rights [page 10]

Editing the Security Configuration [page 32]

4.2 Manage Access Rights

> ⓘ Note
>
> You need an administrator account to use this function.

This section describes how to define access rights to folders, diagrams, the dictionary, and dictionary categories. For information how to activate specific feature sets, see section Activating Feature Sets [page 25].

You can assign access rights for users and user groups.

Access rights are additive. Once users have access by being in a user group with access, the access rights cannot be taken away by adding the users to an additional group with less access or by setting user-specific access rights.

To restrict access rights based on organizational roles, we recommend setting up a folder structure that reflects the different access rights variations.

User Groups

We recommend creating user groups with access rights that match your organizational requirements. See section User Groups and Workspace Administrators.

> ⓘ Note
>
> If users are not members of any group initially, they are able to read, write, delete, or publish in all folders and models in the *Shared documents* folder.

Access Rights for Specific Functions [page 18]
    Recommendations for access rights settings for specific functions.

Setting Access Rights to Folders and Diagrams [page 18]
    You can assign access rights to specific content or to complete folders.

Setting Access Rights to the Dictionary [page 21]
    Give users the access to the dictionary items they need. Access rights can be set for the complete dictionary or dictionary categories.

Removing Access Rights [page 24]
    Remove access rights when the user no longer needs them.

Related Information

Manage Users and Groups [page 10]

4.2.1 Access Rights for Specific Functions

Recommendations for access rights settings for specific functions.

Approval Workflows

To effectively use approval workflows, we recommend restricting the permission to publish diagrams in the SAP Signavio Process Collaboration Hub.

Access Rights for SAP Signavio Process Collaboration Hub Commenting

The commenting feature in SAP Signavio Process Collaboration Hub is a read access. Users who have been invited with the function *Invite anyone for feedback* can add comments to a diagram, but aren't able to edit it.

4.2.2 Setting Access Rights to Folders and Diagrams

You can assign access rights to specific content or to complete folders.

Context

If you give users access rights to a folder, they also have access to all subfolders and diagrams in that folder.

If you give users access to a diagram and they don't have access to the folder containing the diagram, they can only view the diagram and the diagram path. They don't have access to any other diagrams in this folder.

To restrict access rights based on organizational roles, we recommend setting up a folder structure that reflects the different access rights variations and creating user groups to manage access rights. We recommend applying the principle of least privilege: Assign only the rights necessary for the user's job function.

> ⚠ Caution
>
> - Every workspace administrator has full access to content in a workspace. The only thing administrators can't access or manage is the content in a modeler's *My documents* folders.
> - Access rights are not linked to feature sets and licenses. This means that for example a user without a license for SAP Signavio Journey Modeler is still able to delete a folder containing journey models if the user has the relevant access rights for this folder.

Procedure

1. In the explorer, go to ▶ *Setup* ▶ *Manage access rights* ▶. The user management dialog opens.
2. Open the *Access rights* tab. The tree structure shows all content of the *Shared documents* folder.
3. Select the element for which you want to define access rights.

   To remove limitations to specific content, you need to give full access to a folder first.
4. From the drop-down lists, select the users or user groups and the access right types. You find detailed descriptions of the access rights in the section Available Access Rights for Folders and Diagrams [page 20].
5. Confirm with *Add*. The added users and their access rights are added to the list.

4.2.2.1 Limiting Access to Specific Folder Content

Show users only the content they need.

Context

When you grant access to a folder, users have access to the complete folder. You can limit the access to specific folder content.

If you grant users access to a diagram and they don't have access to the folder containing the diagram, they can only view the diagram and the diagram path. They don't have access to any other diagrams in this folder.

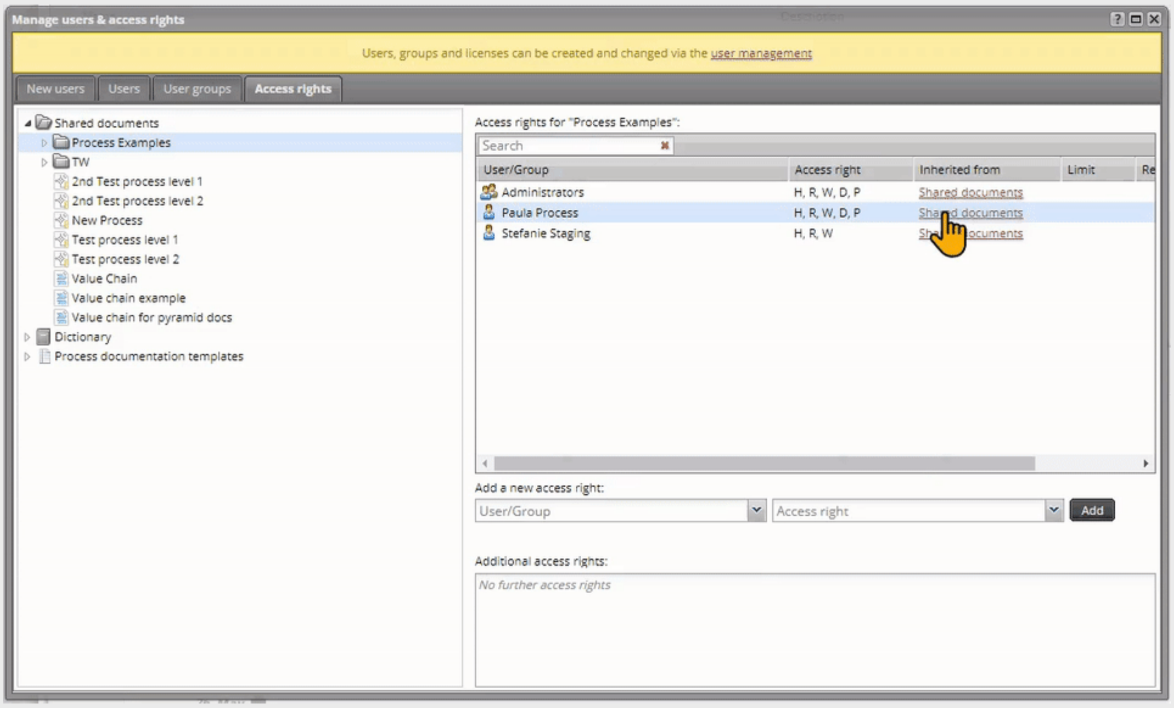
> ⓘ Note
>
> To remove limitations to specific content, you need to grant full access to a folder or the dictionary first.
>
> Journey models and uploaded files always inherit the access rights of the folder in which they are stored. This means you can't limit access rights to specific journey models or uploaded files in a folder.

Procedure

1. Select users or user groups that have access rights.
2. Choose *limit*.
3. Select the content to which users should keep access.
4. Confirm your changes.

Example

Example



Users, groups and licenses can be created and changed via the user management

- Shared documents
  - Process Examples
  - TW
  - 2nd Test process level 1
  - 2nd Test process level 2
  - New Process
  - Test process level 1
  - Test process level 2
  - Value Chain
  - Value chain example
  - Value chain for pyramid docs
- Dictionary
- Process documentation templates

Access rights for "Process Examples":

User/Group	Access right	Inherited from	Limit	Re
Administrators	H, R, W, D, P	Shared documents		
Paula Process	H, R, W, D, P	Sha d documents		
Stefanie Staging	H, R, W	Sh ocuments		

Add a new access right:

User/Group

Access right

Additional access rights:

No further access rights

4.2.2.2 Available Access Rights for Folders and Diagrams

An overview of all access rights for folders and diagrams in the SAP Signavio Process Manager and SAP Signavio Process Collaboration Hub you can assign to users and user groups.

> Note
>
> Access rights are additive. Once users have access by being in a user group with access, the access rights cannot be taken away by adding the users to an additional group with less access or by setting user-specific access rights.

Access right	Details
Hub (H)	View published content in SAP Signavio Process Collaboration Hub
Read (R)	View unpublished content in the simulation tool, the revision comparison tool, the commenting view, and in SAP Signavio Process Collaboration Hub
Write (W)	Edit and save content in the editor

Access right	Details
Delete (D)	Delete and move content ⓘ Note To delete and move content between folders, users need write access for both folders and delete access for the folder from which the content is removed.
Publish (P)	Publish content and move published content • To publish diagrams in SAP Signavio Process Collaboration Hub • To move published elements such as diagrams and folders • To embed a diagram on an external website ⓘ Note To effectively use approval workflows, you should restrict permission to publish diagrams in SAP Signavio Process Collaboration Hub.

4.2.3 Setting Access Rights to the Dictionary

Give users the access to the dictionary items they need. Access rights can be set for the complete dictionary or dictionary categories.

Context

When you remove access to a dictionary category, entries from this category are no longer listed for the users, are not included in their search results, and can't be used by them when creating diagrams.

> ⓘ Note
>
> Users can always view dictionary entries in the diagrams where they are used, even without having access to the dictionary category.
>
> When users have limited access to the dictionary, these users are no longer listed when you select the dictionary folder.

Procedure

1. In the explorer, go to *Setup* > *Manage access rights*.

2. In the user management dialog, open the *Access rights* tab.
3. Select the dictionary folder.
4. From the drop-down lists, select the users or user groups and the access rights.
5. In the user management dialog, choose *Add*. The access rights you can set are listed. To remove limitations to specific content, you need to give full access to a folder or the dictionary first.

4.2.3.1 Limiting Access Rights to Specific Dictionary Categories

Help users focus on the dictionary categories relevant to them by limiting access to specific categories.

Context

You can limit access to specific dictionary categories, for example to only those categories a user group uses.

When you limit access to specific dictionary categories, users are still able to view dictionary items of the restricted categories when they are used in diagrams.

For users with limited access, dictionary categories without access are not listed anywhere and dictionary items won't be included in search results.

Modelers can only use dictionary categories to which they have access while creating diagrams.

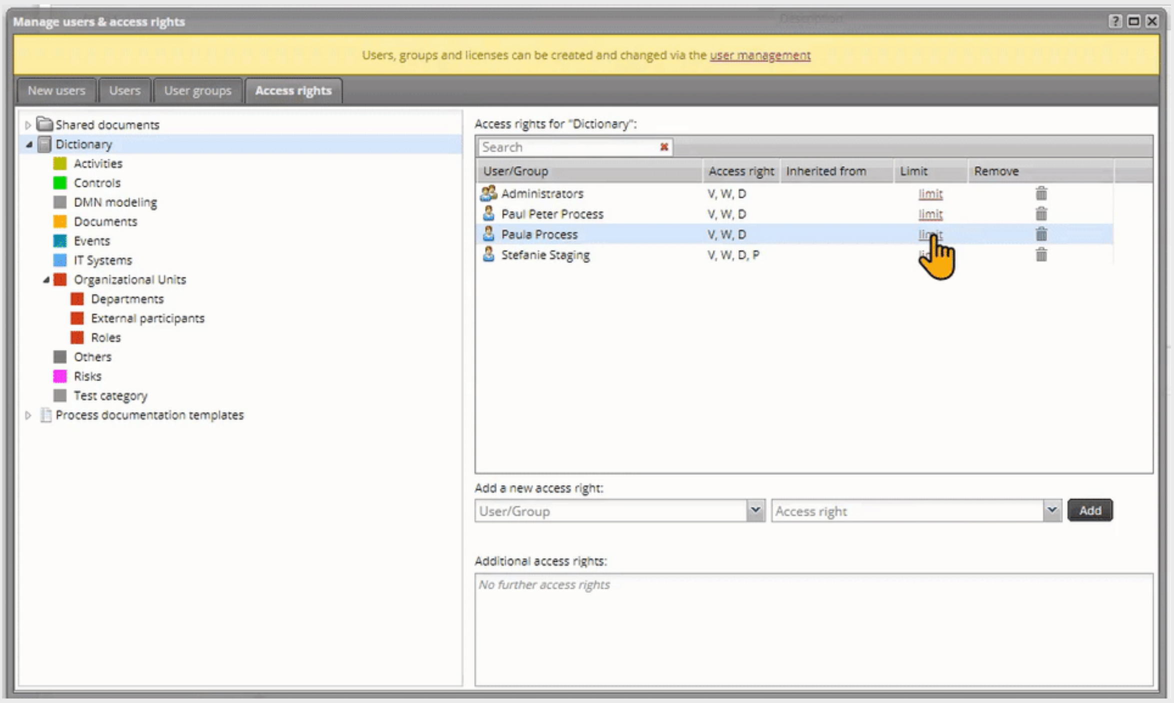
Procedure

1. In the *Access rights* tab, select the folder *Dictionary*.
2. In the column *Limit*, select *limit*.

   If *limit* is not available, select the entry in *Inherited from* to get to the item from which the access right is inherited.
3. Select the dictionary categories to which users should keep access and confirm.

Example

Example



Users, groups and licenses can be created and changed via the user management

Access rights for "Dictionary":

User/Group	Access right	Inherited from	Limit	Remove
Administrators	V, W, D		limit	
Paul Peter Process	V, W, D		limit	
Paula Process	V, W, D		limit	
Stefanie Staging	V, W, D, P			

Add a new access right:

Additional access rights:

4.2.3.2 Available Access Rights for the Dictionary

An overview of all access rights for dictionary items you can assign to users and user groups.

> Note
>
> Access rights are additive. Once users have access by being in a user group with access, the access rights cannot be taken away by adding the users to an additional group with less access or by setting user-specific access rights.

Access right	Function
View (V)	View dictionary entries in the editor and in SAP Signavio Process Collaboration Hub. In the editor, the dictionary entries can be used during modeling.
Write (W)	Edit and save dictionary entries.

Access right	Function
Delete (D)	Delete and move content Note To delete and move dictionary entries between categories, users need write access for both categories and delete access for the category from which the entry is removed.
Publish (P)	Publish dictionary entries in SAP Signavio Process Collaboration Hub.

4.2.4 Removing Access Rights

Remove access rights when the user no longer needs them.

Context

> → Remember
>
> Access rights are additive. Once users have access by being in a user group with access, the access rights cannot be taken away by adding the users to an additional group with less access or by setting user-specific access rights. Access rights on a parent folder are inherited by the child folders.
>
> If users are not members of any group initially, they are able to read, write, delete, or publish in all folders and models in the *Shared documents* folder.

Procedure

1. In the explorer, go to *Setup* › *Manage access rights*. The user management dialog opens.
2. Open the *Access rights* tab. The tree structure shows all content of the *Shared documents* folder and of the dictionary.
3. Select the element for which you want to remove access rights. Users and their access rights are listed.
4. Choose *Remove*. If the *Remove* button isn't visible, select the parent folder in the *Inherited from* column, and remove the access right there.
5. Confirm with *Yes*.

4.2.4.1 Removing Commenting Rights

Context

You can remove commenting rights of collaborators invited to comment from a diagram. After withdrawing access, collaborators can no longer view the diagram or add comments.

Procedure

1. In the explorer, go to *Setup* > *Manage access rights*.
2. In the user management dialog, open the *Access rights* tab. You find the invitations under *Additional access rights*.
3. Select a diagram and choose *Remove* for the email address from which you want to revoke access rights.
4. Confirm in the dialog.

4.3 Activating Feature Sets

Learn how to activate specific feature sets for user groups. Feature sets are for different SAP Signavio products, but are always activated in SAP Signavio Process Manager.

Prerequisites

You have an administrator account in SAP Signavio Process Manager. For more information, see Manage Users and Groups [page 10].

Context

If your user groups require different feature sets to perform their tasks, customize access to specific feature sets for each user group.

Procedure

1. Open the explorer and choose ▶ *Setup* ▶ *Manage access rights* ▶.

   The *Manage users & access rights* dialog box opens.
2. Choose the *User groups* tab.
3. In the *Groups* field, select an entry from the list.
4. On the right, scroll down and in the *Feature sets* list, activate or deactivate feature sets as needed.
5. Confirm with *Save feature sets*.

Related Information

Overview of Feature Sets [page 26]

4.3.1 Overview of Feature Sets

An overview of all the available feature sets in the SAP Signavio Process Transformation Suite you can assign to user groups.

> ⓘ Note
>
> All users can access feature sets labeled as **General**. For all other feature sets, user access depends on the access rights assigned to the user, the user's license assignment, the license assignment to a workspace, or the feature packages activated on the user's workspace.

Feature Set	Description
AI Capabilities - Get recommendations for process models	Can use the AI-assisted process recommender to find business process models instead of modeling them from scratch. For more information, see AI-Assisted Process Recommender.
AI Capabilities - Get recommendations for process performance indicators	Can use the AI-assisted performance indicators recommender to identify measures which help monitor and improve business processes. For more information, see AI-Assisted Performance Indicators Recommender.
Decision Manager - DMN requirements modeling (without decision logic)	• Can create and edit DMN diagrams. However, the system doesn't allow your users to create and edit the decision logic in these diagrams.

Feature Set	Description
Decision Manager - complete	• Can create and edit DMN diagrams. • Can create and edit the decision logic in DMN diagrams.
Decision Manager - export Drools	Can export decision tables and diagrams as described in Exporting DMN diagrams as drools rules.
General - Diagram Import/Export	Can import and export diagrams in formats that can be transferred between workspaces and tools. ⓘ Note Even if this feature set is disabled, you can still export models as PDF and PNG files.
ETL - Superuser Role	• Can create and manage process data pipelines for analysis. • Can create and manage integrations. • Can create and manage connections. The feature set (ETL data pipelines) is available upon request only. For more information, see Process data management feature sets.
ETL - Analyst Role	• Can manage transformations and the load part of the process data pipeline. • Can view integrations. The feature set (ETL data pipelines) is available upon request only. For more information, see Process data management feature sets.
ETL - Reader Role	You have read-only access to process data pipelines. The feature set (ETL data pipelines) is available upon request only. For more information, see Process data management feature sets.
General - Dictionary Import/Export	Can import dictionary entries from Microsoft Excel (XLSX) spreadsheets.
General - Reports (Basic & Documentation)	• Can generate reports designated as basic. • Cannot generate the **Process cost analysis report** and the **Resource consumption analysis report**. For more information, see Reporting.
General - Reports (Cost & Resources)	Can generate the **Process cost analysis report** and the **Resource consumption analysis report**.
General - Upload files	Can upload files to SAP Signavio Process Manager.

Feature Set	Description
SAP Signavio Process Manager - create and edit BPMN processes	Can create and edit BPMN diagrams. When this option is disabled, other diagram types can still be edited. ⓘ Note To create and edit DMN diagrams, you need the feature set *Decision Manager - complete* or *Decision Manager - DMN requirements modeling (without decision logic)*.
SAP Signavio Process Intelligence	Can access SAP Signavio Process Intelligence. For more information, see Grant access to SAP Signavio Process Intelligence.
SAP Signavio Process Intelligence - Create Process	Can create processes in SAP Signavio Process Intelligence. For more information, see Grant access to SAP Signavio Process Intelligence.
Variant Management - Cloning - Clone to create a variant from a normal diagram	Can create a variant from a regular existing diagram. For more information, see Cloning a Template, Variant, or Diagram to Create a Variant.
Variant Management - Cloning - Clone to create a variant from a template	Can create a variant from a template. For more information, see Cloning a Template, Variant, or Diagram to Create a Variant.
Variant Management - Cloning - Clone to create a variant from a variant	Can create a variant from another variant. For more information, see Cloning a Template, Variant, or Diagram to Create a Variant.
Variant Management - Managing dimensions and values - Manage existing dimensions	Can manage a diagram's existing dimensions. For more information, see Managing Dimensions for a Template or Variant.
Variant Management - Managing dimensions and values - Manage values for variant groups	Can manage the values of a variant group. For more information, see Managing Variant Group Dimensions and Values.
Variant Management - Managing templates - Promote a variant to template	Can turn a variant into a template. For more information, see Promoting Variant to Template.
Variant Management - Managing templates - Replace a template	Can replace a template with a different diagram. For more information, see Replacing the Template of a Variant Group.

Feature Set	Description
Variant Management - Managing templates - Revert a template	Can revert a template back to being a regular diagram. For more information, see Reverting Template to Normal Diagram.
Variant Management - Managing templates - Set as template	Can set a diagram as template. For more information, see Setting a Diagram as Template.
Variant Management - Managing variants - Attach diagram as variant	Can attach a diagram as variant to a template. For more information, see Attaching Diagrams as Variants to a Template.
Variant Management - Managing variants - Detach a variant from a template	Can detach a variant from a template. For more information, see Detaching a Variant from a Template.
Variant Management - Managing variants - Detach all variants from the template	Can detach all variants from a template. For more information, see Detaching All Variants from a Template.

4.4 About Licenses

Workspace administrators must assign a license to every user in a workspace.

Licenses are bound to a specific workspace, so the following rules apply:

- Inviting new users doesn't create new workspaces.
- Users having a license for another workspace can't access your workspace unless you assign a license of your workspace to the user.
- If you remove a user from your workspace, the user's license assignments and access rights for other workspaces remain unchanged.

Licenses are also bound to the email addresses you specify when inviting new users. The new users can only use this email address to log in.

When you invite users via the user management, you select the license you want to assign. If you need more licenses, the user management dialog provides you with information for a license purchase on the tab *New users*.

License Types

There are different types of user licenses for modeling users and SAP Signavio Process Collaboration Hub users.

Modeling Users

Modeling users have the full functionality of your SAP Signavio Process Manager edition available, and additionally access to SAP Signavio Process Collaboration Hub.

SAP Signavio Process Collaboration Hub Users

SAP Signavio Process Collaboration Hub users have access to a limited feature set in SAP Signavio Process Manager:

- They can create folders, as well as create and edit BPMN diagrams in QuickModel.
- They can use the diagram comparison tool, see section Comparison.
- They can export diagrams as PNG, SVG, and PDF files, see Downloading/exporting diagrams.
- They can create reports, see section Reporting.
- They have view access to the dictionary, see section The Dictionary.
- They can be given write and delete access to the dictionary.
- They can use the discussion and sharing features, see Your launchpad.

You can also use feature sets to add additional feature restrictions on SAP Signavio Process Collaboration Hub users.

> ⚠ Caution
>
> Assigning the SAP Signavio Process Collaboration Hub license does not limit access rights for users. We recommend that you create a user group for users with this license to manage access rights.
>
> If users are not members of any group initially, they are able to read, write, delete, or publish in all folders and models in the *Shared documents* folder.

> ⓘ Note
>
> This license type is by default available to new customers. If you registered your workspace before version 11.11.0 (January 2018), only SAP Signavio can provide this license type.
>
> Please contact our SAP Signavio service experts from the SAP for Me portal.

Commenting License

SAP Signavio Process Manager users can invite external users, who do not have a license to the workspace, for feedback. Then, the external users automatically get a commenting license. They can only view the diagram for which they have received the invitation in SAP Signavio Process Collaboration Hub and can view and add comments. As these external users also have to create a user account, you can manage them in the user management. Read more in section Manage users and groups.

Accessing SAP Signavio Process Intelligence

For SAP Signavio Process Intelligence, the license is assigned to the workspace, not to individual users. If a workspace has the license assigned, you can give access to SAP Signavio Process Intelligence features by activating feature sets to user groups.

Related Information

Manage Users and Groups [page 10]

4.5 Possible Issues: JavaScript and Cookies

SAP Signavio Process Manager requires JavaScript to run. Cookies are required to authenticate your browser during the login. If one of those functionalities is disabled, problems will occur.

- When trying to login, you are redirected to the login page again, even if the username and password entered are valid. In this case, cookies are deactivated in your browser.
- Instead of SAP Signavio Process Manager, a blank page is displayed. In this case, JavaScript is deactivated.

If you are using Linux/OSX/Windows 7 or higher and your browser is up to date, JavaScript and cookies should be activated by default.

> ⓘ Note
>
> To change these settings, you may need administrator rights on your account. Please contact your system administrator if you cannot access and/or change the settings described in this chapter.

If you have the printed version of this manual, please check how to activate JavaScript and/or cookies in your browser's online user guide.

The links to the corresponding webpages are provided below.

Activating JavaScript for All Browsers

https://support.microsoft.com/en-US/gp/howtoscript

Activating Cookies

To use SAP Signavio Process Manager, you need to have *Cookies* activated.

Read more about cookies at:

- *Firefox:* https://support.mozilla.org/en-US/kb/enable-and-disable-cookies-website-preferences
- *Chrome:* https://support.google.com/chrome/answer/95647?hl=en
- *Safari:* https://support.apple.com/kb/PH19214?viewlocale=en_US&locale=de_DE

4.6 Editing the Security Configuration

Here you can manage the security settings for your workspace.

To enhance IT security, you can limit the access to your workspace by filtering IP addresses. In addition, you can define password policies to enforce strong passwords.

The security settings apply to every user currently in the workspace and also to all future users.

Data Protection and Privacy

Here, you set how long personal information is kept after a user was removed from this workspace.

> ⓘ Note
>
> - For workspaces created after July 18, 2022, this setting is enabled and set to a default data retention period of 70 days.
> - For older workspaces, this setting is not automatically enabled.

You can set how long data is saved. The minimum time is seven days.

After the set time has passed, the user's personal information is irreversibly deleted from the workspace. Content the user created is not deleted. Comments, notifications, and related feed entries no longer show the user's name or email, they show **deleted user**.

While this setting is not enabled, deleted users aren't anonymized.

Set Up IP Address Filtering

> ⚠ Caution
>
> Users of the on premises edition cannot set up IP address filters.

The IP address filter allows you to define a list of trusted IP addresses that can access SAP Signavio Process Manager and SAP Signavio Process Collaboration Hub. Devices with unlisted IP addresses can't access the workspace even with a valid username/password combination. This setting can be useful, for example, if you want to restrict access to your workspace or SAP Signavio Process Collaboration Hub to one or more specific companies.

For specifying IP addresses, the following rules apply:

- The IP address filter is based on IPv4, so IPv6 addresses cannot be added to the list of trusted IP addresses.
- Only Internet IP addresses are accepted. Local area network (LAN) IP addresses can't be listed because they depend on the local network configuration.
- You must specify IP addresses in classless inter-domain routing (CIDR) notation. With the CIDR suffix, you specify whether to filter for an exact IP address or a range of IP addresses. The smaller the number after the slash, the greater the range of IP addresses.

> Example
>
> 99.123.134.246/8 –> range from 99.0.0.0 to 99.255.255.255
>
> 99.123.134.246/16 –> range from 99.123.0.0 to 99.123.255.255
>
> 99.123.134.246/24 –> range from 99.123.134.0 to 99.123.43.255
>
> 99.123.134.246/32 –> exactly 99.123.134.246

The operating administrator's IP address is added automatically, so if you are setting up the list of trusted IP addresses and are using a static IP address, you get access from your current device automatically.

To filter for IP addresses, follow these steps:

1. In the explorer, choose *Setup* > *Edit security configuration*.
2. Check Activate IP Filtering.
3. Enter a CIDR IP address and choose *Add*.
4. The IP address is added to the list of trusted addresses.
5. Save your changes.
   The IP address filter is active.

To remove an IP address from the list of trusted addresses, select the IP address and choose *Remove*.

To deactivate the IP address filtering completely, disable the option *Activate IP Filtering*.

Trusted Domains

> Note
>
> SAP Signavio Process Collaboration Hub can only be embedded in third-party systems via iframes if trusted domains are used. If a domain not included in the trusted domains is used, web browsers don't load the page, and instead show a security violation page to the users.

To embed SAP Signavio products in an iframe using trusted domains, you have the following options:

- Use one of the public trusted domains
- Add workspace-specific trusted domains

Use Public Trusted Domains

Some common third-party tools use domains that are public trusted domains.

When you embed SAP Signavio Process Collaboration Hub in the following domains, no further action is required on your side:

- *.atlassian.net
- *.sharepoint.com
- *.force.com

Add Workspace-Specific Trusted Domains

> ⓘ Note
>
> When embedding SAP Signavio Process Collaboration Hub inside an iframe, you have to use HTTPS and cannot use any custom ports.

When you want to embed SAP Signavio Process Collaboration Hub in other third-party tools, you have to add the domains to the security configuration and adapt the URLs.

Follow these steps:

1. In the Explorer, open *Setup*> *Edit security configuration*.
2. In the section *Domain policies*, add the trusted domains.
3. Add the parameters **`<model ID>`** and **`?t=<workspace_id>`** to the URLs used for embedding.
4. To enable fullscreen mode for embedded pages, add the "fullscreen" value to the allow attribute in the iframe element.

Define a Password Policy

To enforce the use of secure passwords, you can implement a password policy. This allows you to prevent access security issues even if many users have access to your workspace.

Password policy applies whenever users set a password.

To define a password policy, follow these steps:

1. In the explorer, click *Setup > Edit security configuration*.
2. In the section *Password policies*, select the requirements that passwords have to fulfill (see list *Configuration options for password policy*).
3. Save your changes.
   The password policy is active and users need to choose a password that fulfills the password policy.

Configuration Options for the Password Policy

- *Enforce SSO login*
  Define whether users can log in using their email and password on the login page or whether to enforce SSO using SAML. Read more in section Single Sign-on Using SAML [page 35].
- *Complexity requirements*
  A password is accepted when it contains at least three of the following requirements:
  - at least one capital letter (A to Z)

  - at least one lower case letter (a to z)
  - at least one number (0-9)
  - at least one special character (!,§,$,%,&,?,#)
- *Consider user name*
  Users can't use their first or last name in a password, no matter if written in upper or lower case.
- *Consider user name (strict)*
  Users can't use three or more letters in the same order as in the user's first or last name in a password, no matter if written in upper or lower case.
- *Minimum password age*
  Users can't change a password, unless the specified number of days since the last change has passed.
- *Maximum password age*
  Users are prompted to change their password after the specified number of days has passed
  We recommend to set a maximum password age.
- *Minimum password length*
  Define the minimum length of a password. Usually, longer passwords are more secure than shorter ones.
- *Maximum password length*
  Define the maximum length of a password.
- *Password history*
  Users can't reuse passwords immediately. For example, if the number is set to 5, the last 5 used passwords can't be set as a new password.

Locked User Accounts

User accounts get locked after 10 failed log-in attempts with an incorrect password.

To unlock an account, you need to contact SAP Signavio support on the SAP for Me portal.

> ⓘ Note
>
> Accounts are only locked when using a log-in with email address and password, not when Single Sign-On (SSO) authentication is used.

Related Information

SAP for Me Service and Support

4.7 Single Sign-on Using SAML

> ⓘ Note
>
> You need an administrator account to use this function.

> ⓘ Note
>
> With SAP Signavio Process Manager version 14.6, administrators don't need SAP Signavio support anymore to configure single sign-on.
>
> If you had already set up SSO with SAML for older versions, you must update both the IdP and the SP configuration for security reasons.
>
> To update your configuration, follow the steps in section *Configure your IdP*.
>
> Single sign-on (SSO) is an authentication method. When SSO is set up, users can access different applications by logging in with only one account. SAP Signavio
>
> SAML is a standard to exchange authentication and authorization data between a service provider (SP) and an identity provider (IdP). SAP Signavio supports IdP-initiated authentication and SP initiated authentication.
>
> SAP Signavio acts as an SP and agrees to trust an IdP to authenticate users. When a user wants to access SAP Signavio, SAP Signavio sends an authentication request to the IdP. The identity provider validates the user and generates an authentication assertion that allows the user to log in to the workspace with their credentials.
>
> For more information, see *Enable SSO authentication using SAML*.

Just-in-Time Provisioning

When SSO using SAML is enabled, you can specify that users automatically get an account when they access SAP Signavio for the first time. This is called just-in-time (JIT) provisioning and allows users not to have to register with SAP Signavio themselves.

For JIT provisioning to work, the following conditions must be met:

- A user must be authenticated successfully with the IdP.
- The response from the IdP contains the mandatory attributes. Read more in section *Configure your IdP*.
- At least 1 unassigned license for SAP Signavio Process Collaboration Hub is available.

With JIT provisioning enabled, the following happens:

- When a user logs in for the first time, a new account is automatically created.
- When a user logs in who already has a SAP Signavio account and an IdP name ID, any IdP change on their first name, last name, and email address will be automatically updated in the SAP Signavio user management.

applies:

- A user receives a license that is specified in the IdP response, given that such a license is available in the workspace.
- A user is assigned to all groups that are specified in the IdP response, given that these user groups exist. User groups that don't exist are ignored.
- If a user is assigned to a user group that isn't included in the IdP response, the user is removed from this group.

When JIT provisioning is disabled, only users with an existing account can access the workspace. Other users will receive an error message. Read more on user management in section Manage Users and Groups [page 10].

Set Up SSO Using SAML

To set up SSO using SAML, you must configure the IdP and enable SSO for your workspace. Then, you can invite users.

All steps are described in detail in the following sections.

Configure Your IdP

You can configure all third-party IdPs that support SAML 2.0, for example:

- ADFS 2.0/3.0
- Okta
- OneLogin

For the configuration, the SP and the IdP must exchange metadata files.

> ⓘ Note
>
> We recommend to use an IdP with multi-factor authentication enabled, particularly for administrator accounts.

Follow these steps:

1. In the explorer, click **Setup > Manage SAP Signavio Process Collaboration Hub authentication**.
   The configuration dialog opens.
2. Select *SAML 2.0 based authentication* from the drop-down list.
   The configuration dialog opens.
3. Download the IdP metadata file. To do so, click the link *Download the SAML service provider metadata* in the lower dialog area.
4. Upload this file to your IdP or configure your IdP manually with the information from the file.

In your IdP configuration, set the SAML response attributes as follows:

Attribute	Mandatory	Description
Name ID	yes	It's the primary identifier, must be unique, and doesn't change. For example, use the internal employee ID.
email	yes	Email address of a user
first_name	yes	First name of a user
last_name	yes	Last name of a user

Attribute	Mandatory	Description
signavio_licenses_v1	no	The name of the license that you want to assign to a user, for example "Enterprise Plus Edition", "Enterprise Edition" "Classic Edition", "Collaboration Hub", or "Workflow". ⓘ **Note** You can also assign SAP Signavio Journey Modeler licenses through SAMI. Use "Journey Modeling Standard" or "Journey Modeling Advanced". When you assign more than one license, add an `<AttributeValue>` element for each license name. Example: `<Attribute Name="signavio_licenses_v1"><AttributeValue>Enterprise Plus Edition</AttributeValue><AttributeValue>Workflow</AttributeValue></Attribute>`

Attribute	Mandatory	Description

signavio_groups_v1	no	The names of the groups that you want to assign to a user.
		ⓘ Note
		The following 5 characters can't be used in group names:
		`"<>'&`
		When you assign more than one group, add an `<AttributeValue>` element for each group name. Example:
		`<Attribute Name="signavio_groups_v1"><AttributeValue>Employees</AttributeValue><AttributeValue>Sales</AttributeValue><AttributeValue>Process owners</AttributeValue></Attribute>`

If your IdP is Azure, you need to use the following attributes for licenses and groups:		
signavio_licenses_v1_azure	no	The name of the license that you want to assign to a user, for example "Enterprise Plus Edition", "Enterprise Edition" "Classic Edition", "Collaboration Hub", or "Workflow". When you assign more than one license, use a comma separated list. Example: "Enterprise Plus Edition,Workflow" Ensure that there is no space between license names. Spaces within license names are valid.

Attribute	Mandatory	Description
signavio_groups_v1_azure	no	The names of the groups that you want to assign to a user. **Note** The following 5 characters can't be used in group names: `"<>'&` When you assign more than one group, use a comma separated list. Example: "modeling users,admins" Ensure that there is no space between group names. Spaces within group names are valid.

