

## Edit Process

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### [How to edit processes in Holocentric Connect](#)

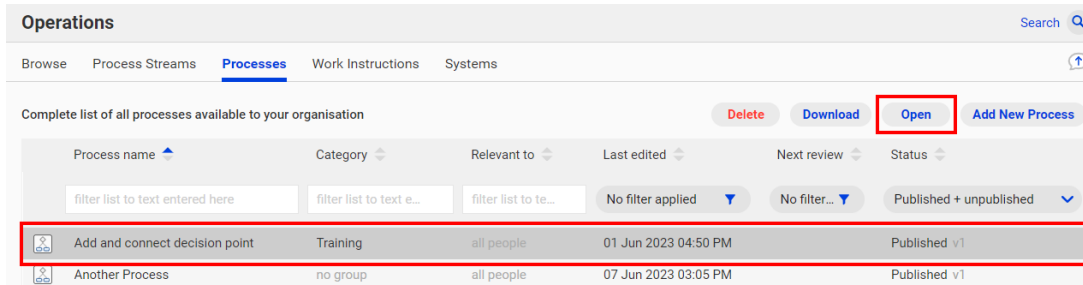
To edit existing processes, a user must have one of the following permissions in the Connect system:

- Process step editing
- Process editing
- Model Administration
- Administration

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

### 1. Edit Process

1.1 To open a process, access the **Operations** tab and click the **Processes** subtab, select the process you want to edit, and click **Open**.

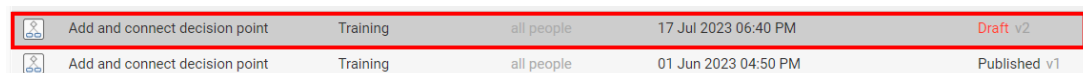


Process name	Category	Relevant to	Last edited	Next review	Status
Add and connect decision point	Training	all people	01 Jun 2023 04:50 PM		Published v1
Another Process	no group	all people	07 Jun 2023 03:05 PM		Published v1

If you have opened a process that has no additional drafts waiting to be approved, published, or deleted, a variety of editing options are available.


### IMPORTANT

If the process already has a draft version (or a version that is awaiting approval/publication) please open this version to edit NOT the older published version.



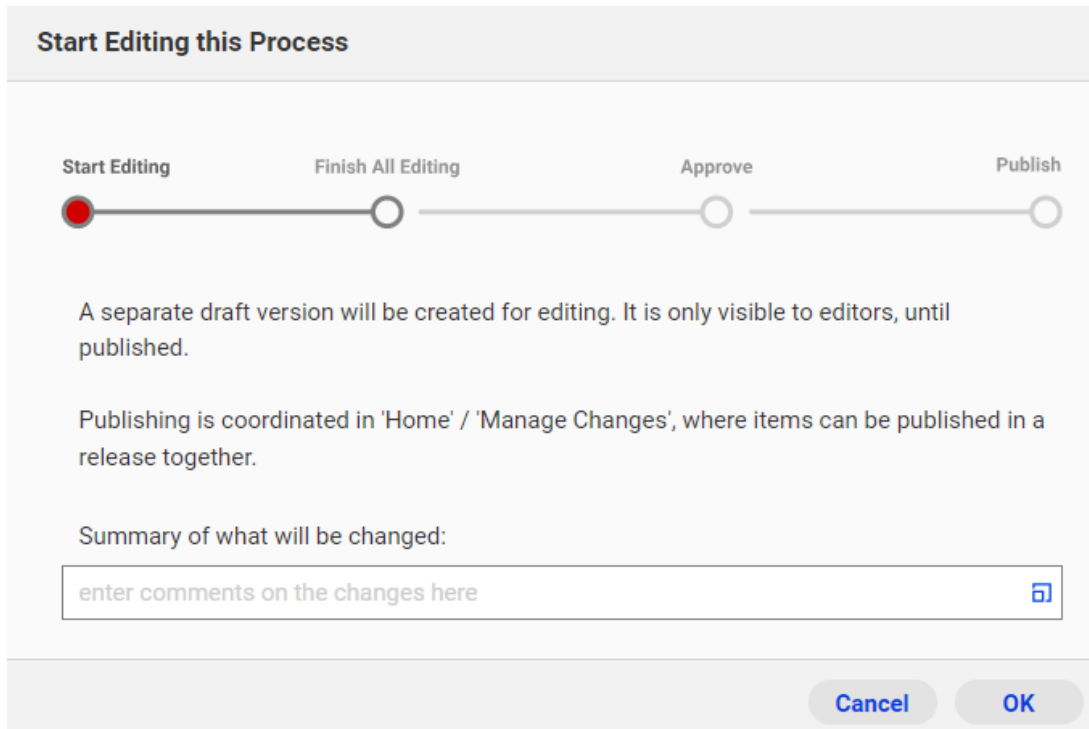
Add and connect decision point	Training	all people	17 Jul 2023 06:40 PM	Draft v2
Add and connect decision point	Training	all people	01 Jun 2023 04:50 PM	Published v1

