



aiio Documentation

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aiio Feature Description

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1 aiiio Feature Description

aiiio is cloud-based software for mapping an organization. It allows you to map organizational structures in terms of both functional and structural organization. Using the process model, additional entities—such as management systems (e.g., standards or laws), resources (e.g., IT systems), locations, and employees—can be linked.

This feature description lists the features of aiiio. aiiio utilizes features of the Microsoft 365 online service. This feature description refers to features provided by aiiio. This feature description is not a feature description of Microsoft 365. When using aiiio, users also have access to Microsoft 365 features. For information on how to use Microsoft 365 features, please refer to the relevant Microsoft user documentation regarding the Microsoft 365 service.

This feature description does not explicitly specify, for each individual feature, which feature is available in which form, to which user groups, and in which mode.

aiiio offers the ability to generate content using AI. Please note that the content generated by our SaaS product's AI is created automatically, and we therefore cannot guarantee its accuracy, completeness, or suitability for a specific purpose. There is a risk that the AI content may “hallucinate,” meaning it generates information that is not based on real data and is potentially incorrect or misleading. The quality and accuracy of the content may vary, as it depends on the underlying data and algorithms. We recommend that you carefully review the generated content and, if in doubt, seek expert advice.

2 System Requirements

- The customer is responsible for ensuring an internet connection with sufficient bandwidth and latency.
- To ensure optimal use of the software's features and functions, the customer must use the latest versions of the following browsers: Google Chrome, Microsoft Edge, or another browser specified by aiiio. Functional cookies are required for the software to work properly. If the customer does not allow these cookies, aiiio assumes no liability for any resulting limitations.
- To use aiiio, each user must have an active subscription to the Microsoft 365 online service for businesses, at a minimum the Microsoft 365 Business Basic version.
- In addition, aiiio can also be used within the Microsoft Teams application. This requires that the administrator of the Microsoft 365 tenant has authorized the aiiio Teams app for use in the customer's tenant.

3 Availability

aiiio guarantees a minimum availability of 95%.

aiiio's availability is determined as a percentage of uptime: The uptime percentage is calculated using the following formula:



$$\frac{\text{Verfügbarkeitsminuten} - \text{Ausfallzeit}}{\text{Verfügbarkeitsminuten}} \times 100$$

whereby downtime is measured in minutes; that is, for each applicable period, downtime is the sum of the duration (in minutes) of each incident that occurs during that applicable period.

Excluded from the availability calculation are downtimes due to maintenance and software updates, as well as periods during which aiiio is unavailable due to technical or other issues beyond the control of aiiio GmbH (e.g., force majeure, third-party fault, network or device failures outside our data centers, use of services, hardware, or software not provided by us, in particular problems resulting from insufficient bandwidth or related to third-party software or services, etc.). If it is foreseeable that downtime for network, server, or software maintenance will last longer than 3 (three) hours, the customer will be notified at least 3 (three) days before the start of the respective work.

4 Customer Data

At the end of the contract, the user may export their processes in PDF format. Additionally, aiiio may export and transfer the customer's database contents to the customer in CSV format at the end of the contract. After the final export of the customer's data from the Cloud Service, aiiio will delete the remaining customer data on the servers used to host the Cloud Service.

5 Known Issues

- Under certain circumstances, the connecting lines between drawing elements may be duplicated when sharing process drawings.
- In rare cases, the process list may not update automatically after certain actions, such as copying or deleting processes. In this case, the list must be refreshed manually via the web browser.
- When using aiiio via the Microsoft Teams app, no warning message appears (for technical reasons) stating that elements currently being edited will be lost when you exit the app.

6 Settings

In the Settings menu item, authorized users (administrators) can set and change certain system settings.

6.1 Group Membership

The group membership settings determine which users of the system can use the system and in what role.

The roles "Executive," "Manager," "Contributor," and "Viewer."

Executives have full access to the system and are authorized to configure or modify system-related settings.

Managers can create content, assign tasks, and approve content.



Contributors can edit content if they have been assigned a task by a Manager or assigned to a process as an Editor.

Viewers can view content and comment on or provide feedback for specific content.

