



PROCESSGROUND

ProcessGround User Guide

A practical guide to preparing source files, reviewing process intelligence, and producing reliable editable diagrams.

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Prepare strong source files. Understand what was assessed. Review the business semantics. Keep the editable package.

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QUICK START AT A GLANCE

Five habits that protect source fidelity and make each generated package easier to review.

- Choose process-only generation when you have a process document but no risk and control file.
- Use risk-mapped generation when you also have a structured XLSX or CSV risk and control matrix.
- Review selected process families, evidence support, decision paths, and unresolved findings before downloading.
- Reuse the same source package within 30 days when you need another export without a new analysis credit.
- Open the Draw.io file directly, import it into Lucidchart, or use an available Microsoft Visio option.
- Save the downloaded files in your document repository because ProcessGround does not provide diagram history.

01 / QUICK START

From source document to review-ready flow

A normal generation follows five steps. Broad manuals may add a scope-selection step before the diagram is generated.



01	Choose the analysis path Upload only a process document for a process-only flow. Add a risk and control file when you want risks, controls, mappings, and potential coverage gaps included.
02	Name the process Use a clear business name such as Vendor Invoice Approval or Purchase Card Reconciliation. The name becomes the diagram title and part of the downloaded filename.
03	Upload the source files The process document is required. The risk and control file is optional and can be removed before generation. Confirm that the uploads exclude prohibited regulated and highly sensitive content before submitting.
04	Confirm the scope when prompted For a broad manual, select up to four ready process families. Supporting rules remain context rather than becoming unnecessary diagram pages.
05	Review before relying on the output Check evidence support, roles, phases, decisions, source boundaries, mappings, and unresolved findings. Then download the files you need.

How diagram credits work

Scope analysis does not use a credit. A new successfully generated package uses one credit, even when it contains several formats or process pages. An exact rerun from the same paid account can reuse its encrypted canonical analysis for 30 days without another credit. Validation, parsing, model, scope-coverage, and export failures do not use a credit. Choosing Run a fresh analysis bypasses the saved result and uses one credit only after successful export.

02 / PROCESS DOCUMENTS

Prepare a source document that preserves the business story

ProcessGround accepts DOCX, PDF, and TXT files. The clearest input is not necessarily the shortest; it is the document that makes activities, ownership, sequence, and outcomes understandable.



Format	Best use	Preparation guidance
DOCX	Structured procedures and narratives	Keep meaningful headings, numbered sections, bullets, and role or system tables.
PDF	Approved procedures and policy manuals	Prefer a born-digital, text-selectable PDF. Confirm that you can highlight and copy its text.
TXT	Simple narratives and clean exports	Preserve line breaks and headings. Plain text cannot retain document layout or tables.

What improves extraction

- A clear trigger or starting event.
- Action-oriented activity descriptions with the accountable role nearby.
- Explicit decision conditions and documented outcomes.
- Section headings that reflect real phases or procedures.
- References that identify where a reused procedure is defined.
- A documented end, handoff, or statement that downstream work is outside the source.

What can reduce reliability

- Scanned or image-only PDFs, especially when OCR is incomplete.
- Screenshots of application steps without surrounding explanation.
- Policy statements that describe requirements but not an operational sequence.
- Appendices, report inventories, definitions, and approval matrices that resemble activity lists.
- Missing actors, undocumented rejection paths, or references to procedures that are not included.

- Very broad manuals in which headings mix workflows, controls, rules, and background material.

Use your real process documentation

Upload the document your organization already relies on. ProcessGround is designed to interpret standard business documentation and clearly identify areas that need review when the source does not provide enough detail for a complete flow.

Current source limits

The combined upload must be 4 MB or smaller. Process documents are limited to 3.5 MB, risk/control files to 1.5 MB, PDFs to 75 pages, and extracted text to 500,000 characters. Unsafe signatures, encryption, active content, embedded files, macros, and unsafe archives are rejected before analysis.

03 / RISK AND CONTROL DATA

Add structured risk and control data when it is available

An XLSX or CSV file enhances the process flow with supplied risks, controls, control attributes, and potential coverage gaps. It is not required for process-only generation.