1. 2 To access your editing options, click **Start Editing**.



Add and connect decision point						Start Editing
Step-by-step	All Steps	Map	RASCI	Relevant Policies	Version	

1.3. A release management workflow appears. It gives you guidance on all the steps you need to take to publish a new version of your process. You can write a summary of what you intend to change. Click **OK** to start editing.



**Start Editing this Process**

Start Editing      Finish All Editing      Approve      Publish

A separate draft version will be created for editing. It is only visible to editors, until published.

Publishing is coordinated in 'Home' / 'Manage Changes', where items can be published in a release together.

Summary of what will be changed:

enter comments on the changes here

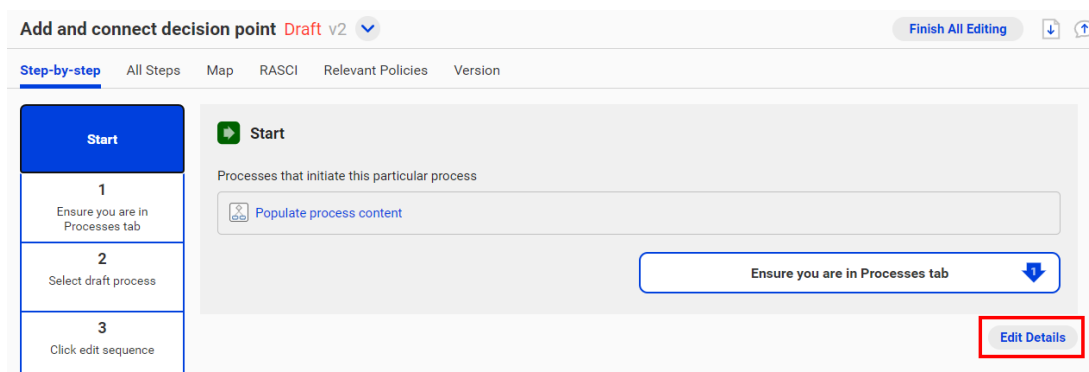
Cancel      OK

This makes a new draft version of your process and you can start editing the content. You can edit different parts of a process. The editing options available to you differ depending on the part of the process that you choose to edit.

## 2. Edit Details

This option allows you to edit the core information about the process.

2.1 Click **Edit Details** to edit the details of the process



Add and connect decision point Draft v2      Finish All Editing

Step-by-step   All Steps   Map   RASCI   Relevant Policies   Version

**Start**

1 Ensure you are in Processes tab

2 Select draft process

3 Click edit sequence

Start

Populate process content

Ensure you are in Processes tab

**Edit Details**

*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

This includes:

