



How-to guide

Step-by-step guides for everything ProcessTrace does, from setting up your organization to keeping every process map up to date.

processtrace.app

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01

Get started

Your organization holds your processes, changes and projects. You create it once, then invite the people who work on your processes.

Create your account and organization

- 1 Click Create account on processtrace.app. Sign up with your e-mail address and a password, or continue with Google or Microsoft.
- 2 If you signed up with e-mail and password, open the confirmation link we send you.
- 3 Enter the name of your organization. You become its owner.

Tip: Invited by a colleague? Open the link in the invitation e-mail and sign in with the invited address: you join their organization instead of creating your own.

Invite your colleagues

- 1 Open Settings → Members.
- 2 Enter a colleague's e-mail address, choose a role and click Send invitation. The invitation is valid for 7 days.
- 3 In the list, change a member's role or remove them. Pending invitations can be cancelled.

Tip: Roles: viewers read everything; modelers also edit maps and manage changes and projects; approvers also approve and publish versions; admins also manage members and settings; owners can also delete the organization.

PT

ProcessTrace

Demo Group

Katarzyna Lewandowska · Owner

EN

Sign out

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Members

People with access to Demo Group and their roles.

Members and pending invitations: 6 of 10.

NAME	ROLE	JOINED	
Anna Kowalska anna.kowalska@example.com	Viewer	Oct 22, 2026	Remove
Jonas Becker jonas.becker@example.com	Approver	Oct 22, 2026	Remove
Katarzyna Lewandowska (you) katarzyna.lewandowska@example.com	Owner	Oct 22, 2026	
Lukas Schmidt lukas.schmidt@example.com	Admin	Oct 22, 2026	Remove
Marta Zielińska marta.zielinska@example.com	Modeler	Oct 22, 2026	Remove
Tomasz Wiśniewski tomasz.wisniewski@example.com	Modeler	Oct 22, 2026	Remove