System users can be added to or removed from user groups by appropriately authorized users.

External (guest) users can also be added, provided these users have previously been added as guest users to the Microsoft Entra ID of the Microsoft 365 tenant.

In addition to assigning individual users, it is also possible to import users from user groups in the Azure AD of the associated Microsoft 365 tenant. aiiio imports the users who are members of the AD group at the time of import.

aiiio only monitors subsequent changes to the AD group if the synchronization feature for Entra ID groups is part of the subscription.

This feature description does not explicitly specify, in the description of individual features, which feature is available in which form and to which user groups.

6.2 Manage Subscription

In the "Manage Subscriptions" menu item, authorized users (executives) can view how many subscriptions per role have been purchased for the aiiio system and at what price, how many subscriptions have been assigned, and how many subscriptions are still available for assignment to users. Furthermore, the number of licensed subscriptions per role can be increased or decreased. When a change in the number of users per role takes effect depends on the agreed-upon term. The term (annual or monthly) is displayed for informational purposes but cannot be changed via these settings. To make such a change, please contact Support.

6.3 Client Properties

In the client properties, appropriately authorized users can configure system-wide settings:

- The use of RACI attributes for processes can be enabled or disabled.
- Email notifications can be enabled or disabled.
- AI-driven process optimization can be turned on or off.
 - You can select which AI model to use at which AI data center location for AI-driven process optimization. Whether and which models are available depends on the aiiio plan the customer has subscribed to. By selecting the model and data center, you accept the underlying data processing agreement with the provider.
 - You can specify the company size by entering the number of employees and the industry, with the aim of improving the quality of AI queries.
- The use of AI can be restricted to specific user groups.
- You can specify which SharePoint sites within the Microsoft 365 tenant aiiio should have access to in order to link to information (documents, lists) stored there.



- The feature for restricting access (target group addressing) to content can be enabled or disabled. Enabling this feature allows you to restrict access to elements of the process organization (process maps, process groups, processes) and to organizational charts. When target group addressing is enabled, inheritance can be activated so that access restrictions for an element are automatically inherited by subordinate elements.
- Access control lists (ACLs) can be created and configured for target group addressing.

6.4 Modeling

In the "Modeling" section, you can define the default color scheme for the borders and fills of process objects.

6.5 Permissions

Microsoft 365 Graph permissions can only be granted by the "Application Administrator" or "Global Administrator" roles of the associated Microsoft 365 tenant. For an optimal user experience, all permissions should be granted. For security reasons, granting each permission triggers a verification request via the Microsoft 365 account. Processing this request may take a moment and will be visible after reloading the page.

7 Language

In the Language menu item, you can switch between the available menu languages (currently, depending on the price tier: Bulgarian, Czech, Danish, German, English, Spanish, French, Italian, Norwegian, Polish, Portuguese, Swedish, Turkish, Ukrainian, Chinese). Changing the *language* only affects the menu language; *aiio does not support multilingual content*.

8 Feature Suggestion

The "Feature Suggestion" menu item directs the user to aiiio's "Upvoty" service. Here, the user can view aiiio's current development roadmap and suggest and describe new features themselves. Additionally, the user can comment on and support other users' suggestions.

9 Report a bug

The "Report a Bug" menu item directs the user to aiiio's "Upvoty" service. Here, the user can report bugs as well as view and comment on other users' bug reports, including their status.

10 Help

The Help menu item gives users access to the aiiio online reference.

11 Notifications

The Notifications menu item contains a list of notifications that the system sends to the user regarding specific actions. These include notifications regarding



tasks related to process initiation or process approval sent to the user. From the Notifications menu, the user can open the model object that triggered the notification. The number next to the bell icon indicates the number of unread messages. The envelope icon allows you to mark all messages as read at once.

12 Dashboard

The dashboard is the system's home page. The dashboard displays links to key content areas of the system (process map, process list, organizational chart, and requirements) as well as open tasks for the logged-in user.

13 Search

The main navigation bar includes a search bar that can be used to find model objects that have their own overview pages. Individual employees, workgroups, and organizational units are not currently included in the search.