Field	Description
Process name	The title of the process.
Description	The introduction of the process. This appears at the process start point.
External reference identifier	An identification code/number for the item. This can be used if the item is being migrated from a different system or if a system of identifiers is required. This field is optional.
Relevant documents	Documents that are related to the process. These documents must first be uploaded to Holocentric Connect.
Related Policies	Policies or policy sections related to the process.
Summary	This is the short description that appears in the browsing menu.
Roles this is relevant to	Roles that have duties within the process.
Category	The group to which the process belongs.
Required reading (for customers with Attestation only)	Tick this box to make this item required reading for all roles to which the item is relevant.
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: <ul style="list-style-type: none"> <li>• not shown in lists</li> <li>• not shown as a related item on any other items.</li> <li>• not accessible by URL (will show item not found message)</li> <li>• not shown in any downloadable report.</li> </ul>

2.2 Click **Save** when you are done editing to commit the changes.

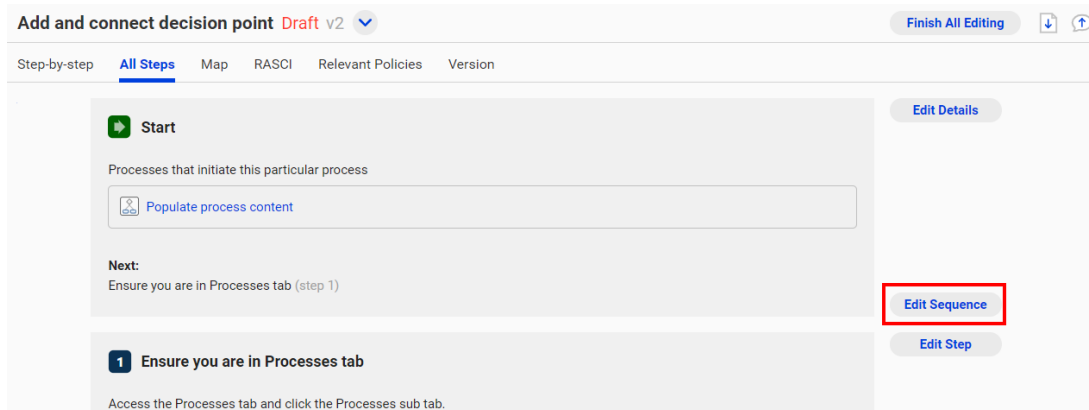
*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

### 3. Edit Sequence

This option allows you to edit your process map. Use the different functions at the bottom to edit the map. This edit option allows you to:

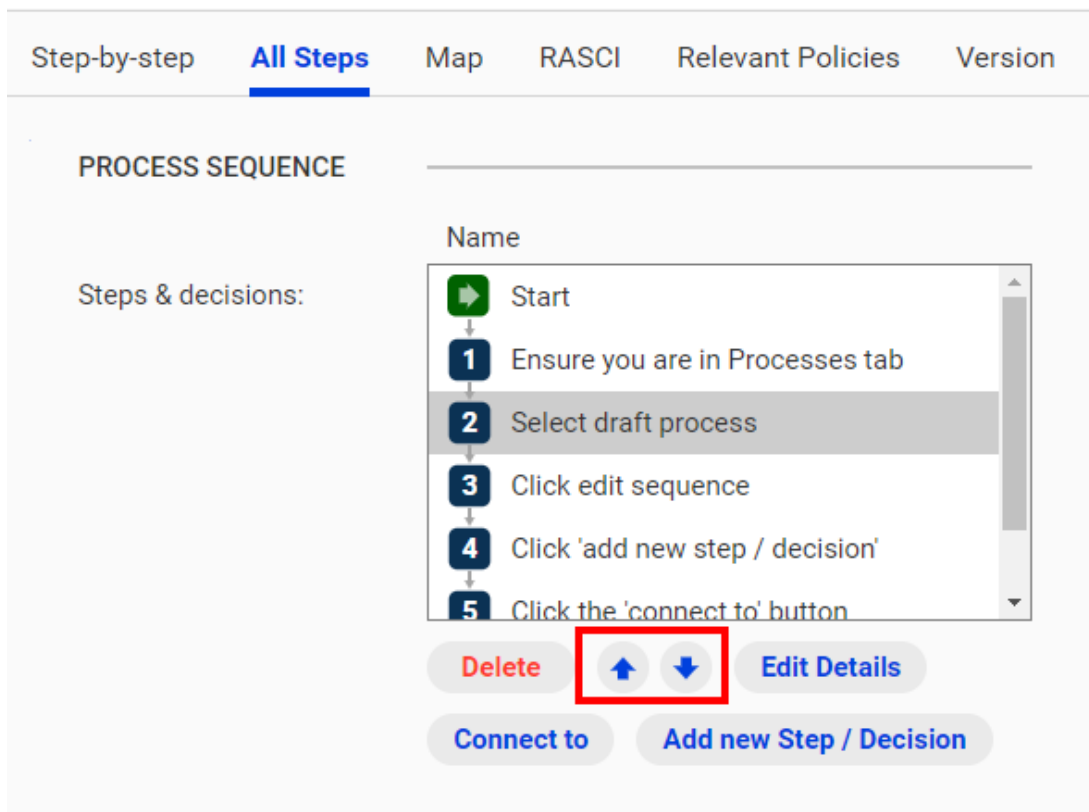
- Delete a step using **Delete**
- Change the order of the steps using the arrows
- Change the connections between steps and decision points using **Connect to**
- Add a new step/decision