Invite someone

Email address

Role

Viewer

Send Invitation

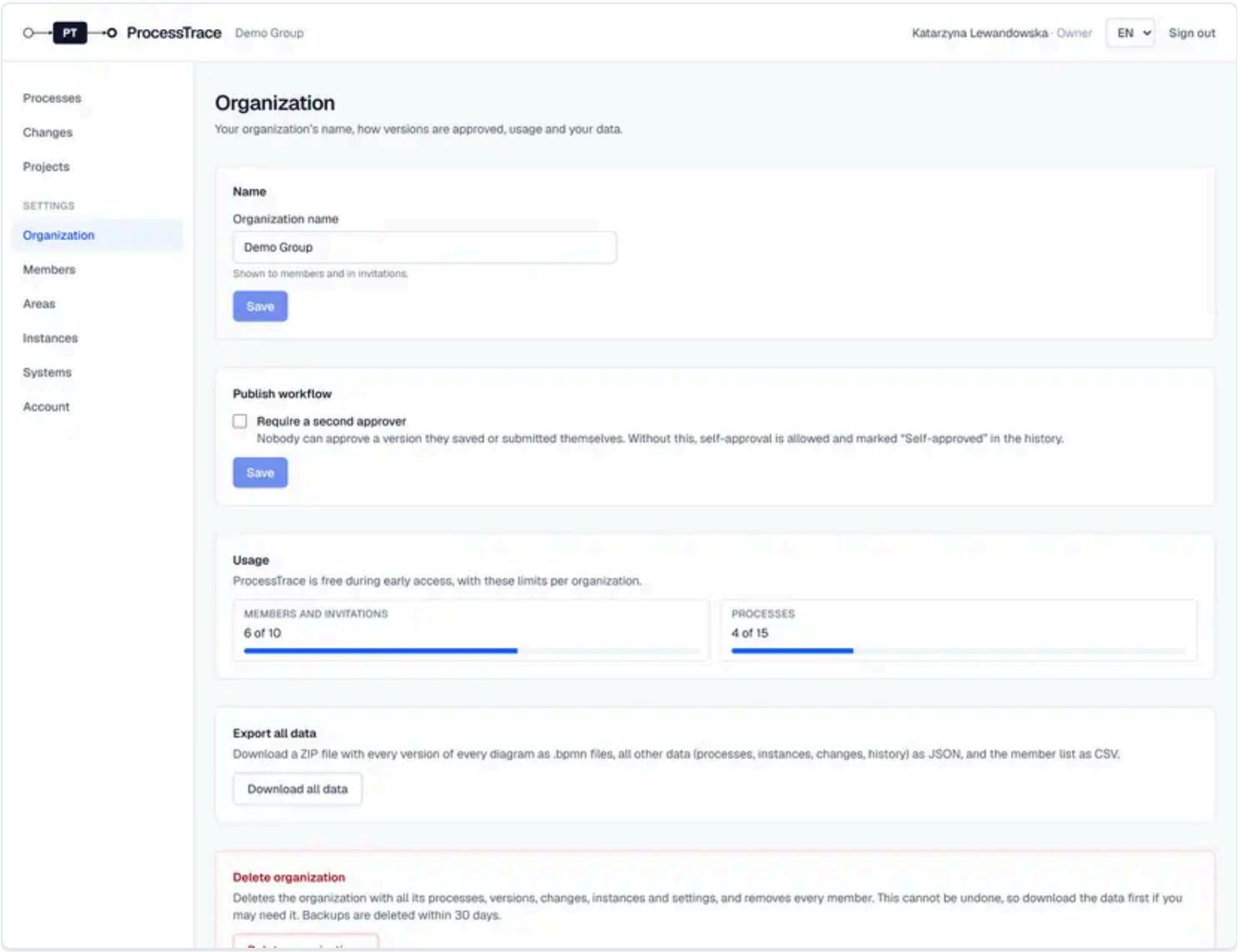
Pending invitations

No pending invitations.

Screenshot with demo data.

Organization settings

- 1 Under Settings → Organization, owners and admins rename the organization.
- 2 Turn on Require a second approver if nobody should approve a version they saved or submitted themselves.
- 3 The same page shows how much of the free plan you use.



Screenshot with demo data.



02

Set up your systems

Systems are the IT systems your processes run on, one row per version, for example JDE 9.2 or QAD 2024. Instances and changes refer to them.

Add a system

- 1 Open Settings → Systems (owners and admins).
- 2 Under Add a system, enter a short code (e.g. JDE), the version (optional) and the name. Click Add system.
- 3 For a new version of a system you already have, pick its code: the name is filled in. Each version is its own row.
- 4 Edit changes the version and the name. The code stays fixed, because saved diagrams refer to it.

Tip: A system that an instance or a change uses can't be deleted.

The screenshot shows the 'Systems' management page in ProcessTrace. The left sidebar contains navigation links: Processes, Changes, Projects, SETTINGS, Organization, Members, Areas, Instances, Systems (highlighted), and Account. The main content area is titled 'Systems' and includes a description: 'The IT systems your processes run on, one row per version (e.g. JDE 9.2, QAD 2024). Instances pick from this list.' Below this is a table with columns: CODE, VERSION, NAME, and USED BY. The table lists five systems: BC (version 27, Microsoft Dynamics 365 Business Central), JDE (version 9.2, JD Edwards EnterpriseOne), QAD (version 2019, QAD Enterprise Edition), QAD (version 2024, QAD Adaptive ERP), and WMS (version 3.4, Warehouse app (in-house)). Each row has an 'Edit' button. Below the table is a form titled 'Add a system' with the instruction: 'Add each version you run as its own row. For a new version of a system you already have, pick its code.' The form has three input fields: 'Code' (with 'JDE' entered), 'Version (optional)' (with 'e.g. 9.2' entered), and 'Name' (with 'e.g. JD Edwards EnterpriseOne' entered). There is an 'Add system' button. A note at the bottom states: 'Short code, e.g. JDE or WMS; the same for every version of a system. It is written into diagrams and cannot be changed later.'

CODE	VERSION	NAME	USED BY
BC	27	Microsoft Dynamics 365 Business Central	Instances or changes: 2
JDE	9.2	JD Edwards EnterpriseOne	Instances or changes: 5
QAD	2019	QAD Enterprise Edition	Not used yet
QAD	2024	QAD Adaptive ERP	Instances or changes: 2
WMS	3.4	Warehouse app (in-house)	Instances or changes: 3

Screenshot with demo data.



03

Set up your instances

Instances are where your processes run: a site, an entity, a business unit or a system installation. Each process can have one local variant per instance.