Recommended column	Purpose	Example
Process Activity	The activity or process area the row applies to	Validate supplier invoice
Risk ID	Your existing risk identifier	AP-R-04
Risk Statement	A clear description of the potential event	Duplicate or inaccurate invoices may be paid
Control ID	Your existing control identifier	AP-C-07
Control Description	The activity performed to address the risk	ERP three-way match blocks unmatched invoices
Control Type	Preventative or Detective	Preventative
Control Nature	Manual or Automated	Automated
Frequency	How often the control operates	Per transaction

Recommended workbook design

- Use one clean risk and control matrix sheet when possible.
- Keep a single header row and avoid merged cells inside the data range.
- Use one process activity relationship per row, repeating identifiers when needed.
- Keep risk and control identifiers stable and unique within your source system.

- Use business wording that a reviewer can understand without relying on abbreviations alone.
- Remove decorative title rows, subtotals, and blank sections that are not part of the matrix.

A selected spreadsheet must contain usable rows

If ProcessGround cannot identify usable risk or control rows, generation stops with a friendly error. Remove the file to continue in process-only mode, or correct the workbook headers and data before trying again.

04 / ANALYSIS MODES

Know what ProcessGround did and did not assess

The analysis mode is determined by whether a risk and control file is included with the request.

Process-only Identifies process groups, activities, actors, phases, decisions, branches, subprocess references, evidence, and structural findings. Risk and control coverage is explicitly shown as not assessed.	Risk-mapped Performs the same process analysis, then maps supplied risk and control rows to the repaired process structure and identifies unmatched, ambiguous, or potentially uncovered areas.
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No risks or controls are invented in process-only mode

A process-only diagram can still contain structural review findings, assumptions, and source boundaries. Those findings are about the documented flow, not risk or control coverage.

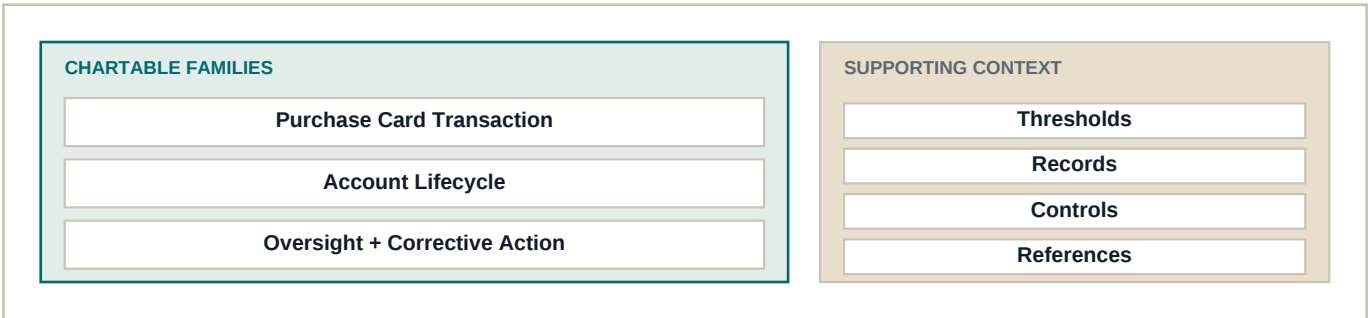
Starter and Professional use the same intelligence quality

Both paid plans use the same models, prompts, validation, repair rules, confidence thresholds, and exporters. Plans differ by allowance, validity, billing, and support, not analysis or diagram quality.

In risk-mapped mode, a potential control gap or suggested risk/control mapping is an analytical signal based on the supplied data and the mapped process structure. It is not an audit opinion, a compliance certification, or a conclusion that a control is designed or operating effectively.

Select process families, not every policy heading

Long manuals often combine workflows with policy rules, controls, references, definitions, and supporting branches. ProcessGround separates these concepts before generation.