3.1 From the All Steps view, click the **Edit Sequence** to open the sequence editor



*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

3.2 Use the arrows to change the order of the step



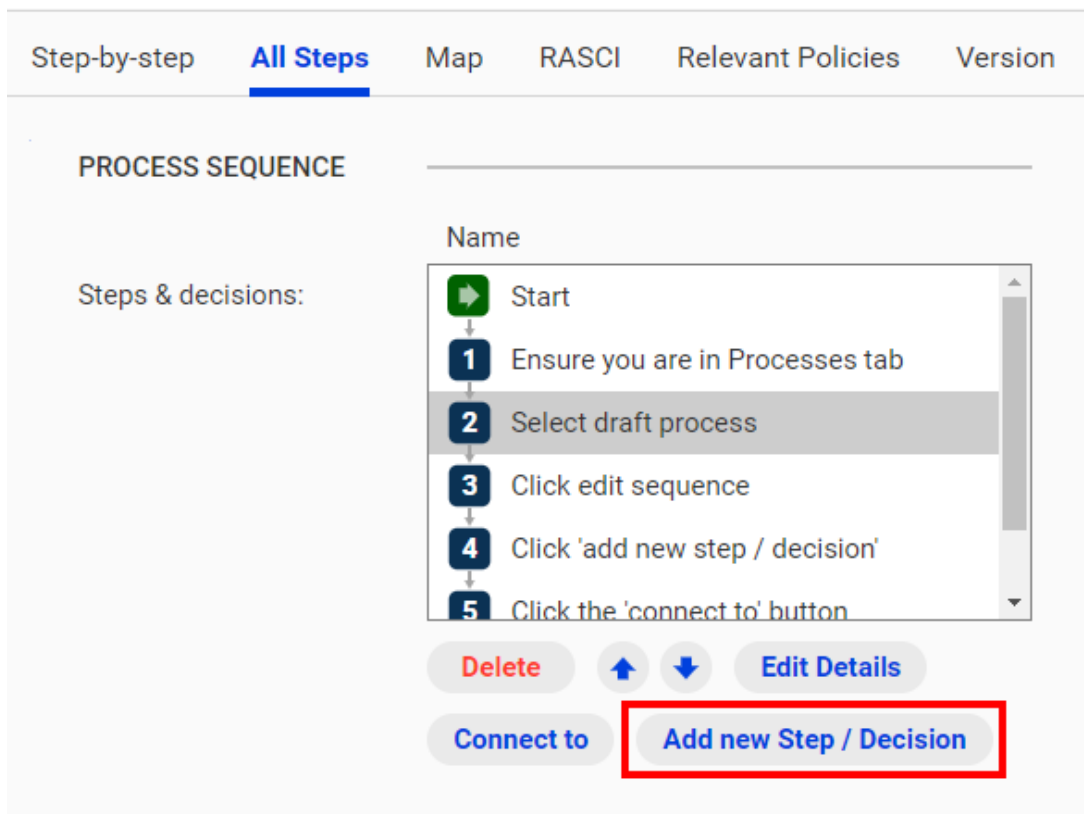
*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

3.3 Click the **Connect to** to update connections to connect to a new process, update existing connections, or add an additional connection for a process step.