IdP configuration is complete. You can continue with enabling SSO for your workspace. Read more in the next section *Enable SSO using SAML*.

Example

Example section from a valid IdP response

```
<Subject>
                    <NameID>ID12345</NameID>
                    <SubjectConfirmation
Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
                    <SubjectConfirmationData
InResponseTo="ONELOGIN_6f26b11b-b290-4d2c-b79d-c46010fe686c"
NotOnOrAfter="2020-10-23T11:49:29.291Z" Recipient="https://
editor.signavio.com/api/v2/saml/v2/tenant/a41f284f4e8841b2c7f5e2af78663c0f/
login"/>
                    </SubjectConfirmation>
                    </Subject>
                    <Conditions NotBefore="2019-10-23T11:44:29.258Z"
NotOnOrAfter="2019-10-23T12:44:29.258Z">
                    <AudienceRestriction>
                    <Audience>https://editor.signavio.com/api/v2/saml/v2/
tenant/a41f284f4e8841b2c7f5e2af78663c0f/metadata</Audience>
                    </AudienceRestriction>
                    </Conditions>
                    <AttributeStatement>
                    <Attribute Name="signavio_licenses_v1">
                    <AttributeValue>Enterprise Plus Edition</AttributeValue>
                    <AttributeValue>Workflow</AttributeValue>
                    </Attribute>
                    <Attribute Name="email">
                    <AttributeValue>john.doe@signavio.com</AttributeValue>
                    </Attribute>
                    <Attribute Name="first_name">
                    <AttributeValue>John</AttributeValue>
                    </Attribute>
                    <Attribute Name="last_name">
                    <AttributeValue>Doe</AttributeValue>
                    </Attribute>
                    <Attribute Name="signavio_groups_v1">
                    <AttributeValue>Employees</AttributeValue>
```

```
                    <AttributeValue>Sales</AttributeValue>
                    <AttributeValue>Process owners</AttributeValue>
                    </Attribute>
                    </AttributeStatement>
```

Enable SSO Using SAML

Before you start, you need the configuration metadata from your IdP. Read more in the previous section *Configure your IdP*.

Follow these steps:

1. In the explorer, click **Setup > Manage SAP Signavio Process Collaboration Hub authentication**.
   The configuration dialog opens.
2. Select *SAML 2.0 based authentication* from the drop-down list.
   The configuration dialog opens.
3. To enable IdP-initiated authentication, select *Enable SAML 2.0 authentication.*
   IdP-initiated authentication means that a user who logs in to the IdP must select SAP Signavio, and is then redirected to your workspace and logged in.
4. With SP-initiated authentication, a user who is logged out from SAP Signavio and tries to access your workspace, is redirected to the IdP, must log in to the IdP, and is then directed back to SAP Signavio and logged in.
   To additionally enable SP-initiated authentication, select *Allow service provider initiated authentication*.
5. For SP-initiated authentication, the initial request sent by the SP to the IdP can be signed with a certificate. If the authentication request is signed, the IdP has additional means to verify that the request was sent by the SP.
   To enable signing the authentication request, select *Sign authentication request*.
6. To enable just-in-time provisioning using SAML, select *Create new user accounts automatically*.
7. Paste the configuration metadata provided by your IdP to the field *XML Metadata*.

   > ⓘ Note
   >
   > - For certificate renewal, the federation XML file changes. For example, if the IdP certificate is renewed or updated, the metadata changes.
   > - Copy the latest federation XML into SAP Signavio when the certificate is renewed.

8. Confirm with *Save settings* and close the dialog.

Hint on links in invitation emails

SAP Signavio Process Manager users can send invitations emails to internal and external stakeholders.

If single sign-on is enabled but not enforced in your workspace, these invitations emails contain 2 web links:

- *Access using single sign-on (requires a company email account)*
  The following applies:
  - Users who are logged in to their company system are directly directed to SAP Signavio Process Collaboration Hub.
  - Logged out users need to enter their company credentials to log in.
  - New users need to register with their company email and get a SAP Signavio account.

- *Access as a guest (you will be asked to register with your name and email address)*
  The following applies:
  - Users with a guest account log in with their guest account credentials.
  - New users need to register.

Read more on the invitation features of SAP Signavio Process Manager in section Inviting Stakeholders to Comment on a Diagram.

Invite New Users by Email

If SP-initiated authentication and JIT provisioning is enabled, you can invite users to your workspace by sending them an email.

Follow these steps:

1. Get the workspace link:
   - Share a link to any content within your workspace, for example by copying the URL from your browser address bar.
   - Create a link to the workspace by adding the workspace ID as an URL parameter, for example **`https://editor.signavio.com/p/hub?t=<WORKSPACE_ID>`**
2. Paste the link to an email and send it to the users you want to log in with SSO using SAML.

Enforce SSO to Disable Login with Credentials

When SSO is enforced for your workspace, users can't log in using their SAP Signavio credentials. All users have to log in through the IdP.

If SP-initiated authentication is enabled, users are logged in when clicking a link to any content within your workspace, for example a published diagram in SAP Signavio Process Collaboration Hub, or a link that includes the workspace ID as an URL parameter.

When SSO is configured but not enforced for your workspace, the following applies:

- Users can log in through the IdP.
- Users can also log in by entering their email and password on the SAP Signavio login page.
- If SP-initiated authentication is enabled, a logged out user is always redirected to the IdP when clicking a link to content in your workspace.

> ⓘ Note
>
> When you've set up enforced SSO, make sure SSO is working before logging out from your workspace. Otherwise all users, including you, won't be able to access the workspace. To test the SSO configuration, log out and log in again with another user account.
>
> In case of problems, please contact our SAP Signavio service experts from the SAP for Me portal so they can disable this option for you.

To enforce SSO, follow these steps:

1. In the explorer, click *Setup > Edit security configuration*.
   The configuration dialog opens.
2. In the *Password policies* section, enable *Enforce SSO login*.
3. Confirm with *Save*.

Related Information

Editing the Security Configuration [page 32]

Manage Access Rights [page 17]

4.8 Managing Access to SAP Signavio Process Collaboration Hub for Active Directory Services

> ⓘ Note
>
> This chapter only applies to the on-premises version.

This section describes how to manage access rights for Active Directory users and user groups on SAP Signavio Process Collaboration Hub.

A prerequisite is that you have integrated SAP Signavio Process Collaboration Hub with your Microsoft Active Directory. For an overview of authentication options to SAP Signavio Process Collaboration Hub, see Granting read-only access to diagrams.

Modeling users with the corresponding permissions have the possibility to publish diagrams to SAP Signavio Process Collaboration Hub.

If you have purchased and configured the corresponding module, you can set read access permissions for diagrams published in SAP Signavio Process Collaboration Hub based on users and user groups in a shared domain. SAP Signavio uses the Windows network account list to give users access to SAP Signavio Process Collaboration Hub with their Windows network access credentials.

Managing Read Access to SAP Signavio Process Collaboration Hub

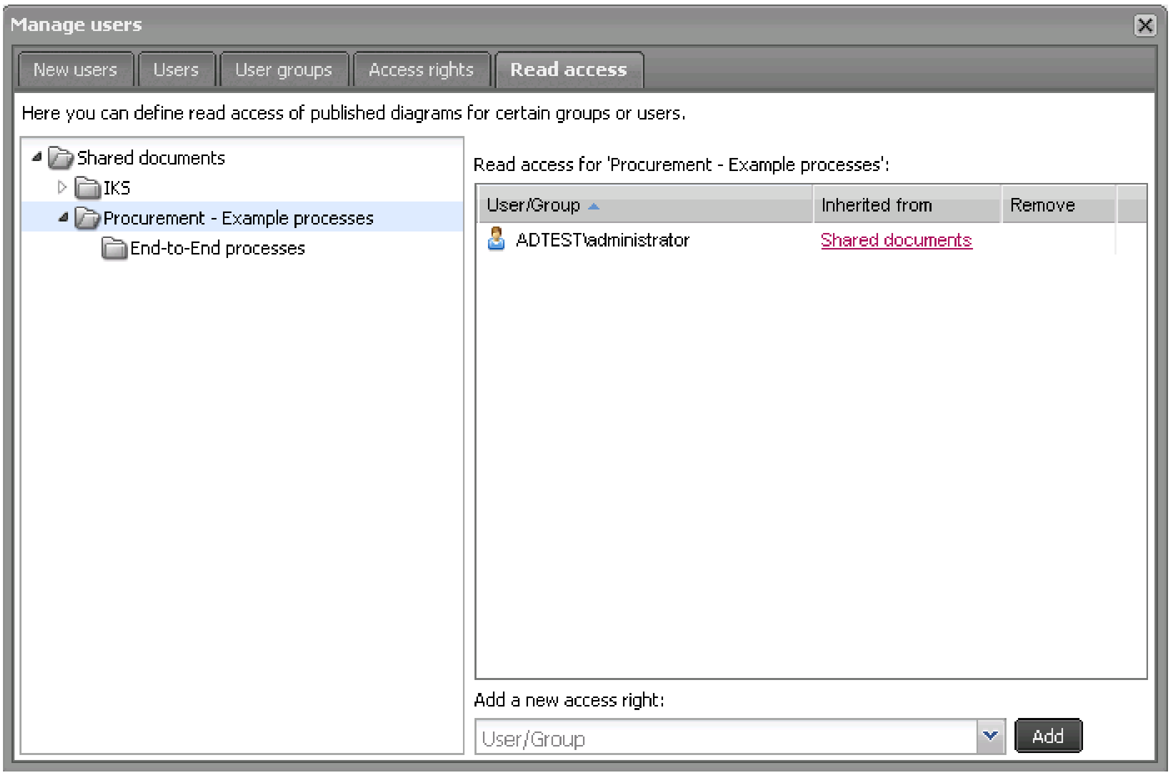
As a user of the *publishing module*, you are able to determine fine-grained access to SAP Signavio Process Collaboration Hub. You allow other users to see diagrams as well as folders in your workspace.

> ⓘ Note
>
> Granting read access to a diagram in SAP Signavio Process Collaboration Hub does not enable SAP Signavio Process Collaboration Hub users to open the diagram in other applications like the Editor or Explorer.

You can grant read access to users that are logged into your domain. It is also possible grant access rights to entire user groups.

To define read access, proceed as follows:

1. In the explorer, choose *Setup* > *Manage access rights*. The user management dialog opens.
2. Switch to the *Read access* tab.



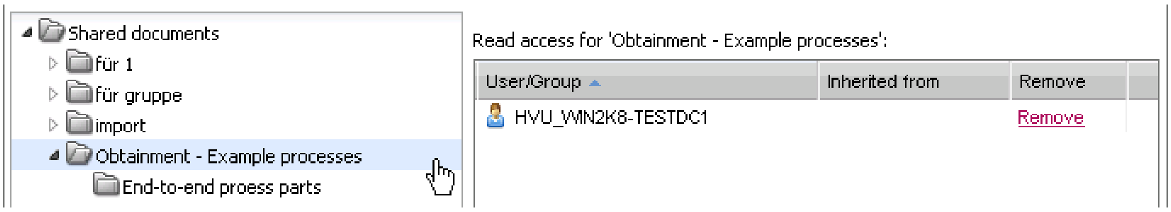
Here you can define read access of published diagrams for certain groups or users.

Read access for 'Procurement - Example processes':

User/Group	Inherited from	Remove
ADTEST\administrator	Shared documents	

Add a new access right:

3. Select a folder or diagram in the left navigation column. The dialog shows the access rights connected to the object and, if existent, the folder the right was inherited from.

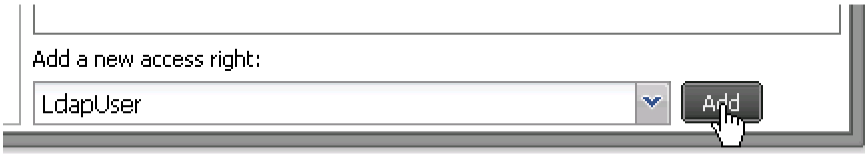


Read access for 'Obtainment - Example processes':

User/Group	Inherited from	Remove
HVU_WIN2K8-TESTDC1		Remove

Select the folder you want to configure read access for.

4. Navigate to the folder or diagram. There are two ways to add access rights for a user:
    - Type in a user name by using the search functionality - as soon as you start typing, a drop down list with matching users appears. Select the user name.
    - Select the input field and select a user name from the drop down list. To navigate the sites, use the arrows below the list.
5. Choose *Add*. The user can now be found in the list of granted access rights.


Add a new access right:

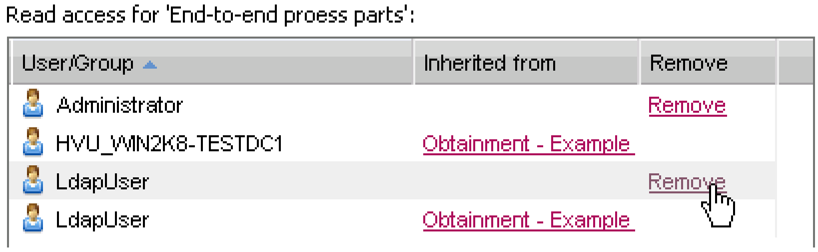
LdapUser

Read access will be established for the user.

Removing Read Access

Follow the first three steps in the paragraph above and continue as follows:

1. Select the user you want to remove the read access from.
2. Choose *Remove* next to the user name.



Read access for 'End-to-end proess parts':

User/Group	Inherited from	Remove
Administrator		Remove
HVU_WIN2K8-TESTDC1	Obtainment - Example	
LdapUser		Remove
LdapUser	Obtainment - Example	

> ⓘ Note
>
> If you cannot see the *remove* option for a diagram or folder, the read access right was inherited from a parent folder. Navigate to this folder by clicking its name in the column *Inherited from*.

3. Confirm the action with *Yes*.

Remove access right

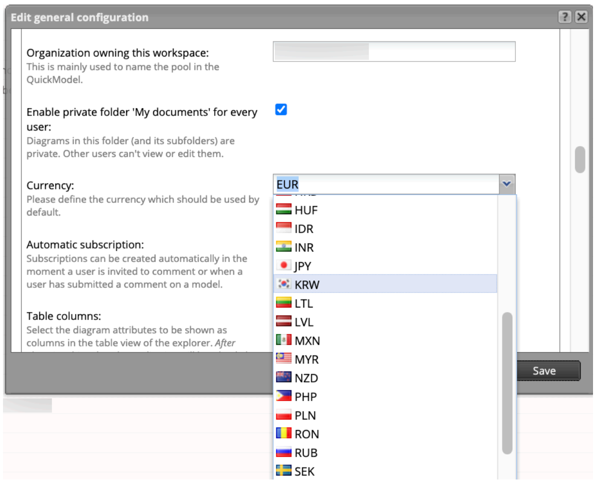
Are you sure to remove the access right?

5 Configure General Software Settings

Define the look and behavior of SAP Signavio Process Manager for all modelers in your workspace.

To configure the general settings for all modelers, open the explorer and choose *Setup* > *Edit general configuration*.

Explorer Settings

Name of this workspace	Sets the name that shows up in the workspace selection for users who are members of multiple workspaces. By default, the name is the name of the organization you entered when registering the workspace, plus workspace owner's full name in parentheses.
Organization owning this workspace	Sets the name of your organization, which is displayed in diagrams you create with QuickModel and in most reports.
Enable private folder 'My documents' for every user	If you enable a private *My documents* folder, any content in this folder can only be accessed by the user owning the folder. This folder can't be accessed by any other user on the system, not even administrators.
Currency	Defines the default currency used in the simulation tool and in different reports.  Edit general configuration Organization owning this workspace: This is mainly used to name the pool in the QuickModel. Enable private folder 'My documents' for every user: ☑ Diagrams in this folder (and its subfolders) are private. Other users can't view or edit them. Currency: EUR Please define the currency which should be used by default. Automatic subscription: Subscriptions can be created automatically in the moment a user is invited to comment or when a user has submitted a comment on a model. Table columns: Select the diagram attributes to be shown as columns in the table view of the explorer. *After*
Automatic subscription	Lets you define whether and when commentators' email addresses should be added to an email subscription that informs them about changes in the corresponding documents.
Table columns	Sets which columns are shown in the explorer's list view. Read more about the folders in section Working with folders and diagrams.

Editor Settings

Color palette	Enables you to customize the colors of the color palette that is accessible in the Editor. To adjust a color, overwrite one of the default hexadecimal values in the palette and press enter to see the color preview change.
Enforcing matching dictionary item types	By default, mappings between BPMN elements and Dictionary category entries are enforced, as recommended by BPMN. When this check box is enabled, the following BPMN element types only references Dictionary entries in the corresponding categories: **IT system** elements reference entries in the **IT Systems** category **Data object** elements reference entries in the **Documents** category **Task** elements reference entries in the **Activities** category **Pool/Lane** elements reference entries in the **Organizational Units** or **IT Systems** categories. This preselection keeps Dictionary entry references consistent and prevents an unsuitable usage of Dictionary entry references. However, this restriction can be disabled by clearing the *Enforce matching dictionary item types* check box.

Help Settings

Here, you can enable a set of help options that show news and tips about our software and link to further information about Business Process and Business Decision Management.

By default, all options are activated. You can also define custom help options that can for example link to sites in your intranet. You can define these settings separately for the explorer and SAP Signavio Process Collaboration Hub.

General Settings

Enable the upload of documents/pictures	Enable this option to allow users to upload documents and pictures.
Enable content subscriptions	Enable this option to allow users to subscribe to content such as process models. If a user subscribes to content, the user receives email notifications on changes. When you disable this option, user can't subscribe to workspace content. For already existing subscriptions, email notifications are no longer sent.

5.1 Welcome to the SAP Signavio Process Manager Workspace Admin Guide

If you are new to SAP Signavio, we recommend to read the sections First steps with SAP Signavio Process Manager and What kind of SAP Signavio user am I?.

If you are already familiar with SAP Signavio Process Manager, navigate the table of content on the left or use the search to find the sections that are most relevant to you.

For additional information, take a look at:

- Featured Videos
- Tutorial Videos
- SAP Signavio Blog
- White Papers
- SAP community page for SAP Signavio

6 Configure Language Settings for All Users

Define the different languages into which content in your workspace can be translated. Set a default lanuage for your workspace.

You can define the different languages that diagrams can be translated into. Whenever a diagram is created or edited, you can for example translate labels of modeling elements and element documentation to each language that is defined in the workspace. Users then have the option to select the suitable language.

> ⓘ Note
>
> - We recommend to only configure your workspace for multiple languages if you actually use them.
> - Users of SAP Signavio Process Collaboration Hub can switch between languages that are defined in the workspace in their personal profile.

Add a Language

Follow these steps:

1. Open the explorer and click *Setup*> *Define languages*.
2. The configuration dialog opens.
3. Choose the languages you want to add to your workspace:
4. Prioritize the languages by moving them up the list.
   The language on position 1 is the default language of your workspace, it is used as the standard language for all diagrams that are created.
5. Click *Save* to apply your changes.

Set a Default Language

The default language of your workspace is used as the standard language for all diagrams that are created.

> ⓘ Note
>
> Changing the default language has a major impact on your workspace. For example, you have to open and save all diagrams again for a correct diagram preview. You need to contact our support team to get an execution code for this change.

To set a default language, follow these steps:

1. Open the explorer and choose ▶ *Setup* ▶ *Define languages* ◀.
2. In the configuration dialog, prioritize the languages by moving them up the list.

The language on position 1 is the default language of your workspace.

3. Choose *Save* to apply your changes.

Remove a Language

Follow these steps:

1. Open the explorer and choose *Setup* > *Define languages*.
2. In the configuration dialog, choose *Remove* next to the language you want to remove.
3. Choose *Save* to apply your changes.

Related links

- Translate Content with PO Files

7 Setting up the Visibility for Variant Group

Learn how to manage and control the display of a diagram's variant group.

Context

This content gives you instructions on how to configure the visibility of a diagram's variant group via the *Settings* page in SAP Signavio Collaboration Hub. It is useful if you want to customize the user interface and control what information is displayed to users.

Procedure

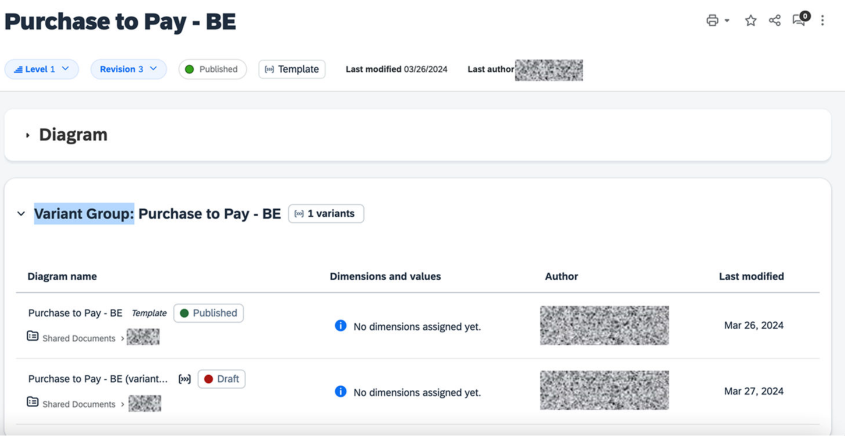
1. In SAP Signavio Collaboration Hub, go to *Settings* in the bottom-left corner of the page.
2. In the left-hand side panel, under *Page properties*, select *Diagram page*.
3. Under *Notation set*, select either *Business Process Diagram (BPMN 2.0)* or *Value Chain* from the dropdown.
4. To the right from *Variant Management*, select *Show on page*.

Notation set
Business Process Diagram (BPMN 2.0)

Description
Diagram view
Attributes
Activity list ☑ Show on page
Featured Attributes ☐ Show on page
Variant Management ☑ Show on page

5. Select *Save*.

   The variant group is displayed under the selected diagram in *Shared Documents*.



Purchase to Pay - BE

Level 1 | Revision 3 | Published | Template | **Last modified** 03/26/2024 | **Last author** [redacted]

Diagram

Variant Group: Purchase to Pay - BE | 1 variants

Diagram name	Dimensions and values	Author	Last modified
Purchase to Pay - BE *Template* Published Shared Documents › [redacted]	No dimensions assigned yet.	[redacted]	Mar 26, 2024
Purchase to Pay - BE (variant... Draft Shared Documents › [redacted]	No dimensions assigned yet.	[redacted]	Mar 27, 2024

8 Settings for SAP Signavio Journey Modeler

This section provides a quick overview about the necessary information to set up SAP Signavio Journey Modeler for your users.

Licenses

To activate SAP Signavio Journey Modeler for your users, you need to assign SAP Signavio Journey Modeler licenses in the new user management. You can access the user management in two ways:

- In the settings for SAP Signavio Process Collaboration Hub, click *User Management*.
- In SAP Signavio Process Manager, go to ▶ *Setup* ▶ *Manage users & groups* ◀.

Details on user management can be found in section Manage users and groups.

Access Rights to Journey Models

At the moment, journey models inherit the access rights of the folder in which they are stored. Read more about access rights to folders in section Setting Access Rights to Folders and Diagrams [page 18].

Layout and Formatting

Elements of a journey model can have different colors. How to adjust the colors available in your workspace is described in section Editor settings [page 46].

9 Settings for Navigation Maps

This section provides an overview about settings useful for navigation maps.

Layout and Formatting

Elements of a navigation map can have different colors. How to adjust the colors available in your workspace is described in section Editor settings [page 46].

Images

The section Upload custom graphics describes how to upload custom graphics for different modeling languages.

> ⓘ Note
>
> Modeling users can upload images while creating navigation maps but cannot delete any images. Workspace administrators can delete images in the explorer, read more in section Delete custom graphics.
>
> For images uploaded in the explorer, individual file size is limited to 20 kB for all notations, including navigation maps. Images uploaded with the image manager while creating navigation maps have a size limit of 50 kB each.

Set a Navigation Map as an Entry Diagram

You can set a diagram as an entry diagram in SAP Signavio Process Collaboration Hub, read more in section Page Properties.

10 Manage Approval Workflows

> ⓘ Note
>
> For more information about SAP Signavio Process Governance, contact sales@signavio.com.

SAP Signavio Process Manager enables you to define and manage approval workflows for publishing diagrams. Approval workflows route a diagram to a predefined list of people, who need to approve that the diagram is ready to be published. This enables your organization to ensure the quality of all diagrams published in the SAP Signavio Process Collaboration Hub.

You can define approval workflows in **SAP Signavio Process Governance** . To define approval workflows, you need to purchase licenses for SAP Signavio Process Governance in addition to your SAP Signavio Process Manager licenses.

Related Information

Activate the Approval Workflow Feature [page 55]

10.1 Activate the Approval Workflow Feature

Learn how to toggle the approval workflow feature.

> ⓘ Note
>
> To activate *Approval Workflow*, you are the owner of the workspace and you have administrator rights.

1. To open the settings for the approval workflow feature, choose ▶ *Setup* ▶ *Manage approval workflows* ◀ from the explorer's top menu.
2. If approval workflows are inactive, toggle the checkbox and choose *Activate*.
3. Choose *Next* to confirm and start configuring the approval workflow preferences.
   The approval workflow function is activated.

Deactivate the Approval Workflow Feature

> ⓘ Note
>
> To deactivate *Approval Workflow*, you are the owner of the workspace and you have administrator rights.

To deactivate the approval workflow feature, follow these steps:

1. To open the settings for the approval workflow feature, choose ▶ *Setup* ▶ *Manage approval workflows* ◀ from the explorer's top menu.
2. In the approval workflow management window, choose *Deactivate*.
3. Confirm the deactivation.

10.2 Configure Approval Workflows

> ⓘ Note
>
> To effectively use approval workflows, you should restrict permission to publish diagrams in the SAP Signavio Process Collaboration Hub. Read more about access rights management in the section Setting Access Rights to Folders and Diagrams [page 18] .

- To open the settings for the approval workflow feature, click *Setup* , then *Manage approval workflows* in the top drop-down menu of the explorer. Here you can activate the approval workflow feature.

When the approval workflow feature is active, the following configurations are available:

- **Open your workspace in SAP Signavio Process Governance**
  Selecting the link opens your SAP Signavio Process Governance workspace in a new browser tab, so you can manage your tasks and workflows there.
- *Manage approval workflows*
  All approval workflows defined in SAP Signavio Process Governance and the default approval workflow are listed as links in this section. To edit, click an approval workflow.
- *Deactivate the approval workflow feature*
  If you want to stop using the approval workflow feature, you can deactivate it.
- **Synchronize users with SAP Signavio Process Governance**
  After you created new users in SAP Signavio Process Manager, you need to synchronize SAP Signavio Process Manager with SAP Signavio Process Governance, so your new users can be included in your approval workflows. Click *Synchronize users now* to create a SAP Signavio Process Governance account for all your SAP Signavio Process Manager users who did not have a SAP Signavio Process Governance account before.

> ⓘ Note
>
> If your organization is using SAP Signavio Process Governance for approval workflows in SAP Signavio Process Manager, synchronizing the workspace will delete SAP Signavio Process Governance users who have been previously deleted in SAP Signavio Process Manager.

Synchronize configuration with SAP Signavio Process Governance

Usually, the configuration updates automatically when changes are made. You only need to click this button if there are problems with the configuration between your SAP Signavio Process Manager and SAP Signavio Process Governance workspaces, for example if the tenant ID is missing in SAP Signavio Process Governance. If you do need to manually fix the configuration, click *Synchronize configuration now* to trigger a synchronization of all diagram states, SAP Signavio Process Manager URLs and the SAP Signavio Process Manager tenant ID.

Related Information

Diagram States [page 57]
Participants [page 58]
Approval Expiration [page 59]

10.2.1 Access Control for Approval Workflows

If the option *Use workflow access permissions* is enabled, permissions for processes set in SAP Signavio Process Governance are used for approval workflows.

"Start process" Permission and "See process" Permission

When an approval workflow is created or edited in SAP Signavio Process Governance, it is possible to restrict who can see or start a process.

For details on how to set these permissions in SAP Signavio Process Governance, read more in section Access control.

- If a user is permitted to see but not start an approval workflow, that workflow is visible as disabled in the drop-down list. In case this user still tries to start the approval workflow, an error message is shown.
- If a user is not permitted to see a workflow, the workflow won't be listed.

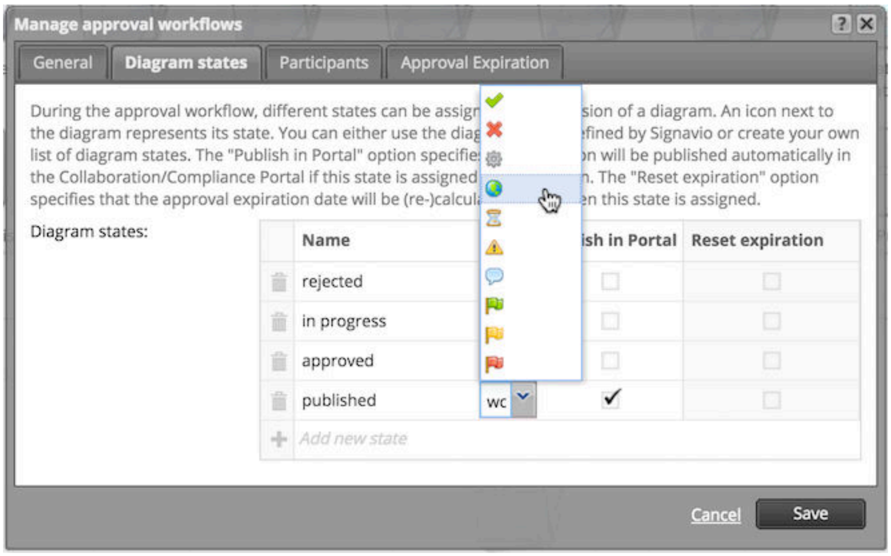
> ⓘ Note
>
> If you enable the option *Use workflow access permissions* , every user who wants to start an approval workflow needs a SAP Signavio Process Governance account. If a user tries to start an approval workflow while not having an account for SAP Signavio Process Governance, an error message is shown.

10.2.2 Diagram States

You can edit the diagram states within an approval workflow.

The table in the *Diagram states* tab contains all states a diagram can be in. Icon and name of a state are displayed in the explorer as soon as the state has been triggered for the corresponding diagram. If the check box *Publish* is activated, a diagram is automatically published in SAP Signavio Process Collaboration Hub after the corresponding status has been triggered. For this, it is necessary that your workspace includes SAP Signavio Process Collaboration Hub.

Edit the states by clicking the corresponding table fields:



During the approval workflow, different states can be assign sion of a diagram. An icon next to the diagram represents its state. You can either use the diag fined by Signavio or create your own list of diagram states. The "Publish in Portal" option specifie on will be published automatically in the Collaboration/Compliance Portal if this state is assigned n. The "Reset expiration" option specifies that the approval expiration date will be (re-)calcul en this state is assigned.

Diagram states:

	Name		ish in Portal	Reset expiration
	rejected		☐	☐
	in progress		☐	☐
	approved		☐	☐
	published	wc	✓	☐
+	Add new state			

> ⓘ Note
>
> The *Reset expiration* column is only relevant if you want to configure Approval Expiration [page 59] .

Changes in state configuration, as well as the deletion or creation of new states, are automatically transferred to SAP Signavio Process Governance and are instantly available when selecting states in the SAP Signavio Process Governance workspace.

- To add a new state, choose + (*plus*).
- To delete a state, choose *trash* next to the corresponding column and confirm in the dialog.

You can assign diagram attributes for process participant roles. This enables you to define the roles of participants in processes within SAP Signavio Process Manager. In SAP Signavio Process Governance, you can then assign approval tasks to these roles.

For example, the default approval workflow process is assigning the task *business approval* to the process owner role. This means that the *business approval* for a process is automatically assigned to the user whom you have defined as the process owner in the corresponding attribute.

Related Information

Participants [page 58]

Approval Expiration [page 59]

10.2.3 Participants

Configure the *Participants* attributes in the *Participants* tab.

Here, you can assign diagram attributes to SAP Signavio Process Governance roles. This requires the creation of corresponding attributes on BPMN diagram level in SAP Signavio Process Manager. Read more about custom attributes in the chapter Configuring notations and attributes [page 92] .

When creating or editing a business process diagram, you can now add the email addresses of the corresponding participants to these attributes.

> ⓘ Note
>
> With this feature, you can only use the email addresses the corresponding users used to register themselves in SAP Signavio Process Governance.

When configuring approval workflows in SAP Signavio Process Governance you can assign responsibilities to the different participants.

Related Information

Approval Expiration [page 59]

10.2.4 Approval Expiration

In this tab you can set expiry dates for diagram approvals. Expiry dates ensure your diagrams are regularly re-checked, for example to fulfill compliance rules.

> ⓘ Note
>
> When you use subprocesses in approval workflows, the first and the last status change need to happen in the main process. Otherwise, when using approval expiration expiry dates for approved processes are not created correctly.

By default, the expiry frequency is set to *Never* .

1. To define one static expiry frequency for all diagrams, set the drop-down menu *Select how the timespan is determined* to *Fixed period* .
2. Define the expiry frequency in the field *Number of months*.
3. To define the expiry frequency per diagram, set *Select how the timespan is determined* to *Custom attribute (type: number)* .
4. Select the attribute you want to use to configure the frequency. To configure custom attributes, see section Configuring notations and attributes [page 92].
5. Define the expiry frequency in the field *Fallback value if attribute not set* . This field serves as the default value if a diagram's expiry frequency attribute value is empty.

To select the workflow you want the system to trigger once a diagram approval expires, you need to switch to the *Diagram states* tab. Here you can define the states that are considered as approvals in the *Reset expiration* column.

> ⓘ Note
>
> To use both expiring and non-expiring approvals, set up a specific approval workflow that triggers only states that the expiry function doesn't regard as approved. For example, create the states **Approved (expires)** and **Approved (no expiry)**. Activate the check box **Reset expiration** only for **Approved (expires)**. Workflows triggering this state will expire, workflows triggering **Approved (no expiry)** won't.

Related Information

Create and Edit Approval Workflows for Process Diagrams [page 61]

10.3 Reapprovals

To schedule reapprovals, set an expiry period in the *Approval Expiration* tab and mark at least one of the diagram states in the *Diagram states* tab as **Reset expiration** .

Existing Approvals

Existing approvals are affected by changing the *Approval Expiration*.

Approval Expiration

If you change the expiration timespan, the new expiration period is used to schedule the reapproval.

Example: If a diagram was approved two months ago and you set the reapproval period to one month, the reapproval workflow is triggered immediately.

Diagram State

If you change the diagram state that resets the expiration, new reapprovals only depend on the new states. De-selected states are no longer considered for newly initiated expiry periods. All existing expirations stay unchanged, even if they were based on a now de-selected state.

Example: You have two diagram states, **approved** and **rejected**. So far, **approved** was activating the approval expiration, now you want to change the diagram state to **rejected**. As soon as the diagram state is changed, the reapprovals linked to **approved** are discarded by the system. This means that changing the diagram state does not trigger the reapproval workflow for diagrams that have been approved already. It still takes the complete original timespan for the reapproval workflow to be triggered.

10.4 Create and Edit Approval Workflows for Process Diagrams

You can edit approval workflows and add further approval workflow processes.