14 Process Management

The "Process Management" section is used to map the organizational workflow. It includes one or more process maps as well as a tabular list of the processes in the system.

14.1 Process Map

The "Process Map" tab allows you to create one or more process maps. A process map is represented by a tile, which can be further described with a name, a description, and a logo. If target group targeting is enabled, an access control list (ACL) can be configured to restrict access to the element to members of the ACL.

Graphical elements representing process groups, processes, containers (visual groupings of other elements), images, and text can be placed within a process map. These elements can be created here; process groups and processes can also be referenced via drag-and-drop from the process browser. Depending on their type, the created or referenced elements can be further described or formatted using additional attributes.

14.2 Process List

The "Processes" tab contains a hierarchical list of the process groups and processes in the system. The columns of the process list contain essential metadata about the elements (e.g., owner, location, status, version).

The process groups, as organizational elements, can be expanded or collapsed.

For each element (row), additional functions are available by clicking on the title or opening a context menu ("⋮"). Different functions are available depending on the type of element (process group or process).

You can search the process list using the "Search for process" input field.

Additionally, depending on the column type, further sorting and filtering operations can be accessed via the respective column headers.



Using the "Actions" dialog in the process list, additional actions can be initiated for processes and process groups depending on the process status and the user group (such as copying processes, or deleting processes by process owners, process creators, or the "Executives" user group).

14.3 Creating Process Groups

Process groups can be created from the process list. A process group serves to organize the process list hierarchically. Process groups can contain processes and other process groups. Each process can be assigned to only one process group, although the assignment can be changed later. In addition to a name, process groups can be supplemented with additional metadata (including textual description, goal and purpose, owner, involved organizational units, RACI roles if applicable, assignments of requirements, resources, locations, links, and documents).

If target group addressing is enabled, an access control list (ACL) can be defined to restrict access to the element to members of the ACL.

A process map can be graphically modeled for a process group. In the process browser, only the process groups and processes that are part of the selected process group are displayed.

14.4 View Process Groups

In the process group view, users see an overview of all metadata recorded for a process group and links to other model objects, in addition to any associated process map.

14.5 Create and model processes

From the process list, you can create new (sub)process groups and (sub)processes, open existing process groups and processes for editing, and copy or delete existing processes. New versions can also be created for existing and approved processes. Existing processes can be archived.

For newly created processes, it is possible to grant access to other users with the appropriate permissions

"Modeling tasks." If multiple modeling tasks related to the same process are sent, the assigned modelers each create their own draft instance of the process. The manager who sent the modeling task can then provide feedback on the incoming proposals and ultimately select one of the drafts for further processing.

Various metadata (e.g., a title, a description, purpose, an owner, the parent process, involved organizational units, RACI roles if applicable, assignments for requirements, resources, locations, links, and documents, as well as approval details) can be maintained, or other model objects can be linked to the process (e.g., the process group to which the process belongs, a responsible department, a location). The description can be generated with AI support.



If target group targeting is enabled, an access control list (ACL) can be configured to restrict access to the element to members of the ACL.

Newly created processes or existing processes opened via “Start Modeling” can be modeled graphically by the creator or assigned to other users by the creator for modeling; modeling tasks can be sent to other users for this purpose. Affected users are notified of the modeling tasks created.

To model processes that have already been approved, a new version must first be created. The status of the process is indicated next to the title by a color marker (e.g., “Blue” = “in modeling”).

A process can be graphically modeled and thereby broken down into several individual sequential objects. aiiio’s representation is based on BPMN 2.0 but does not support all BPMN 2.0 artifacts; instead, it is limited to the following artifacts:

- Swimlane,
- Event (Start Event, End Event, Intermediate Event, Timed Event, Message-Driven Event),
- BPMN tasks of various types (Task),
- Text annotation,
- Data object (e.g., documents),
- Subprocess,
- Branches (exclusive gate, inclusive gate, parallel gate),
- Sequence flow, Message flow.

When modeling processes, aiiio uses its own artifacts that are not defined by BPMN 2.0:

- Links to predecessor or successor processes can be added to start and end events.