The screenshot shows the 'All Steps' menu bar with options: Step-by-step, All Steps (selected), Map, RASCI, Relevant Policies, and Version. Below the menu bar is the 'PROCESS SEQUENCE' section. On the left, it says 'Steps & decisions:'. On the right, there is a list of steps with a 'Name' header. The steps are: 1. Start (with a green play button icon), 2. Ensure you are in Processes tab, 3. Select draft process (highlighted in grey), 4. Click edit sequence, 5. Click 'add new step / decision', and 6. Click the 'connect to' button. Below the list are buttons: Delete, up arrow, down arrow, Edit Details, Connect to (highlighted with a red box), and Add new Step / Decision.

The screenshot shows the 'Add and connect decision point Draft v2' section. It has a menu bar with options: Step-by-step, All Steps (selected), Map, RASCI, Relevant Policies, and Version. Below the menu bar, it shows 'STEP' with '2 Select draft process' and 'NEXT STEP' with a blank line. Under 'Connects to:', there is a dropdown menu with '3 Click edit sequence' selected and a 'Select' button. Below that is a checkbox labeled 'Customize the label on this choice' which is unchecked. At the bottom is a button labeled 'Add additional connection'.

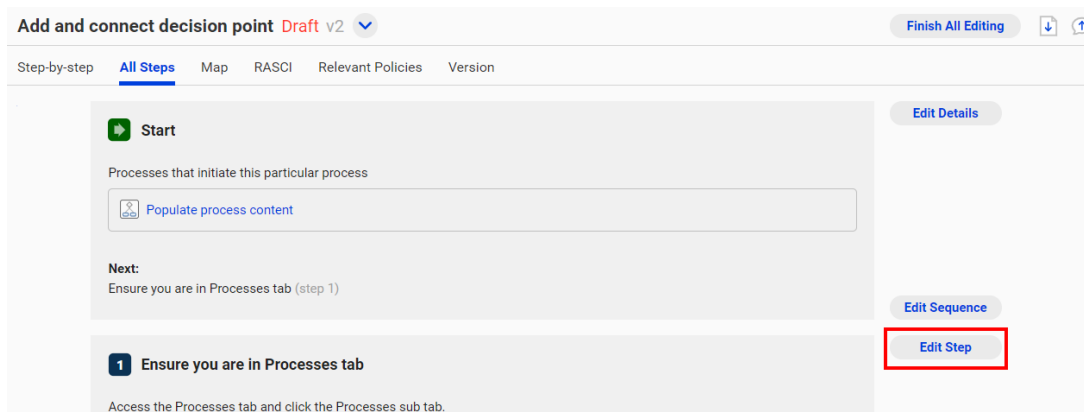
3.4 Click **Add new Step / Decision** to add a new process step or decision point



3.5 Click **Save** when you are done editing to commit the changes.

## 4. Edit Step

By using this option, you can change information about each process step.



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This includes:

Field	Description
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Type	You can make this section either a step or a decision point by selecting the radio buttons. <i>Please note: the first step cannot be a decision point.</i>
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Name	The title of the step.
Description	The instructions for completing the step.
Performed by	Roles, organisations and/or people that are responsible for the steps.
Work instructions	If you have this enabled, you can attach further instructions to a step.
Documents used in step	Documents that are relevant to this step.
Policies relevant to step	Policies that link to this process step.

## 5. Version

5.1 You can edit the version control information for the process. Access the **Version** subtab and click **Edit**.

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5.2 Make the necessary changes. When editing Version you can add/edit:

- which user approved the process
- the date on which the process was approved
- summary of previous content changes
- the date of next review.

5.3 Click **Save** to commit changes.

### NOTE

Please note that the location of your editing options depends on how you have chosen to view your process.

**END**