To create or edit a **process diagram** approval workflow, follow these steps:

1. Choose ▶ *Setup* › *Manage Approval Workflows* ◀ in the top drop-down menu of the explorer.
2. Either choose *Open workspace in* SAP Signavio Process Governance or select a link to an existing approval workflow.
   In case you did not select a specific workflow, you are redirected to your SAP Signavio Process Governance workspace. Go to the *Processes* tab to see all existing processes, including your approval workflows.
3. Select an approval workflow for editing it or click *New process* to create a new approval workflow.
4. If you have created a new approval workflow, enter a name for the approval workflow and hit *Enter*.

Set the Workflow Trigger

If you have a SAP Signavio Process Governance stand-alone license, you need to define **SAP Signavio approval** as the trigger for the process.

In case you are using SAP Signavio Process Governance as part of SAP Signavio Process Manager, the approval workflow trigger is set automatically.

Create Actions

Go to the *Actions* tab.

Here you can create actions for the approval workflow and link them with each other. To create the first process element, choose *Start event*.

Change States

Follow these steps:

1. Select the *Process Manager* drop down menu and choose *Set model state* to create a new SAP Signavio Process Manager task.
2. Connect start event and task.

3. Label the task and select to which state the model should be changed by the trigger.

The states can be defined in SAP Signavio Process Manager, read more in section Diagram states [page 57].

When the task was executed in SAP Signavio Process Governance, SAP Signavio Process Manager automatically sets the diagram for which the approval workflow is executed, into this state.

Create and Assign User Tasks

You can use the interactive context menu to create the first user task and name the task.

Assign the task to one or several of your modeling users in the *General* tab.

Alternatively, you can assign the task to one of the process participant roles. This is recommended for most cases, as it eases approval workflow management when having several process owners and participants within the different processes.

Read more in section Roles in the SAP Signavio Process Governance user guide.

Adding Fields for Additional Information

In the *Form* tab you can add several fields providing information about diagram.

To edit the field's information, like label and initial value, click the field and edit it in the dialog.

Add Exclusive Gateways

You can add an *exclusive gateway* followed by at least two SAP Signavio Process Manager*Set model state* tasks.

Read more in section Exclusive gateway in the SAP Signavio Process Governance user guide.

Define Task Labels

Define task labels as well as the state changes the tasks should trigger. If you want to end the workflow after these steps, add *end events*.

The gateway represents a user decision, meaning the user executing the previous task can decide which of the following tasks should be triggered.

When clicking the gateway, you can define the labels of the dialog that are displayed to the executing user when the corresponding decision is to be made.

To define the outcome or the possible process flows, name the task following a decision.

Set Automatic Decisions

Alternatively, gateways can be resolved automatically.

For this, you need to select *Automatic decision* and define the conditions for gateway resolution.

In our example, it does not make sense to resolve the gateway automatically. You can refer to the above illustration as a reference for automated gateway resolution in a similar case.

Using Subprocesses in Approval Workflows

We recommend using a sub-process action in the following cases:

- To simplify complex process models. To view the next level of detail, you open the sub-process.
- To delegate responsibility to a different process owner.
- To reuse a part of the process that is the same for several processes.
- To update a part of the process that is changed often.

For correct results, the first and the last status change need to happen in the main process. Otherwise, expiry dates for approved processes are not created correctly when using approval expirations and not updated correctly when changing related configurations.

Read more about subprocesses in section Sub-process.

Publish the Process

To make new approval workflow available from the explorer, choose *Publish to run this process*.

Related Information

Creating an Approval Process for Journey Models [page 64]

10.4.1 Creating an Approval Process for Journey Models

Learn how to create a new approval process in SAP Signavio Process Governance specifically for journey models.

Prerequisites

- As the user creating the approval process, *Dictionary integration user* has been added to your organization settings.
- Both organizations of SAP Signavio Process Collaboration Hub and SAP Signavio Process Governance are the same.
- You have an SAP Signavio Process Governance license.

Context

When you create an approval process, you have the option to save it as a template or as a unique approval process. You also have the option to create an approval process from an existing template.

Procedure

1. In SAP Signavio Process Governance, choose (*Processes*) to navigate to the processes window.
2. Choose ▶ *Create* ▶ *From scratch* in the header area.
3. Write a name for the process and select the enter key.

   Example

   Approvals for JM Template

   Enter a name for this process and press ↵ to save it

   ...or create from templates

   Alternatively, you can create a unique journey model approval process when you choose *create from templates*, select a saved template from the folder selection, and adjust the participants fields.

4. Under the *Trigger* tab, choose ▶ *Process Manager* ▶ *Journey Model approval* ▶.
5. Choose *Add a participant* to add one or more participants to your approval workflow.

   > ⓘ Note
   >
   > Although it is possible to create a trigger without a participant, we recommend adding a participant for a journey model approval process.
   >
   > For journey models, participants are typically the owner and modeler. Every participant added needs to approve the case so that the approval will be successful.

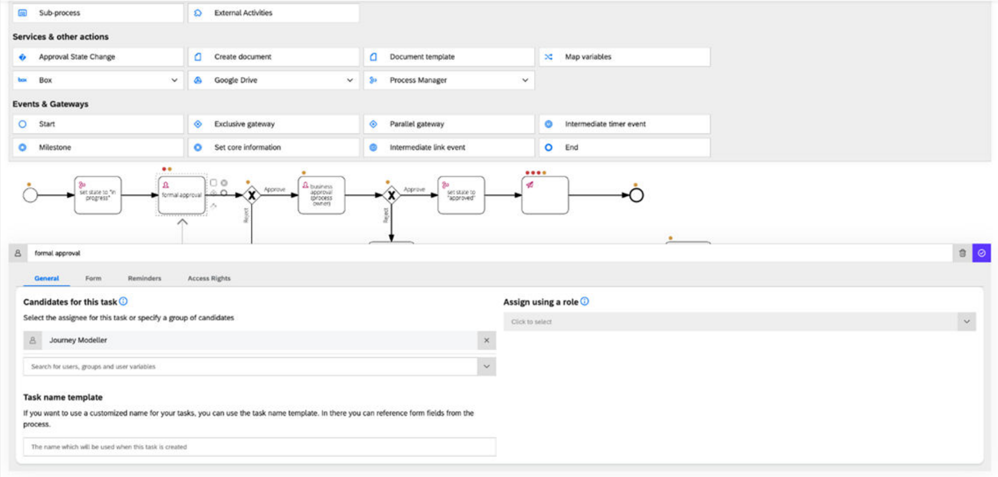
   > Example
   >
   > 
   >
   > Participant label
   >
   > Journey Owner
   >
   > Journey Modeller
   >
   >

   Upon adding a participant, the *Participants* tab appears beside the *Trigger* tab.
6. Under the *Participants* tab, use the drop-down menu in the *Data source* column to assign a data source to each participant.

   The data source options for journey models are as follows:
   - *Attribute*: A persona that comes from the journey model.
   - *Ask the user*: The connection to dictionary category items with an associated email address.

     > ⓘ Note
     >
     > Categories without email addresses are not available here.
     >
     > Dictionary items can be individually selected when you start the approval from SAP Signavio Process Collaboration Hub.
7. Under the *Actions* tab, create the process, as described in Create and Edit Approval Workflows for Process Diagrams [page 61].
8. Select a user task from the process that requires an approval.

   The user task window opens.

> Example
>
> 
>
>
> formal approval
>
> **Candidates for this task**
>
> Select the assignee for this task or specify a group of candidates
>
> Journey Modeller
>
> **Assign using a role**
>
> **Task name template**
>
> If you want to use a customized name for your tasks, you can use the task name template. In there you can reference form fields from the process.

9. In the user task window, navigate to the *General* tab and select a candidate for approval from your saved list of participants.

> Note
>
> In the user task window, you can also assign candidates using a role such as *reviewer* when multiple tasks should be completed by the same person, for example. Also, you can use the *Task name template* field to create a customized name for your tasks.
>
> For more information on the user task window, see Adding a Decision to an Approval Process.

10. Confirm by selecting *Publish to run this process* in the header area.

Next Steps

After creating a workflow, start the workflow, as described in Starting an Approval Workflow from Journey Modeler.

Related Information

Triggers

Starting an Approval Workflow from Journey Modeler

11 Manage Notations, Attributes, and the Dictionary

You can configure notations and create custom diagram attributes according to your specific needs. In addition, you can customize dictionary categories and attributes in order to ensure consistency and enable easy re-use of objects throughout your process landscape.

Related Information

Manage the Dictionary [page 67]
Add and Manage Custom Attributes [page 84]
Add and Manage Notation Subsets [page 92]
Managing Modeling Conventions [page 99]

11.1 Manage the Dictionary

Get an overview of dictionary settings and adjustment options.

This section provides a quick overview about the necessary information to set up the dictionary for your users.

Access Rights

You can set access rights for the complete dictionary or limit the access to specific categories. Read more in section Setting Access Rights to the Dictionary [page 21].

Custom Attributes

How to create custom attributes for dictionary categories is described in section Add a custom attribute for a dictionary category [page 84].

Import Dictionary Entries

If you need to add multiple entries at once or want to update existing entries, you can import dictionary entries as XLS files. Read more in section Import dictionary entries.

Special Dictionary Categories

How to set up different categories for risks and controls is described in section Create dictionary categories for risks and controls [page 73].

Dictionary entries can be used as data input objects or data definitions in DMN modeling. For such entries, you need to set up a dictionary category that is activated for DMN modeling. Read more in section Set up a dictionary category for DMN input data elements [page 68].

11.1.1 Set Up a Dictionary Category for DMN Modeling

Learn how administrators set up a dictionary category for input and output data. Modeling users can use entries of this dictionary category in decisions of DMN diagrams.

Dictionary entries can be used for input and output data in decisions of DMN diagrams. For that, you need to set up a dictionary category that is activated for DMN modeling.

Follow these steps:

1. Open the explorer and choose ▶ *Setup* ▶ *Define notations/attributes* ◀.
   The configuration dialog for notations and attributes opens.
2. Go to the *Dictionary* tab.
3. You have the following options:
   - To create a new category, choose *Add*.
   - To create a new sub-category, select the parent category and then choose *Add*.

   The creation dialog opens.
4. To activate the category for DMN modeling, set the option *Use for* to *Data Modeling*.
5. Specify the other category settings as needed.

   > ⓘ Note
   >
   > We recommend naming the category in a meaningful way. Then, modeling users can easily identify it as a category for DMN modeling.

   Read more on the settings in section Add custom categories for dictionary entries [page 69].
6. Confirm with *Create*.
   The category is created.

Related Information

Create dictionary entries for input or output data in decisions

11.1.2 Add Custom Categories for Dictionary Entries

> ⓘ Note
>
> This feature is only available for customers with an *Enterprise* license.

You can define attributes for dictionary entries, like you can define them for diagrams. You can also define custom dictionary categories and subcategories.

Category types

Category types have two purposes:

- They are used by the system when creating reports (for example, RACI, document use, or process documentation reports) to identify objects of a certain category.
- They act as filters when dictionary references are suggested while modeling. For example, dictionary entries of the type *IT System* are only suggested when the user attempts to label an IT System element. Entries for which no type is set are suggested for any element.

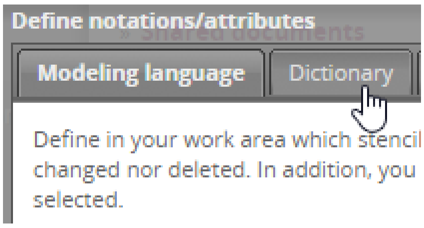
Category types can be defined for both root level categories and child categories. The following category types are available:

Organization	Organizational entities, that can be used to assign responsibilities for actions. Examples would be whole organizations (for example 'ACME Inc.'), organizational units or departments (for example 'Finance'), roles (for example 'Chief Financial Officer'), or even external process participants like partners, suppliers, government institutions or customers.
Document	Anything that can hold information and that is used or created during processes. This can be physical documents (for example printed applications), digital files (for example PDF forms), entries in databases, or variables in a computer program.
IT-System	Anything that can process documents or data, from standard software, individualized applications, and custom scripts, to hardware systems, like individual server instances, data centers, and hand-held devices, to integrated systems, like application servers, scanners, printers, or personal computers.

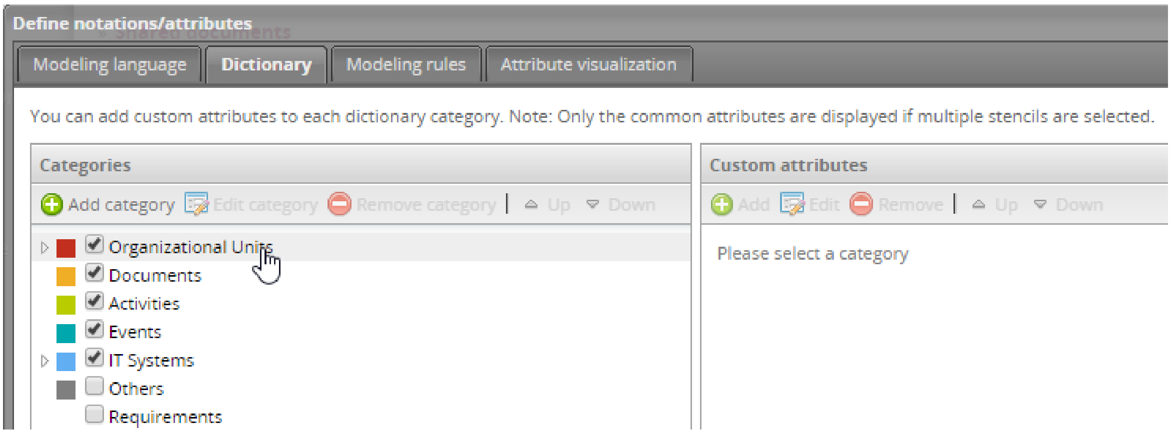
Event	Anything that can trigger a process, either during the execution or as the result of a process. Events are usually described by defining the situation or state reached once the event has occurred, for example "Customer order received" or "Goods sent".
Activity	Actions that are performed within processes. Actions usually connect all other types of objects. They are performed by organizational units or roles, can read and create documents or data, can use IT-systems, can cause events, and usually achieve certain goals.
Goal	The reasons behind why processes are executed at all and why they are designed the way they are: business goals to be achieved, key performance indicators to be met, or stakeholders to be satisfied.
Processes	Used for elements in value chains and navigation maps. Disabled by default.
Requirement	Typically descriptions of the differences between as-is and to-be processes or IT-systems, for example change requests, functional or non-functional specifications, or tickets in a requirements management system. Disabled by default.
Others	Categories with this type have no defined meaning attached to them and are recommended to users for diagram elements that don't match more specific types. One example is the BPMN *group* element.

Create a New Category

To create dictionary categories, follow these steps:

1. In the explorer, choose ▶ *Setup* ▶ *Define notations/attributes* ▶.
2. Open the *Dictionary* tab. The window to configure dictionary attributes opens. All categories are listed.
3. 

Define in your work area which stencil changed nor deleted. In addition, you selected.
4. To create a sub-category, first select the parent category.



You can add custom attributes to each dictionary category. Note: Only the common attributes are displayed if multiple stencils are selected.

- 🟥 ☑ Organizational Units
- 🟧 ☑ Documents
- 🟩 ☑ Activities
- 🟩 ☑ Events
- 🟦 ☑ IT Systems
- ⬛ ☐ Others
- ☐ Requirements

Please select a category

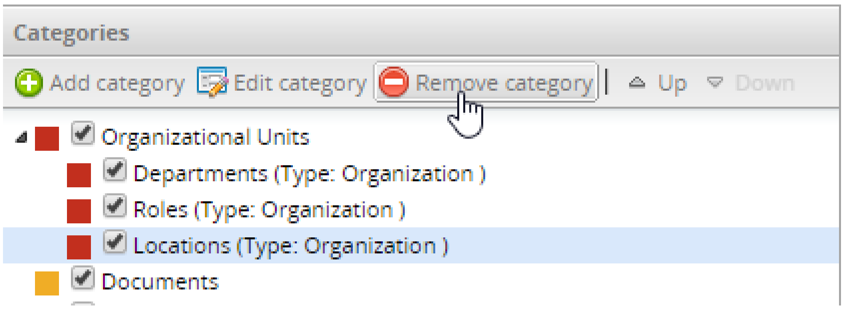
> → Tip
>
> Sub-categories can't be parent category of other categories, a category path is either one or two levels deep.

5. Choose *Add*. In the dialog, set the following:

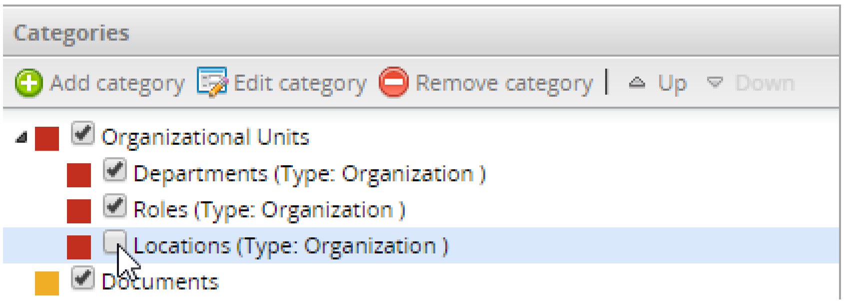
Preference	Description
Name	Specify a name for the category (mandatory)
Parent category	Select the parent category.
Use for data modelling	Activate if you want to use the category for DMN input data (see Managing input and output data for DMN data input elements [page 68]).
Publishing mode	Determines whether dictionary entries should be published in SAP Signavio Process Collaboration Hub manually or automatically. *manually* an updated dictionary entry has to be explicitly published to display the most recent version in SAP Signavio Process Collaboration Hub. This enables strict quality assurance (see also Publishing dictionary entries). *automatically* a new or updated dictionary entry is displayed in SAP Signavio Process Collaboration Hub as soon as the entry is saved. After enabling *manually*, you need to explicitly grant users the right to publish dictionary entries, as described in Setting Access Rights to the Dictionary [page 21] .

Preference	Description
On change, linking diagrams are	*updated automatically*: diagrams referencing dictionary entries of the corresponding category are updated automatically when changed. *unpublished*: the changes can be approved manually. You can control whether the updated dictionary entry is still matching the context of the referencing diagrams.
Color	Select a color for the category.
Type of category	Select a category type.

6. Choose *Create*. The new category is created.
   - To edit, remove or rearrange categories, choose the corresponding icon in the toolbar.



   - To deactivate a custom category, disable the checkbox between the category's color and its name.



Dictionary Categories for Risks and Controls

For risks and controls, it is not possible to use subcategories. If you need more than one category for risks and controls, we recommend using multiple risk attributes. This means you create one dictionary category for each type of risk, for example financial risks, legal risks, or health risks.

Manage Custom Attributes for Dictionary Entries

You can manage custom attributes of dictionary categories in the same way you manage custom attributes of elements. Read more in section Add and manage custom attributes [page 84].

Related Information

[Manage Definitions for Risks and Controls [page 73]](#)
[Add and Manage Custom Attributes [page 84]](#)

11.1.3 Manage Definitions for Risks and Controls

How administrators can define dictionary categories for risks and controls and configure their attributes.

With the centralized risks and controls management, you can configure custom risks and controls data types and manage risk and control objects in the dictionary.

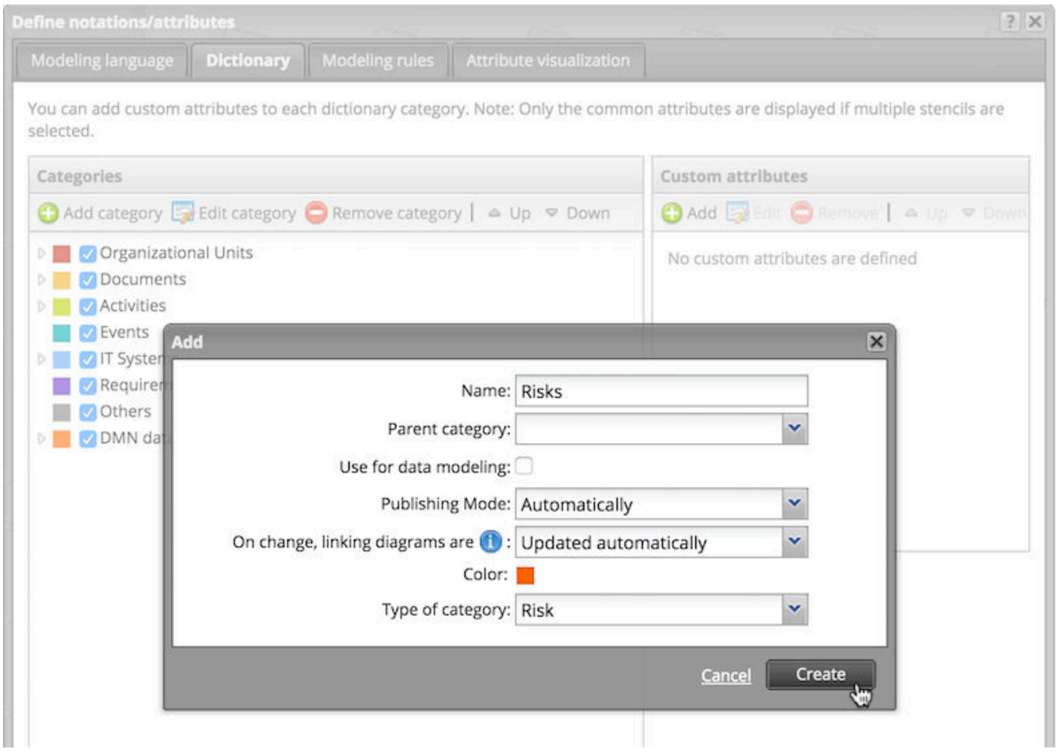
This way, you can ensure your risks and controls are consistent throughout your process landscape and facilitate re-use of those already defined.

Create Dictionary Categories for Risks and Controls

> ⓘ Note
>
> We recommend using multiple risk attributes if you need more than one category for risks and controls. This means you create one dictionary category for each type of risk, for example financial risks, legal risks, or health risks.

To create dictionary categories, follow these steps:

1. In the explorer, click *Setup > Define notations/attributes*.
2. Switch to the *Dictionary* tab and create at least two new categories:
3. - One category for risks

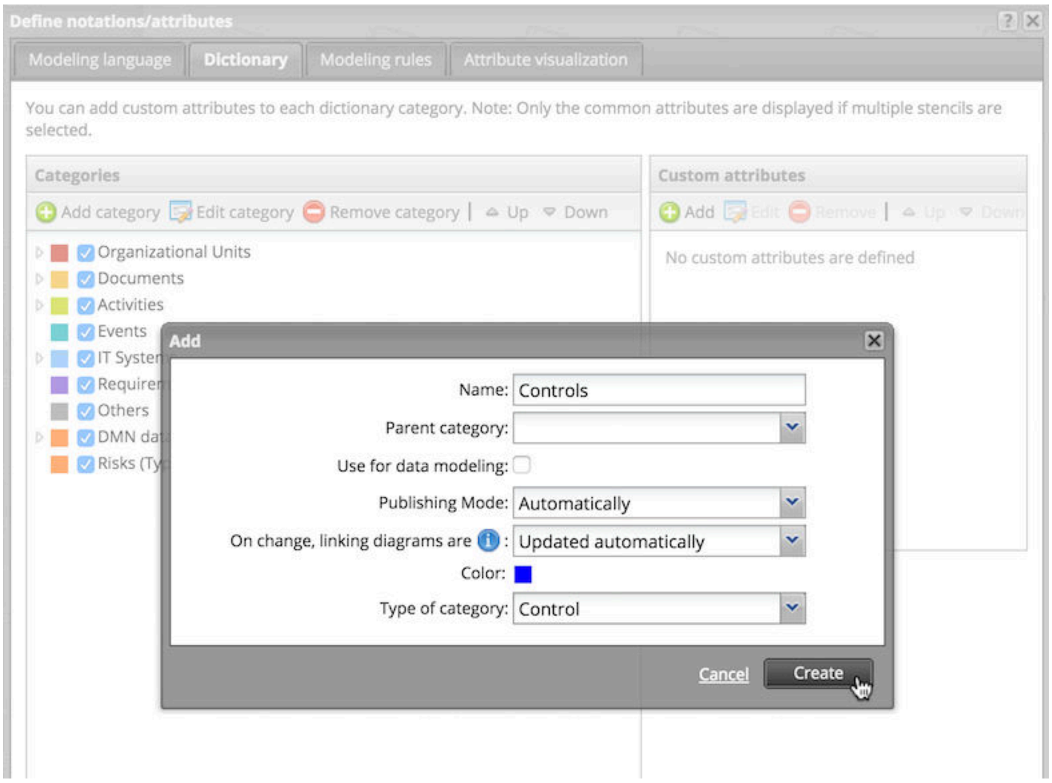


You can add custom attributes to each dictionary category. Note: Only the common attributes are displayed if multiple stencils are selected.

No custom attributes are defined

Name: Risks
Parent category:
Use for data modeling: ☐
Publishing Mode: Automatically
On change, linking diagrams are: Updated automatically
Color: 🟧
Type of category: Risk

- One category for controls



You can add custom attributes to each dictionary category. Note: Only the common attributes are displayed if multiple stencils are selected.

No custom attributes are defined

Name: Controls
Parent category:
Use for data modeling: ☐
Publishing Mode: Automatically
On change, linking diagrams are: Updated automatically
Color: 🟦
Type of category: Control

4. Set the type of the category to *Risks or Controls*.
5. To customize your risks and controls definition, add additional attributes to these categories. The attributes resemble the table headers in your risks or controls tables, for example *severity*, *control interval*, or *responsibility*.

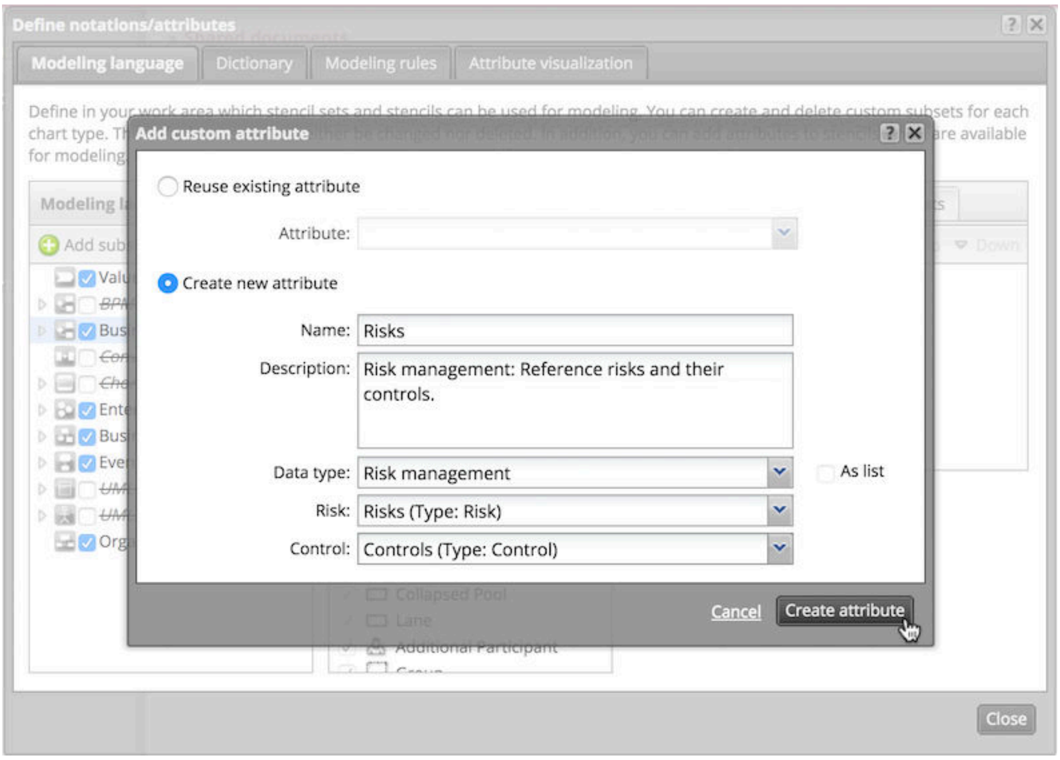
> ⓘ Note
>
> The following attributes can be modified in the editor:
>
> - Single line text
> - Drop-down box
> - Number
>
> Custom attributes of other types can only be modified in the dictionary.

Configure Risk Management Element Attributes

Follow these steps:

1. Switch to the *Modeling Language* tab and create a custom *Risk Management* attribute.
2. When configuring the attribute, reference the newly-created *Risk* and *Control* categories.

> ⓘ Note
>
> Only the elements of the configured categories can be used in the risk and control tables. Elements from subcategories are not available.



Add custom attribute

○ Reuse existing attribute

Attribute:

● Create new attribute

Name: Risks

Description: Risk management: Reference risks and their controls.

Data type: Risk management ☐ As list

Risk: Risks (Type: Risk)

Control: Controls (Type: Control)

3. Define risk and controls for diagrams in your process landscape.

11.1.4 Managing Standard Dictionary Categories

For workspace administrators: Learn how to enable standard dictionary categories.

The standard dictionary categories *Processes* and *Requirements* are disabled by default. Workspace administrators can enable these categories.

> ⓘ Note
>
> - Existing categories are not overwritten when a standard category is enabled.
> - The standard category *Processes* was introduced with SAP Signavio Process Manager version 17.0. If your workspace already had a custom dictionary category with the name **Processes** in earlier versions, the custom category was renamed to **Processes (Custom)**. You can rename the custom category, but you can't change the name back to **Processes**.

To enable the dictionary category, follow these steps:

1. Open the explorer and choose ▶ *Setup* ▶ *Define notations/attributes* ◀.
   The configuration dialog for notations and attributes opens.
2. Go to the *Dictionary* tab.
3. To activate the standard category *Processes*, activate the checkbox.
4. Specify the other settings as needed.
5. Confirm with *Close*.

Modeling Elements

Modelers can link to entries from all enabled standard categories from modeling elements that are not restricted to specific categories. For example, most elements in navigation maps can be linked to all dictionary entries.

Most modeling elements can only link to matching categories.

For value chains, dictionary entries from the category *Processes* can be linked to the following modeling elements:

- Process
- Collapsed Process

Access Rights

- Adjust the access rights for the dictionary category.

For details, see section Setting Access Rights to the Dictionary [page 21].

Related Information

Add Custom Categories for Dictionary Entries [page 69]

11.2 Main Attributes and More Attributes for Diagram Types

Check what attributes are available for your diagram.

Business Process Modeling and Notation (BPMN)

Main Attributes	Description
Documentation	Annotates the BPMN element, such as descriptions and other documentation.
Name	Refers to the descriptive name of the BPMN element.
Process Type	Provides additional information about the level of abstraction modeled by this process.
Diagram Orientation	-

More Attributes	Description
Auditing	Specifies audit-related properties. Auditing can be defined for a process only.
Author	Applies to the original diagram author.
Categories	Can be used for documentation or analysis purposes. Each group may belong to one category.
Creation Date	Defines the date on which the diagram was created.
Data Input Set (depreciated)	Represents a collection of data input elements that together define a valid set of data inputs.
Data Inputs	Serves as a declaration that a particular kind of data will be used as input of the *InputOutputSpecification*.
Data Output Set (depreciated)	Serves as a collection of data output elements that together may be produced as output from an activity or event.
Data Outputs	Serves as a declaration that a particular kind of data will be used as output of the *InputOutputSpecification*.
Errors	Represents the error definition.
Exporter	Identifies the tool that is exporting the BPMN 2.0 model file.
Exporter Version	Identifies the version of the tool that is exporting the BPMN 2.0 model file.

More Attributes	Description
Expression Language	A language may be provided so that the syntax of expressions used in the diagram can be understood.
Flat Design	Remove the color gradient of this element.
Imports	Represents XML imports.
Input Sets	Represents a collection of data input elements that together define a valid set of data inputs.
Interfaces	-
Invisible Pool Name	Represents a pool element without any boundary. This property sets the name of the invisible pool (and referenced process element in BPMN 2.0 XML) represented by the canvas itself.
Is closed	Refers to a boolean value specifying whether interactions, not modeled in the process can occur when the process is executed or performed. If the value is true, they may not occur. Such interactions such as sending and receiving messages and events. If the value is false, they may occur.
Is executable	Represents an optional boolean value specifying whether the process is executable.
Item Definitions	Defines the type of a structure or references a definition.
Language	Names the language in which the text is written.
Messages	Refers to messages sent and received.
Modification Date	Defines the date on which the diagram was last modified.
Monitoring	Specifies monitoring-related properties. Monitoring can be defined for a process only.
Namespaces	Provides abbreviations to URLs.
Output Sets	Serves as a collection of data output elements that together define a valid set of data outputs.
Process ID	Defines the ID of the container process used in the exported BPMN 2.0 XLM. The ID has to be a valid *XSD:id* string and identifies a process as unambiguous.
Properties (depreciated)	Refers to modeler-defined properties that may be added to an activity. These properties are local to the activity (for example, *Add Customer Name*).
Properties	Refers to modeler-defined properties that may be added to an activity. These properties are local to the activity, but subelements have access (for example, *Add Customer Name*).
Resources	Used to specify resources that can be referenced by activities.
Signals	Defines the signals provided for signal events.
Target Namespace	Defines the XML namespace of the elements inside the document.

More Attributes	Description
Type Language	Identifies the type system used by the elements of this definition.
Version	Defines the version number of the diagram.

QuickModel

Main Attributes	Description
N/A	-

More Attributes	Description
N/A	-

Value Chain

Main Attributes	Description
Description	Refers to a detailed description of the element.

More Attributes	Description
N/A	-

Enterprise Architecture Diagram (ArchiMate 3.0)

Main Attributes	Description
Documentation	Used to annotate the ArchiMate element, such as descriptions and other documentation.
Name	Represents the descriptive name of the ArchiMate element.
Color	-

More Attributes	Description
Version	Defines the version number of the diagram.
Author	Applies to the original diagram author.
Namespaces	Refers to additional namespaces and their prefixes used in the diagram.

More Attributes	Description
Target Namespace	Defines the XML namespace of the elements inside the document.
Creation Date	Defines the date on which the diagram was created.
Modification Date	Defines the date on which the diagram was last modified.

Unified Modeling Language (UML) Use Case

Main Attributes	Description
Description	Refers to a detailed description of the element.
Name	Refers to the descriptive name of the UML use case.

More Attributes	Description
N/A	-

Customer Journey Map

Main Attributes	Description
Description	Refers to a detailed description of the element.

More Attributes	Description
N/A	-

Navigation Map

Main Attributes	Description
Description	Refers to a detailed description of the element.

More Attributes	Description
N/A	-

Business Decision Diagram (DMN 1.2)

Main Attributes	Description
Documentation	Allows for optional text documentation about the diagram.

More Attributes	Description
N/A	-

UML Class

Main Attributes	Description
Description	Refers to a detailed description of the element.
Name	Refers to the descriptive name of the UML class.

More Attributes	Description
N/A	-

BPMN Choreography

Main Attributes	Description
Documentation	Annotates the BPMN element, such as descriptions and other documentation.
Name	Refers to the descriptive name of the BPMN element.
Process Type	Provides additional information about the level of abstraction modeled by this process.

More Attributes	Description
Auditing	Specifies audit-related properties. Auditing can be defined for a process only.
Monitoring	Represents a hook for specifying monitoring-related properties. Monitoring can only be defined for a process.
Flat Design	Removes the color gradient of this element.
Version	Defines the version number of the diagram.
Author	Applies to the original diagram author.
Language	Holds the language in which the text is written.

