Holocentric

Create and Publish Process Stream

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Create and Publish Process Stream

To create and publish process streams, a user must have one of the following permissions in the Connect system:

- Process editing
- Model Administration
- Administration

System administrators can change permissions for different users by going to **People > Users.**

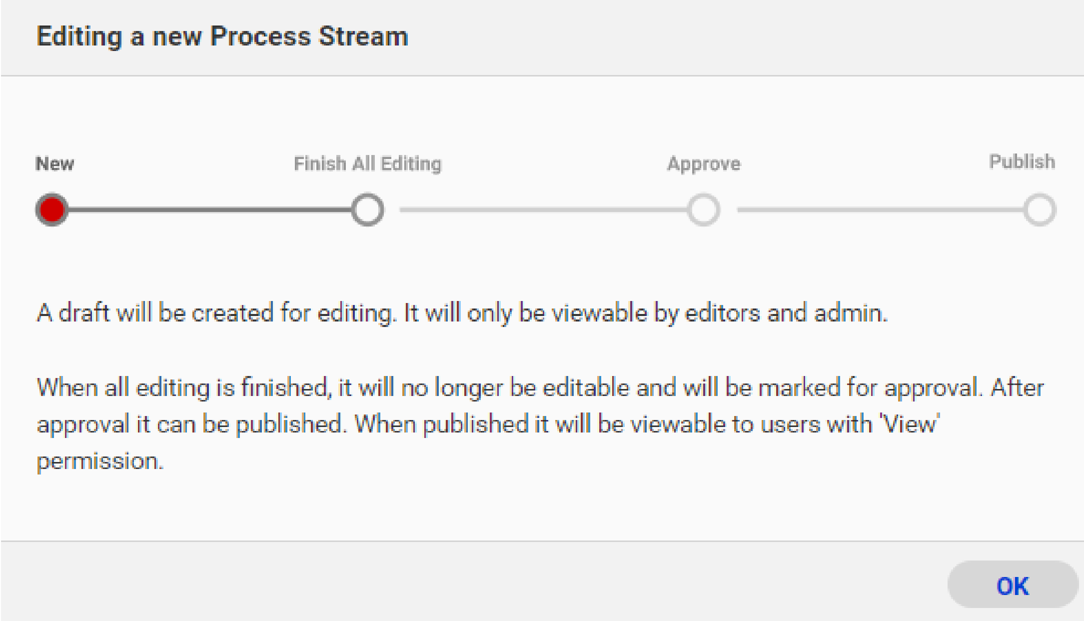
View our Process Stream video guide for an overview.