Additional metadata can be maintained for process objects (e.g., title, description, responsibilities, RACI roles if applicable, linked management systems, linked resources, links to any pages accessible via hyperlink, as well as documents via links to documents or list items in document libraries or lists accessible to the logged-in user in the SharePoint Online tenant within the Microsoft 365 tenant to which the user is assigned. aiiio saves the link to the document or list item in the document library or list that was current at the time the link was created. If the document or list item in the SharePoint Online document library or list is subsequently deleted, moved, or renamed, aiiio may no longer be able to open the document. For process objects, the background color, border color, and font color can be set.

The type of a modeled process object can be changed later (e.g., to convert an activity into a subprocess).

The “Element ID” can be displayed in the process view.

A drawing can be locked to prevent accidental editing. An “Undo” function reverses the last editing step.



Process objects can be assigned to swimlanes.

Swimlanes can either be labeled with a free-text title or linked to an organizational unit (e.g., a department). If a swimlane is linked to an organizational unit, the process objects assigned to the swimlane are automatically assigned to that organizational unit as the responsible party. The background color for swimlanes can be customized.

The "Align Automatically" function launches an algorithm that automatically aligns the process objects placed in a process diagram as evenly as possible.

An authorized user can assign additional editors to a process.

A modeled process can be approved by its creator. Alternatively, the process can be sent for approval to other users, departments, roles, or workgroups, provided they have the necessary permissions. The creator or editor of the process can specify whether approval should be granted by a simple majority, the consent of all, or the consent of a single approver. Approval tasks are created for approvals addressed to other users. The recipient(s) are notified of the approval task.

Created approval tasks can be withdrawn at a later time.

As part of the approval process, a description of the changes made can be created and edited with AI support.

An approved process is then visible to all users of the system. Users with the "Viewer" can only view approved processes.

Affected users will be notified when a new process version is approved.

14.6 View processes and retrieve optimization suggestions

In the process view, users see not only the process diagram but also an overview of all metadata and links associated with a process, as well as a tabular view of all process elements and their key metadata.

By selecting individual process objects, users can view the metadata recorded for that specific process object.

When displaying processes, aiiio uses its own artifacts that are not defined by BPMN 2.0:

- Flyouts appear on BPMN tasks, displaying metadata when the mouse hovers over them,
- Flyouts appear on start and end events, containing links to predecessor and successor processes.

In the process view, users can

- add comments to the process, either by name or anonymously,
- view older approved versions of the process,
- provide feedback on a process,
- center the drawing,



- filter elements of the drawing,
- open a view that contains formatting suitable for PDF export via the browser,
- open and close a full-screen view of the process graphic,
- Enable the display of the element ID,
- use the corresponding function to retrieve AI-powered process optimization suggestions that take various additional parameters into account. The system administrator can disable this feature.

Affected users are notified via comments and feedback regarding their processes.

15 Organization

The “Organization” section is used to map the organizational structure.

aiio supports the graphical modeling of organizational structures. One or more organizational charts can be modeled graphically. An organizational chart is represented by a tile, which can be further described with a name, a description, a logo, and additional metadata. If target group addressing is enabled, an access control list (ACL) can be assigned to the organizational chart to restrict access to the element to members of the ACL.

The organizational units modeled in an organizational chart can be used as owners or holders of RACI roles when modeling processes.

The organizational chart can be exported as an SVG file.

15.1 Modeling Organizational Charts

Within an organizational chart, aiio supports the modeling of different types of organizational units (departments, staff functions, roles, and external partners), with graphical connectors representing the reporting relationships between the organizational units, including a function for automatically arranging the modeled content.

The organizational chart can be enhanced with images and text.

A subpage can be created for organizational units, which in turn can contain its own organizational chart. If a subpage has been created for an organizational chart object, this is indicated by an icon on the organizational chart object.

The graphical representation of the organizational chart in the browser includes a zoom function.

The organizational chart can be downloaded as an SVG file. The user can choose which of the three available zoom levels to download.

Selecting individual organizational objects displays their metadata and linked content. The type and content of the metadata depend on the type of organizational unit.