More Attributes	Description
Target Namespace	Defines the XML namespace of the elements inside the document.
Creation Date	Defines the date on which the diagram was created.
Modification Date	Defines the date on which the diagram was last modified.
Item Definitions	Defines the type of a structure or references a definition.
Signals	Defines the signals provided for signal events.
Exporter	Identifies the tool that is exporting the BPMN 2.0 model file.
Exporter Version	Identifies the version of the tool that is exporting the BPMN 2.0 model file.
Invisible Pool Name	Represents a pool element without any boundary. This property sets the name of the invisible pool (and referenced process element in BPMN 2.0 XML) represented by the canvas itself.
Properties (depreciated)	Refers to modeler-defined properties that may be added to an activity. These properties are local to the activity (for example, *Add Customer Name*).
Properties	Refers to modeler-defined properties that may be added to an activity. These properties are local to the activity, but subelements have access (for example, *Add Customer Name*).
Data Inputs	Serves as a declaration that a particular kind of data will be used as input of the *InputOutputSpecification*.
Data Outputs	Serves as a declaration that a particular kind of data will be used as output of the *InputOutputSpecification*.
Input Sets	Represents a collection of data input elements that together define a valid set of data inputs.
Output Sets	Serves as a collection of data output elements that together define a valid set of data outputs.
Data Input Set (depreciated)	Represents a collection of data input elements that together define a valid set of data inputs.
Data Output Set (depreciated)	Serves as a collection of data output elements that together may be produced as output from an activity or event.
Is closed	Refers to a boolean value specifying whether interactions, such as sending and receiving messages and events, not modeled in the process can occur when the process is executed or performed. If the value is true, they may not occur. If the value is false, they may occur.
Is executable	Represents an optional boolean value specifying whether the process is executable.
Process ID	Defines the ID of the container process used in the exported BPMN 2.0 XLM. The ID has to be a valid *XSD:id* string and identifies a process as unambiguous.
Resources	Used to specify resources that can be referenced by activities.

More Attributes	Description
Messages	Refers to messages sent and received.
Errors	Represents the error definition.
Interfaces	-
Namespaces	Provides abbreviations to URLs.
Categories	Can be used for documentation or analysis purposes. Each group may belong to one category.
Imports	Represents XML imports.

Event-Driven Process Chain (EPC)

Main Attributes	Description
Title	Refers to the title of the element.
Description	Refers to a detailed description of the element.
Process Link	Refers to a link to another diagram or process resource.
Version	Represents the version number of the diagram.
Author	Applies to the original diagram author.

More Attributes	Description
N/A	-

Organization Chart

Main Attributes	Description
Description	Used to annotate the organizational unit, such as descriptions and other documentation.

More Attributes	Description
N/A	-

BPMN Conversation

Main Attributes	Description
Name	Represents the descriptive name of the BPMN element.
Documentation	Annotates the BPMN element, such as descriptions and other documentation.

More Attributes	Description
N/A	-

Process Documentation Template

Main Attributes	Description
Font Color	-

More Attributes	Description
Element ID	-

Journey Model

Main Attributes	Description
N/A	-

More Attributes	Description
N/A	-

11.3 Add and Manage Custom Attributes

For workspace administrators: Learn how to add custom attributes for diagram elements and dictionary categories.

You can add custom attributes for diagram elements and dictionary categories. Custom attributes work in the same way as standard attributes in a modeling notation and can also be displayed in SAP Signavio Process Collaboration Hub.

Custom attributes can be added for modeling elements and dictionary categories.

Adding a Custom Attribute for a Modeling Element

Follow these steps:

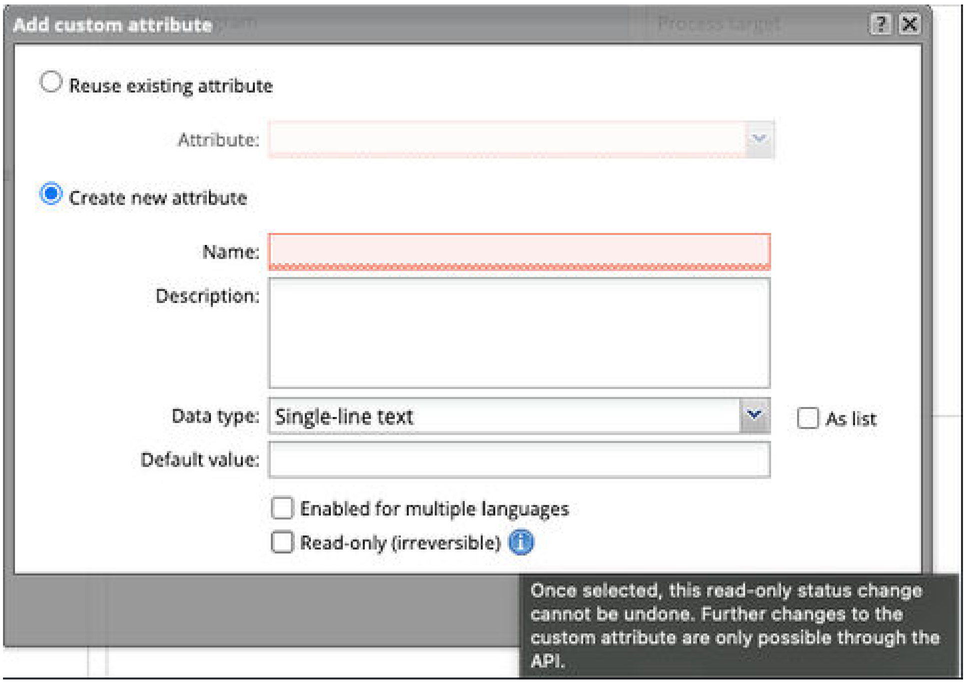
1. In the explorer, select ▸ *Setup* ▸ *Define notations/attributes* ▸.
2. In the tab *Modeling language*, select a notation.
3. Select a diagram element or dictionary category. To select more than one element, hold *Shift* or *Ctrl*.
4. In the tab *Custom Attributes*, choose ⊕ (*Add*).
   From here, you can either create a **new** custom attribute or **reuse** an attribute you already have available in your workspace.
   - (Optional) To **reuse** a custom attribute, choose *Reuse existing attribute*, select a name from the *Attribute* list, and confirm with *Reuse attribute*.
5. To create a **new** attribute, choose *Create new attribute*.
6. Fill in the *Name* and *Description* fields for at least one language offered.

   > ⓘ Note
   >
   > By default, the content is the same for all languages. To enable users to add different attribute content for each of your configured languages, fill the *Enabled for multiple languages* checkbox.

7. Select a *Data type* from the list. You can create list attributes by activating *As list*.

   > ⓘ Note
   >
   > *Data type* can be enabled for *Single-line text* and *Multi-line text*.
   >
   > You can only edit *Data type* or *As list* before saving the attribute.

8. Fill the *Read-only (irreversible)* checkbox for the value of a custom attribute to not be changed further in the workspace by users.
   As a result, the custom attribute displays as a *Read-only* item.



● Create new attribute

Data type: Single-line text

Once selected, this read-only status change cannot be undone. Further changes to the custom attribute are only possible through the API.

> ⓘ Note
>
> You can apply the *Read-only (irreversible)* option upon new custom attribute creation only. Once applied and confirmed, the *Read-only* status cannot be reversed. Further changes to the value of the custom attribute must be performed through the API.

9. Confirm with *Create attribute*.

> ⓘ Note
>
> The *Read-only (irreversible)* option functions in the same way where it is also available for creating new custom categories for **dictionary** entries and for **QuickModel** configuration.

Adding a Custom Attribute for a Dictionary Category

Follow these steps:

1. In the explorer, select ▶ *Setup* ▶ *Define notations/attributes* ▶.
2. Switch to the tab *Dictionary*.
3. Select a dictionary category or dictionary subcategory.
4. In the tab *Custom Attributes*, choose ⊕ (*Add*).
5. You can create a new custom attribute or reuse an attribute you already have available in your workspace.
    - To reuse a custom attribute, select it from the list.
    - To create a new attribute, enter a name and a description for the new attribute. Select the data type for the attribute. You can create list attributes by activating *As list*.
6. Choose *Create attribute* to save.

> ⓘ Note
>
> You can't edit the *data type* or the *As list* option after saving the attribute.

Showing Custom Attributes ID

Technical ID section is displayed in the *Custom attributes* tab of all processes or objects.

Reusing Attributes

To make the same attribute available for different elements or dictionary categories, you can reuse attributes that are already available in your workspace.You can show the technical ID of custom attributes for processes, tasks, and dictionary items directly in the UI, offering your users a better experience with a simplified process for retrieving them. If this feature is activated, the

Reused attributes have the same ID.

In SAP Signavio Process Collaboration Hub, attributes can be populated from a linked diagram if an attribute with the same ID is available for both the linking element and the linked diagram.

Managing Custom Attributes

In the tab *Custom Attributes*, you can manage the custom attributes in your workspace.

To access the custom attributes you want to change, follow these steps:

1. In the Explorer, select *Setup* > *Define notations/attributes*.
2. To edit an attribute for a modeling element, stay in the tab *Modeling language*.
   You can show the technical ID of custom attributes for processes, tasks, andTo edit an attribute for a dictionary entry, switch to the tab *Dictionary*.
3. Select a notation or a dictionary category.
4. Select a diagram element or dictionary category. To select more than one element, hold *Shift* or *Ctrl*.
5. The custom attributes for your selection are listed.
   - To view the attribute details, choose an attribute.
   - To change the order in which custom attributes are listed in the attribute panel, select an attribute and move it up or down with the arrow buttons.
   - To edit an attribute, choose *Edit*.

     > ⓘ Note
     >
     > The *data type* or the *As list* option are not available for editing.
   - To remove an attribute, choose *Remove* and confirm. If the attribute is used for more than one element, you can decide to remove it from all elements or only from the selected element.

Configure Custom Date Attributes

To change the timestamp format on diagrams, tasks, and dictionary categories, customize the date attribute.

By default, the format is `d/m/y` (for example, 15/02/25).

> ⓘ Note
>
> Once a date format is set, it cannot be changed.

Format Options

Option	Meaning	Example
`j`	current day of the month, without zeroes	1
`d`	current day of the month, with zeros	01
`D`	abbreviated day of the week	Wed
`l`	full day of the week	Wednesday
`F`	current month name	February
`M`	abbreviated current month name	Feb
`n`	current month in numerals without leading zeroes	2
`m`	current month in numbers with leading zeroes	02
`y`	current year, in two digits	25
`Y`	current year, in four digits	2025
`a`	lowercase am and pm	am
`A`	uppercase AM and PM	PM
`g`	12 hour format without leading zeroes	9:15
`h`	12 hour format with leading zeroes	09:15
`G`	24 hour format without leading zeroes	9:15
`H`	24 hour format with leading zeroes	09:15
`i`	minutes, with leading zeroes	05
`s`	seconds, with leading zeroes	09

Example

See examples of how the following timestamp is displayed: Friday, September 1st, 2025 at 03:05 pm:

- `y-m-d` is displayed as `25-09-01`
- `y/m/d` is displayed as `25/09/01`
- `F j, Y` is displayed as `September 1, 2025`
- `g:i:s A` is displayed as `3:05:00 PM`
- `l, F d, Y g:i:s A` is displayed as `Friday, September 01, 2025 3:05:00 PM`
- `F j, Y, g:i a` is displayed as `September 1, 2025, 3:05 pm`

Related Information

Define Custom Attributes for RACI [page 89]

Create Custom Attributes to Link Documents [page 90]

11.3.1 Define Custom Attributes for RACI

Learn how to create the custom attribute necessary to add RACI resposibilities to diagrams.

Responsibilities can be assigned directly to tasks. To enable modelers to do this, you need to define custom attributes.

To define custom attributes for RACI, follow these steps:

1. In the Explorer, select ▶ *Setup* ▶ *Define notations/attributes* ▶.
2. From the list *Modeling Language*, select *Business Process Diagram (BPMN 2.0)*.
3. From the list *Diagram element types*, select *Task*.
4. In the tab *Custom Attributes*, choose *Add*.
5. In the *Add custom attribute* dialog, enable *Create new attribute*.
6. Enter the name of the responsibility you want to assign to the task in the field *Name*.

> ⚠ Caution
>
> - Enter the names exactly as listed the table below. When you use different names, you won't be able to assign RACI responsibilities to tasks.
> - The additional definitions are only available when using custom attributes, not for connectors.
> - RACI definitions are only available in English, German, and French.

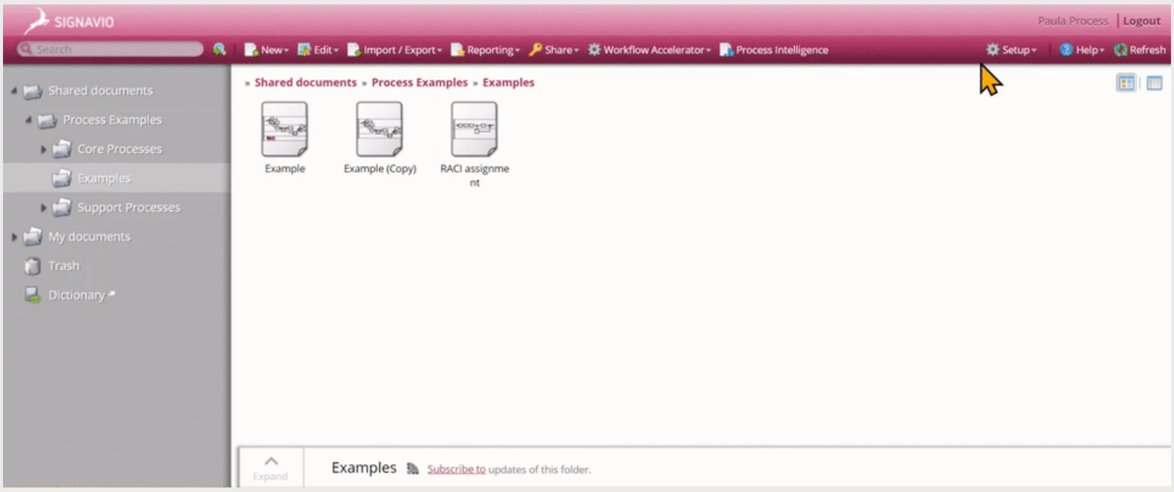
	English	**German**	**French**
R	responsible **or** additional responsible **or** additionally responsible	führt durch **or** führt zusätzlich durch	réalisateur
A	accountable	erteilt Freigabe **or** ist gesamtverantwortlich	autorité
C	consulted	wird konsultiert	consulté
I	informed	wird informiert	informé

7. To enable dictionary suggestions for *data type*, select *Dictionary link*.
8. We recommend to enable *As list*.

> ⓘ Note
>
> You can't edit the *data type* or the *As list*option after saving the attribute.

9. To ensure suggested dictionary entries are roles, select in *Only for* the category *Organizational Units*.
10. To save the custom attribute, click *Create attribute*.

> Example
>
> *Example:*



Related Information

Add and Manage Custom Attributes [page 84]

11.3.2 Create Custom Attributes to Link Documents

Learn how to create a custom attribute to enable modelers to link content to diagrams.

When you create a custom attribute of the data type *Document/URL*, modelers can use this attribute to link to documents in SAP Signavio file storage, your document management system, or in your network. They can also use this attribute to link to online documents.

To create a custom attribute for linking documents, follow these steps:

1. In the Explorer, select ▶ *Setup* ▶ *Define notations/attributes* ◀.
2. Select a notation , one or more subsets and a modeling element.
3. In the tab *Custom Attributes*, choose *Add*.
   In the *Add custom attribute* dialog, enable *Create new attribute*.
4. Insert a name and a description for the attribute.
5. For *data type*, select *Document/URL*.
6. Select *As list* to enable linking multiple images or documents to one element.

> Note
>
> The *data type* or the *As list* option is not available for editing after saving the attribute.

7. Choose *Create attribute* to save.

Related Information

Add and Manage Custom Attributes [page 84]

11.3.3 SAP Signavio Process Insights Integration

Learn how to add a custom attribute for linking SAP Signavio Process Insights to diagrams.

Deep links from SAP Signavio Process Insights standard performance indicators can be added to diagrams as links in custom attributes.

> ⓘ Note
>
> You need an administrator account create custom attributes.

To create a custom attribute for linking SAP Signavio Process Insights content, follow these steps:

1. In the explorer, select ▶ *Setup* ▶ *Define notations/attributes* ▶.
2. In the tab *Modeling language*, select *Business Process Diagram (BPMN 2.0)*.
3. Select the diagram element type *Task*.
4. In the tab *Custom Attributes*, choose ⊕ (*Add*).
5. Select *Create new attribute*.
6. Enter a name and a description for the new attribute.
7. Select the data type *Document/URL* for the attribute. You can create list attributes by activating *As list*.

   > ⓘ Note
   >
   > The *data type* or the *As list* option is not available for editing after saving the attribute.
8. Choose *Create attribute* to save.

Viewing Linked Content

To be able to view the linked content, users need the necessary permissions in SAP Signavio Process Insights.

Read more in the following sections of the user guide for SAP Signavio Process Insights:

- User Management
- Roles in Default Role Collections

Related Information

Standard Performance Indicators
Process Flows

11.4 Add and Manage Notation Subsets

> **Note**
>
> You need an administrator account to use this function.

You can configure which diagram types and diagram elements modelers can use in your workspace.

You can define subsets for each diagram type and enable or disable diagram elements in these subsets.

Subset Examples

To support modeling for different purposes in the process landscape, we recommend you start with notation subsets that are split by model complexity.

End-to-end process diagrams	End-to-end process diagrams provide a high-level perspective on your operations. For this level, we recommend using only the following elements: • start and end events • tasks • collapsed sub processes • pools/lanes • connectors
Complete processes	For modeling complete processes, start with the BPMN Core Elements subset and extend it if necessary.
Technical process steps	The technical level specifies the role IT systems play in your process. To specify technical details like exception handling and data storage, you need to make use of a large set of BPMN elements.

Add a Subset of Elements for a Notation

To define a subset for a modeling language, follow these steps:

1. Go to *Setup* > *Define notations/attributes*.

2. Select the modeling language.
3. Click *Add subset* .
4. Enter a name for the subset.
5. To list the diagram elements grouped by type in the shape repository, activate *Group diagram element types*.
6. Click *Save*.
   The subset is listed under the modeling language.
7. By default, every element is selected for the new subset. Select or remove elements for the subset.
   All changes are saved immediately.
8. Choose *Close* to leave the settings.

Copy a Subset

You can copy subsets and edit the copy.

Follow these steps:

1. Select the subset to duplicate.
2. Choose ⊕ (*Copy subset*).
3. Edit the name.
4. To list the diagram elements grouped by type in the shape repository, activate *Group diagram element types*.
5. Choose *Save*.
6. Edit the subset.
   All changes are saved immediately.
7. Choose *Close* to leave the settings.

Edit or Delete a Subset

It is not possible to edit or remove default subsets.

To edit or remove custom subsets, follow these steps:

1. Select the subset you want to edit or delete.
2.
   - To edit the subset, choose *Edit subset*.
     You can now edit the subset name and change the element grouping preferences.
   - To delete the subset choose *Remove subset* and confirm in the dialog.
3. Choose *Close* to leave the settings.

Related Information

Add and Manage Custom Attributes [page 84]

Add and Manage Notation Subsets [page 92]

11.5 Define Default Colors and Font Formats for Element Types

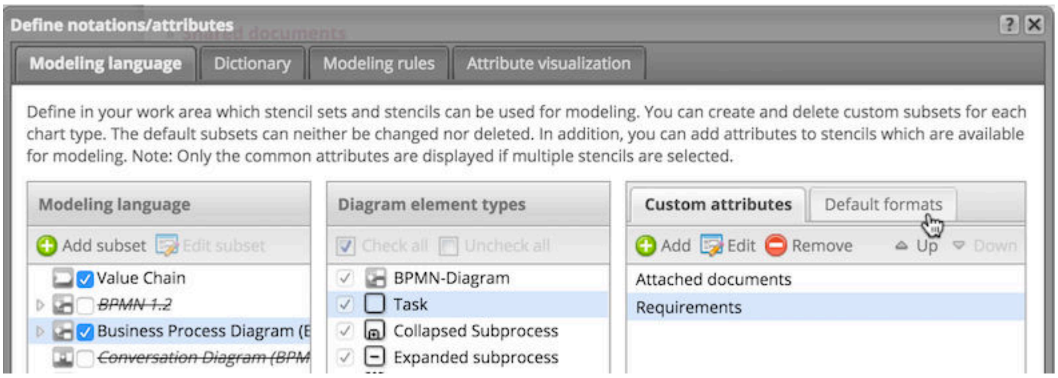
You can define custom default shape and font formats for element types. These formatting attributes are defined for all notation subsets. For example, if you change the background color of the *Task* element, the system changes all BPMN subsets accordingly. You can still overwrite these settings when formatting an element in the editor as described in the chapter Formatting elements .

The following default formatting options are available:

Font size	**Default** : `12`
Font bold	**Default** : `False`
Font italic	**Default** : `False`
Font color	**Default** : `#000000` (black)
Background color	**Default** : `#ffffcc` (yellow)
Border color	**Default** : `#000000` (black)
Solid color (no gradient)	**Default** : `False`

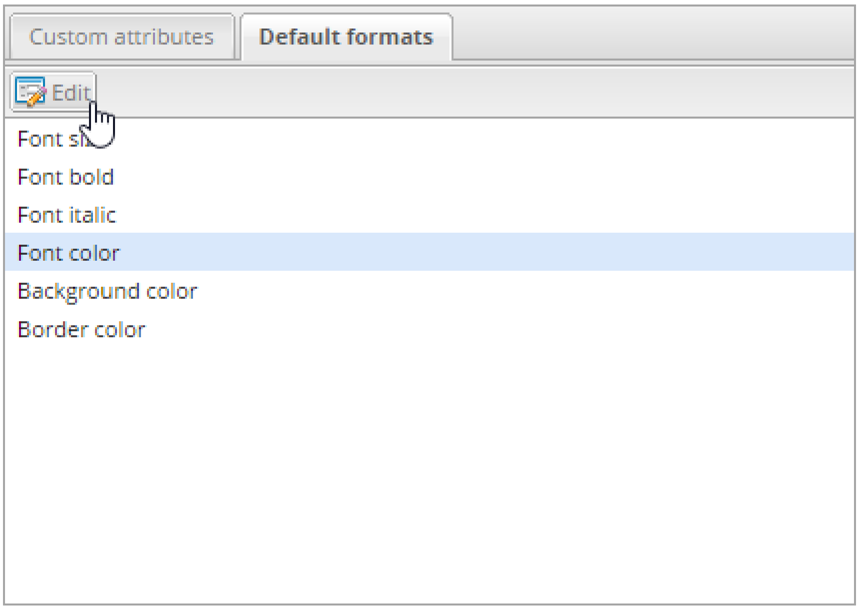
You can change the default format settings in the *Modeling Languages* tab of the notations/attributes configuration dialog:

1. Switch to the *Default Formats* tab and select an element type. In our example, we want to highlight the labels of all collapsed subprocesses of your BPMN diagrams in pink by default:

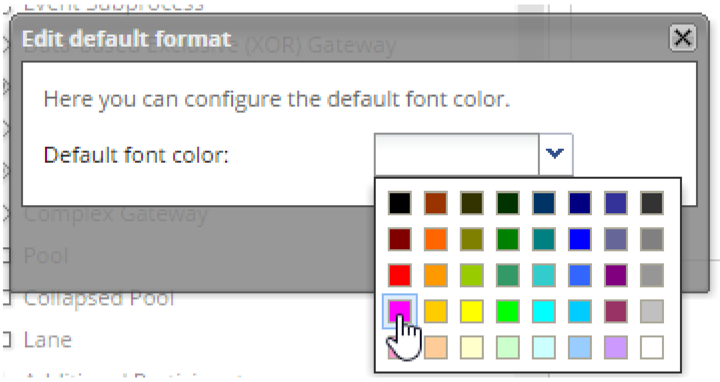


Define in your work area which stencil sets and stencils can be used for modeling. You can create and delete custom subsets for each chart type. The default subsets can neither be changed nor deleted. In addition, you can add attributes to stencils which are available for modeling. Note: Only the common attributes are displayed if multiple stencils are selected.

2. Select the setting you want to adjust and choose *Edit* or double-select the setting, such as *Font color*:



3. Adjust the settings accordingly. Here, we use the drop-down menu to select the color of our choice or insert the respective hexadecimal value:

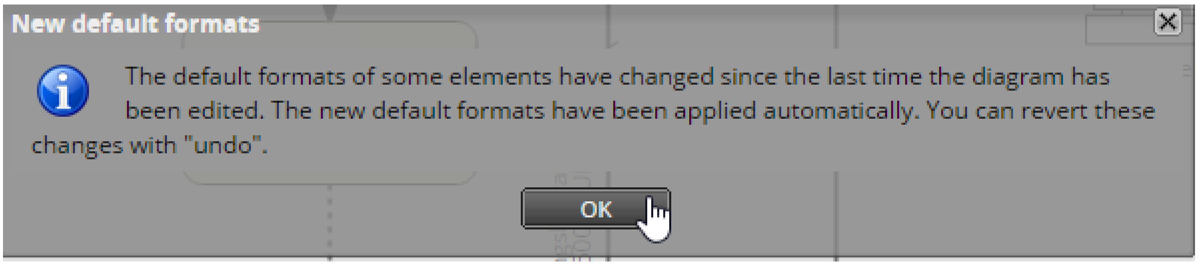


Here you can configure the default font color.

Default font color:

4. Choose *Apply* to save the changes. All existing elements of the corresponding type in the diagrams of your workspace will now be adjusted. SAP Signavio Process Manager will use the changed format for new diagrams as well.

When opening a diagram containing one or more corresponding elements, an information dialog informs you that the elements have been changed:



The default formats of some elements have changed since the last time the diagram has been edited. The new default formats have been applied automatically. You can revert these changes with "undo".

If you want to revert the changes, hold *Ctrl* + *Z* or choose *Undo*.

Related Information

Add and Manage Custom Attributes [page 84]

11.6 Manage Attribute Overlays

Set up attribute overlays: Add and define attribute overlays, also called attribute visualization layers.

With attribute overlays, also called attribute visualization layers, modelers can display attributes directly on the diagram canvas using different icons and colors. You as an administrator create and configure custom rules that define the state of each visualization layer.

Attribute overlays are available for the following diagram types:

- BPMN diagrams
- Value chain diagrams
- ArchiMate diagrams
- Organization charts

Create a Visualization Layer

In the explorer, follow these steps :

1. Choose *Setup* > *Manage attribute visualization*.
2. In the dialog, choose *Add new layer*.
   A new layer is created.
3. Enter a name for the new layer.
4. In the *Visualization* drop-down list, you can either select an icon or select *Property value*. When you select *Property value*, instead of an icon the value of the attribute is displayed.
5. For layers that are visualized with an icon, you can enable *Show Details*. The attributes that are used for calculating the rules are then displayed next to the icon.
6. Define the rules how the icons are displayed. See details below.
7. Choose *Close* to leave the dialog. The changes are applied immediately.

Rules for Visualization Layers

To set or edit the rules for visualization, follow these steps:

1. Choose *Setup* > *Manage attribute visualization*.
2. Open the rules by choosing *Define rules* or the displayed rule.
3. To add a new rule, choose *Add new rules*.

4. Define the rule set for displaying the icon.
   Every layer can contain several rules.
5. To set the color for the icon, select the icon.
   You can select one of the available colors or enter a hexadecimal color code.
6. Select values for the three parts of the rule: *Property*, *Relation* and *Value*.
   - In the *Property* section, you select the attribute.
   - The *Relation* selection contains several relational operators or boolean statements, depending on the attribute.
   - Set a *Value* if applicable.
7. You can connect rules with the AND or the OR operator:
   - To connect rules with AND, choose ... (*more options*) and add additional rules.
   - To connect rules with OR, add a new rule to the layer by choosing *Add new rules*.

Example

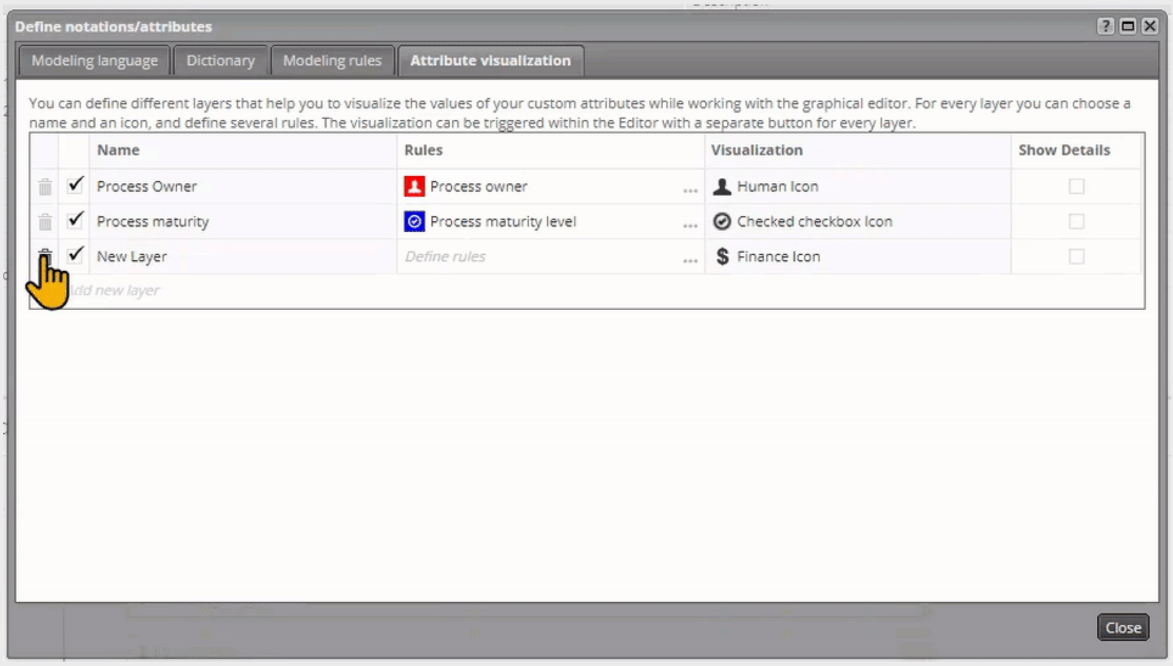
Example for attribute overlay settings:

In this example, you create an attribute overlay for the execution time that highlights two different durations:

- The execution time is highlighted in yellow if it is longer than 3 minutes.
- The execution time is highlighted in red if it is longer than 5 minutes

You need 2 rules to achieve this.

You create the first rule:

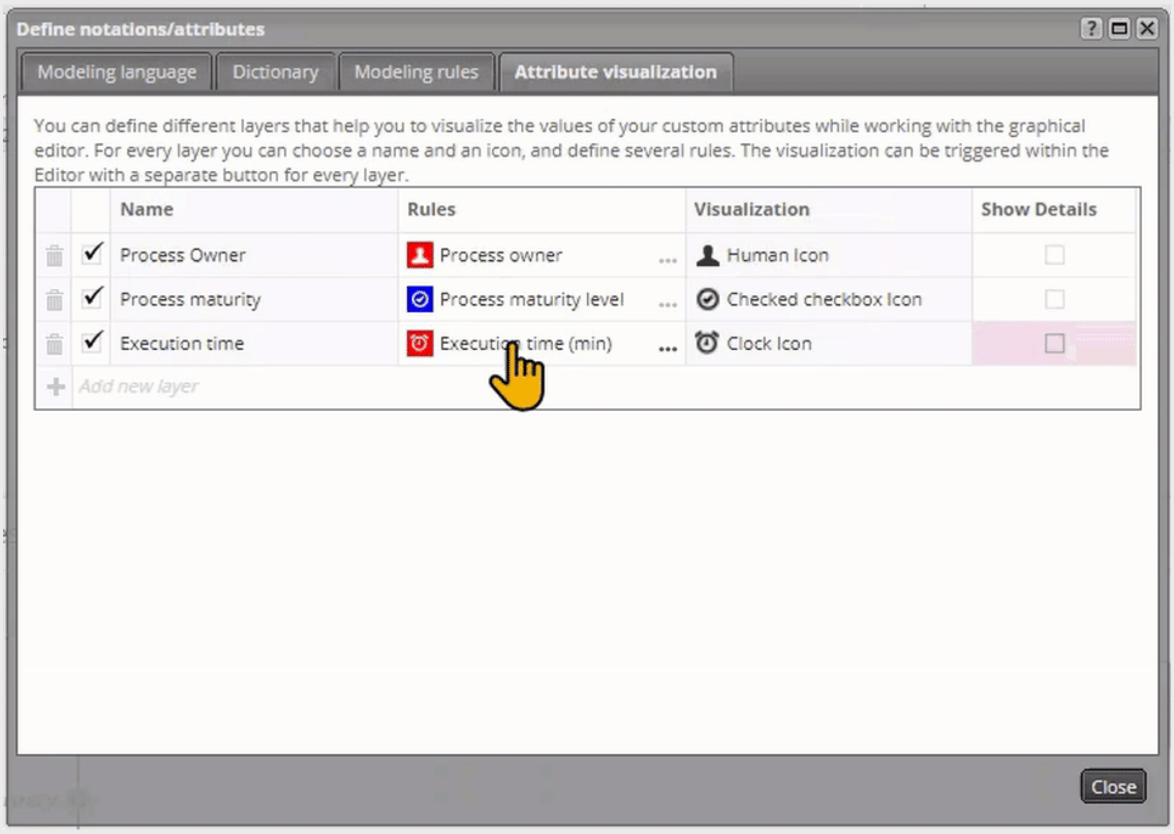


You can define different layers that help you to visualize the values of your custom attributes while working with the graphical editor. For every layer you can choose a name and an icon, and define several rules. The visualization can be triggered within the Editor with a separate button for every layer.

		Name	Rules	Visualization	Show Details
	✓	Process Owner	Process owner ...	Human Icon	☐
	✓	Process maturity	Process maturity level ...	Checked checkbox Icon	☐
	✓	New Layer	*Define rules* ...	$ Finance Icon	☐

dd new layer

Add the second rule:



You can define different layers that help you to visualize the values of your custom attributes while working with the graphical editor. For every layer you can choose a name and an icon, and define several rules. The visualization can be triggered within the Editor with a separate button for every layer.