1. Create a new Process Stream

1.1 Access the **Operations** tab and click on the **Processes** sub-tab.

1.2 Click the **Add New Process Stream** button

1.3 A release management window will appear if you have Release Management enabled.

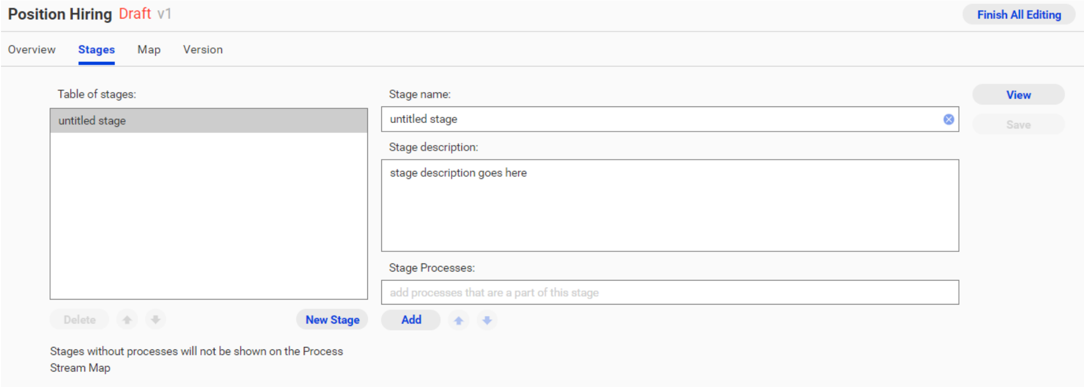


1.4 Complete all relevant fields in the form.

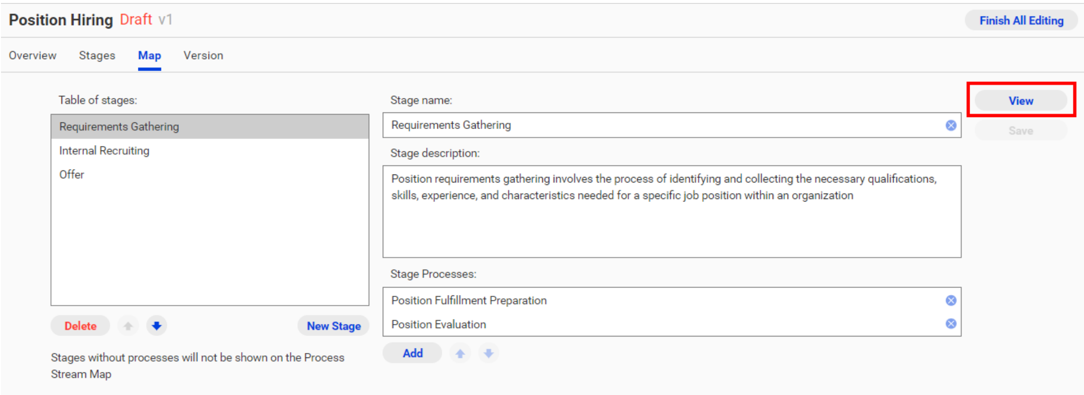
Field	Description
Process Stream Name	Name or title of the Process Stream
Description	Description of the Process Stream, an explanation of what the stream is for
External reference identifier	Code or reference to the process stream, if it is an external system
Related Stakeholders	Positions that are related to this Process Stream, they can be Accountable, Approver, Owner, and Reviewer
Summary	This is the short description that appears in the browsing menu.
Keywords for 'Search'	Keywords that, when searched in Holocentric Connect, will make the item appear in search results.
Remove from view	Tick the box to hide the item. This will make the item only visible to users with Administrator permissions. Hidden items are: • not shown in lists • not shown as a related item on any other items. • not accessible by URL (will show item not found message) • not shown in any downloadable report.