Affected users are informed about their assignment to organizational chart elements.

16 Employees

The "Employees" menu item provides access to an employee list as well as a collection of workgroups.



16.1 Employee List

The "Employee List" tab contains a tabular list of employees with specific metadata for each employee.

You can add employees to the employee list for use in aiiio via the "New" dialog. To do this, they must be registered in the EntraID of the Microsoft 365 tenant. This registration can only be performed via the user management of the Microsoft 365 tenant and cannot be influenced by aiiio.

The employee list can be sorted in ascending or descending order by clicking the header of the "Name" column.

When removing people from the employee list, all associated aiiio elements are automatically updated.

16.2 View and Edit Employees

The View Employee dialog displays all metadata and links to other model objects recorded for the employee in the system.

In the "Edit Employee" dialog, the employee's links to other model objects (e.g., an employee's assignment to specific departments, roles, locations, and workgroups within the organization) can be modified. The contents of various columns, such as "Job Title," "Phone Number," and "Email" are taken from the Entra ID of the Microsoft 365 tenant and cannot be modified via aiiio.

16.3 Workgroups

In the "Workgroup" tab, employees can be grouped into workgroups that exist as an alternative to the disciplinary organization in the organizational chart.

Workgroups are represented by a tile. Workgroups can be further described with a title, a location, and a description, and can be populated with members from the employee list.

Workgroups can be active or inactive.

An edit dialog allows you to view and add the participating employees as well as maintain additional metadata.

17 Resources

Resources represent the means used in processes.

The "Resources" menu item allows you to create, modify, delete, and group resources and resource groups. Resources can be assigned to one or more resource groups.

For each resource, you can view a detailed overview that displays metadata about the resource (e.g., resource description, parent resource group, resource owner, documents, and processes to which the resource is assigned).

17.1 Resource Groups

In the "Groups" tab, resources can be assigned to groups. Groups serve solely as a classification criterion but do not contain any additional metadata. A group is represented by a



tile with a label, which also shows how many elements the group contains, as well as functions for editing or deleting the group.

Clicking on the tile displays the resources assigned to that group. A resource can be assigned to any number of groups.

17.2 Resource list

The "Resource List" tab displays all resources in the system. The resource list provides a tabular view of resources and specific metadata.

New resource groups and new resources can be created in the resource list. Sub-resources can be created for resources.

The detailed view of a resource allows you to view and maintain metadata (e.g., title and description, employee responsible for the resource), assign links, link documents, and establish links between resources and processes.

The resource list can be sorted in ascending or descending order by name by clicking on the "Name" table header.

17.3 Viewing and Editing Resources

The Resource Display dialog displays all metadata and links to other model objects recorded in the system for the resource.

In the Edit Resource dialog, you can edit the metadata and links.

18 Requirements

"Requirements" describe the organization's management system. Requirements may arise, for example, from standardized or non-standardized management system components to which the organization is subject or to which it voluntarily adheres. aiiio offers the ability to group requirements, describe them, support them with documents, structure them hierarchically into chapters, and link them to processes.

18.1 Requirements List

At the top level, a requirement is represented by a tile, which is further described by a title, a description, and additional metadata.

A top-level requirement can be opened to display the chapters it contains and specific metadata associated with those chapters.

In the tabular view, new chapters and subchapters can be created, edited, and deleted.

18.2 View and edit requirements

The View Requirement dialog displays all metadata and links to other model objects associated with the requirement in the system.

In the Edit Requirement dialog, you can edit the metadata and links.



19 Locations

In aiiio, “locations” of the modeled organization can be stored and displayed in a table. Sub-locations can be created for locations.

Locations can be linked to other model objects to, for example, specify the geographical scope of processes, the local assignments of employees, or the regional responsibilities of departments.

20 My Tasks

The "My Tasks" menu item displays the tasks in the system for the currently logged-in user.

The “Process Recording” tab displays tasks that are generated when a manager invites the user to model a process using the “Send Modeling Task” to model a process.”

The "Approval" tab displays tasks that are created when a process editor uses the "Approve" function to assign the user as an approver for a process.