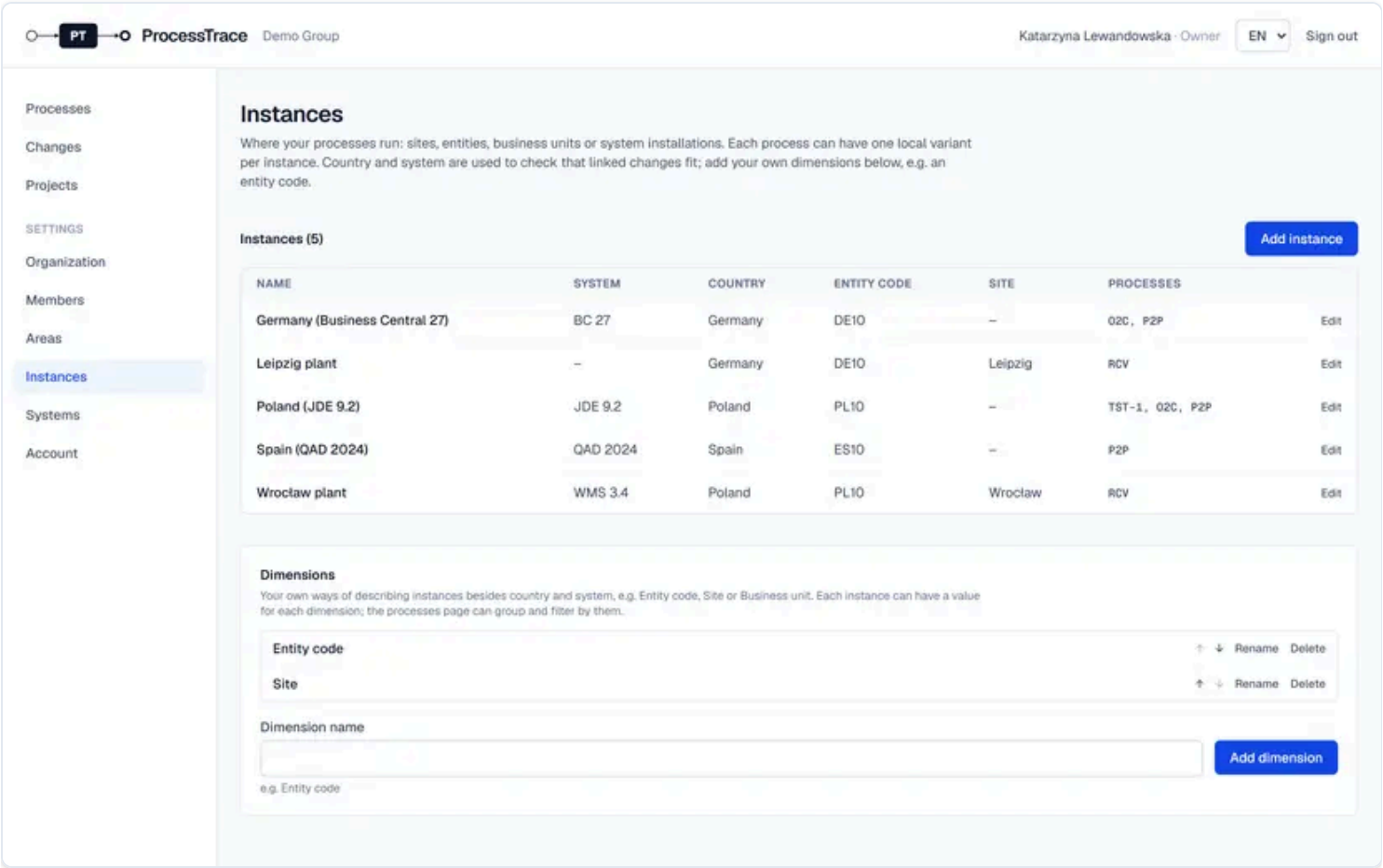
Add your own dimensions

- 1 Open Settings → Instances. Under Dimensions, owners and admins add their own ways of describing instances, for example Entity code or Site.
- 2 Use the arrows to set their order; it is also the order of the columns.

Add an instance

- 1 Click Add instance.
- 2 Choose the system (system and version together), the country and a value for each dimension. A name is suggested from them; you can type your own.
- 3 Save. Any process can now get a variant for this instance.

Tip: Country, system and dimension values decide which changes apply to an instance (see Register changes).



Screenshot with demo data.

Group processes into areas

- 1 Under Settings → Areas, add areas such as Order-to-Cash or Logistics. An area’s optional code suggests the start of new process keys.
- 2 Move areas up and down to set their order on the processes page.



04

Create and edit processes

Every process has a global template, the standard way it runs, and local variants for instances where it runs differently. Every save is a new version; nothing is overwritten.

Create a process

- 1 On Processes, click New process.
- 2 Choose the area, enter a key (e.g. O2C) and a name, and optionally a description and the projects it belongs to.
- 3 To start from an existing BPMN 2.0 file, for example from Camunda Modeler or Signavio, choose it under Start from a .bpmn file.
- 4 Under Also create variants for, tick the instances that need their own variant right away.
- 5 Click Continue to the editor, draw the template and click Save...: the process is created with your diagram as version 1.

The screenshot shows the 'New process' form in the ProcessTrace application. The form is titled 'New process' and includes a description: 'Describe the process, then draw its global template in the editor. Nothing is saved until you save the diagram, which becomes version 1.' The form fields are as follows:

