Configuration: Centralised Setup

Introduction

The Engage Process Suite is used by organisations for many different themes and management goals. They include Continuous Improvement, Risk management/ FMEA, digital and organisational transformation etc. Our consultants have a lot of experience in configuring the settings of the Suite for these different purposes. All their experiences and a lot of wonderful input from many customers, has now been bundled in Standard Configurations. With these configurations our customers' key users can manage the settings of the Suite in an effective and efficient way aimed at these themes. Where needed, our consultants can provide guidance or help to complete the configuration.

Centralised Setup

The Central Setup configuration is one of the base configurations of the Engage Process Suite. With this configuration you will create a clear setup of projects and the authorization in support of effective process management. It will help to set clear guidelines for any growing process management environment and allows you keep a central control. Users will experience a ready-to-use environment and work with the central guidelines.

Next steps

This configuration is also a basis for other configurations; a logical next steps would be the configuration '**Handbook'** where you shared process models with the rest of the organisation. The '**Knowledge Management**' configuration takes that even further by creating a platform for sharing and improving knowledge in your organization.

Engage Process Suite Modules needed (x) or preferred (*):

Name	Needed/Preferred
Modeler	**x**
Viewer	
Autorisatie	**x**
Tabellen	
Publisher	
Teamboard	
Feedback	
Brainstorm	

For which subscriptions?

This configuration is possible in **all** our **Suite** subscriptions

Base requirements:

Team of people must be assigned and authorized to decide on Authorization and Groups of Users for your organization.

Creating the configuration per Module

First we will start to create User Groups and assign Users in these groups. By creating such User Groups we will greatly simplify the Authorization within in the Suite later on. It will allow you to use standard Authorizations for Projects or Processes for groups of users without having to consider each and every individual User.

Settings

Go to Users & Groups in Settings (settings.engageprocess.com, or via the App Switcher in the upper right corner of the Modeler).

- Create a minimum of 3 User Groups
  - Administrators
  - Creators
  - Viewers
- Assign all roles to 'Administrators'
- Do not assign any roles to the Creators
- Assign individuals / members to these groups
- Create a single user called viewer@yourorganisation.com (your company's email) and assign a Viewer license to this user. Make this user a member of the group '**Viewers'**.

Change a couple of Icons in the '**Step library'**, still in 'Settings'

- Add a couple of icons that are recognizable for your users, like '**email'**, a specific IT-system where you can use the logo of that system etc.
- Ps: we also suggest to hide the icons '**Parallel Start'** and '**Service**' as these are not often used and they can create confusion.

Create a table with the appropriate roles in your organization; we cannot give a generic example in this Configuration as this will highly depend on the type of company that you are or industry that you are in.

- Go to the standard '**Roles'** table in '**Tables'**: Divide the roles in logical sub-tables for your organization.

Example

Table	Roles
Operational roles	Operator Client desk Customer Support
Management roles	Operations Manager Director
Support roles	Admin clerk Controller Reception desk Auditor
External roles	Client IT Service Company

Note!

Roles typically are not the same as job-functions. Any person or function in your organization can have a multiple roles in multiple processes. The role Operator in an process can be done by several different functions of your organization.

Modeler settings:

Projects: Create 2 projects in the Modeler

1. '**Final Processes'**, in which we will put processes that are ready to use for your organization;

2. '**Concept Processes'**, for all processes that are still in development, in review, test, or for training purposes.

Actions in project '**Final Processes'**

- Folders:
  Choose one of the following examples for Folders that you create in the Project window:
  Choose one of the following folder structures:
    - *Option 1*: Create a folder for each organizational entity or department
    - *Option 2*: Create a folder for Primary Processes, one for Management Processes and one for Supporting Processes.
- Give '**Authorization**' to users:
    - Assign all rights / give all authorization to the group '**Administrators'** in this project
    - Give the following authorization to the '**Viewers**' in all folders of this project:
      - Read
      - View Shared
      - Feedback
    - Give the following authorization to the '**Creators'** (you may differentiate this per group or department if you have made that distinction in the Folders)
      - Read
      - Update
      - Create
      - Delete
      - Publish
      - View Shared
      - Feedback

  Tip!
  Alternatively you do not give authorization to '**Update'** and '**Remove'**; Creators cannot change the folder structure that you've created or remove folders. They can still Create, Update and Remove any Process that they have created.

For the Project Tables, via the Project window:

- Assign all authorization to the group '**Administrators**'
- Do not give any authorization to the '**Creators'**

Actions in project '**Concept Processes'**

- Give full authorization to both Administrators and Creators in this Project.

Alternative

Make a separate Project and User Group for each division / department of your organization. Assign the described authorities per Project to the appropriate User Groups.