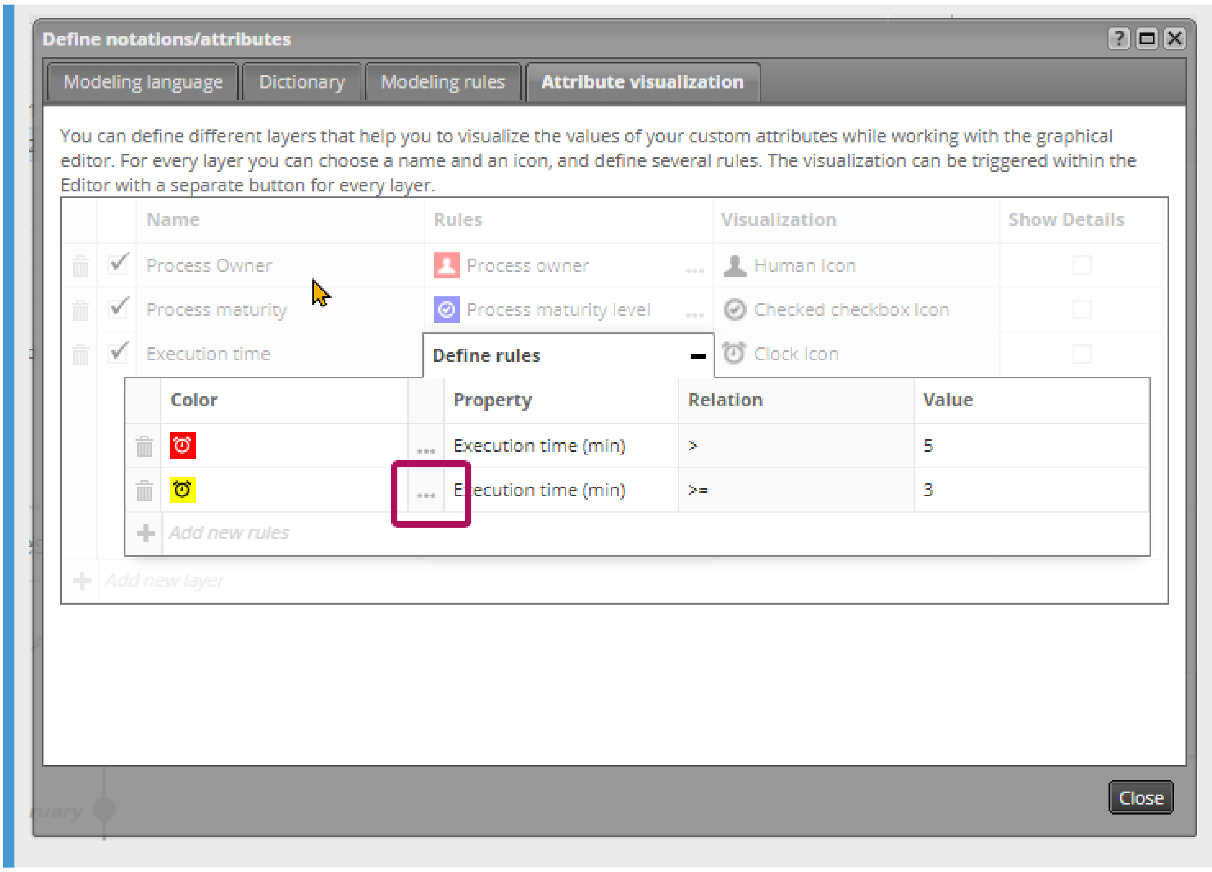
		Name	Rules		Visualization	Show Details
	✓	Process Owner	Process owner	…	Human Icon	☐
	✓	Process maturity	Process maturity level	…	Checked checkbox Icon	☐
	✓	Execution time	Execution time (min)	…	Clock Icon	☐
+	Add new layer					

The execution time attribute overlay can now be added by modeling users.

Operators

The rules are connected with OR, which is what is usually used for overlays.

To add rules connected with AND, you choose … (*more options*) instead of *Add new rules* to add additional rules.



You can define different layers that help you to visualize the values of your custom attributes while working with the graphical editor. For every layer you can choose a name and an icon, and define several rules. The visualization can be triggered within the Editor with a separate button for every layer.

	Name	Rules	Visualization	Show Details
✓	Process Owner	Process owner	Human Icon	☐
✓	Process maturity	Process maturity level	Checked checkbox Icon	☐
✓	Execution time		Clock Icon	☐

Color	Property	Relation	Value
🟥	Execution time (min)	>	5
🟨	Execution time (min)	>=	3

11.7 Managing Modeling Conventions

ⓘ Note

Access to this feature depends on your license. For more information, contact your workspace administrator.

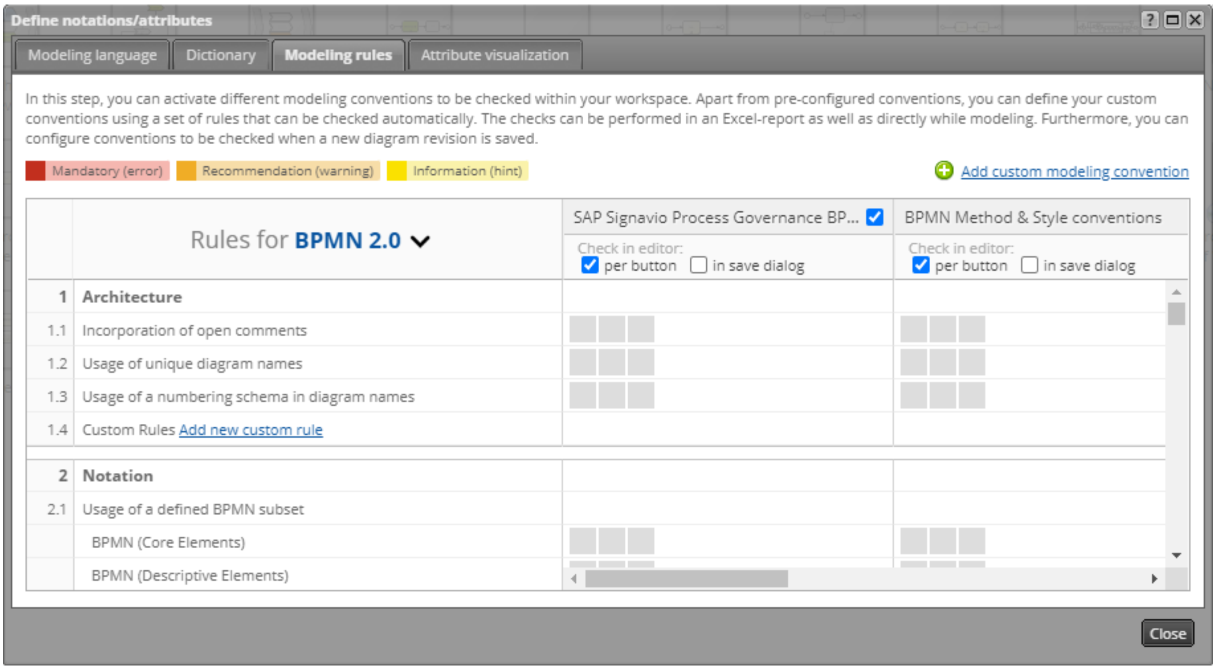
The *modeling convention* feature enables users to check if diagrams stick to certain rules regarding notation(/BPMN-language), labeling, process structure and diagram layout. This check can be displayed while modeling (or saving). Additionally, a modeling conventions report can be generated.

SAP Signavio offers **SAP Signavio Best Practices** modeling conventions as well as *custom modeling conventions*.

To manage modeling conventions in your work space you need to be a member of the *Administrators* group.

To access the modeling convention dialog open the explorer and choose *Setup*, then *Define modeling conventions* in the top drop-down menu.

The following window opens:



Define notations/attributes

In this step, you can activate different modeling conventions to be checked within your workspace. Apart from pre-configured conventions, you can define your custom conventions using a set of rules that can be checked automatically. The checks can be performed in an Excel-report as well as directly while modeling. Furthermore, you can configure conventions to be checked when a new diagram revision is saved.

🟥 Mandatory (error) 🟧 Recommendation (warning) 🟨 Information (hint)

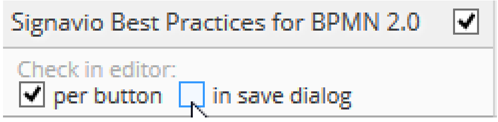
Add custom modeling convention

	Rules for **BPMN 2.0**	SAP Signavio Process Governance BP... ☑ Check in editor: ☑ per button ☐ in save dialog	BPMN Method & Style conventions Check in editor: ☑ per button ☐ in save dialog
1	**Architecture**		
1.1	Incorporation of open comments		
1.2	Usage of unique diagram names		
1.3	Usage of a numbering schema in diagram names		
1.4	Custom Rules Add new custom rule		
2	**Notation**		
2.1	Usage of a defined BPMN subset		
	BPMN (Core Elements)		
	BPMN (Descriptive Elements)		

In this dialog you can manage the existing modeling conventions and create new ones.

This dialog offers an overview over the existing modeling conventions. Furthermore conventions can be (de-)activated:

- Globally for the whole work space
- And specifically, the check button in the editor and the auto-check in the save dialog



Signavio Best Practices for BPMN 2.0 ☑

Check in editor:

☑ per button ☐ in save dialog

Defining Custom Modeling Rules and Conventions

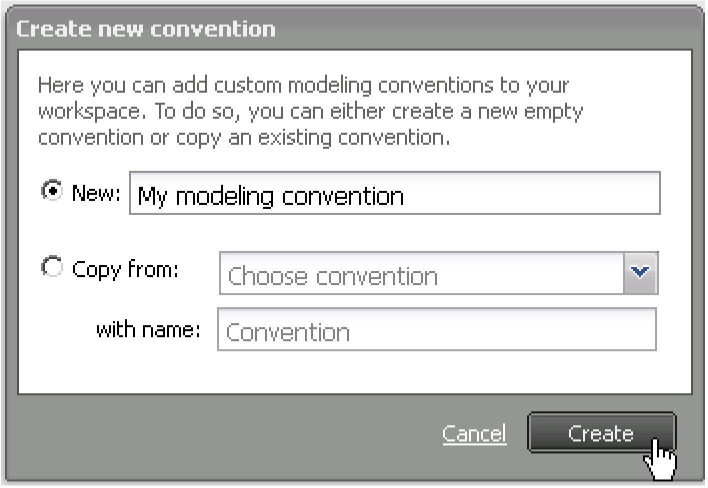
> ⓘ Note
>
> Access to this feature depends on your license. For more information, contact your workspace administrator.

In addition to the **SAP Signavio Best Practice** modeling convention, it is possible to define custom modeling rules and conventions that fit your needs.

Custom rules can be defined to complement already existing modeling conventions, whereas defining a new convention means creating a customized set of rules, either from scratch or derived from an existing convention.

If you want to create a whole new modeling convention, select *Add custom modeling convention* in the upper right corner of the dialog:

Now you can chose between creating a new convention from the beginning or copying an existing convention:



Create new convention

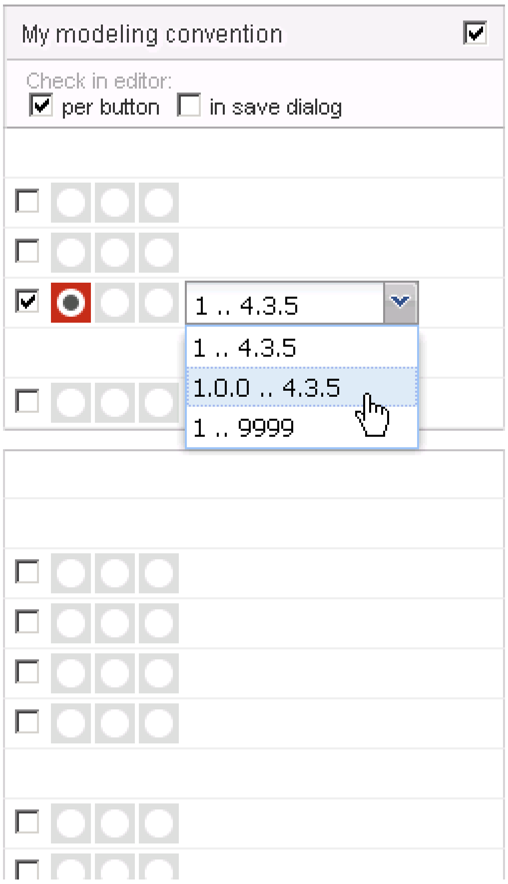
Here you can add custom modeling conventions to your workspace. To do so, you can either create a new empty convention or copy an existing convention.

● New: My modeling convention

○ Copy from: Choose convention

with name: Convention

Afterwards, the new convention shows up as a new column in the convention table and you can now configure it by activating rules and adjusting the importance of rules and other parameters:



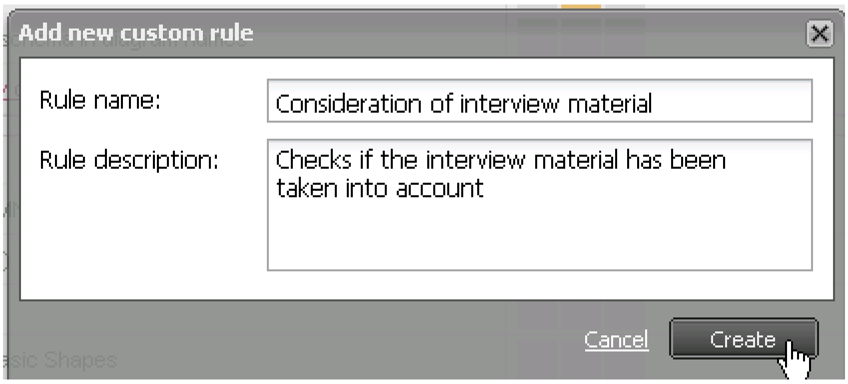
My modeling convention ☑

Check in editor: ☑ per button ☐ in save dialog

The new modeling convention is saved after closing the dialog and is now included in the convention checks if activated (default setting).

To add a custom rule, choose *Add new custom rule* in the corresponding section of the convention's table:

A dialog will appear. Here you can insert the name and description of your new custom rule:

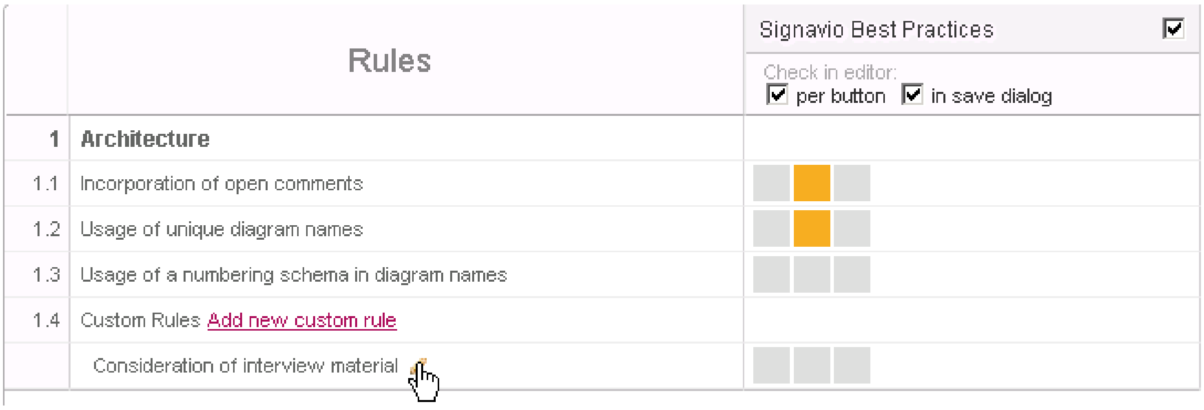


Add new custom rule

Rule name: Consideration of interview material

Rule description: Checks if the interview material has been taken into account

After choosing *Create* , the new rule appears in the modeling convention dialog, where it can be edited by selecting the pen icon:



	Rules	Signavio Best Practices ☑ Check in editor: ☑ per button ☑ in save dialog
1	**Architecture**	
1.1	Incorporation of open comments	
1.2	Usage of unique diagram names	
1.3	Usage of a numbering schema in diagram names	
1.4	Custom Rules Add new custom rule	
	Consideration of interview material	

> **Note**
>
> These custom rules cannot be checked automatically by our system. They need to be checked manually.

In addition to creating this kind of custom rules, you can define custom mandatory attributes. If a process diagram contains empty mandatory attributes, this will be reported by the modeling convention check.

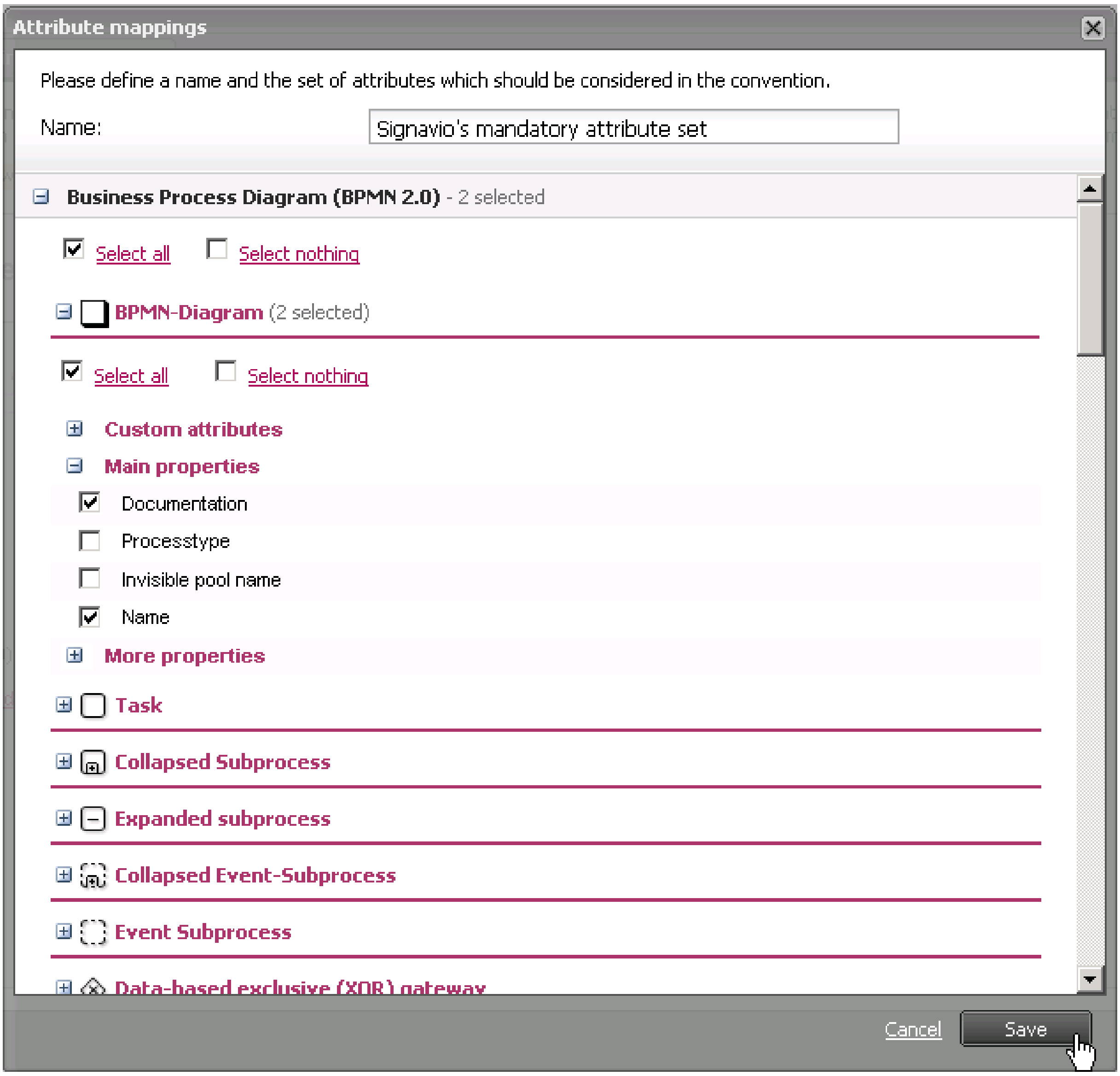
To define mandatory attributes within an existing modeling convention, open the modeling convention dialog and click *Add new rule* under *Definition of mandatory attributes* :

2.2 Definition of mandatory attributes Add new rule

Activity Documentations

Checks if all mandatory attributes are set.

In the following dialog, you can now select the attributes you want to be mandatory:



Please define a name and the set of attributes which should be considered in the convention.

Name: Signavio's mandatory attribute set

Business Process Diagram (BPMN 2.0) - 2 selected

☑ Select all ☐ Select nothing

BPMN-Diagram (2 selected)

☑ Select all ☐ Select nothing

Custom attributes

Main properties

- ☑ Documentation
- ☐ Processtype
- ☐ Invisible pool name
- ☑ Name

More properties

After saving the configuration, the attribute set will be added to the modeling convention table.

To change the selection of mandatory attributes or to delete the mandatory attribute set, choose the pen icon.

Preventing Accidental Overwriting of Dictionary Entries

To report and prevent overwriting of dictionary items, you can set the necessary checks in the modeling guidelines.

The checks are in section 2.4, *Consistency with attributes of the linked dictionary item*.

When this rule is activated, modelers get an info, warning. or error, depending on your configuration, when dictionary items are changed while modeling. Additionally, the guidelines report can provide an overview of where in a folder items have been overwritten.

11.8 Manage External Data Sources

ⓘ Note

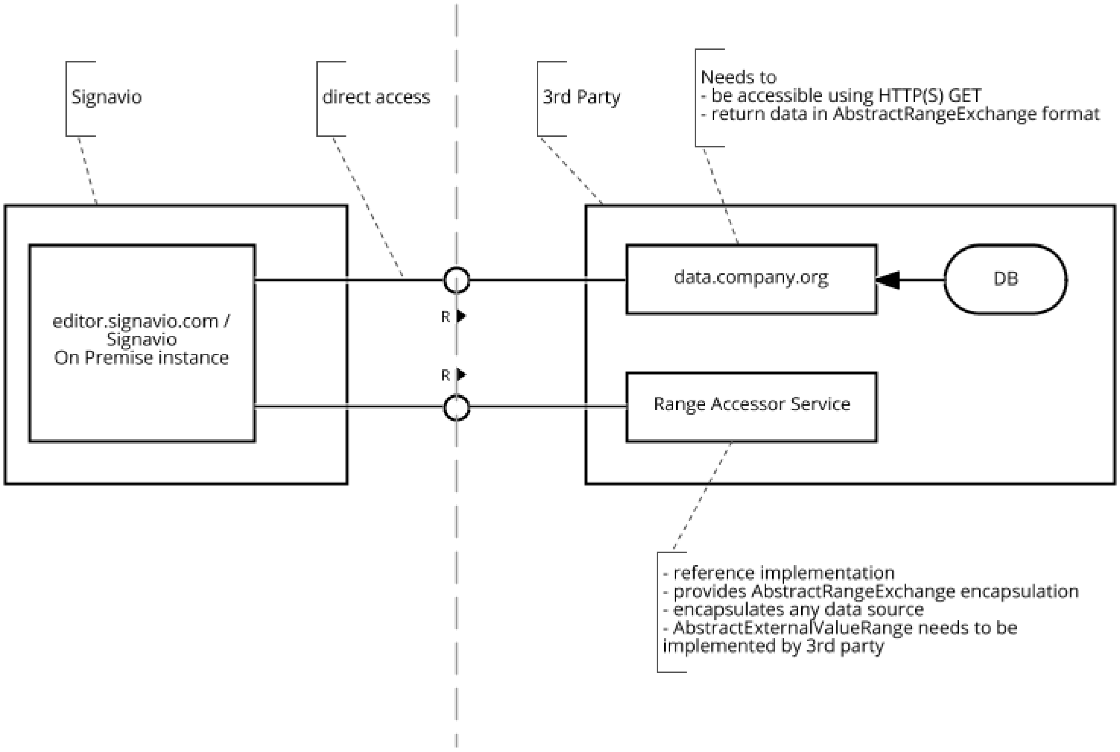
The external data sources interface for DMN data objects is available for your On Premises installation on request. In case you want to activate the interface, please contact our SAP Signavio service experts from the SAP for Me portal.

In the SAP Signavio *Decision Manager*, you can use to define the data types of input columns in DMN model decision tables.

For the data types *string lists* (enumerations) and *hierarchies* , you can set up external services to retrieve corresponding data objects.

Architecture

The following diagram shows the system architecture of the external data source interface:



The component on the left represents the SAP Signavio system. The right part of the diagram represents a third-party service with access to the to-be transferred data. It may contain a bridging application that reformats third party data so the SAP Signavio Decision Manager can read it.

There are two options to set up a service so that third party data can be accessed by the SAP Signavio Decision Manager.

The options are represented by the two outgoing request/response channels in the diagram.

- *Direct access:* For this, the service URL defined in the SAP Signavio Decision Manager has to be accessible via HTTP(S) GET requests. The service response needs to match the SAP Signavio data format. See how to match the format below.
- *The Range Accessor Service:* SAP Signavio offers a reference web application that can either be used as an adapter to map data from existing services or to build up an entirely independent data service. To use this web app provided by SAP Signavio, you need to calibrate SAP Signavio accordingly.

Direct Third Party Access: Data Format

The SAP Signavio system needs the response of an external service request to comply to the following JSON structure:

```
<response> := <enumResponse> | <hierarchyResponse> | [<enumItem>*]
<enumResponse> := { type: "enumeration", enumItems: [<enumItem>*] }
<enumItem> := { id:<String>, title:<String> }

<hierarchyResponse> := { type: "hierarchy", hierarchyItems: [<hierarchyItem>*] }
<hierarchyItem> := {id:<String>, title:<String>, children: [<hierarchyItem>*] }
```

The response is either declared as an enumeration or hierarchy and contains a type definition and items.

The following examples serve as references for the data structures necessary.

Example enumeration:

```
{ type: "enumeration",
          enumItems:  [
             {id:"firstPlace", title:"Gold medal"},
             {id:"secondPlace", title:"Silver medal"},
             {id:"thirdPlace", title:"Bronze medal"}
          ]
       }
```

The enumeration response is a JSON object with a type declaration and a JSON array of enumeration items. Each item is a JSON object with the mandatory attributes *id* and *title* . Any other attributes will be ignored.

Example hierarchy:

```
{
      type: "hierarchy",
      hierarchyItems: [{
        id: "am",
        title: "America"
      }, {
        id: "eu",
        title: "Europe",
        children: [{
          id: "uk",
          title: "United Kingdom"
        }, {
          id: "de",
          title: "Germany",
          children: [{
```

```
              id: "berlin",
              title: "Berlin"
            }]
          }, {
            id: "fr",
            title: "France"
          }]
        }, {
          id: "as",
          title: "Asia"
        }]
      }
```

The hierarchy response is a JSON object with a type declaration and an array of hierarchy items. Each item is an object with the mandatory attributes *id* and *title* attribute and the optional attribute *children* . *children* is an array having the same format as hierarchy items. Any other attributes will be ignored.

> ⓘ Note
>
> The *id* value must not contain any whitespace characters and the value of the *title* attribute has to start with an alphabet letter.

Range Accessor Service

SAP Signavio offers a reference web application that can either be used as an adapter to map data from existing services or to build up an entirely independent data service.

To use this service, extend the *AbstactExternalValueRange* class (using a non-abstract class) and dispatch the *RangeServingServlet* . This can facilitate the reuse of an existing service. The service can be called and the data can be mapped to the specified data format.

In either way, the output has to comply with the data format as specified above. The sample web app **SAP Signavio Range Accessor Service** contains (among others) the following files and folders (packages) of interest:

`RangeServingServlet.java (com/signavio/rangeservice/servlet)`

`AbstractExternalValueRange.java (com/signavio/rangeservice/conversion/)`

`public byte[] getValues(HttpServletRequest req) throws JsonProcessingException {...}`.

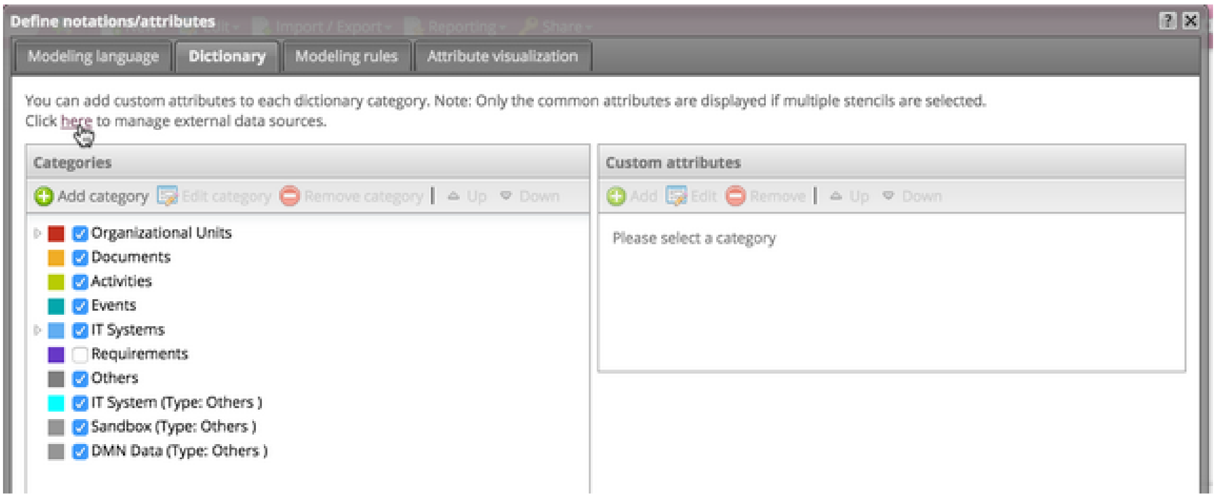
The subclasses in the example subpackage serve as simple examples of service implementations for enumeration and hierarchy providers.

`AbstractRangeExchange.java (com/signavio/rangeservice/util/exchange/)`

> ⓘ Note
>
> To ensure proper functionality, don't change, delete or move other files, folders and jar files. Some of them are only of interest at compile time, some at runtime

Creating External Data Sources

To make use of an external service, it has to be registered in the corresponding SAP Signavio workspace. Open the explorer and choose *Setup* > *Define notations/attributes* in the explorer and choose the *Dictionary* configuration tab, then click the link in the explanatory header text:



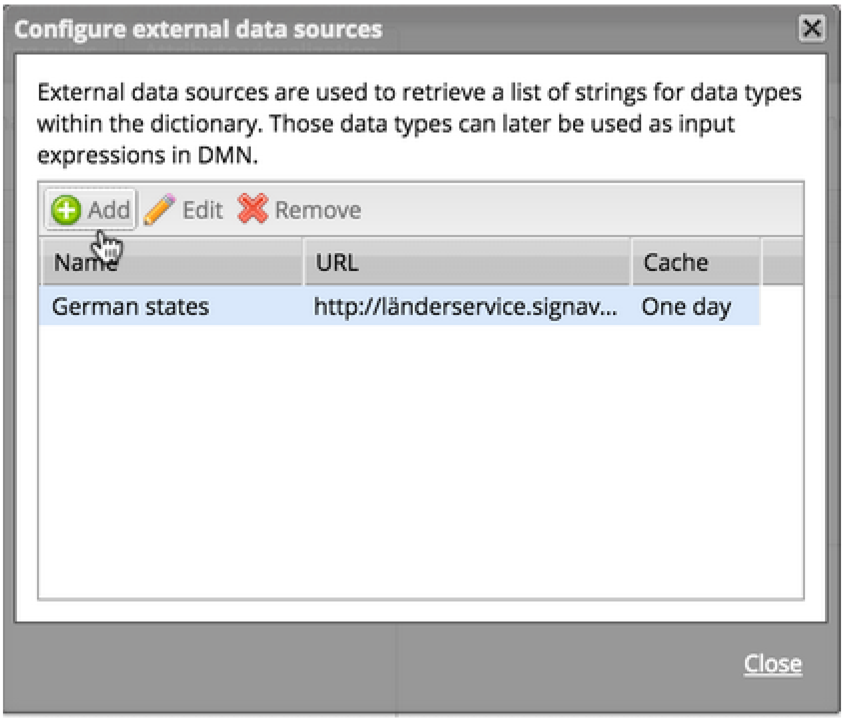
You can add custom attributes to each dictionary category. Note: Only the common attributes are displayed if multiple stencils are selected.
Click here to manage external data sources.

- 🟥 ☑ Organizational Units
- 🟧 ☑ Documents
- 🟩 ☑ Activities
- 🟦 ☑ Events
- 🟦 ☑ IT Systems
- 🟪 ☐ Requirements
- ⬛ ☑ Others
- 🟦 ☑ IT System (Type: Others)
- ⬛ ☑ Sandbox (Type: Others)
- ⬛ ☑ DMN Data (Type: Others)

Please select a category

Select the link to open the management dialog for external data sources.

Choose *Add*:



External data sources are used to retrieve a list of strings for data types within the dictionary. Those data types can later be used as input expressions in DMN.

Name	URL	Cache
German states	http://länderservice.signav...	One day

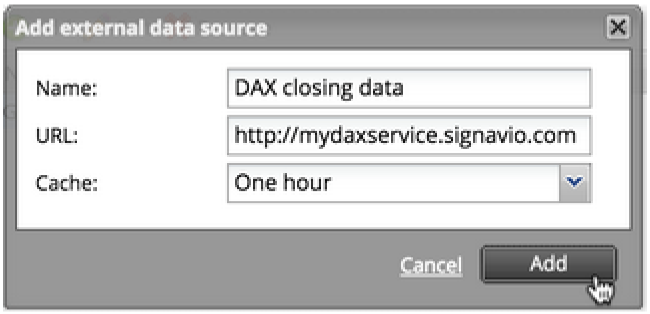
A service consists of a name, a unique URL and a caching configuration:

- *Name*
  The name is used as the identifier in the SAP Signavio dictionary.
- *URL*

This is the service URL accessible by an HTTP GET request responding with data in the SAP Signavio data format as specified above.

- *Cache*
  It is possible to cache the data temporarily. If activated and configured, the referenced service will not be queried for the caching period, as the system will use the cached values.
  It is highly recommended to activate caching. Otherwise, the service data will be newly requested each time the dictionary entry is loaded. Without caching, if the service is temporarily unavailable, the request the SAP Signavio Decision Manager is making to the service will timeout and the data will be unavailable until the request is answered.

Choose *Add* to register the service:



Add external data source

Name: DAX closing data

URL: http://mydaxservice.signavio.com

Cache: One hour

To learn how to reference external services when modeling data objects in the Dictionary, read more at Reference External Data Sources.

11.9 Creating and Managing Process Documentation Templates

Process documentation can include diagrams as well as all element descriptions, and dictionary entries. The documentation is created in Microsoft Word or PDF format.

You can create custom templates that suits your organization's needs and generate a process documentation based on a template.

You can create the following:

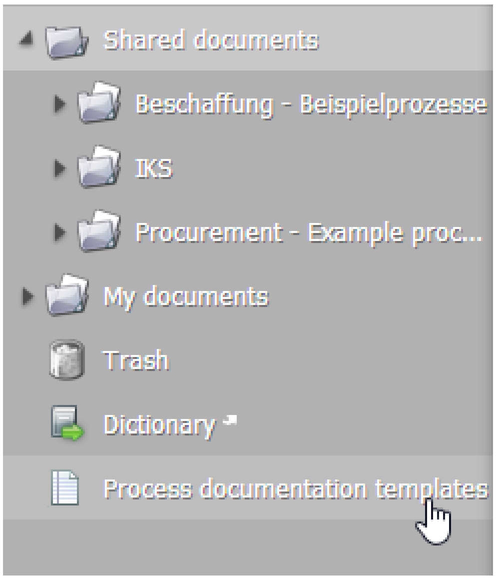
- An overview of all BPMN 2.0 process diagram tasks in your diagrams.
- A matrix with all dictionary entries linked in the diagrams.
- A detailed overview of the element usage in your diagrams.

Not only the content of process documentations can be configured, but also their visual properties.

Process documentation templates are stored in the *Process documentation templates* folder. This folder will appear in the folder tree on the left side of the Explorer if you activate the process documentation templates as described below.