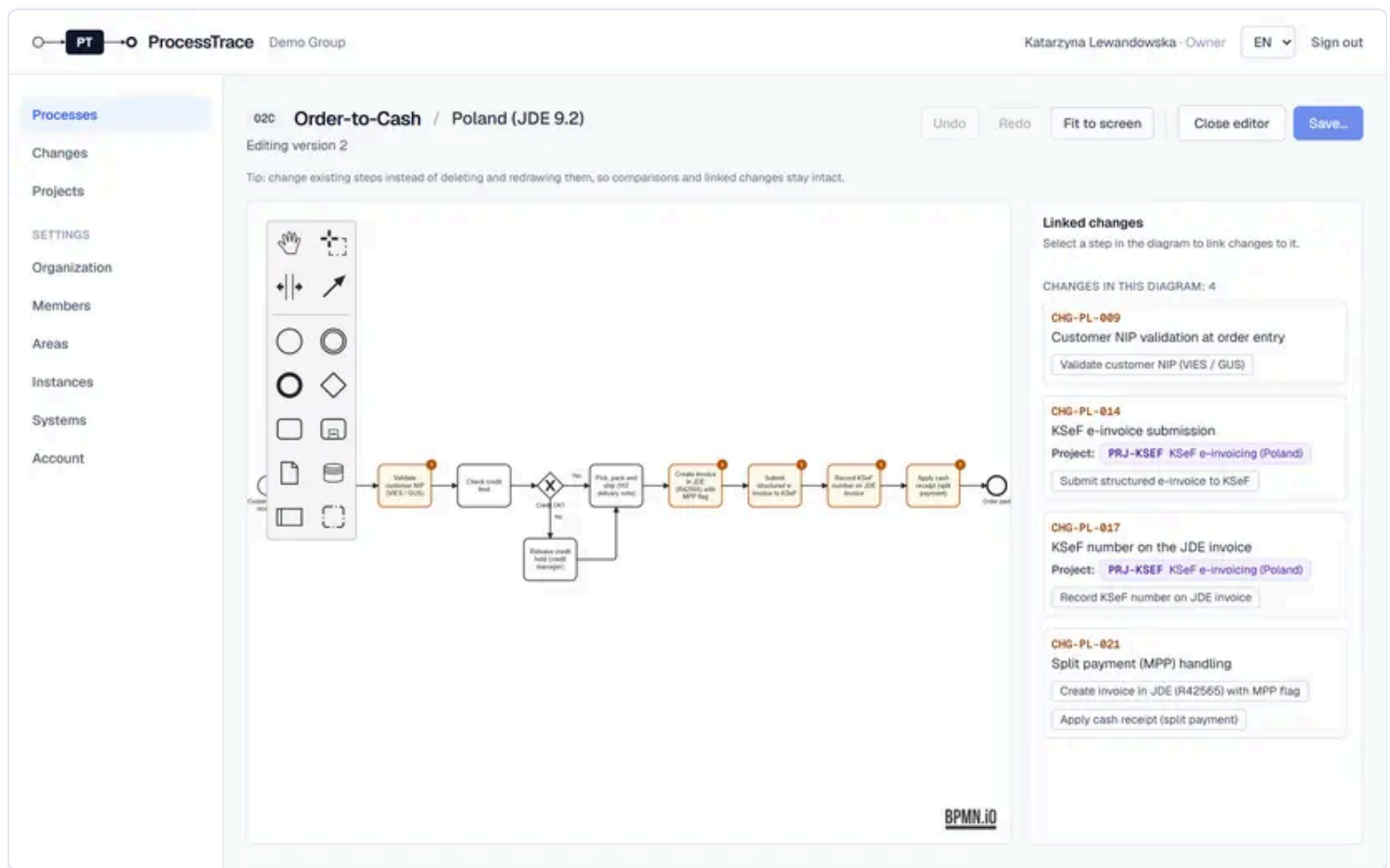
- Area:** A dropdown menu with 'No area' selected. Below it, a note says 'Optional. Groups the process on the processes page.'
- Key:** A text input field containing 'O2C'. Below it, a note says 'Short code, e.g. O2C or O2C-CR: capital letters, digits and -, starting with a letter.'
- Name:** A text input field containing 'e.g. Order-to-Cash'.
- Description (optional):** A large text area.
- Projects (optional):** A section with the note 'The projects this process belongs to. Closed projects are not offered.' and a '+ Add project' link.
- Start from a .bpmn file (optional):** A section with a 'Choose File' button and 'No file chosen' text. Below it, a note says 'A BPMN 2.0 file from another tool, e.g. Camunda Modeler or Signavio. Without a file, the process starts with an empty diagram.'
- Also create variants for (optional):** A section with the note 'Each chosen instance gets its own variant, starting as a copy of the template's version 1. You can add variants later too.' and a list of checkboxes:
 - ☐ Germany (Business Central 27)
 - ☐ Leipzig plant
 - ☐ Poland (JDE 9.2)
 - ☐ Spain (QAD 2024)

Screenshot with demo data.

Edit a map

- 1 Open a version and click Edit.
- 2 Draw with the palette on the left. Change existing steps instead of deleting and redrawing them, so comparisons and linked changes stay intact.
- 3 Click Save..., describe what changed and why, and choose the stage: As-is (how the process runs today) or To-be (a planned change).

Tip: Editing an older version creates a new latest version from it. If someone saved a newer version meanwhile, you are told and can save anyway.



Screenshot with demo data.

Add a variant for an instance

- 1 On Processes, open a process and click + Add variant.
- 2 Choose the instance (or create a new one), the template version to start from and the stage.
- 3 The variant starts as a copy of the template; edit it to show how the process runs there.

Tip: Where an instance has no variant, the global template applies. The By instance view shows, for each instance, the version in force.