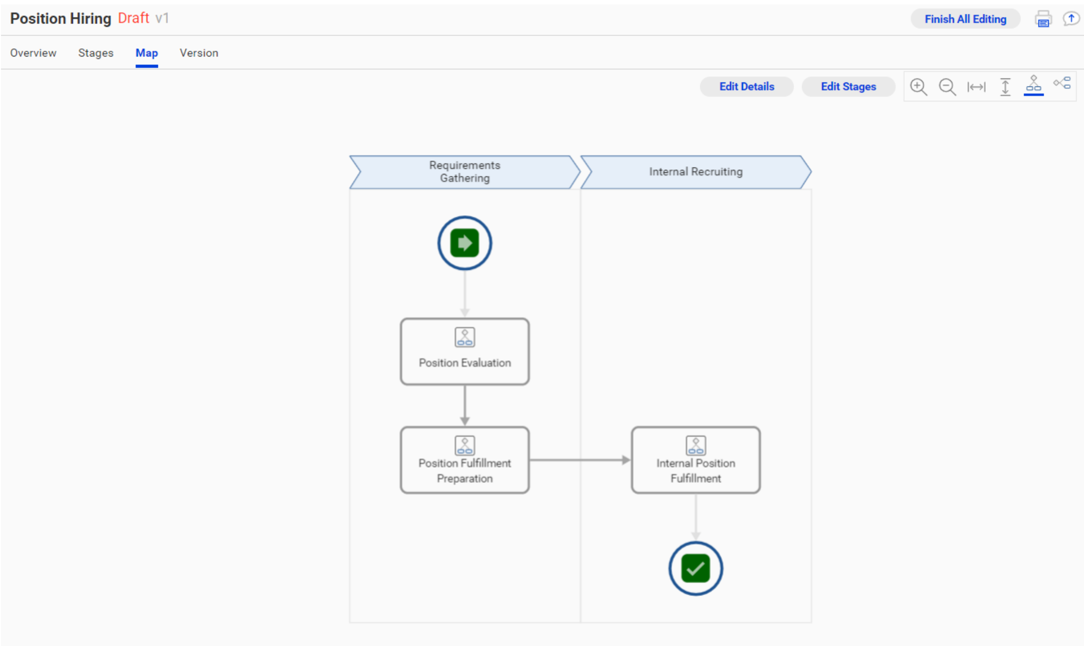
1.5 Click **Save**

1.6 In the process stream editor view, you can edit the stage name, description, and add processes within the stages.



1.7 Click the **View** to display the stages in a map view.

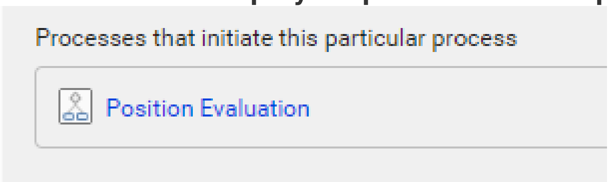




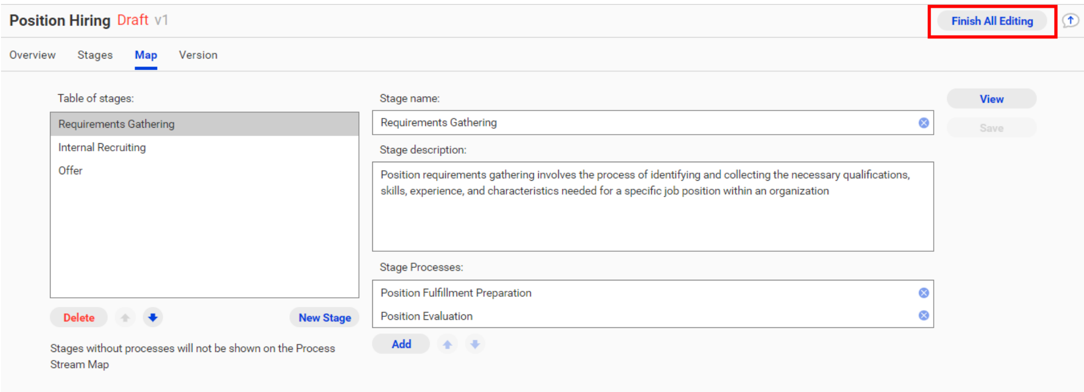
NOTE

Only stages that contain a process will be shown in the map view
The connections on this process stream map view are drawn automatically based on how the process hands over to another process.

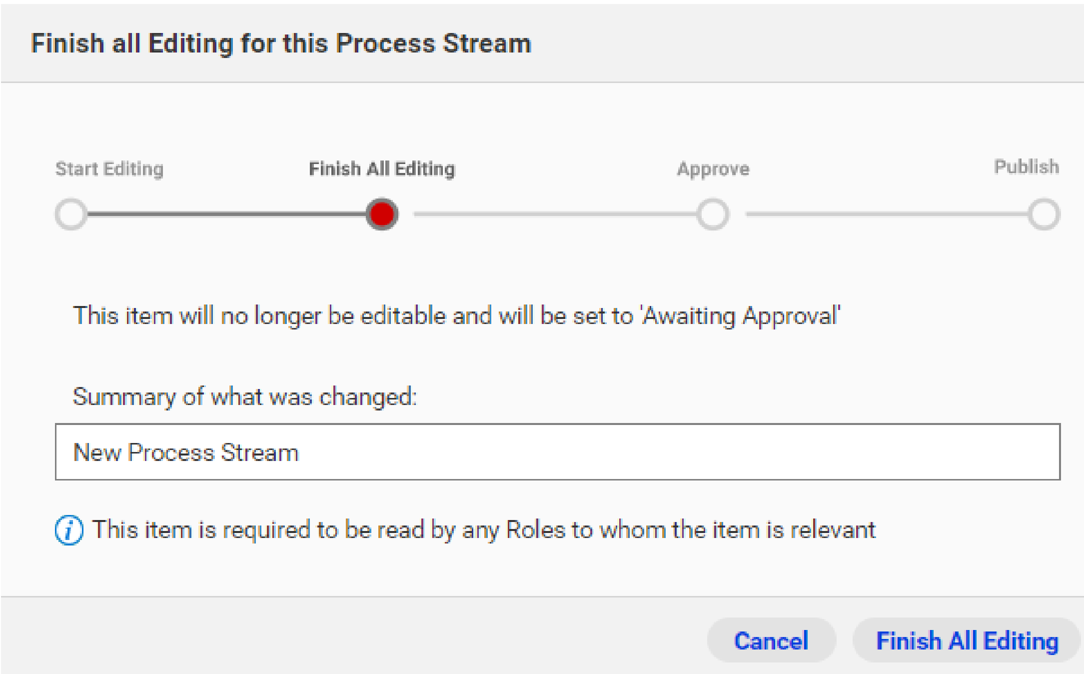
If applicable, you can view which process initiated a particular process from the Process **Step-by-Step View** and **All Steps View.**



1.8 When you have finished editing click **Save** to commit the changes and click **Finish All Editing**.



1.9 A release management workflow appears. Write a summary of what you added to the process stream and click **Finish All Editing** to move to the approval stage.