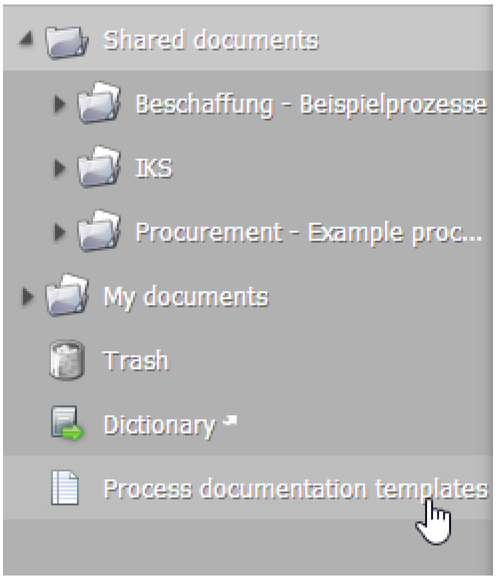
Activating the Process Documentation Templates

1. Select in the menu bar under *Setup* the *Show process documentation templates* entry.
1. Select in the navigation on the left the *Process documentation templates* folder.



Creating a New Template

1. Navigate to the template overview by selecting *Templates* in the folder tree on the left side of the Explorer.



> ⓘ Note
>
> If the template folder is not shown in the folder tree, you can activate the display as described above.

1. Select in the menu bar under *New* the *Process documentation template* entry. You can also use *create example template* and then customize this according to your needs.

To create and edit new templates, you are directed to the Editor. Here, you can define the document structure, edit header and footer or specify diagram details.

Working with Templates

Editing templates is similar to editing diagrams - elements are placed on the canvas via drag&drop and customized via attributes, which you can edit on the right side in the attribute editor. The alignment of the elements is done mostly automatically.

When you create a new template the following sections are applied automatically:

- *cover page*
- *table of contents*, which is automatically updated
- *content pages*, containing the actual process documentation

You can adjust the sections as needed, add new pages, or remove one of the standard sections.

1. To delete a section, first select the element to delete, and then choose in the menu bar *Delete* .
2. In the panel on the left, under *Document Structure* all available elements are listed. To add an element, drag the element on the canvas while holding the left mouse button.
3. You can format labels of elements in the menu bar. Select the element and then choose*text format*. Here, you can define font size and color.

General Attributes

Many shapes have similar general attributes that can be set in the attribute panel. These will be explained here. Other, shape specific attributes will be explained in the section about the corresponding shape.

- *Color* - You can change the background color of a section, sometimes also the color of a label. You can either choose a color from the color picker or define a hexadecimal value.
- *Label* - Many shapes have a label that will stand in front of a value (for example 'Organization: [name of organization]'). You can define whether a label should be displayed (check/uncheck the box 'Show label') and what the label should be by configuring the corresponding attributes.
- *Show Label* - Define if the label shall be displayed for the element by checking or unchecking the box.
- *Hide page header/footer* - Available in the *More Attributes* section of all sections - check or uncheck the box to hide the header or footer for the whole section.
- *Display* - Here you can choose whether you would like the information to be displayed in a list or in a table.

Importing/Exporting Templates

If you want to use an already applied template in an other SAP Signavio workspace, you can export it here. Templates are exported as **SAP Signavio archive SGX** file and can imported in another workspace for reuse.

1. Select the template file you want to export.
2. Choose in the menu bar *Import/Export* and then the **Export SAP Signavio archive (SGX)** entry. The corresponding dialog opens.
3. By default, the latest revision of each template will be exported. However, you can disable this option.
4. Choose *Export* . The selected template is downloaded as SGX-file.

The Cover Page

By default, when you create a new template, the first section is the cover page.

Cover Page Attributes

The cover page has a header and a footer, two spaces for content and the document title in the center of the page.

You can configure the following attributes for the cover page section by clicking onto the page and opening the attribute panel:

- *Title* - Configure the title of a process documentation (per default, it is set to **Process Documentation**).
- *Subtitle* - An explanatory subtitle (in the example below it is "Business processes 2012")
- *Show a separator* - When a subtitle is given, it can be separated optically by a horizontal line.
- *Alignment* - The title and subtitle can be aligned left, right or center. This option only affects the text on the cover page.

Template Parameters

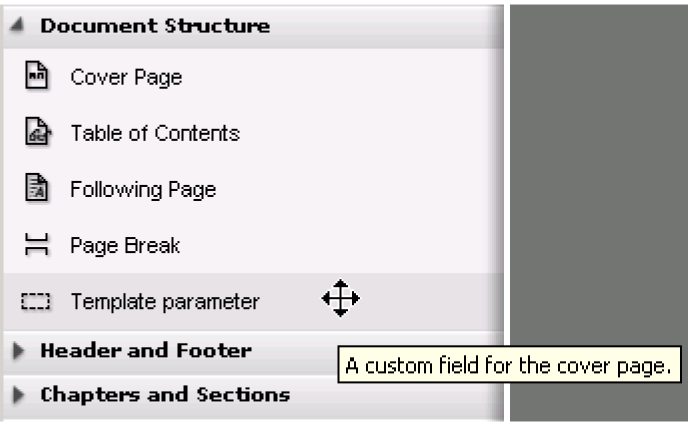
In addition you can define *template parameters* for the cover page. Each template parameter shape, available in the *Document Structure* header in the shape repository, contains information about the process documentation file in general.

Template parameters can contain one of the following variables:

- *Author*
- *Organization* (default)
- *Date*
- *Version*

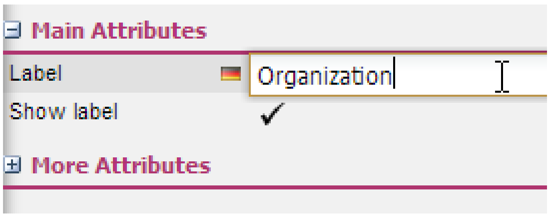
In the attribute panel, you can define which kind of information should be displayed. The data is automatically retrieved and added every time when you create the actual documentation. You can also change the parameter label (for example, 'author') and determine whether this should be displayed before the value.

1. Drag the desired template parameter from the palette on the cover page.



A custom field for the cover page.

1. Configure its type in the attribute editor.

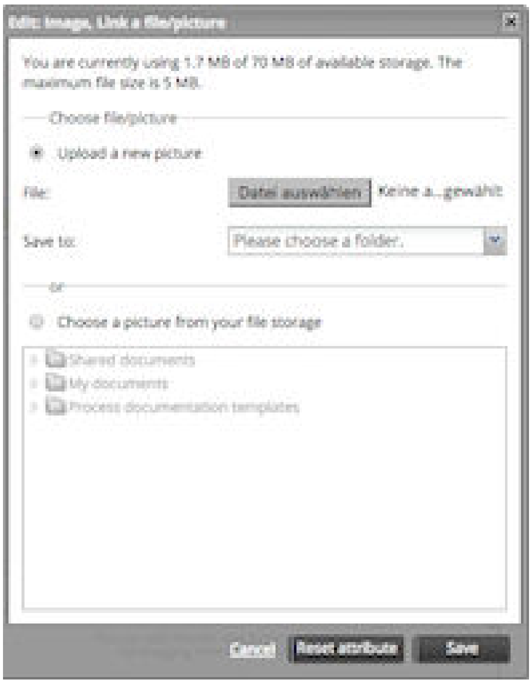


Label: Organization
Show label: ✓

Adding an Image

You can insert an image of your choice into the cover page. The image can be selected from the workspace or uploaded from your computer. The corresponding element can be found in the modeling palette under *Static contents* .

1. To add an image drag the *Image* element from the *Static Contents* section of the shape repository to the cover page.
2. Select a picture from your computer or from the SAP Signavio workspace by clicking the *Edit* button of the attribute *Image*. The dialog *Edit: Image, link a file/picture* opens.



Edit: Image, Link a file/picture

You are currently using 1.7 MB of 70 MB of available storage. The maximum file size is 5 MB.

Choose file/picture

● Upload a new picture

File: Keine a...gewählt

Save to: Please choose a folder.

or

○ Choose a picture from your file storage

1. Choose *Save* to insert the image.

Sample cover

You can add header and footer contents, by dragging them onto this area.

Label: <Date>

Process Documentation

Label: <Organization>

Label: <Author>

You can add header and footer contents, by dragging them onto this area.

The Table of Contents

The table of contents is created and updated automatically. When you create comprehensive templates, this update may take some time. In this case we recommend to deactivate the automatic updating during modeling by unchecking the box of the attribute *Preview*.

Title	Table of contents
Preview	☑

If you enable the preview again, the contents is updated.

The Process Documentation

The process documentation pages are configurable and can be adapted to your needs.

Configuring the Header and Footer

For each of the three sections, you can design a separate header and footer. Thus, you can specify for example page numbers and at the same time prevent that they appear on the cover and in the table of contents.

1. Select at the top or at the bottom of a page (if there is no header or footer, you can drag the corresponding element from the palette to the page).
2. In the *header and footer* section you will find all the elements that you can specify. Drag the required element to the desired location.
3. In the attribute editor, configure the display of each element.

> ⓘ Note
>
> Each section's header and footer must be designed separately.

The following elements and configurations can be dropped into a header or footer:

Element	Description
Page number	In the attribute panel, check the box *Continue numbering* to continue counting from a previous section. Otherwise the numbers for this section will start at 1. Change the attribute value for *Style* to switch from Arabic to Roman numbers, for example.
Date	Displays the documentation creation date.
File name	Displays the name of the file that is generated when exporting the documentation, for example, 'Process_Handbook_Order-to-Delivery'.

Element	Description
Version	Displays the version of the process documentation, for example, 1.0.0.
Modification	Displays the last modification date.
Text	Write a text you want to display in the header or footer into the attribute editor.
Image	Here you can put a logo or a small picture. Upload it or choose from your workspace.

Sample footer

<File name> <No> <DD.MM.YYYY>

<Version> last updated: <Modification date>

> ⓘ Note
>
> Configuring the header is not possible in the trial edition.

Chapters and Sections

Before you can add any variable elements to the content section, you need to add a *chapter/section* element.

If you drop another chapter into a chapter, a sub-chapter will be created. If you drop a chapter below another chapter, a new chapter will be created. In case you don't need an elaborate chapter structure, you can simply place a *per Diagram* or a *Folder structure* element. These are needed as a container for information elements on diagram and element level. Chapters and sub-chapters can be named and will be numbered and added to the table of contents automatically.

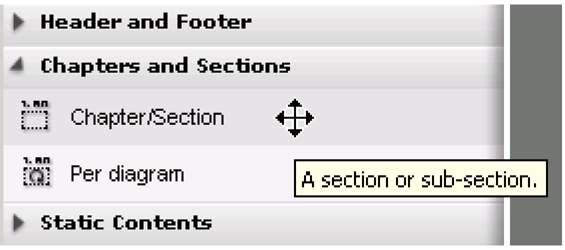
When you added a chapter, you can place static information elements. These elements do not need a container. Static information can be defined in the attribute panel and does not change with the diagrams a handbook includes.

A static attribute can for example be a disclaimer, a chapter overview, an image or a table. You can put text directly into the table by double clicking it. Note that a table can contain a header or a footer.

You can enforce page breaks, for example after large chapters, by placing a *Page Break* element.

When configuring the display of dynamic diagram information, you can either use a chapter per diagram with the *Per Diagram* element or use the *Folder Structure* element to create a chapter per folder (with a sub chapter for each diagram). In any case, the order of the diagrams is aligned to the folder structure.

1. Create a chapter by dragging a *Chapter/Section* element from the shape repository to the template.



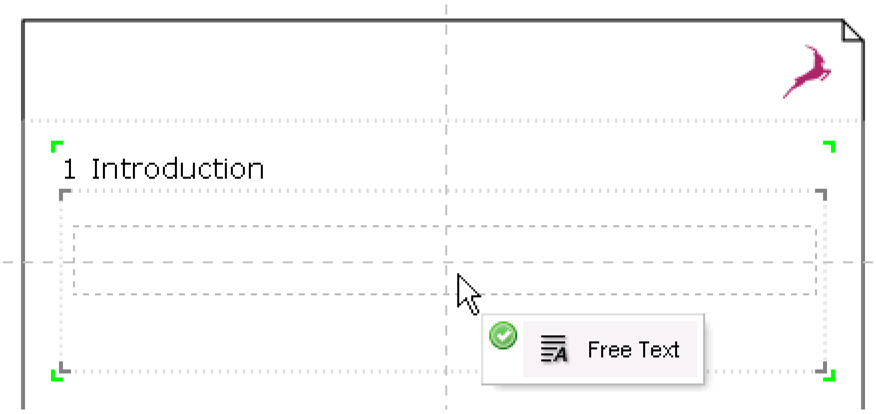
1. To divide this chapter into sub-chapters, drag another *Chapter/Section* element on it.
2. In a chapter, you can drag different static elements whose values are set during the modeling of the template. Such elements do not need any containers.
3. In the attribute editor, you can choose between the numbering style of the chapters (Arabic numbers (default), Roman numbers or bullet points) for the whole section. You can also define if the corresponding chapter should be listed in the table of contents and if the numbers are displayed or hidden.

It is possible to create dynamic content based on the diagrams a process documentation is created for. Dynamic content is kept in the *Per Diagram* or *Folder Structure* element.

Dynamically created chapters will get a small loop symbol on their upper right corner in the template. You can easily combine static and dynamic chapters by for example, dragging a *Chapter/Section* element onto a *Per Diagram* element.

Sample Chapter Introduction

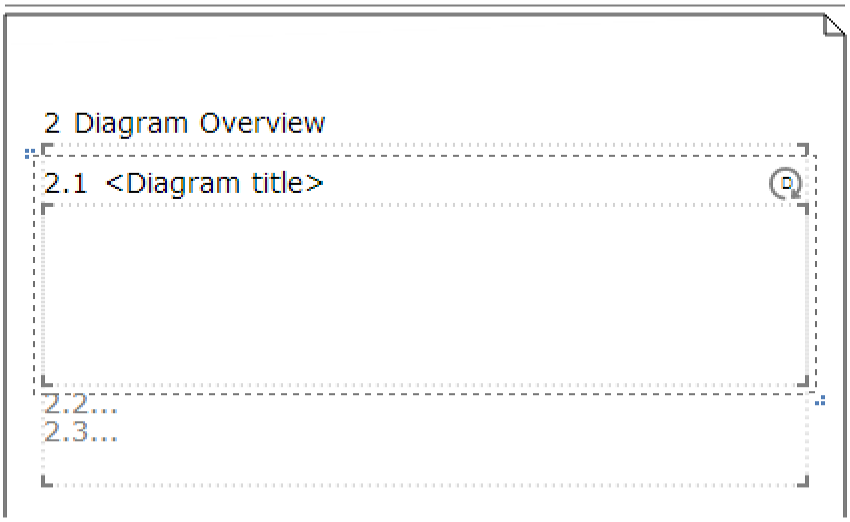
A chapter can contain different elements. For example, the chapter **Introduction** could contain a free text element as the introduction text. Drag the *Text* element from the section *Static Content* in the shape repository to a chapter. Add free text to the introduction template.



Sample Complete Overview of the Individual Diagrams

In the following example, a graphic for all diagrams is displayed in the chapter **Overview of individual diagrams**:

1. Drag the container element to the appropriate chapter.



2 Diagram Overview

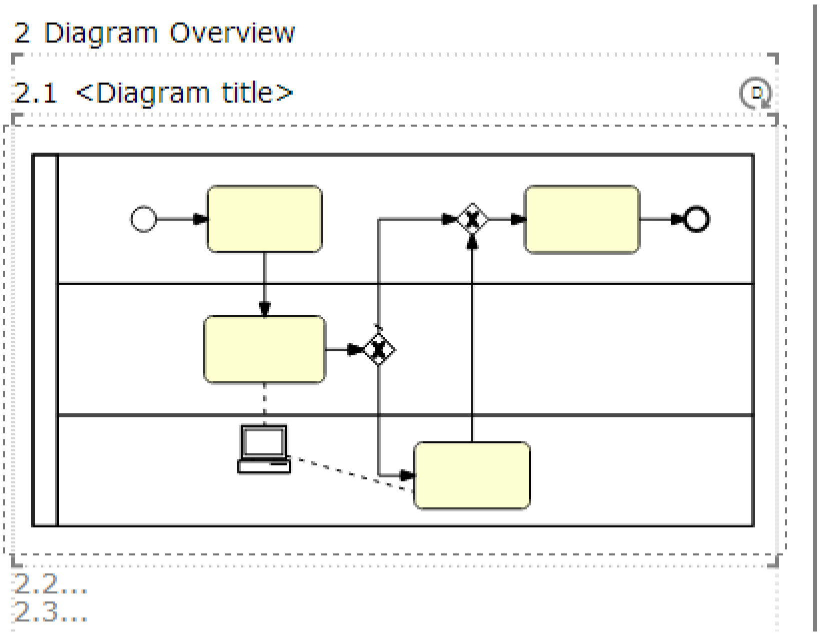
2.1 <Diagram title>

2.2...
2.3...

ⓘ Note

For each diagram, the container element will later create a new section.

1. Drag the element *Diagram Image* from the section *Diagram Details* to the *Per Diagram* -element.

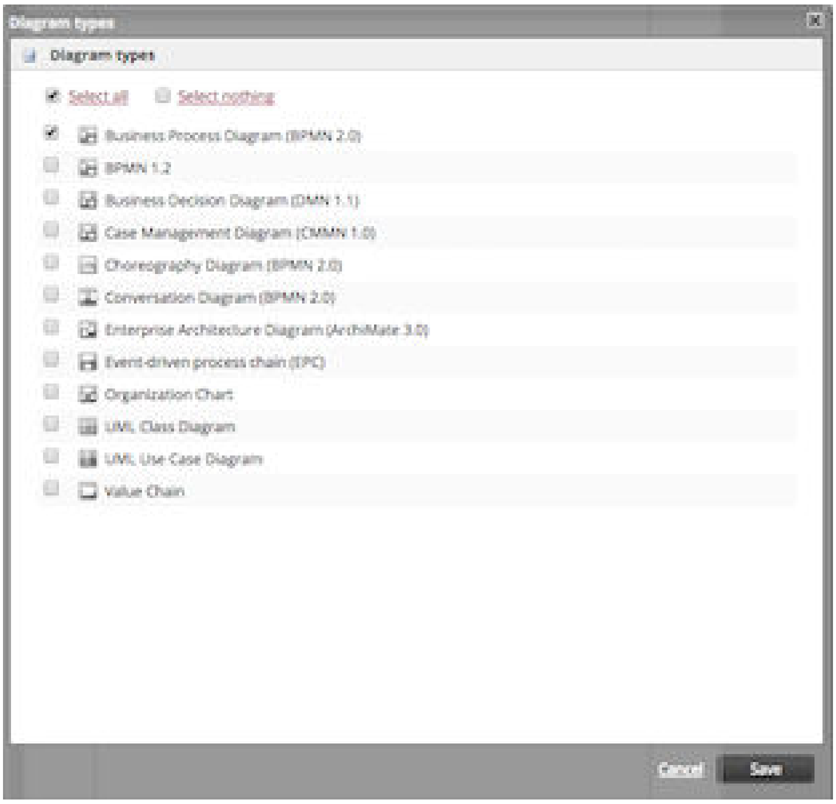


2 Diagram Overview

2.1 <Diagram title>

2.2...
2.3...

1. In the attribute editor, you can restrict what diagram type to be inserted (if for example only BPMN 2.0 process diagrams should be documented, disable all other chart types).



☑ Select all ☐ Select nothing

- ☑ Business Process Diagram (BPMN 2.0)
- ☐ BPMN 1.2
- ☐ Business Decision Diagram (DMN 1.1)
- ☐ Case Management Diagram (CMMN 1.0)
- ☐ Choreography Diagram (BPMN 2.0)
- ☐ Conversation Diagram (BPMN 2.0)
- ☐ Enterprise Architecture Diagram (ArchiMate 3.0)
- ☐ Event-driven process chain (EPC)
- ☐ Organization Chart
- ☐ UML Class Diagram
- ☐ UML Use Case Diagram
- ☐ Value Chain

Diagram Details

In addition to a graphical representation, you can represent numerous information on the diagram as a whole, such as the diagram attribute and modeling elements of a certain type. The subitems indicate the specific attributes for each template element that can be defined:

Element	Description
Information about the diagram	Displays one of the diagram attributes *Author, Diagram type, Last modified, Link, Path, Revision number, Last author, Publishing status, Publishing date or Authors* (all people who worked on the diagram), which can be chosen in the attribute panel. You can add more than one shape to display different attributes.

Element	Description
Diagram image	Creates an image of the diagram. The following attributes can be defined: - *Rotate* : defines if the diagram image should be rotated 90°. The default setting 'Automatic' rotates thediagram if it is too large to fit. - *Orientation* : defines in which direction a diagram should be rotated. - *Stretch over multiple pages* : if activated, a diagram is printed in its original size, over multiple pages if necessary.
Attribute on diagram level	Select an attribute (or more in 'Multiple choice'), which value should be presented for each diagram (for example process description). - *Attribute* : Specify which attribute to be displayed in the browser.
Process participants	Displays all roles of a diagram. Pool/lanes, additional owner and organizations that are linked through a dictionary entry are included here. - *Lanes in diagram* : Specify whether lanes should apply as process participants. - *Additional process participants* : Select which process participants should be taken into account in the overview (depending on their RACI property). - *Omit pools* : Specifies whether pools should be included in the overview.
Data objects	Lists all used data objects of a diagram.
IT Systems	Lists all used IT systems of a diagram.
Process trigger	Lists all start events of a diagram. - *Only named events* : Specifies whether events that have no name, should be listed as process triggers.
Process results	Lists all end events of a diagram. - *Only named events* : Specifies whether events that have no name, should be listed as process results.
Linked dictionary entries	Displays all dictionary entries linked in the diagram regardless of their category. Entries that are linked via a diagram element as well as links via own attributes are considered. - *Categories* : Select from which categories dictionary entries should be included in the overview. To enable a better overview in the list view, you can create a heading for each of these categories in the form of a sub-chapter.

Element	Description
Document revisions	This overview displays all versions of the diagram including the creator and revision comment. - *Limit* : In the attribute editor, you can define the maximum number of revisions displayed, default: 10.

Element Details

Information shapes on element level require another kind of sorting shape as diagram elements will be listed in a certain way here. You have to choose between a table or a list view. If you add for a table, for each new information a column will be added for the table.

1. Add a *Table of Process Elements* or a *List of Process Elements* to the documentation template. To change the layout later, alter the value of the *Display as* -attribute.
2. The new element will function as a frame to display element-based information. Now you can add content to the table/list and define their attributes.
3. The columns 'Name' and 'Responsible' are created by default. Now you can drag and drop 'Element Details' elements into the table/list. A column will be added for each new element.

> ⓘ Note
>
> In list view, subitems are added instead of columns that you can also select and edit.

1. If you want to delete a column, select it and click the *Delete* button in the menu bar of the Editor, or alternatively use the delete key on your keyboard.
2. If you have selected an *Attribute on element level* or *Attribute on element level (Multiselection)* , specify now a column header (attribute *Title* in the attribute editor) and select the attributes to be viewed.
3. In the attribute editor, click the *Edit* button. In the dialog that opens, select the corresponding attribute for each modeling element. The elements *Process participants* , *Data objects* , *IT systems* and *Used dictionary entries* provide information about the named item regarding the listed elements.
4. Configure the appearance and content of the table (or list) in the attribute editor.

Table Column Elements

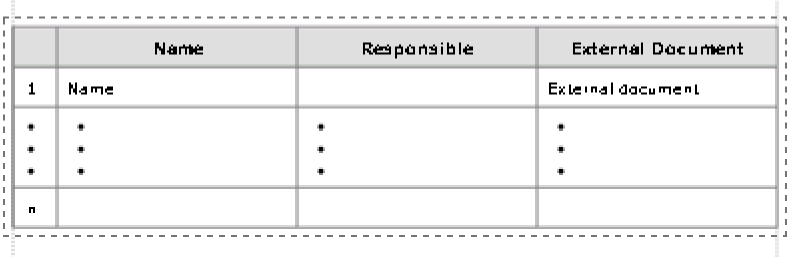
The following elements can be dragged into a table as a column:

Element	Description
Attribute on element level	Select an attribute whose value will be listed for each element in the diagram. A dialog will open, allowing you to configure the selection.

Element	Description
Attribute on element level (multiselection)	Select multiple attributes whose value will be listed for each element in the diagram. A dialog will open, allowing you to configure the selection.
Process participants	Insert a column that displays the element's process participants (organizations, departments or additional participants).
Data objects	Insert a column that displays the data objects that are connected to the element.
IT systems	Insert a column that displays the IT systems connected to the element.
Linked dictionary entries	Insert a column that displays all the dictionary entries linked to the element.
Element type	Insert a column that displays the element type.

The resulting table could look as follows:

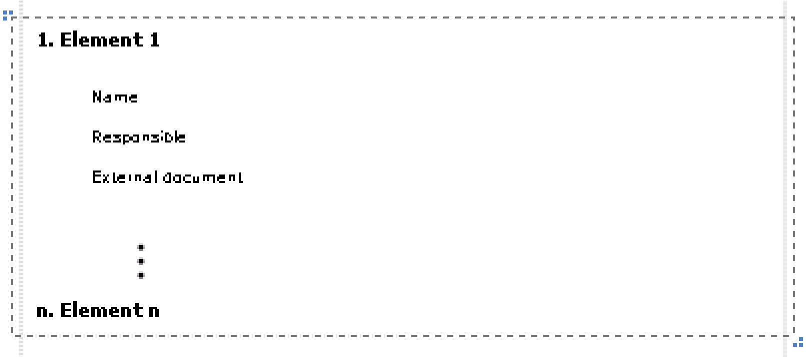
Sample Tables



	Name	Responsible	External Document
1	Name		External document
⋮	⋮	⋮	⋮
n			

Sample: element overview table

Sample List



1. Element 1

Name

Responsible

External document

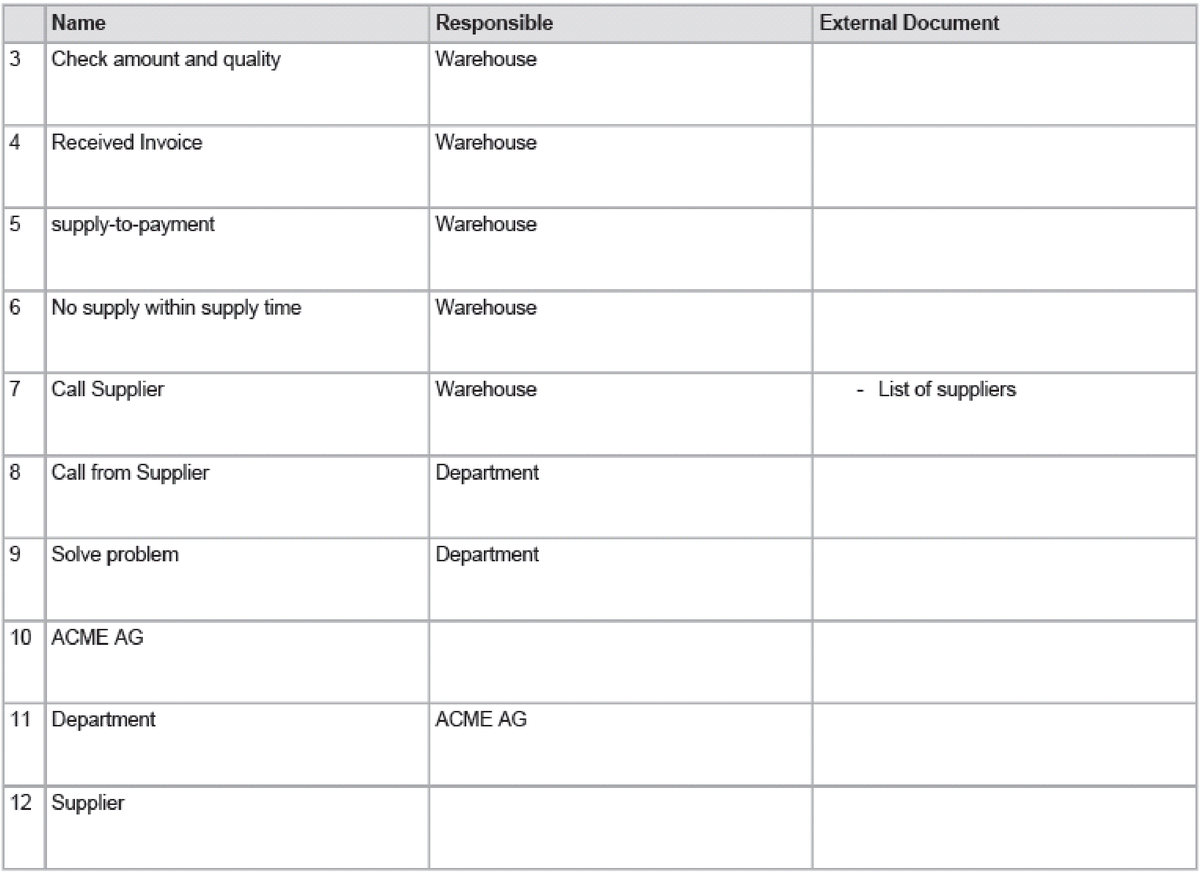
⋮

n. Element n

Sample: element overview list

Sample Exported Table

This example table contains the name, the responsible role and documents that are connected to each element of the diagram:



	Name	Responsible	External Document
3	Check amount and quality	Warehouse	
4	Received Invoice	Warehouse	
5	supply-to-payment	Warehouse	
6	No supply within supply time	Warehouse	
7	Call Supplier	Warehouse	- List of suppliers
8	Call from Supplier	Department	
9	Solve problem	Department	
10	ACME AG		
11	Department	ACME AG	
12	Supplier		

An exported element overview table

Table and List-Specific Attributes

You can configure the following properties of a table/list of process element shapes in the attribute panel:

- *Diagram element types* : choose elements that are supposed to be displayed for each modeling language or notation.
- *Numbered* : define whether the elements should be numbered.
- *Ignore unnamed elements* : select whether to ignore or list unnamed elements.
- *Sorting* : element information can be sorted by diagram and process flow or alphanumerically by element type and label.
- *Display as* : Choose between list and table.

> ⓘ Note
>
> If all flows after a gateway have probabilities, flows are sorted by probability.

> If only some flows have probabilities, the sorting follows additional rules:
>
> - If both outgoing sequence flows have probabilities, then the one with the higher probability is listed first.
> - If only one or none have probabilities, then the positioning of their target element on the canvas is used:
>   - The one positioned higher ends up in a higher list position.
>   - If both are on the same height, then the element that is further left on the canvas is listed in a higher position.
>   - If neither of them has a target element, then their IDs are compared to ensure consistent behavior.

Defining Multiple Languages for Templates

It is possible to define multiple languages for diagrams in SAP Signavio Process Manager. This feature is also available for templates.

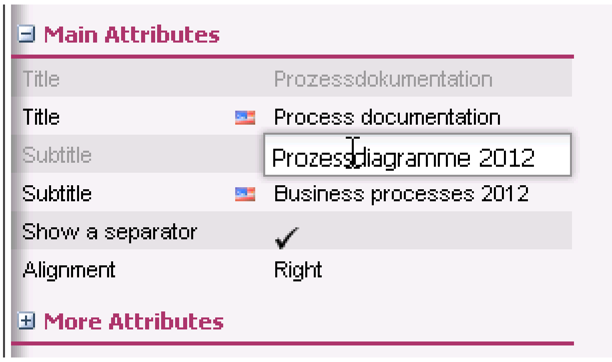
If multiple languages are defined for you workspace, a drop-down listin the upper right corner of the template editor let's you switch the language of the template content.

Elements that are not available in the selected language will be highlighted. By selecting their title, you can translate them.

Prozessdokumentation

Business processes 2012 (en_us)

The original language will be displayed in the attribute editor. You can translate the elements here.



Title	Prozessdokumentation
Title	Process documentation
Subtitle	Prozessdiagramme 2012
Subtitle	Business processes 2012
Show a separator	✓
Alignment	Right

If templates were defined in multiple languages you can choose the desired language each time a process documentation is created.

12 Embedding SAP Signavio Diagrams in 3rd-Party Systems

There are several options to make SAP Signavio diagrams available in 3rd-party systems:

- You can embed SAP Signavio Process Collaboration Hub via an iframe. Then, all diagrams are available to users. Read more in section Embedding SAP Signavio Process Collaboration Hub via an iframe [page 125].
- You can also embed single SAP Signavio diagrams:
  - Embedding diagrams as HTML code
  - Embedding diagrams as a picture

12.1 Embedding SAP Signavio Process Collaboration Hub Content via an iframe

SAP Signavio Process Collaboration Hub diagrams can be embedded in third-party systems via an inline frame (iframe). When using an internal wiki, diagrams can be embedded so users can view content in SAP Signavio Process Collaboration Hub alongside traditional documentation systems, such as Atlassian Confluence.

Learn how to integrate an iFrame into a Confluence documentation ➦ .

Embedded Content

Only diagrams can be embedded. To find the diagram link, open the diagram in SAP Signavio Process Collaboration Hub and copy its URL. For details see section URL format [page 127].

> ⓘ Note
>
> We recommend to embed published diagrams.

The access control rules that normally apply to SAP Signavio Process Collaboration Hub also apply to an embedded instance:

- Users with the necessary permissions can access the SAP Signavio Process Collaboration Hub preview, that means every diagram of the workspace they can access, as well as their private diagrams.
- If SAP Signavio Process Collaboration Hub is integrated with your Directory Service, users can view diagrams they have read access to.
- Users who aren't logged in receive an SSL connection error.

Trusted Domains

> ⓘ Note
>
> SAP Signavio Process Collaboration Hub can only be embedded in third-party systems via iframes if trusted domains are used. If a domain not included in the trusted domains is used, web browsers don't load the page, and instead show a security violation page to the users.

To embed SAP Signavio products in an iframe using trusted domains, you have the following options:

- Use one of the public trusted domains
- Add workspace-specific trusted domains

Use Public Trusted Domains

Some common third-party tools use domains that are public trusted domains.

When you embed SAP Signavio Process Collaboration Hub in the following domains, no further action is required on your side:

- *.atlassian.net
- *.sharepoint.com
- *.force.com

Add Workspace-Specific Trusted Domains

> ⓘ Note
>
> When embedding SAP Signavio Process Collaboration Hub inside an iframe, you have to use HTTPS and cannot use any custom ports.

When you want to embed SAP Signavio Process Collaboration Hub in other third-party tools, you have to add the domains to the security configuration and adapt the URLs.

Follow these steps:

1. In the Explorer, open *Setup*> *Edit security configuration*.
2. In the section *Domain policies*, add the trusted domains.
3. Add the parameters **`<model ID>`** and **`?t=<workspace_id>`** to the URLs used for embedding.
4. To enable fullscreen mode for embedded pages, add the "fullscreen" value to the allow attribute in the iframe element.

Viewing Embedded Content

Embedded diagrams can be saved as favorites, shared, and commented.

From embedded content, the action menu ⋮ and the *Create* button can't be accessed.

URL Format

To embed SAP Signavio Process Collaboration Hub diagrams in a website or wiki via iframe, add an iframe tag and insert the SAP Signavio Process Collaboration Hub URL as its source.