The screenshot shows the ProcessTrace application interface. At the top, there's a header with the ProcessTrace logo, 'Demo Group', user information 'Katarzyna Lewandowska - Owner', language 'EN', and a 'Sign out' button. A sidebar on the left contains navigation links: Processes, Changes, Projects, SETTINGS, Organization, Members, Areas, Instances, Systems, and Account. The main area is titled 'Processes' and includes a 'New process' button. Below this, a yellow banner indicates 'Awaiting review: 1' for '02C Poland (JDE 9.2) - v2' by Tomasz Wisniewski on Jan 21, 2026. A 'Process list' tab is active, showing a search bar and '4 of 4' results. The first process, '02C Order-to-Cash', is expanded, showing its description 'From customer order to cash received.', projects 'PRJ-KSEF KSeF e-invoicing (Poland)', and template 'v3' with 2 local variants and 1 outdated variant. The 'Global template' section shows version history (v4 To-be, Draft). The 'LOCAL VARIANTS (2)' section lists 'Germany (Business Central 27)' (v1 As-is, Published) and 'Poland (JDE 9.2)' (v2 To-be, In review). The 'Poland (JDE 9.2)' variant is noted as outdated and follows template v2.

Screenshot with demo data.

Download a map

- 1 Download .bpmn on any version gives you a standard BPMN 2.0 file that opens in other BPMN tools, such as Camunda Modeler.



05

Register changes

The change register records what changed, why, when and by whom, from system configuration to new ways of working. Each change is linked to the steps it affects, in every map where it applies.

Register a change

- 1 Open Changes and click New change.
- 2 Enter a code (e.g. CHG-PL-014; it can't be changed later), a title, the type and the implementation date.
- 3 Describe the change and the business reason, the requester and the implementer, and optionally add a ticket link and the project.
- 4 Under Scope, add where it applies: an instance, a system version, a country or a dimension value. No rows means everywhere. Then add the affected processes; none means all.

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Sign out

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New change

Record what changed and why. Link it to the affected steps in the diagram editor.

Code

CHG-PL-014

Unique, e.g. CHG-PL-014: capital letters, digits and -.

Title

e.g. Credit check before order release

Type

Choose...

Implemented on

mm/dd/yyyy

Optional, e.g. the go-live date.

What changed

What is different now, in words a process user understands.

Business reason

Why the change was needed.

Requested by

Person or department

Implemented by

Person, team or partner

Ticket link

https://

Optional link (https) to the ticket or request.

Project

No project

The project this change belongs to, if any.

Scope

Where the change applies. Leave it empty when it applies everywhere. Linking it in an instance or process outside its scope shows a warning.

Systems and instances

A system alone covers every instance running it. Pick an instance to limit the row to that instance.

+ Add system or instance

Countries and dimension values

Covers every instance with this country or value, including instances added later, e.g. a legal change for all of Poland.

+ Add country or dimension value

No rows: the change applies to every instance.

Affected processes

The process maps this change should be linked in. No rows: all processes.