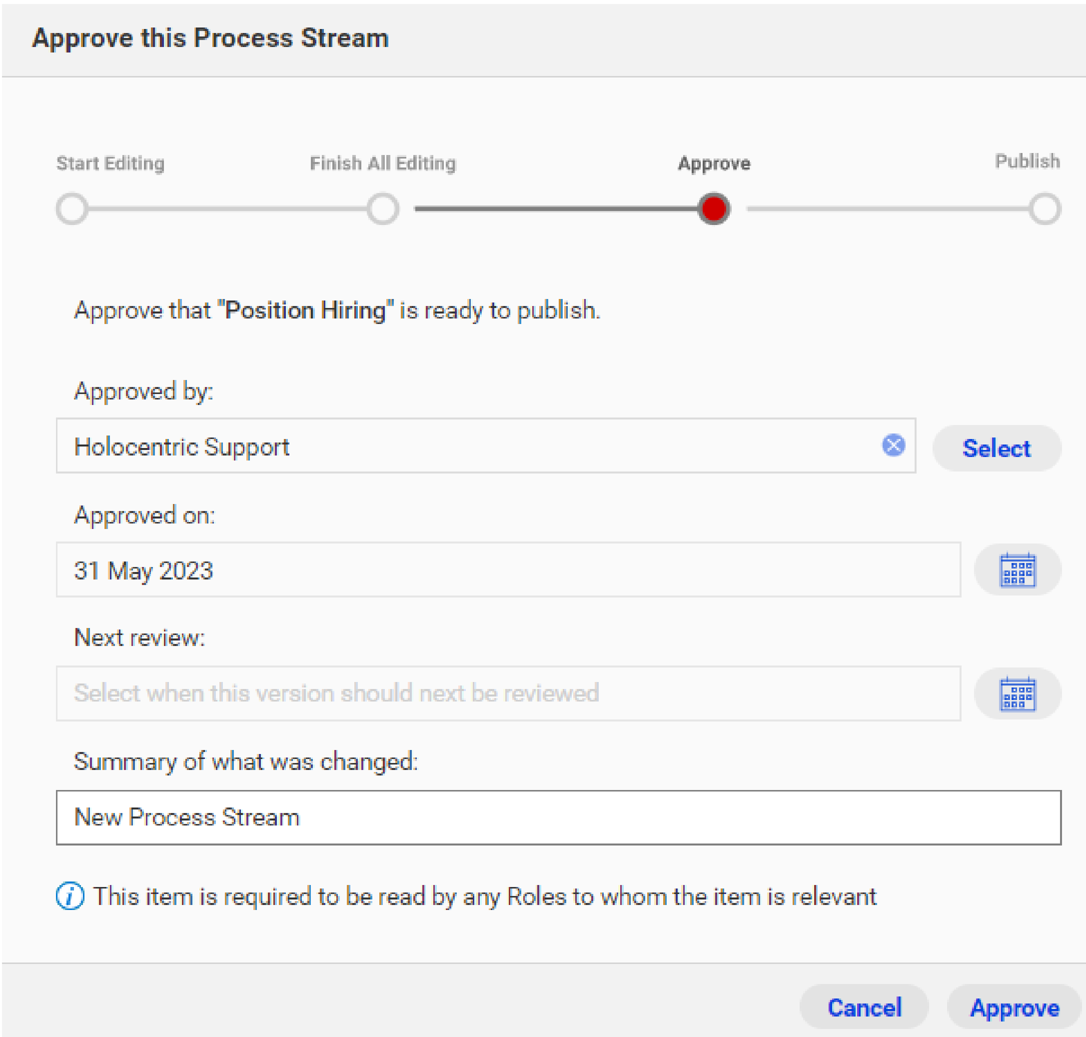


2. Approve and Publish Process Streams

2.1 Click **Approval.** A drop-down menu appears. You can approve the process stream or you can revert it if you want to make further changes to your content.

2.2 You can edit your summary of what additions you made. You also have the option to select who approved the item, the date on which it was approved as well as the next review date. Click **Approve** to continue to the publication stage. Once approved, the process stream is marked ‘Ready to Publish’.