Make sure to use a URL of the form

```
https://editor.signavio.com/p/hub/model/<model ID>?t=<workspace ID> (region:
Europe)
```

```
https://app-us.signavio.comp/hub/model/<model ID>?t=<workspace ID> (region: US)
```

```
https://app-au.signavio.com/p/hub/model/<model ID>?t=<workspace ID> (region:
Australia)
```

```
https://app-jp.signavio.com/p/hub/model/<model ID>?t=<workspace ID> (region:
Japan)
```

```
https://app-ca.signavio.com/p/hub/model/<model ID>?t=<workspace ID> (region:
Canada)
```

```
https://app-kr.signavio.com/p/hub/model/<model ID>?t=<workspace ID> (region:
Korea)
```

```
https://app-sgp.signavio.com/p/hub/model/<model ID>?t=<workspace ID> (region:
Singapore)
```

An iframe that embeds SAP Signavio Process Collaboration Hub can look like this, for example:

```
<iframe
src="https://editor.signavio.com/p/hub/model/273j5d0mf3174c3b8b9439fn5k2a8b0f?
t=e7d74637279848fe9d2913f25abf41a4"
width="90%"
height="90%"
allow="fullscreen"
name="SAP Signavio Process Collaboration Hub">
</iframe>
```

Settings in SAP Signavio Process Collaboration Hub

You can adjust the look of embedded content by hiding the header and side navigation. For details, see section Page Properties.

Next steps

Find the Workspace ID [page 9]

13 Integrating SAP Enable Now

Find detailed user instructions for the SAP Signavio integration in SAP Enable Now in the integration guide on the SAP Help Portal.

14 SAP Signavio Process Governance Integration with SAP Signavio Process Manager

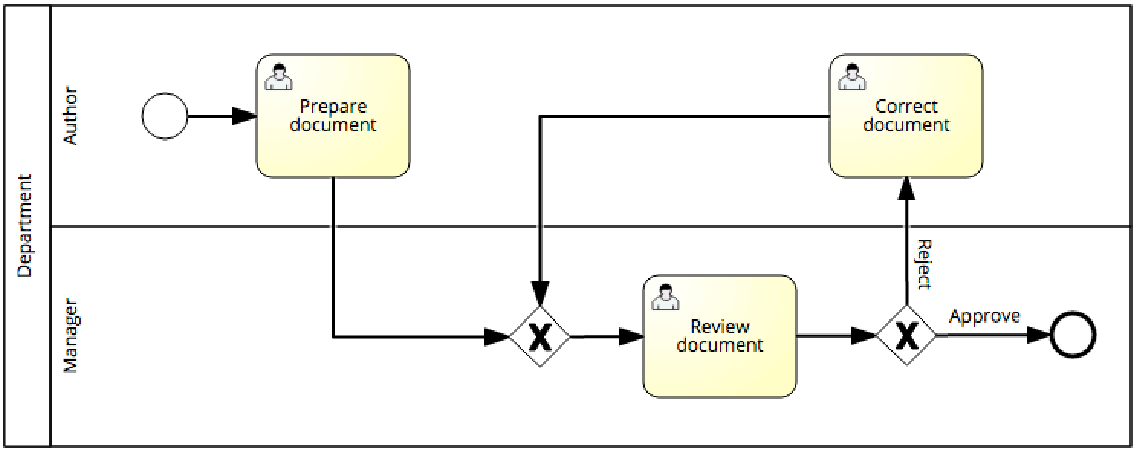
Learn how to use SAP Signavio Process Governance integration to combine SAP Signavio Process Manager with an execution system.

Prerequisites

- You have an SAP Signavio Process Governance license.
- You established a link between SAP Signavio Process Manager and SAP Signavio Process Governance.
  - For more information, contact SAP Signavio service experts from SAP for Me portal.
- You, as a workspace administrator, enabled BPMN 2.0 for SAP Signavio Process Governance for modelers.
  - Choose *Define notations/attributes* › *Modeling language* .

Process Design

Modelers can design SAP Signavio Process Governance processes like any other BPMN processes. Here's an example of a document approval process, which consists of basic BPMN elements:



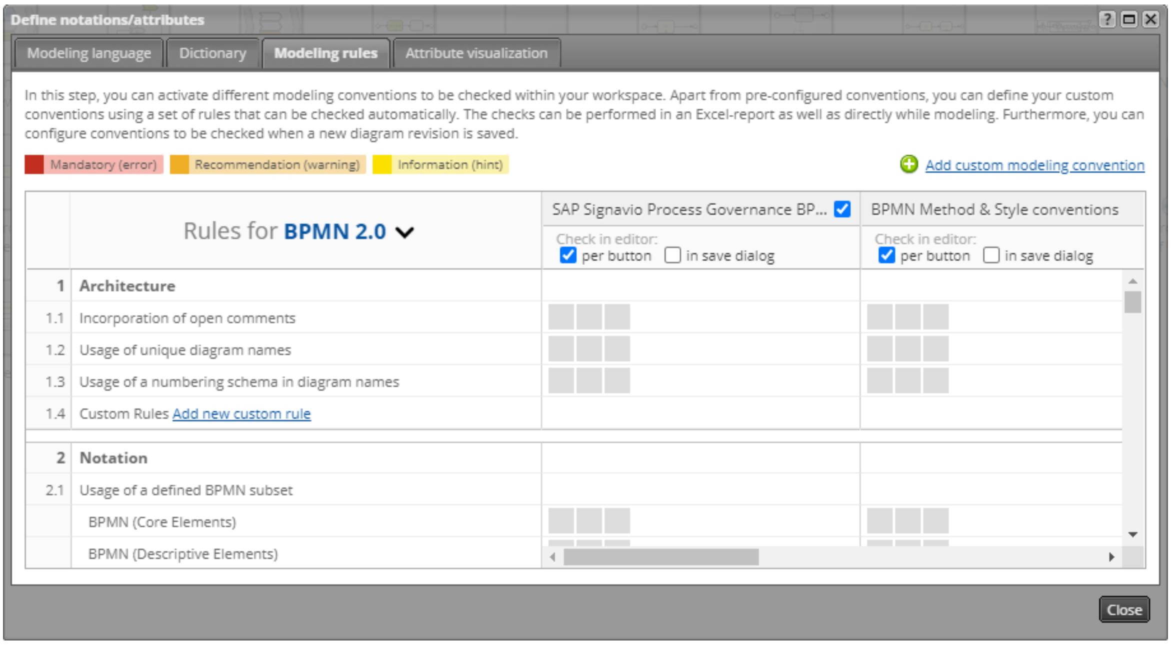
We recommend using the following basic BPMN elements for initial SAP Signavio Process Governance processes:

- Pools/Lanes
- Simple Start and End Events
- Exclusive and Parallel Gateways
- User and System Tasks
- Sequence Flows
- Plain Intermediate Event (Milestone)
- Intermediate Link Event

We recommend publishing diagrams in SAP Signavio Process Collaboration Hub to increase modelers' process awareness and to encourage feedback.

Transferring a Process to SAP Signavio Process Governance

1. Select the process in the explorer and choose › *Process Governance* › *Execute in SAP Signavio Process Governance* ›.
   If the process contains elements that are not supported by SAP Signavio Process Governance, a warning is shown. If these elements are relevant for process execution, adjust the process accordingly.
2. (Optional) Enable a check to determine if a diagram's elements are supported by SAP Signavio Process Governance. We recommend enabling this check *per button*, as shown in the following screenshot.



In this step, you can activate different modeling conventions to be checked within your workspace. Apart from pre-configured conventions, you can define your custom conventions using a set of rules that can be checked automatically. The checks can be performed in an Excel-report as well as directly while modeling. Furthermore, you can configure conventions to be checked when a new diagram revision is saved.

	Rules for **BPMN 2.0**	SAP Signavio Process Governance BP... ☑ Check in editor: ☑ per button ☐ in save dialog	BPMN Method & Style conventions Check in editor: ☑ per button ☐ in save dialog
1	**Architecture**		
1.1	Incorporation of open comments		
1.2	Usage of unique diagram names		
1.3	Usage of a numbering schema in diagram names		
1.4	Custom Rules Add new custom rule		
2	**Notation**		
2.1	Usage of a defined BPMN subset		
	BPMN (Core Elements)		
	BPMN (Descriptive Elements)		

3. Select the diagram language.
4. Confirm with *Transfer*.

Adjust the Deployed Processes

- You can adjust the process in SAP Signavio Process Manager and re-deploy it as described in the **Process Deployment** section.
- Alternatively, adjust the process directly in SAP Signavio Process Governance as described at Processes. Then, you can use the **Execute in SAP Signavio Process Governance** function in the explorer to transfer the changes back to SAP Signavio Process Manager.

Related Information

BPMN Import
BPMN Simulation
Start a New Case
Collaboration
Working with Approval Workflows

15 SAP Signavio Process Manager for SAP Solution Manager 7.2

Classic connector: Overview about the integration with SAP Solution Manager. Includes link to best practices.

> ⓘ Note
>
> This section describes the classic connector for SAP Solution Manager 7.2. For the user guide for our new business process model connector for SAP Signavio solutions see business process model connector for SAP Signavio solutions.

SAP Solution Manager is one of SAP's Application Lifecycle Management (ALM) offerings.

SAP Signavio Process Manager can be used as an interface for SAP Solution Manager.

You can import the following content type from SAP Solution Manager to SAP Signavio Process Manager:

- The *Executable Library* as dictionary entries
- The *Process Step Library* as dictionary entries
- Process diagrams as BPMN diagrams

SAP Solution Manager is the leading system, this means changes made in SAP Signavio Process Manager are overwritten by an import.

You can export the following content types from SAP Signavio Process Manager to SAP Solution Manager:

- Folders
- Sub folders as scenarios
- BPMN diagrams as processes
- Tasks as *Process Steps* and linked dictionary entries as *Process Step Originals*
- Custom attributes

Process Structure on the SAP Side

How processes are created and structured differs between SAP Solution Manager and SAP Signavio Process Manager.

In SAP Solution Manger, unlike SAP Signavio Process Manager, there is a distinction between process definitions and visual process diagrams.

A structure that contains process definitions is called a scenario. A process definition can contain a list of *Process Steps*. *Process Steps* are stored in the *Process Step library* and can contain additional links, material and attributes. This list of Process Steps can be used to create visual process diagrams.

Set Up the Integration with SAP Solution Manager 7.2

> ⓘ Note
>
> SAP and SAP Signavio have jointly created a document with an integration overview and best practices, you can find it here.

To set up the integration, follow the descriptions in the sections Configure SAP Solution Manager [page 133] and Configure SAP Signavio Process Manager [page 137].

If you need additional information, please contact our SAP Signavio service experts from the SAP for Me portal.

Related Information

Configure SAP Solution Manager [page 133]
Configure SAP Signavio Process Manager [page 137]
Import Solution Manager Content to the Dictionary [page 140]
Export to Solution Manager [page 143]
Troubleshooting [page 148]

15.1 Configure SAP Solution Manager

Classic connector: Configure your systems to allow communication between SAP Solution Manager and SAP Signavio Process Manager.

> ⓘ Note
>
> This section describes the classic connector for SAP Solution Manager 7.2. For the user guide for our new business process model connector for SAP Signavio solutions see business process model connector for SAP Signavio solutions.

To prepare SAP Solution Manager for the integration with SAP Signavio Process Manager, first configure your systems to allow communication with SAP Signavio Process Manager and then set up the solution you want to integrate.

Scopes

You can limit the imported content with *Scopes*. Scopes are defined in SAP Solution Manager, for details see this section of the SAP Solution Manager WIKI.

If you don't select a Scope for the import, the full branch content is used as the basis for all imports.

The first export to SAP Solution Manager creates a completely new folder and process structure.

When you limit the imported content with a Scope, your Scope needs to include the folder that the export created. Then all following exports update the content of that folder.

If content is not included in the Scope, this content won't be updated during later imports, but imported again as a copy.

Necessary User Rights

You need to enter credentials for a user in the connection setup. The rights this user needs can be system-specific.

To create the user in SAP Solution Manager, follow these steps:

1. In the User Maintenance, create a new user, for example with the name CONNECTOR.
2. In *Logon Data*, set the *User Type* to *Service*.
3. In *Roles*, assign the following roles:
    - SAP_SM_SL_DISPLAY
    - SAP_SM_SL_EDIT_BPMN
    - SAP_SM_SL_ADMIN
4. Adjust the role SAP_SM_SL_ADMIN:
    1. Double-select SAP_SM_SL_ADMIN and create a copy.
    2. Add a prefix to the name of the copy, for example Z_SAP_SM_SL_ADMIN.
    3. In *Display Roles*, go to *Authorizations* > *Edit Authorization Data and Generate Profiles*.
    4. Navigate to *Solution Manager* > *Solution Administration* > *Activity*.
    5. Double-select the description text ("Create or generate...") next to *Activity* .
    6. Enable activity 61 *Export*.
    7. Save and generate the adjusted role.
5. Save the user.

> ⓘ Note
>
> This section only provides an overview of the necessary settings.
>
> For a detailed description of the SAP Solution Manager User Management, refer to the SAP Help Portal.

Network and Firewall Requirements

Ensure your security settings allow incoming requests from SAP Signavio Process Manager to your SAP Solution Manager server (to the URL/port you need to specify later). The IP addresses of the SAP Solution Manager integration service are **3.68.26.78, 3.67.68.183, and 18.192.165.143** for editor.signavio.com . You need to use all 3 of them.

For https://app-us.signavio.com (region: US), the IP addresses are 18.235.204.147, 50.16.9.226, and 54.205.22.53. You need to use all 3 of them.

For https://app-au.signavio.com (region: Australia), the IP addresses are 13.236.49.140, 52.64.193.78, and 54.66.30.251. You need to use all 3 of them.

For https://app-jp.signavio.com (region: Japan), the IP addresses are 52.192.122.249, 18.179.115.110, and 54.199.38.209. You need to use all 3 of them.

For https://app-ca.signavio.com (region: Canada), the IP addresses are 3.97.198.20, 3.98.70.54, and 35.183.74.254. You need to use all 3 of them.

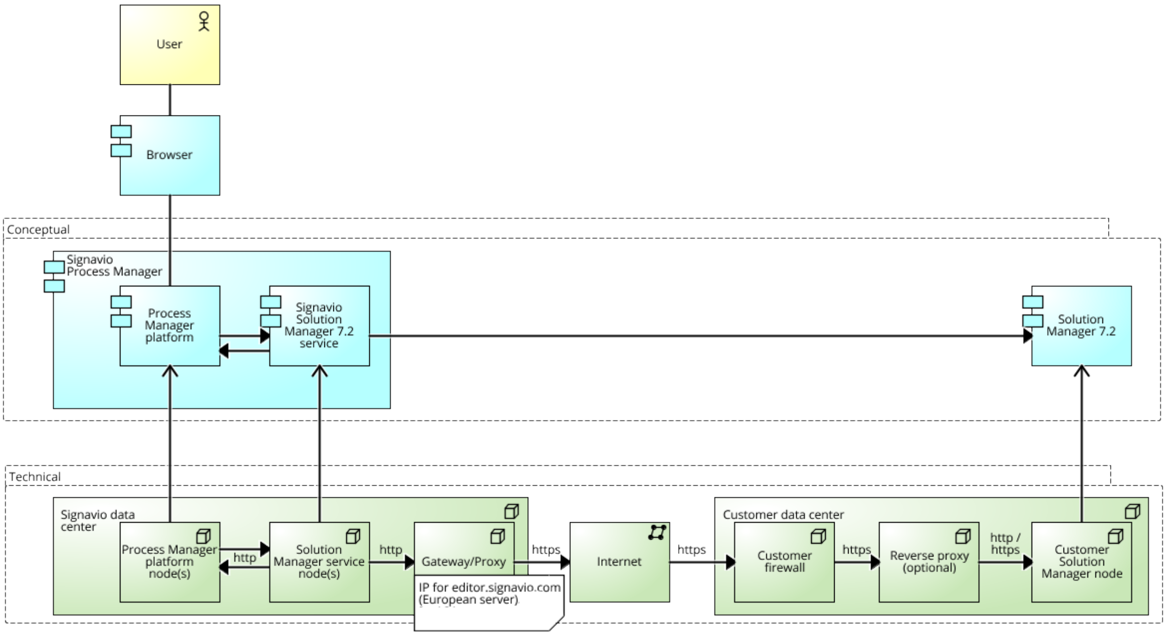
For https://app-kr.signavio.com/ (region: Korea), the IP addresses are 3.38.89.68, 43.200.231.93, and 13.125.122.170. You need to use all 3 of them.

For https://app-sgp.signavio.com/ (region: Singapore), the IP addresses are 3.97.198.20, 3.98.70.54, and 35.183.74.254. You need to use all 3 of them.

For bug bounty, the IP addresses are 3.121.4.82, 3.126.184.35, 3.122.131.84. You need to use all 3 of them.

Shield Your SAP Solution Manager Server

You can optionally use a reverse proxy to shield your SAP Solution Manager server. The following diagram shows communication between SAP Signavio Process Manager and Solution Manager:



The specific Solution Manager API endpoints we use for this integration are documented by SAP here.

If you want to set up a reverse-proxy, you find all the necessary information in the linked SAP documentation.

Make sure that in any response the Cross-Site Request Forgery (CSRF) protection token is passed through and not removed. This is necessary to ensure that SAP Signavio Process Manager can modify data in SAP Solution Manager. For details on CSFR, see this section of the SAP Help Portal.

The protocol being used to access this API is always HTTPS. SAP Signavio Process Manager never tries to establish a connection using unsecured HTTP requests.

Basic Administration

Activate *Process Management* in SAP Solution Manager as described in the SAP Solution Administration documentation .

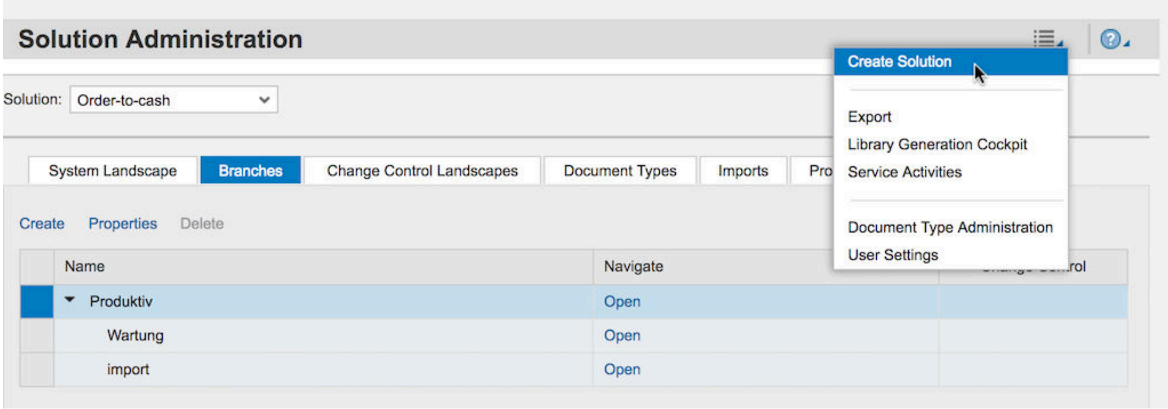
> ⓘ Note
>
> Ensure that in the list of gateway services for Process Management, the following services are activated:`AGS_GBC_ODATA_BPMN_SRV` (Graphical Component BPMN Gateway Service) `AGS_GBC_ODATA_GOM_SRV` (GBC GOM Gateway Service)`PROCESSMANAGEMENT` (SAP Solution Manager APIs for third party tool integration)

Solution Administration

> ⓘ Note
>
> SAP recommends that you use exactly one solution for the production scope of your SAP Solution Manager.

To set up the solution you want to integrate, follow these steps:

1. Open the*Solution Administration*, either through the GUI or by executing the transaction `soladm`.
2. Create a new solution or select an existing one.



Solution: Order-to-cash

Name	Navigate	rol
Produktiv	Open	
Wartung	Open	
import	Open	

Creating a new solution

3. Select the branch you want to use for the integration.
4. Leave the browser tab open or document the names of the *Solution* and *Branch*. You'll need them when configuring the integration on the SAP Signavio Process Manager side.

> ⓘ Note
>
> You'll also need the SAP solution administration later for Configure attribute mappings [page 140] .

Related Information

Configure SAP Signavio Process Manager [page 137]

15.2 Configure SAP Signavio Process Manager

Classic connector: Set up the connection with SAP Solution Manager on the SAP Signavio Process Manager side.

> ⓘ Note
>
> This section describes the classic connector for SAP Solution Manager 7.2. For the user guide for our new business process model connector for SAP Signavio solutions see business process model connector for SAP Signavio solutions.

When you have configured SAP Solution Manager as described in section Configure SAP Solution Manager [page 133], you can configure SAP Signavio Process Manager.

To set up SAP Signavio Process Manager for the integration, you first set up the connection as described in this section. You then define attribute mappings as described in section Configure attribute mappings [page 140].

Connection User

You need to enter credentials for a user in the connection setup. The rights this user needs can be system-specific.

How to create the user in SAP Solution Manager is described in the configuration of SAP Solution Manager, in section Necessary user rights. [page 133]

Set Up the Connection to SAP Solution Manager

1. In the SAP Signavio Process Manager explorer, select *Setup* - *Manage SAP Solution Manager 7.2*.
   The settings open in a new tab.
2. Point to your Solution Manager endpoint, which typically is `<solutionManagerURL>:<port>sap/opu/odata/sap/PROCESSMANAGEMENT/` . `<solutionManagerURL>` stands for the base URL of your SAP Solution Manager server and `<port>` for its port number.
    - Your SAP Solution Manager server needs to accept incoming requests on the port you specified in the URL from SAP Signavio Process Manager's Solution Manager integration service. The IP addresses of this service are **3.68.26.78, 3.67.68.183, and 18.192.165.143** for editor.signavio.com ➦ . You need to use all 3 of them.

      For https://app-us.signavio.com (region: US), the IP addresses are 18.235.204.147, 50.16.9.226, and 54.205.22.53. You need to use all 3 of them.

For https://app-au.signavio.com (region: Australia), the IP addresses are 13.236.49.140, 52.64.193.78, and 54.66.30.251. You need to use all 3 of them.

For https://app-jp.signavio.com (region: Japan), the IP addresses are 52.192.122.249, 18.179.115.110, and 54.199.38.209. You need to use all 3 of them.

For https://app-ca.signavio.com (region: Canada), the IP addresses are 3.97.198.20, 3.98.70.54, and 35.183.74.254. You need to use all 3 of them.

For https://app-kr.signavio.com/ (region: Korea), the IP addresses are 3.38.89.68, 43.200.231.93, and 13.125.122.170. You need to use all 3 of them.

For https://app-sgp.signavio.com/ (region: Singapore), the IP addresses are 3.97.198.20, 3.98.70.54, and 35.183.74.254. You need to use all 3 of them.

For bug bounty, the IP addresses are 3.121.4.82, 3.126.184.35, 3.122.131.84. You need to use all 3 of them.

3. Enter your credentials.
4. Enter your solution name.
5. Enter a branch name of your solution.
    - We recommend using the design branch for the SAP Signavio Process Manager import. You find more information about branches in SAP Solution Manager in this article from SAP.
    - The connector does not support exporting to branches that have *Change Control* enabled in SAP Solution Manager.
6. You can limit the imported content by selecting a *Scope* ID.
    - Scopes are defined in SAP Solution Manager, for details see this section of the SAP Solution Manager WIKI.
    - If you don't select a *Scope*, the full branch content is used as the basis for all imports.
7. Set up the authentication, for details see below.
8. Choose *Save*.

Using Self-Signed Certificates for Server-Side Authentication

> ⓘ Note
>
> SAP Signavio accepts certificate chains signed by any common certificate authority by default. Uploading a certificate is only necessary when your Solution Manager server tries to authenticate itself against SAP Signavio using a certificate, which is self-signed instead of signed by a trusted certificate authority.

You can use self-signed certificates with your connection configuration. Once uploaded, this certificate is trusted on every request sent to Solution Manager.

Self-signed certificates must be in the SSL *X509* format encoded with Base64 (this happens by default when exporting certificates from a web browser). If your certificate is in the PKCS7 format, you need to convert it. Make sure your certificate is in the following format:

-----BEGIN CERTIFICATE-----

followed by the content of the certificate on a new line.

Then, on another new line, finish the certificate with

-----END CERTIFICATE-----

To upload your certificate, in the *Configure* tab, choose *Select a certificate* next to *SSL Certificate*.

Keystore for Client-Side Authentication

You can additionally upload a keystore containing a private key so that your Solution Manager server can validate that requests are indeed coming from the SAP Signavio Solution Manager connector (client-side authentication).

To set up client-side authentication, follow these steps:

1. In the SAP Signavio Process Manager *Explorer*, select *Setup - Manage SAP Solution Manager 7.2*.
   The settings open in a new tab.
2. In the tab *Connection settings*, upload the keystore for client-side authentication.
3. Enter the keystore password.
4. Choose *Save*.
   Two-way authentication is set up.

The PKCS12 format is accepted for keystores. Uploaded files are validated.

Technical Information

SAP Signavio uses the API of the Process Management component of Solution Manager 7.2 to read and update the branch content. We use GET and PUT requests via https.

For session handling, the SAP Signavio connector authenticates with GET request, sending a username and password and requesting a CSRF token. The response from Solution Manager is an unauthenticated session and a CSRF token. The token from the first request is used for all further communication. It's a unidirectional connection.

Related Information

Configure Attribute Mappings [page 140]

Import Solution Manager Content to the Dictionary [page 140]

15.3 Configure Attribute Mappings

Classic connector: Configure attribute mappings to specify how content structures are aligned for SAP Signavio Process Manager and SAP Solution Manager.

> ⓘ Note
>
> This section describes the classic connector for SAP Solution Manager 7.2. For the user guide for our new business process model connector for SAP Signavio solutions see business process model connector for SAP Signavio solutions.

You can configure attribute mappings that specify how content structures in SAP Signavio Process Manager are aligned to content structures in SAP Solution Manager.

To configure mappings, follow these steps:

1. Switch to the *Attribute mappings* tab.
2. Define the SAP Solution Manager attribute that stores the SAP Signavio Process Collaboration Hub link to exported processes.
3. Optionally, you can configure mappings between SAP Signavio Process Manager custom attributes and SAP Solution Manager attributes.

The following SAP Signavio Process Manager attribute types are supported:

- Boolean
- Number
- Single-line text
- Multi-line text
- Drop-down (enumeration)
- Dictionary link

If the SAP Signavio Process Manager attributes are defined as lists, the mapped Solution Manager 7.2 attributes have to be of the type *multivalue* to be compatible.

Read more about how to configure attributes in Solution Manager in this SAP blog post .

15.4 Import Solution Manager Content to the Dictionary

Classic connector: Import Process Steps and Executables from SAP Solution Manager to SAP Signavio Process Manager.

> ⓘ Note
>
> This section describes the classic connector for SAP Solution Manager 7.2. For the user guide for our new business process model connector for SAP Signavio solutions see business process model connector for SAP Signavio solutions.

You can import the following from SAP Solution Manager into theSAP Signavio Process Manager dictionary:

- All existing Executables
- Process Steps from the Process Step Library

SAP Solution Manager is the leading system, this means changes made in SAP Signavio Process Manager are overwritten by an import.

> ⓘ Note
>
> Trigger the import to SAP Signavio Process Manager before you start modeling your processes. This makes the imported content available to the modelers when you start mapping your processes.

You can import one or both content types into the dictionary. When you import both types, modelers can use both in diagrams.

Create Custom Dictionary Categories

We recommend that you create custom dictionary categories specifically for SAP Solution Manager content. Only workspace administrators should have write access to these categories.

- The custom dictionary category for Executables must be of the type *Others*
- The custom dictionary category for Process Steps must be of the type *Activities*

How you create custom dictionary categories is described in section Add custom categories for dictionary entries [page 69].

Import Executables

> ⓘ Note
>
> Updates on dictionary items made in SAP Signavio Process Manager are overwritten by an import. We recommend that only workspace administrators get write access to the Executables category.

In SAP, Executables are program functions that form the building blocks of a solution's business processes. You can import the definitions of available Executables from SAP Solution Manager to SAP Signavio Process Manager as dictionary entries and use them in your process models.

All Executables

All Executables from the Executable Library from the connected SAP Solution Manager are copied into the designated dictionary category.

Only title and description attributes are imported.

Type Name	Title
Transaction	TRANID
Program	PROGID
Fiori-App	FIORI_SEMANTIC_OBJECT / FIORI_ACTION
URL	WEBLINK
Custom URL	CUSTELEMENTID
SF-App	SFDEEPLINK
Web Dynpro ABAP Application	WDYAPPID
Web Dynpro ABAP Application Configuration	WDYAPPCONFIGID
BSP Application	BSPAPPID
CRM WebClient Application	CRMWEBCLIENTLOGLINKID
CRM People-Centric UI	CRM_BSP_FRAMEID
Java Web Dynpro	WDY_JAVA_SOLMANID

To configure and run Executables imports, follow these steps:

1. Open the *Dictionary Mappings* tab.
2. Select the custom dictionary category of the type *Others*.
3. Choose *Import Transactions*.
   The Executables are imported.

Updates for Executables made in SAP Signavio Process Manager are overwritten by an import.

Current Limitations

- When Executables are imported, the full library is imported. Limiting which Executables are imported is not possible, since the Solution Manager API only allows to import the full branch content.
- The folder hierarchy from Solution Manager is not imported, all Executables are added to the same dictionary category. A dictionary entry for an imported Executables contains the Solution Manager folder path for this Executable.
- Only the name and description of the Executables are imported into the dictionary. It isn't possible to import attributes.

Import Solution Manager Process Steps

> ⓘ Note
>
> Updates on dictionary items made in SAP Signavio Process Manager are overwritten by an import. We recommend that only workspace administrators get write access to the Process Steps category.

When you import Process Steps to the dictionary, modelers can link BPMN tasks directly to Process Steps. This way, the tasks contain all additional links, material and attributes defined in the linked Process Steps when exported to Solution Manager later.

1. Open the *Dictionary Mappings* tab.
2. Select the custom dictionary category of the type *Activities*.
3. Click *Import Process Steps*.
   The Process Steps are imported.

Current Limitations

- All Process Steps are added to the same dictionary category, the folder hierarchy from Solution Manager is not imported. A dictionary entry for an imported Process Step contains the Solution Manager folder path for this Process Step.
- Only the name and description of the Process Steps are imported into the dictionary.
- If a Process Step is created in SAP Signavio Process Manager as a new dictionary item and referenced by at least one task, this addition is imported to SAP Solution Manager. A new Process Step original is created in the library and the exported Process Step references it. All other updates on dictionary items made in SAP Signavio Process Manager are overwritten by an import. This is why we recommend that only workspace administrators get write access to the Process Steps category.

15.5 Copy Processes from SAP Solution Manager 7.2

Classic connector: Import from SAP Solution Manager

> ⓘ Note
>
> This function is no longer available for the classic connector for SAP Solution Manager 7.2. For new integration projects, you can use the business process model connector for SAP Signavio solutions.

15.6 Export to Solution Manager

Classic connector: Export content from SAP Signavio Process Manager to SAP Solution Manager.

> ⓘ Note
>
> This section describes the classic connector for SAP Solution Manager 7.2. For the user guide for our new business process model connector for SAP Signavio solutions see business process model connector for SAP Signavio solutions.

You can export the following content types from SAP Signavio Process Manager to SAP Solution Manager:

- Folders
- Sub folders as scenarios
- BPMN diagrams as processes
- Tasks as Process Steps and linked dictionary entries as Process Step Originals
- Custom attributes

Conflicts during import or export can be found in a log output.

Current Limitations

The following limitation applies to exporting processes to SAP Solution Manager:

- At the moment, visual diagrams cannot be exported from SAP Signavio Process Manager to SAP Solution Manager.

Export BPM Projects to SAP Solution Manager

> ⓘ Note
>
> When you export content to SAP Solution Manager for the first time, all selected folders and all objects in these folders are newly created. Later exports update the content and do not create duplicates.

Follow these steps:

1. Select the folder you want to export and select ▶ *Import/Export* ▶ *Export to SAP® Solution Manager® 7.2* ▶.
2. > ⓘ Note
   >
   > You can't export single diagrams, you always need to export the folder containing the diagram.

   A new tab opens.
3. Choose *Start*.
   The status of the export is shown.

After a successful export, the selected folders and processes are available in SAP Solution Manager.

Export Links to Executable Transactions to SAP Solution Manager

Executable transactions are not exported to SAP Solution Manager. Instead, links to the transaction definition in Solution Manager are exported with any BPMN task that contains transaction references, either directly or indirectly via reused Process Steps. Changes made in SAP Solution Manager are updated in SAP Signavio Process Manager when the import is triggered again. No new object is created in this case.

Changes to executable transactions on the SAP Signavio Process Manager side are ignored during export. This means that when you create a new Process Step as a dictionary entry linking to an executable transaction, this executable transaction is not recognized in SAP Solution Manager.

You need a custom attribute for the export, for referencing transactions in business processes. We recommend that you create an attribute specifically for this purpose.

How to create custom attributes is described in section Add and manage custom attributes [page 84].

To include links to executable transactions in your exports, follow these steps:

1. Configure a custom attribute of the type *Dictionary link (list)* for the element type *task* of BPMN diagrams.
2. Restrict the attribute to only support dictionary entries of the category you configured for the import of transactions.
3. Switch to the SAP Solution Manager configuration and open the tab *Dictionary Mappings*.
4. In the *Export* section, select your custom attribute.
   Now linked transactions are part of your export.
5. To start an export, close the configuration tab and switch back to the explorer .

Export Process Steps to the Process Step Library in SAP Solution Manager

Solution Manager requires that every Process Step in a process references a Process Step original from the Process Step Library. For every exported BPMN task, one of the following actions is performed:

If the task references a Process Step (via an imported dictionary item)	no new Process Step original is created in Solution Manager. The exported Process Step references the existing Process Step original.
If the task references a dictionary item that hasn't been imported from the Process Step Library	A new Process Step original is created in the library and the exported Process Step references it. For all following tasks referencing the same dictionary item, the exported Process Step will reference this Process Step original (this means only one original is created per dictionary item). For subsequent exports, the Process Step original is reused.
If the task references no dictionary item:	a new Process Step original is created and the exported Process Step references it. On subsequent exports the Process Step original is reused.

Changing the Link of a Dictionary Item

Removing a link to a dictionary item or linking to a different dictionary item in SAP Signavio Process Manager doesn't adjust the existing link in SAP Solution Manager if the item was exported with a different state before.

If you want to change a link to a dictionary item, follow these steps:

1. Delete the task in SAP Signavio Process Manager.
2. Create a new task with the new link.
3. In SAP Solution Manager, delete the outdated item.
4. Export the new item to SAP Solution Manager.

Deleting Items

You can't delete SAP Solution Manager items in SAP Signavio Process Manager. Deleted items in SAP Signavio Process Manager are still present in the SAP Solution Manager after an export. To delete an item, for example a model, a directory, or an attribute, you must delete it on the SAP Solution Manager side.

15.7 Switch to the New business process model connector for SAP Signavio solutions

Preparing your workspace for using the new business process model connector for SAP Signavio solutions when you've used the classic connector before.

If you've used the classic connector only in non-production environments, it's possible to switch to the new connector immediately.

The new connector will duplicate any existing data created by the classic connector. To avoid this, you need to delete this data in both SAP Signavio Process Manager and SAP Solution Manager.