+ Add process

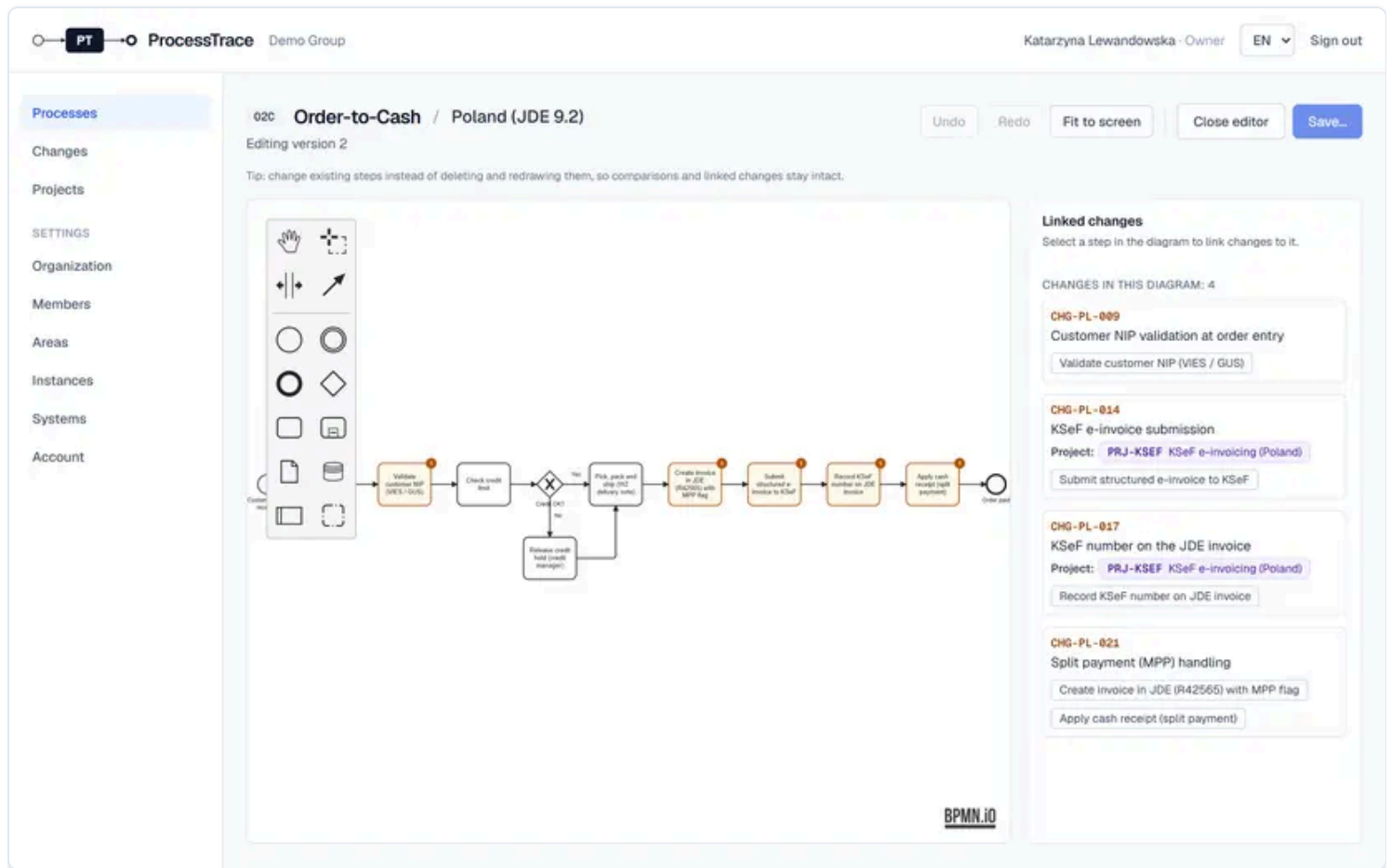
Cancel

Create change

Screenshot with demo data.

Link a change to steps

- 1 Open the map in the editor and select a step.
- 2 In the panel on the right, pick the change. Changes that apply here but aren't in the map yet are listed first. You can also register a new change there.
- 3 Save the version. The step gets a badge, and the changes panel next to the map shows its changes.



Screenshot with demo data.

See where changes are missing

- 1 The register shows where each change is linked and where it is still missing. Filter by process, instance, country, system, project or linking.
- 2 A change's page lists every map it applies to, with Link in editor where it is missing.
- 3 Retire a change that no longer applies. A change that no version ever linked can be deleted.

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Change register

Every change that affects your processes: what changed, why, when and by whom, and which steps it affects.

Search code, title or step

All types

All processes

All instances

All countries

All systems

Any linking

All projects

Active and retired

Showing 18 of 18

CHANGE	SCOPE	LINKED IN (LATEST VERSIONS)
CHG-DE-003 System customization XRechnung / ZUGFeRD e-Invoice output Implemented on: Mar 4, 2025	Germany (Business Central 27) O2C	o2c Germany (Business Central 27) - steps: 1
CHG-DE-011 System configuration Purchase approval workflow in Business Central Implemented on: Oct 30, 2025	BC 27 P2P	P2P Germany (Business Central 27) - steps: 1
CHG-DE-012 System customization Inbound XRechnung import Implemented on: Feb 16, 2026	Germany (Business Central 27) P2P	P2P Germany (Business Central 27) - steps: 1
CHG-ES-002 System customization SII invoice reporting to the Spanish tax agency Project: PRJ-ES-QAD QAD 2024 upgrade in Spain Implemented on: Nov 20, 2025	Spain P2P	P2P Spain (QAD 2024) - steps: 1
CHG-ES-005 System configuration Automatic three-way match with tolerances Project: PRJ-ES-QAD QAD 2024 upgrade in Spain	QAD 2024 P2P	P2P Spain (QAD 2024) - steps: 1

Screenshot with demo data.