Note: As with other aspects of web app content, you can edit version control information for policies, processes, documents and work instructions using the ***Version*** *subtab.*



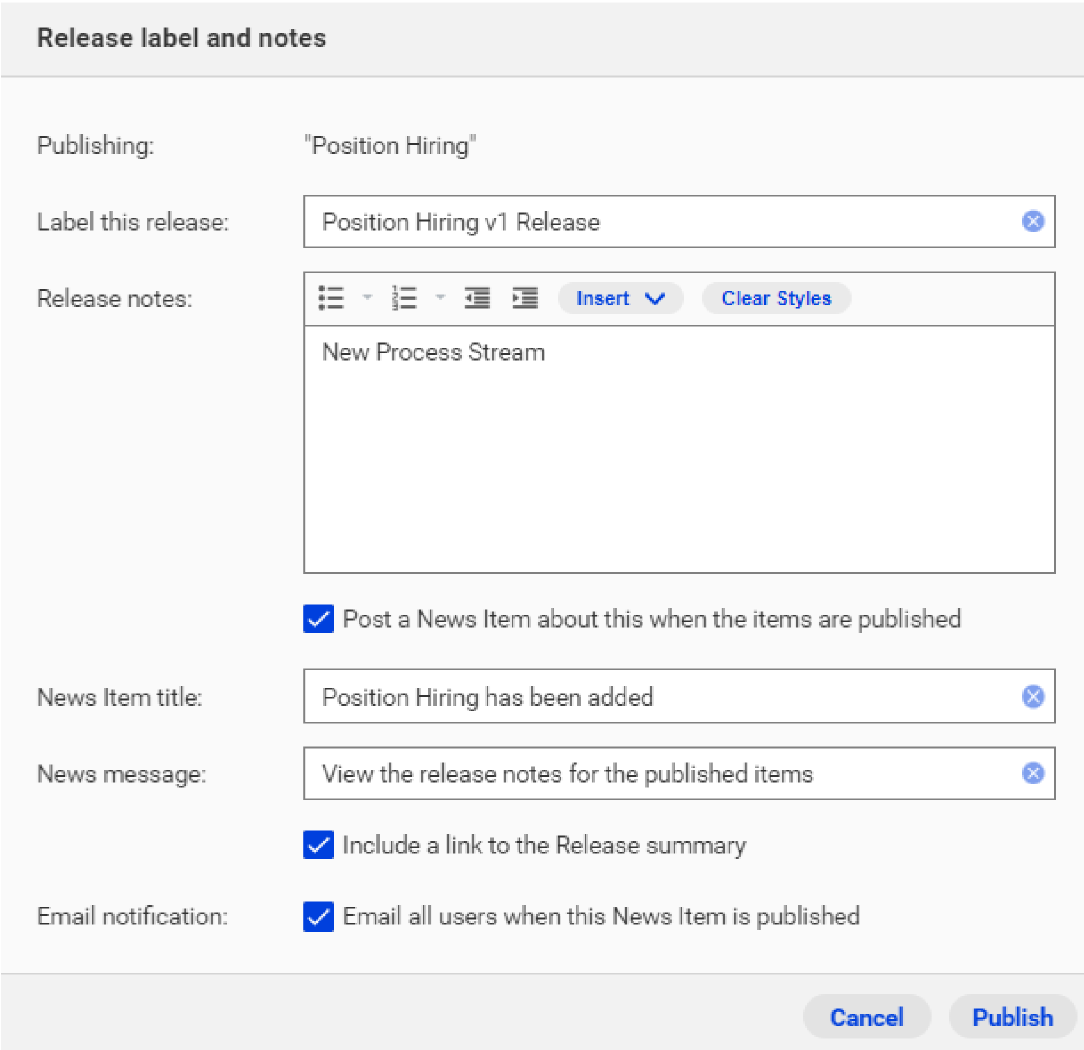
TIP

If the new process stream is part of a larger release (i.e. a release with multiple content updates), leave it marked 'Ready to Publish'. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**.

2.3 To proceed with publication, click **Publishing** and **Publish Immediately**.

When you confirm publication, the release management workflow appears. You have the option to edit the summary of the changes that you have made. Click **Continue.**

2.4 The **Release label and notes** window appears. Write official release notes for the new policy. You can edit the release notes later if required.



Field	Description

Label this release	The official name of this release.
Release notes	Details about what updates you have made.
Post a news item about this when the items are published	If selected, you can post a news item on the Home tab to notify users about your content changes.
News item title	Title of the news item that will appear in the Home tab.
News message	The message that will appear under the news item title.
Include link in release summary	If selected, this option will allow you to include a link to the release notes for the item.
Email all users when this News Item is published	If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day.

2.5 Click **Publish** to officially release the new process stream. It will now be visible to all web app users in your organisation.

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