What to Delete in SAP Signavio Process Manager

You might have imported the following content types from SAP Solution Manager to SAP Signavio Process Manager:

- The Executable Library as dictionary entries, all Executables are added to the same dictionary category
- The Process Step Library as dictionary entries, all Process Steps are added to the same dictionary category
- Process diagrams as BPMN diagrams, for example SAP Best Practice Process Models, including folder structures

Usually customers create custom dictionary categories specifically for SAP Solution Manager content.

We recommend deleting all dictionary entries created by previous imports, to avoid any reuse of outdated dictionary entries. For diagrams, an import using the new connector saves imported diagrams in a separate folder. Depending on your use case, you can decide whether to delete previously imported diagrams immediately or manually merge them later with diagrams imported by the new connector.

What to Delete in SAP Solution Manager

The first export to SAP Solution Manager creates a completely new folder and process structure.

You can export the following content types from SAP Signavio Process Manager to SAP Solution Manager:

- Folders

- Sub folders as scenarios
- BPMN diagrams as processes
- Tasks as Process Steps and linked dictionary entries as Process Step Originals
- Custom attributes

Executables aren't exported to SAP Solution Manager. Instead, links to the transaction definition in Solution Manager are exported with any BPMN task that contains transaction references, either directly or indirectly via reused Process Steps.

We recommend deleting all Process Step Originals created by previous imports, to avoid any reuse of these outdated library objects. For processes, an import using the new connector saves imported diagrams in a separate folder. Depending on your use case, you can decide whether to delete previously imported processes immediately or manually merge them later with processes imported by the new connector.

You can't delete SAP Solution Manager items in SAP Signavio Process Manager. Deleted items in SAP Signavio Process Manager are still present in the SAP Solution Manager after an import. To delete an item, for example a model, a directory, or an attribute, you must delete it on the SAP Solution Manager side.

15.8 Using the business process model connector for SAP Signavio solutions

The business process model connector for SAP Signavio solutions is now available for use. However, the connector can't currently be reached directly from SAP Signavio Process Manager. A direct link will become available in future releases.

For now, how you reach the connector depends on your current setup:

- If you've already set up the connector, you can find the link to access it in *SAP BTP Cockpit* > *Instances and Subscriptions*. The link to the business process model connector for SAP Signavio solutions is in the subscriptions table.
- Otherwise, please refer to the guide for the business process model connector for SAP Signavio solutions to set up the connector.

Related Information

business process model connector for SAP Signavio solutions

15.9 Troubleshooting

Classic connector: Find solutions for possible problems when you set up the integration with SAP Solution Manager and when you use the integration.

Setup/connection settings

If you have problems setting up the integration, test the availability of the Process Management Gateway Service (typically `sap/opu/odata/sap/PROCESSMANAGEMENT/`):

1. In the SAP GUI, execute the SAP Gateway Client transaction `/IWFND/GW_CLIENT` .
2. Send a `GET` request against: `sap/opu/odata/sap/PROCESSMANAGEMENT/?$format=json` .
   You also need to ensure this request is accepted when made from the origin SAP Signavio Process Manager's integration service.

Problem/Error message	Solution
URL is not reachable/no message	• Check which URL you have entered for the Solution Manager. Often this address is an internal one that cannot be reached from the internet. This means the request needs to be rerouted, using a reverse proxy, the SAP Cloud Platform Integration (SCPI), a load balancer, an API management tool, or something similar. The internal domain has to be replaced by the URL of this gateway. The component of the Solution Manager that we access via the API is `sap/opu/odata/sap/ProcessManagement`. • Check the user rights. If the rights are not sufficient, you get an unspecific the error message. In that case, you can view the login of the user in the Solution Manager to confirm that an incorrect URL is not the cause of the problem.
Connection failed (the Solution does not exist)	Check the Solution Name you've entered. It has to be the technical name of the Solution that can be found in the properties section of the Solution in the Solution Manager. By default it's the solution name in capital letters.
Connection failed (the Branch does not exist)	Check the branch name you've entered. It has to be the technical name of the branch that can be found in the properties section of the branch in the Solution Manager. By default it's the branch name in capital letters.
Credentials are incorrect	Check the username and password you've entered to log in to the Solution Manager.

Problem/Error message	Solution
Connection can't be established	1. Trace the request and check if there is an incoming request of the IPs 3.68.26.78, 3.67.68.183, and 18.192.165.143 (US: 18.235.204.147, 50.16.9.226, and 54.205.22.53, AU 13.236.49.140, 52.64.193.78, and 54.66.30.251) at your firewall and/ or the used gateway. 2. If there is no incoming request, check the URL you've entered and your firewall settings 3. If there is an incoming request, check if there is a login or login attempt on the SAP Solution Manager with the credentials entered in the connection settings tab 4. If there is no login, check your gateway settings 5. If the login to the Solution Manager is successful but you don't get a message that the connection is established: - check the SSL settings of your network. If you use a self-signed certificate inside your network or for your Solution Manager, this certificate needs to be uploaded in the settings. - the self-signed certificate is valid for a specific internal IP address. For the SAP Signavio side of the connection, the answer to the request is coming from the gateway and not the internal server IP. 6. If you still can't establish a connection, please contact our SAP Signavio service experts from the SAP for Me portal. To enable our support team to check the logs for your workspace, open the *Attribute mappings* tab, and note the time you did this.
The connection was established, but diagrams can't be exported	- For the export, SAP Signavio uses a PUT request, check if your firewall or gateway are blocking these requests. - There could be a problem with the session handling and the CSRF Token. For the PUT request SAP Signavio uses the CSRF Token, which is received at the initial login of the session. This CRSF Token could be filtered out of the header at the gateway. It is also possible that the Solution Manager issued a new CRSF Token for each request.
Virus scan error message	If you get the error message `Virus scan profile does not exist`, SAP Signavio Process Manager cannot access the SAP Solution Manager API. To have a successful virus scan, an SAP-certified virus scanner software needs to be installed and configured. If you assume that there is no risk from connections outside your network, for example your SAP Solution Manager server is run in an on-premises structure, it is possible to deactivate the virus scan. We recommend to configure your virus scan according to the SAP specifics.

Problem/Error message	Solution
Connection test is showing the error `Connection failed (Limited connection, cannot modify data on SolMan.)`	Make sure that in any response the Cross-Site Request Forgery (CSRF) protection token is passed through and not removed. This is necessary to ensure that SAP Signavio Process Manager can modify data in SAP Solution Manager. For details on CSFR, see this section of the SAP Help Portal.

Export

Problem	Solution
The connection was established, but diagrams can't be exported	• For the export, SAP Signavio uses a PUT request, check if your firewall or gateway are blocking these requests. • There could be a problem with the session handling and the CSRF Token. For the PUT request SAP Signavio uses the CSRF Token, which is received at the initial login of the session. This CRSF Token could be filtered out of the header at the gateway. It is also possible that the Solution Manager issued a new CRSF Token for each request.
Exports fail	SAP Signavio Process Manager is only able to act as connector to the SAP Solution Manager. This connection is not able to verify the constraints of SAP Solution Manager attributes, for example a size limit. When an attribute is mapped that contains a value that is longer than this size maximum, the export fails. In that case, check the attribute constraints.
Export single models is not possible	You cannot export single models. To export content, select folders that contain the models to be exported. Every model and every subfolder contained in the selected folder is exported. To export BPM projects to SAP Solution Manager, proceed as described in Export BPM projects to SAP Solution Manager [page 143] .
Models linked in collapsed subprocesses are not exported	To export a model that links to another model by a collapsed subprocess, the linked model must be in the same top-level folder as the model you want to export. Additionally, make sure that the linked model and the main model are always exported together to ensure that the linked data is consistent.

Problem	Solution
Export to Solution Manager produces duplicate copies of process and process steps	For exports to update existing structures, the structures need to be included in the scope definition. You need to adjust your scope definition in Solution Manager to include the folder that the SAP Signavio export created. Then all following exports update the content of that folder. See section Scopes [page 133]. Scopes are defined in SAP Solution Manager, for details see this section of the SAP Solution Manager WIKI.

Import into the Dictionary

Problem/Question	Solution
How is the transaction list imported from Solution Manager?	Via the Processmanagement API. SAP Signavio uses a GET request to retrieve the content of the specified branch. Only executable transactions listed in the Executable Library in this branch are imported.
Is it possible to use an ABAP program from SAP to define the scope of the transaction list that is imported? **The program extracts the executable transactions per system, per module, or per function.**	SAP Signavio only imports elements from the Executable Library. If the program can fill the Executable Library or if you can import the program results into that library, you can use the program. SAP Signavio always imports the complete library from the branch.

16 System Integration Scenarios

List of options for integration scenarios. APIs, iframes, and app configuration enable single sign-on and embedding of apps or content. Also migration, synchronization, translation, and exchange of content is possible.

While SAP Signavio Process Manager is a powerful tool in itself and in combination with other applications of the SAP Signavio Process Transformation Suite ↗ , many organizations integrate it with third-party or custom systems of their enterprise application landscape. This document provides an overview of common integration scenarios.

Migrating Content from Other Process Modeling Tools

If you've already modeled some of your processes with a different tool, you want to import your diagrams in SAP Signavio Process Manager without cumbersome manual copy-and-paste. SAP Signavio Process Manager supports the open standard BPMN 2.0 XML for process diagrMoam interchange, but you can also import diagrams of most popular proprietary formats. Read more in the Importing/exporting diagrams and uploading files overview of this user guide.

Synchronize Diagram and Dictionary Data with External Tools

There are multiple integration use cases, you can, for example, synchronize the following:

- Documents from DMS systems
- IT systems and capabilities from EAM systems
- Organizational data, roles, or employee records with HR systems
- Risks and controls with GRC systems

Many customers want to exchange data between SAP Signavio Process Manager and enterprise architecture and document management systems, either as a one-time transfer of enterprise application or document definitions, or to set up continuous synchronization process.

Depending on the requirements, there are different options for an integration:

- For a one-time transfer of data to SAP Signavio Process Manager, you export the data from your tool in any spreadsheet-like format and use Importing dictionary entries to generate the corresponding dictionary entries.
- For the architecture management tool LeanIX, a special interface is available that allows a seamless synchronization of LeanIX and SAP Signavio Process Manager data. Read more in the corresponding LeanIX documentation ↗ .
- For custom integrations, you can use SAP Signavio Process Manager REST API to automate data synchronization with third-party systems.

Access to SAP Signavio Process Collaboration Hub

SAP Signavio Process Collaboration Hub is the single source of truth for your process landscape for all people who contribute to your organization. Consequently, it should be easily accessible and integrated with other systems that provide your employees with crucial information.

- Set up single sign-on for SAP Signavio Process Collaboration Hub. Read more in section Single sign-on using SAML.

Integrating SAP Signavio Process Manager with Collaboration Tools

Many organizations use multiple systems for knowledge management in addition to SAP Signavio Process Manager, for example ticket tracking/project management systems and wikis.

You find instructions on how to embed diagrams in third-party systems at Embedding diagrams in external systems.

If you've specific requirements, consider using the SAP Signavio Process Manager API, which consists of the following two components:

- The *REST API* allows you to retrieve data from SAP Signavio Process Manager via a popular and well-established data exchange pattern.
- The *MASHUP API* allows you manipulate the visual properties of embedded diagrams with custom JavaScript.

Single Sign-On

Users find it inconvenient to manage authentication credentials for every system in your enterprise application landscape. Enabling single sign-on improves user experience (less time spent on login procedures and password recoveries) and enhances security (less tempted to use easy-to-guess passwords or write passwords on post-its). SAP Signavio Process Manager supports Single sign-on using SAML. SAP Signavio Process Collaboration Hub also supports Managing access to SAP Signavio Process Collaboration Hub for Active Directory services [page 43].

Integrating SAP Signavio Process Manager with Application Lifecycle Management (ALM)

You can integrate SAP Signavio Process Managerin your application lifecycle management toolchain.

- For the architecture management tool LeanIX, a special interface is available that allows a seamless synchronization of LeanIX and SAP Signavio Process Manager data. Read more in the corresponding LeanIX documentation .

SAP Signavio Process Manager for SAP Solution Manager

Engaging business users is a key success factor for SAP implementation projects and ongoing system operations. SAP Signavio Process Manager is the perfect business-facing interface for SAP Solution Manager. Read more about integrating SAP Signavio Process Manager with SAP Solution Manager at SAP Signavio Process Manager for SAP Solution Manager 7.2 [page 132] .

Custom API Integration

If you use a different ERP system, you can implement a custom integration using SAP Signavio Process Manager's REST API. REST APIs are programming language-independent and follow a popular and well-established data exchange pattern. This simplifies the implementation for your IT department, because your engineers don't need to learn a new programing language or paradigm.

To request API access to the SAP Signavio Process Manager API and the full documentation, please open a support incident on the SAP ONE Support Launchpad. Whether you've access to the API depends on your individual contract situation.

Combine Content from SAP Enable Now with BPMN Processes

SAP Enable Now is a platform for collaborative content authoring, management, and sharing. You can align training content from SAP Enable Now with business processes from SAP Signavio Process Manager. Read more in section Link training content from SAP Enable Now to BPMN processes [page 128].

Integrating SAP Signavio Process Manager with Business Process Execution (BPX) Engines

Business process execution (BPX) engines allow you to execute the process models you create with SAP Signavio Process Manager. Because process execution is based directly on BPMN 2.0 (or DMN 1.1) diagrams, BPX engines close the communication gap between business and IT in combination with collaborative process modeling tools. Generally, you can integrate SAP Signavio Process Manager with any BPX engine that supports BPMN 2.0 XML. Below we list some of the most popular engines.

SAP Signavio Process Governance

SAP Signavio provides its own workflow execution platformSAP Signavio Process Governance , which enables business users to automate workflows, while keeping IT involvement at a minimum. Read more in the chapter Integrating SAP Signavio Process Manager with SAP Signavio Process Governance [page 129] of the SAP Signavio Process Manager user guide. We recommend using SAP Signavio Process Governance for automating workflows with human participation.

Generating Custom Reports

The Reporting function of SAP Signavio Process Manager can provide you with detailed insights into diagram and usage metrics. For example, Viewing governance reports offers an overview of usage statistics and helps you confirm that your process management initiative is really taking off. To create customized reports, you can use process documentation templates or aggregate data of process characteristics reports with spreadsheet software like Microsoft Excel. We recommend creating custom reports by using the REST API only in scenarios with very specific requirements that can't be fulfilled otherwise.

Translating SAP Signavio Process Manager Content with External Tools and Services

If you're part of an internationally operating organization, you might want to document at least some of your processes in multiple languages. SAP Signavio Process Manager supports the creation of multilingual content - see Translating diagrams and Translate content with PO files. Some customers prefer to outsource the content translations to a third party, who doesn't have direct access to the SAP Signavio Process Manager workspace. In such a scenario, you can set up a custom integration - for example with a translation management system - through SAP Signavio Process Manager's REST API.

17 Purchasing Additional Licenses

Our website provides a detailed overview of the different features and license types at https://www.signavio.com/products/process-manager/ . If you want to purchase or upgrade licenses, please contact our Sales Team at sales@signavio.com.

18 API Access to SAP Signavio Process Manager

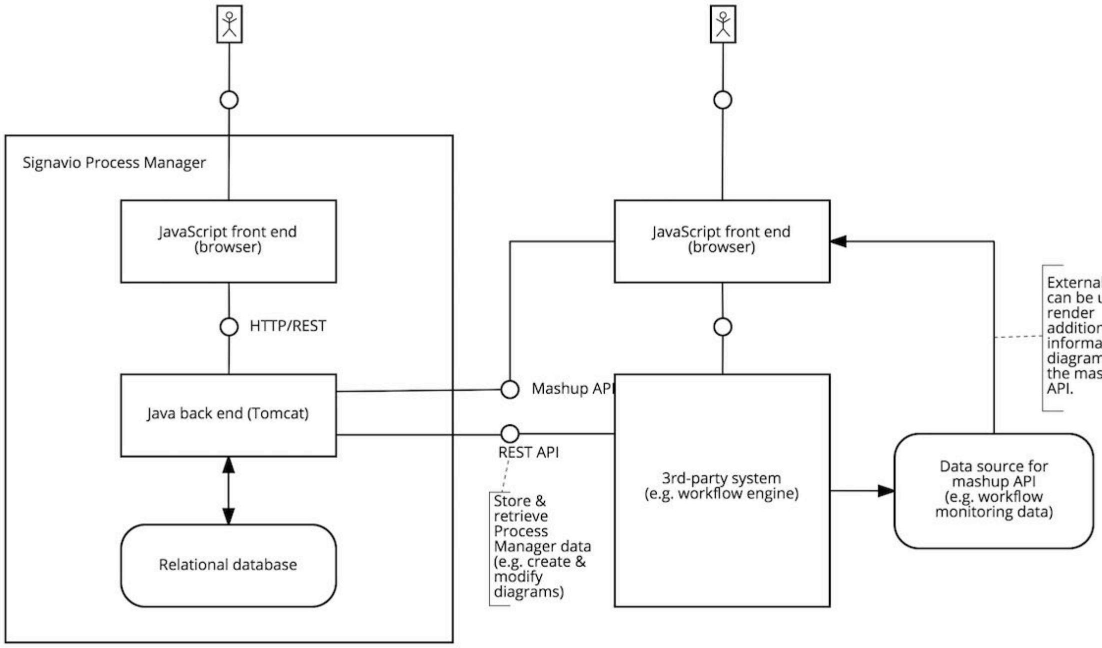
ⓘ Note

This document provides an overview of the capabilities of SAP Signavio Process Manager APIs.

A full set of API documentation for the SAP Signavio Process Manager API is available. Whether you have access to the API depends on your individual contract situation.

This section provides an overview of the accessible APIs. For more information on common integration scenarios, see System integration scenarios [page 152].

The following diagram illustrates how to access SAP Signavio Process Manager with the REST API and the Mash-up API.



The SAP Signavio Process Manager REST API

The REST API provides access to SAP Signavio Process Manager resources via HTTP.

REST API Coverage

You can use the REST API to work with folders and diagrams. You can:

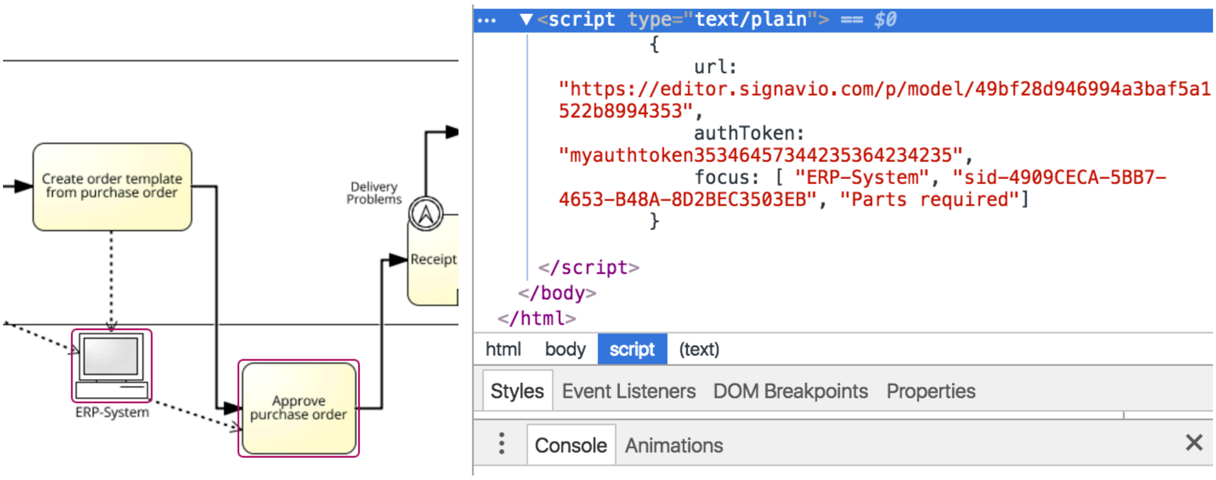
- List folders and their contents
- Create, rename, move and delete folders
- Search folders and diagrams. Searching supports filtering by result type and paging search results.
- List a diagram’s revisions
- Fetch a specific diagram revision in JSON, BPMN 2.0 XML, SVG and PNG formats
- Create, update, rename, move, copy, publish and delete diagrams
- Import diagrams from BPMN 2.0
- Check BPMN 2.0 diagram syntax

You can also use the REST API to work with the Dictionary and set-up. You can:

- List Dictionary categories and fetch category details
- Create, update and delete Dictionary categories
- Search for Dictionary entries by category, initial letter of the entry name, or full text. Searching supports sorting and paging search results
- Fetch Dictionary entries
- Create, update and delete Dictionary entries
- Create custom attributes
- Create custom data types

> ⓘ Note
>
> Access to this feature depends on your license. For more information, contact your workspace administrator.

The SAP Signavio Process Manager Mash-up (JavaScript) API



```
▼<script type="text/plain"> == $0
            {
                url:
"https://editor.signavio.com/p/model/49bf28d946994a3baf5a1
522b8994353",
                authToken:
"myauthtoken35346457344235364234235",
                focus: [ "ERP-System", "sid-4909CECA-5BB7-
4653-B48A-8D2BEC3503EB", "Parts required"]
            }

  </script>
 </body>
</html>
```

Using the Mash-up API: screenshot of an embedded diagram

Related Information

Access and Licensing

19 Configure SAP Signavio Process Collaboration Hub

Enable QuickModel for all users.

You can configure the appearance and behavior of SAP Signavio Process Collaboration Hub.

You can add your own logo, adapt the color theme, set up personalized launchpads for different audiences, and manage attribute groups and attribute visibility per audience.

Most of the settings for SAP Signavio Process Collaboration Hub are accessed from SAP Signavio Process Collaboration Hub, for details see section SAP Signavio Process Collaboration Hub Settings.

Some additional settings are available from SAP Signavio Process Manager, under *Setup - Edit SAP Signavio Process Collaboration Hub configuration*.

Enable View Options

Modelers who use SAP Signavio Process Collaboration Hub can switch between two views, *Preview* and *Publish* by default.

- In *Preview*, all items the user has access to are visible, in their current state. This includes unpublished modifications and items in draft status.
- In *Publish*, the published versions of items are visible.

You can enable both views for all users of SAP Signavio Process Collaboration Hub.

This setting is part of the settings of SAP Signavio Process Collaboration Hub, read more in section Enabling View Options.

Manage Attribute Overlays

Attribute overlays are attribute visualizations that are added by modelers when they create a diagram in SAP Signavio Process Manager.

By default, all overlays are visible.

This setting is part of the settings of SAP Signavio Process Collaboration Hub, read more in section Manage Overlays Visibility.

Enable QuickModel

Modelers have access to QuickModel automatically. To give other users access to QuickModel, we recommend to create a user group.

For this user group, the following settings are necessary:

- Access to *Preview* view needs to be enabled, see section Enabling View Options for details.
- For the folder in which the users works with QuickModel, the user group needs at least *Edit* permission. See section Setting Access Rights to Folders and Diagrams [page 18] for details.
- The feature set *SAP Signavio Process Manager - create and edit BPMN processes* needs to be enabled. See section Activating Feature Sets [page 25] for details.

Related Information

User Groups

20 Configuring Access to SAP Signavio Process Collaboration Hub

SAP Signavio Process Collaboration Hub users have the ability to read and comment on diagrams published to SAP Signavio Process Collaboration Hub.

If you are using SAML 2.0-based authentication: Hub users can authenticate via a third-party account using a SAML (Security Assertion Markup Language) SSO service. Read more in section Enabling single sign-on via SAML.

Once SAP Signavio Process Collaboration Hub is configured correctly, published diagrams are available to all Hub users with access rights.

21 SAP Cloud ALM for Implementation

Learn how to connect SAP Signavio Process Manager with SAP Cloud ALM for future data synchronization.

Connecting an SAP Signavio Workspace to SAP Cloud ALM (also known as Automatic Provisioning)

Prerequisites

> ⓘ Note
>
> The integration feature is available to customers with an SKU based on SAP contracts. Currently, there aren't plans to extend these integrations to older SKUs tied to legacy contracts.

- You have workspace administrator rights.
- You have the access and authorizations to start provisioning in SAP for Me. For more information, see SAP for Me - Access and Authorizations.
- You checked SAP BTP Cockpit to ensure that the subaccount containing your SAP Cloud ALM subscription has an entitlement of *SAP Cloud ALM API*. For more information, see SAP BTP Cockpit - Enabling SAP Cloud ALM API.

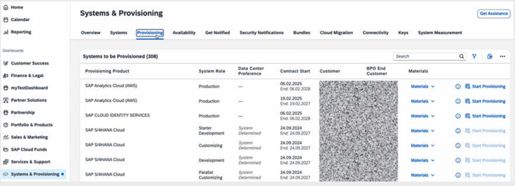
Context

> ⓘ Note
>
> This activity is possible under the following conditions:
>
> - Your SAP Signavio workspace and SAP Cloud ALM tenant exist under the same business partner ID.
> - Connectivity exists between one SAP Signavio workspace and one SAP Cloud ALM tenant (1:1).

Procedure

1. From the SAP for Me home page, choose *Systems & Provisioning* on the left side panel, then the *Provisioning* tab from the menu options.

Example



Systems & Provisioning

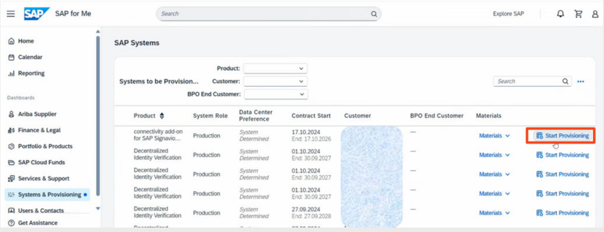
Systems to be Provisioned (308)

Provisioning Product	System Role	Data Center Preference	Contract Start	Customer	BPO End Customer	Materials	
SAP Analytics Cloud (AWS)	Production	—	06.02.2025 End: 06.02.2028	[redacted]		Materials	Start Provisioning
SAP Analytics Cloud (AWS)	Production	—	19.02.2025 End: 19.02.2027	[redacted]		Materials	Start Provisioning
SAP CLOUD IDENTITY SERVICES	Production	—	06.02.2025 End: 06.02.2028	[redacted]		Materials	Start Provisioning
SAP S/4HANA Cloud	Starter Development	System Determined	24.09.2024 End: 24.09.2027	[redacted]		Materials	Start Provisioning
SAP S/4HANA Cloud	Customizing	System Determined	24.09.2024 End: 24.09.2027	[redacted]		Materials	Start Provisioning
SAP S/4HANA Cloud	Development	System Determined	24.09.2024 End: 24.09.2027	[redacted]		Materials	Start Provisioning
SAP S/4HANA Cloud	Parallel Customizing	System Determined	24.09.2024 End: 24.09.2027	[redacted]		Materials	Start Provisioning

The *SAP Systems* page displays a list of available systems for provisioning.

2. Navigate to your *connectivity add-on for SAP Signavio solutions* entry.
3. Choose *Start Provisioning*.

Example



SAP Systems

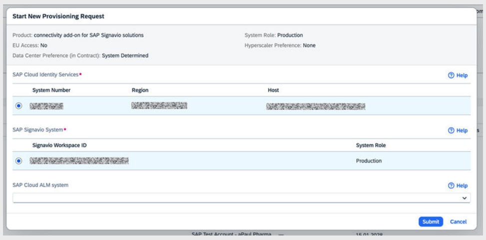
Systems to be Provision...
Product:
Customer:
BPO End Customer:

Product	System Role	Data Center Preference	Contract Start	Customer	BPO End Customer	Materials	
connectivity add-on for SAP Signavio...	Production	System Determined	17.10.2024 End: 17.10.2026	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	System Determined	01.10.2024 End: 30.09.2027	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	System Determined	01.10.2024 End: 30.09.2027	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	System Determined	01.10.2024 End: 30.09.2027	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	System Determined	27.09.2024 End: 27.09.2028	[redacted]	—	Materials	Start Provisioning

The *Start New Provisioning Request* details window opens.

4. (Optional) Check the *SAP Cloud Identity Services* details and select the desired system number and region if you have more than one region displayed.
5. Select an available SAP Signavio System.
6. Use the drop-down menu to select an SAP Cloud ALM system.

Example



Start New Provisioning Request

Product: connectivity add-on for SAP Signavio solutions
System Role: Production
EU Access: No
Hyperscaler Preference: None
Data Center Preference (in Contract): System Determined

SAP Cloud Identity Services*

	System Number	Region	Host
●	[redacted]	[redacted]	[redacted]

SAP Signavio System*

	Signavio Workspace ID	System Role
●	[redacted]	Production

SAP Cloud ALM system

7. Confirm with *Submit*.

   A window opens confirming that the provisioning request has been submitted.

   Note

   Assignments on renamed task/solution activity in SAP Cloud ALM need to be reassigned to the renamed task/solution activity.

8. Choose *OK* and scroll down the *SAP Systems* page to track the progress in the *Provisioning Status* section.

Example

Provisioning Status (2)

Product: solutions

Status:

BPO End Customer:

Customer:

Product	System Role	Customer	BPO End Customer	Contract End	Status	Materials	Provisioned System
connectivity add-on for SAP Signavio solutions	Production	[redacted]	—	17.10.2026 Start: 17.10.2024	Provisioning Triggered	Materials	*No system provided yet*
connectivity add-on for SAP Signavio solutions	Production	[redacted]	—	08.11.2025 Start: 08.11.2024	Provided	Materials	— [redacted]

Note

Successful provisioning results in a *Provided* status. If you do not receive confirmation of successful provisioning, select the status provided to link to troubleshooting instructions.

Next Steps

Establishing this connection from SAP Signavio to SAP Cloud ALM allows members of the user group to begin synchronizing BPMN Diagrams to Systems & Provisioning SAP Cloud ALM. For more information, see Synchronizing BPMN Diagrams to SAP Cloud ALM.

22 Provisioning for AI-assisted process modeler, text to process

Learn how to enable your SAP Signavio Process Manager workspace to create process diagrams with artificial intelligence (AI).

Prerequisites

- You have workspace administrator rights.
- You have the access and authorizations to start provisioning in SAP for Me. For more information, see SAP for Me - Access and Authorizations.

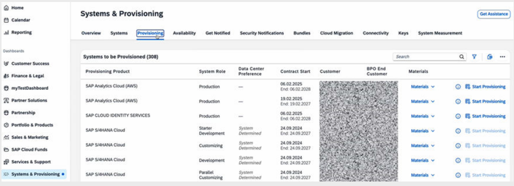
Context

Provisioning for SAP Signavio Process Manager is the one-time process of enabling and setting up key features. Provisioning settings may enable solutions that require the purchase of a license.

Procedure

1. From the SAP for Me home page, choose *Systems & Provisioning* on the left side panel, then the *Provisioning* tab from the menu options.

   Example

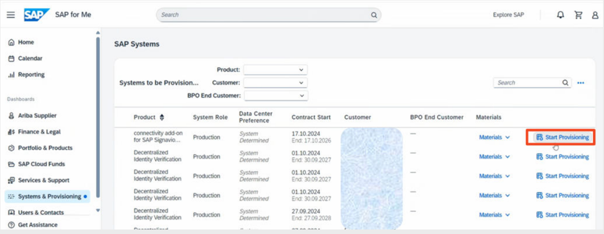
   

   Systems to be Provisioned (308)

Provisioning Product	System Role	Data Center Preference	Contract Start	Customer	BPO End Customer	Materials	
SAP Analytics Cloud (AWS)	Production	—	06.02.2025 End: 06.02.2028	[redacted]	[redacted]	Materials	Start Provisioning
SAP Analytics Cloud (AWS)	Production	—	19.02.2025 End: 19.02.2027	[redacted]	[redacted]	Materials	Start Provisioning
SAP CLOUD IDENTITY SERVICES	Production	—	06.02.2025 End: 06.02.2028	[redacted]	[redacted]	Materials	Start Provisioning
SAP S/4HANA Cloud	Starter Development	*System Determined*	24.09.2024 End: 24.09.2027	[redacted]	[redacted]	Materials	Start Provisioning
SAP S/4HANA Cloud	Customizing	*System Determined*	24.09.2024 End: 24.09.2027	[redacted]	[redacted]	Materials	Start Provisioning
SAP S/4HANA Cloud	Development	*System Determined*	24.09.2024 End: 24.09.2027	[redacted]	[redacted]	Materials	Start Provisioning
SAP S/4HANA Cloud	Parallel Customizing	*System Determined*	24.09.2024 End: 24.09.2027	[redacted]	[redacted]	Materials	Start Provisioning

   The *SAP Systems* page displays a list of available systems for provisioning.
2. Navigate to your *connectivity add-on for SAP Signavio solutions* entry.
3. Choose *Start Provisioning*.

Example



SAP Systems

Systems to be Provision...

Product:

Customer:

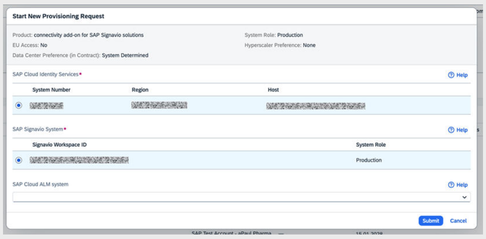
BPO End Customer:

Product	System Role	Data Center Preference	Contract Start	Customer	BPO End Customer	Materials	
connectivity add-on for SAP Signavio...	Production	*System Determined*	17.10.2024 End: 17.10.2026	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	*System Determined*	01.10.2024 End: 30.09.2027	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	*System Determined*	01.10.2024 End: 30.09.2027	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	*System Determined*	01.10.2024 End: 30.09.2027	[redacted]	—	Materials	Start Provisioning
Decentralized Identity Verification	Production	*System Determined*	27.09.2024 End: 27.09.2028	[redacted]	—	Materials	Start Provisioning

The *Start New Provisioning Request* details window opens.

4. (Optional) Check the *SAP Cloud Identity Services* details and select the desired system number and region if you have more than one region displayed.
5. Select an available SAP Signavio System.

Example



Start New Provisioning Request

Product: connectivity add-on for SAP Signavio solutions

System Role: Production

EU Access: No

Hyperscaler Preference: None

Data Center Preference (in Contract): System Determined

SAP Cloud Identity Services*

	System Number	Region	Host
●	[redacted]	[redacted]	[redacted]

SAP Signavio System*

	Signavio Workspace ID	System Role
●	[redacted]	Production

SAP Cloud ALM system

Note

You do not need to make an SAP Cloud ALM selection to enable the text to process feature. For more information about provisioning with SAP Cloud ALM, see SAP Cloud ALM for Implementation [page 163].

6. Confirm with *Submit*.

   A window opens confirming that the provisioning request has been submitted.
7. Choose *OK* and scroll down the *Systems & Provisioning* window to track the progress in the *Provisioning Status* section.

Example

Provisioning Status (2)

Product: solutions ×

Status:

BPO End Customer:

Customer:

Product	System Role	Customer	BPO End Customer	Contract End	Status	Materials	Provisioned System
connectivity add-on for SAP Signavio solutions	Production	[redacted]	—	17.10.2026 Start: 17.10.2024	Provisioning Triggered	Materials	*No system provided yet*
connectivity add-on for SAP Signavio solutions	Production	[redacted]	—	08.11.2025 Start: 08.11.2024	Provided	Materials	— [redacted]

Note

Successful provisioning results in a *Provided* status. If you do not receive confirmation of successful provisioning, select the status provided to link to troubleshooting instructions.

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