06

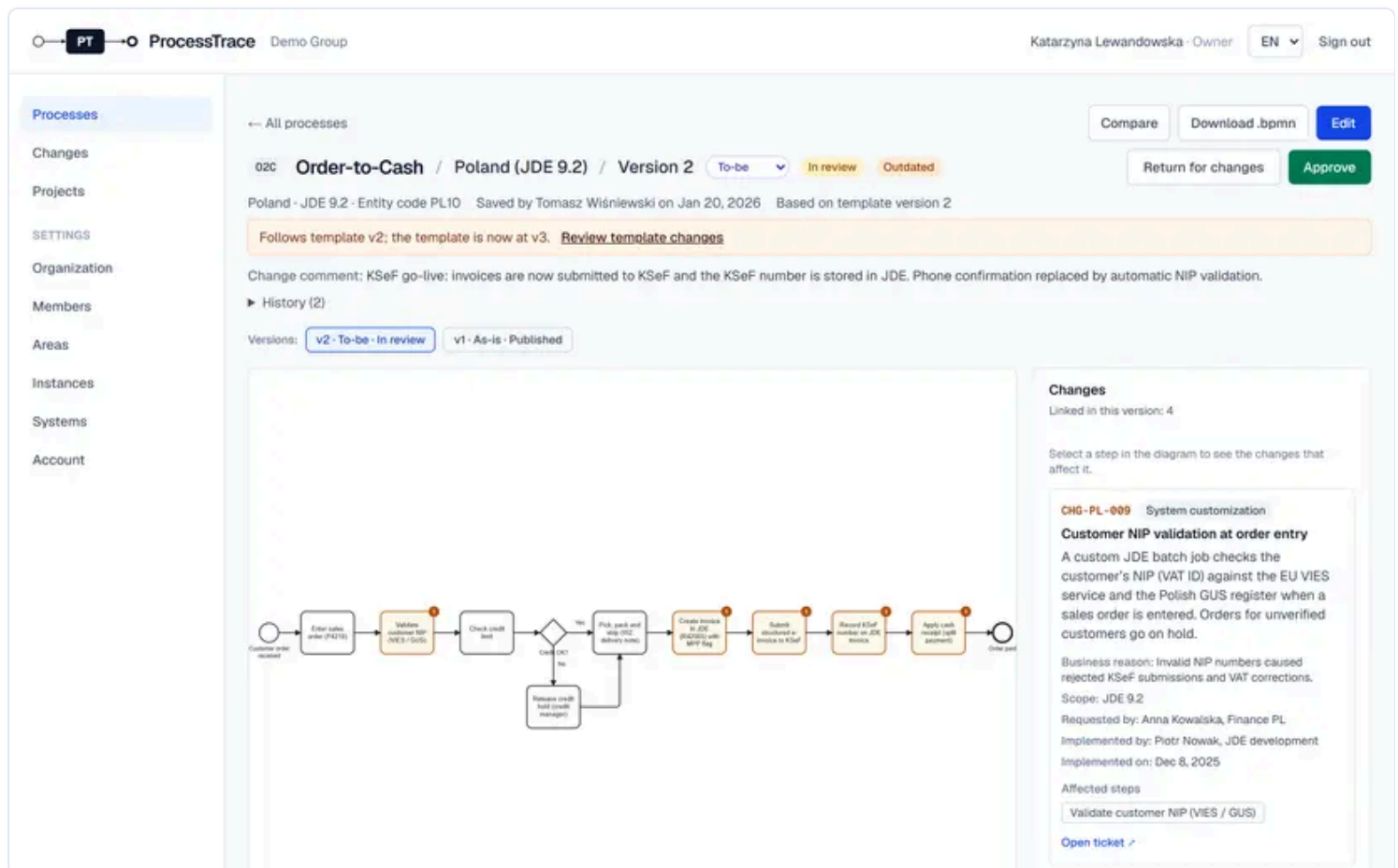
Review and publish versions

New versions are drafts until they are reviewed and published. The published version is the one in force; earlier published versions show as archived.

From draft to published

- 1 The modeler opens the draft and clicks Submit for review.
- 2 Approvers see it under Awaiting review on the processes page. They open it and click Approve, or Return for changes with a comment.
- 3 When the change goes live, click Publish (go-live). A to-be version then becomes as-is, and the previous published version is archived.

Tip: An as-is version is approved and published in one step (Approve and publish). With Require a second approver (Settings → Organization), nobody approves their own work.



Screenshot with demo data.



07 Compare versions

Compare any two versions of a process side by side, including a local variant against the global template.

Compare two versions

- 1 On a version, click Compare and choose the other version, or click Compare with previous in the version history.
- 2 Removed steps are red on the left, added steps green on the right, changed steps amber on both. A list below names every difference, including linked and unlinked changes.

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← Back to the version

020 **Order-to-Cash** / Compare versions

Review template changes: Poland (JDE 9.2)

Poland (JDE 9.2) follows template v2; the template is now at v3. Below is what changed in the template between these two versions. Decide whether the instance needs the same changes.

Edit to adopt changes

No changes needed

Compare the instance with template v3

"Edit to adopt changes" opens the editor; the new version will follow template v3. "No changes needed" records the review; a new version with the same diagram, following template v3.

FROM

Global template · v2

As-is

Archived

Jul 1, 2025 · Katarzyna Lewandowska · Added order confirmation with the customer after order entry.

TO

Global template · v3

As-is

Published

May 12, 2026 · Katarzyna Lewandowska · Invoice step now covers e-invoicing where a country requires it.

Removed (left)

Added (right)

Changed

Show moved elements

Screenshot with demo data.

Bring template changes into a variant

- 1 When the template gets a newer published version, variants that follow an older one are marked Outdated.
- 2 Click Review template changes to see what changed in the template.
- 3 Click Edit to adopt changes to bring them into the variant, or No changes needed, with a comment, if they don't apply there.



08

Set up projects

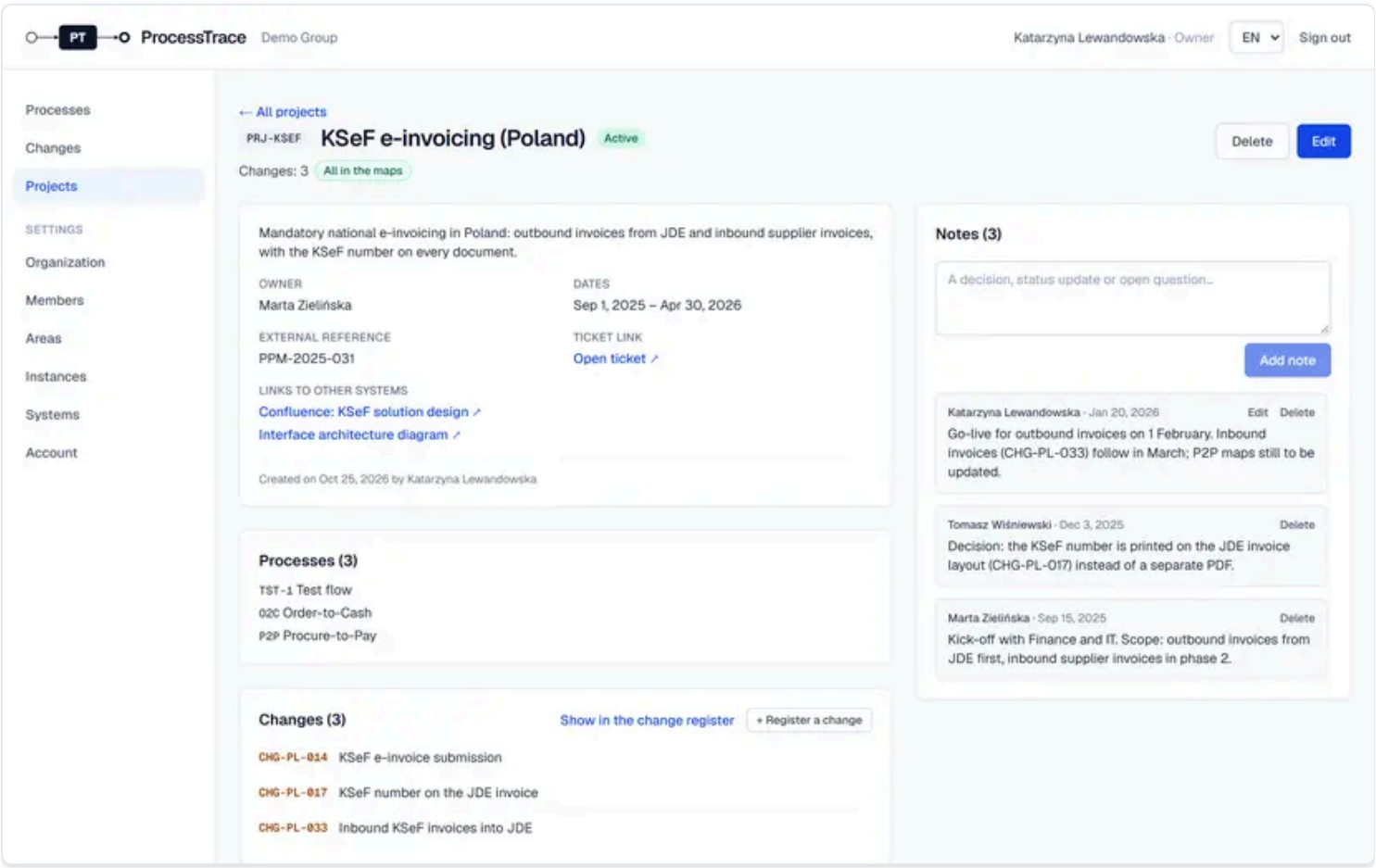
Projects group the work of a rollout, a reorganisation or an improvement initiative: its changes, the processes it touches, links to documents in other systems, and notes.

Create a project

- 1 Open Projects and click New project.
- 2 Enter a code and a name, the status, owner and dates, a ticket link, an external reference and links to documents in other systems.
- 3 Add the processes it touches. You can also add projects to a process in New process or Edit process.

Work with a project

- 1 Assign changes to the project in the change form, or click + Register a change on the project page.
- 2 The project page shows its changes and whether they are in every map yet.
- 3 Write notes for decisions, status updates and open questions. Everyone sees who wrote what and when; you can edit your own notes.



Screenshot with demo data.



09

Your data

Your data stays yours: download it whenever you like, and delete it when you leave.

Download all data

- 1 Owners and admins: Settings → Organization → Download all data. You get a ZIP with every version as a .bpmn file, all other data as JSON, and the members as a CSV file.

Delete the organization or your account

- 1 Owners delete the organization under Settings → Organization: type its name to confirm. Everything in it is deleted.
- 2 Under Settings → Account you delete your own account: type your e-mail address to confirm. Versions you saved stay in the organization as “Deleted user”.

Tip: The only owner of an organization can't delete their account: make someone else owner first, or delete the organization.