Workflow	A chartable process family with a supported trigger, multiple activities, and an outcome or explicit source boundary.
Branch	A variant or exception that normally belongs within a parent process rather than on its own page.
Policy rule	A requirement, threshold, prohibition, or condition that informs steps but is not itself a workflow.
Control	A documented oversight or control requirement that can be attached to relevant activities.
Reference	Background, definitions, inventories, or cross-references used as context.

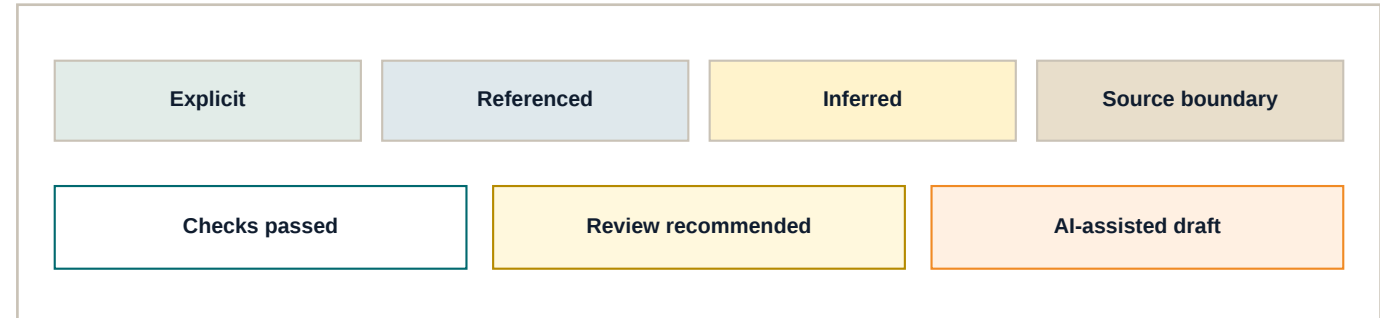
01	Review the recommendations ProcessGround recommends ready workflows and shows supporting context separately.
02	Select up to four families Choose the process families you want in the package. A family can still contain supported branches and referenced subprocesses.
03	Generate one complete package The selected families are extracted together so names, roles, rules, and boundaries remain consistent.
04	Use the recovery result If a selected family is missing, ProcessGround retries it once with focused source context. If it still cannot be represented, no package is produced and no credit is used.

Supporting context still matters
Thresholds, recordkeeping rules, prohibited uses, approval requirements, and similar source material can remain attached to the relevant process metadata without becoming fake activity pages.

06 / REVIEW RESULTS

Separate evidence strength from flow integrity

A high evidence score can coexist with a structural issue. Review both dimensions before you rely on or distribute the diagram.



Evidence support	How strongly the extracted activities are supported by the source text and structure. It does not measure whether the source itself is correct or complete.
Automated checks passed	No unresolved structural issue was detected by the current validation and verification passes. This is not professional certification or a guarantee of completeness.
Review recommended	The package is usable, but one or more assumptions, ambiguities, or structural findings deserve review.
AI-assisted draft — review before use	One or more unresolved high-severity findings remain. The files are provided for analysis and correction, not unreviewed reliance.

Evidence support	Meaning	Reviewer action
Explicit	The source directly describes the activity, actor, transition, or outcome.	Confirm the source was interpreted in the intended business context.
Referenced	The source points to another documented procedure or section.	Open the referenced source and confirm the handoff or subprocess.
Inferred	A limited interpretation was needed to make the documented sequence readable.	Compare the inference carefully with the source and revise if unsupported.
Source boundary	The source ends, excludes downstream work, or does not document the next action.	Do not assume a downstream path unless another approved source supports it.

Review the complete result, not only the score

- Confirm each process group represents a real business procedure or documented variant.
- Check that every swimlane names one accountable actor rather than a mixture of roles and systems.
- Follow every decision label to its intended target and confirm exception paths do not rejoin improperly.
- Review automatically applied repairs and make sure they preserve the source meaning.

- Open the complete unresolved-finding list rather than relying on the short summary.
- Review low-confidence steps, unmatched risk rows, and ambiguous mappings individually.

Reused canonical analysis

When the account, source files, selected process families, analysis mode, and pipeline version match, ProcessGround can rebuild the exports from the same encrypted canonical analysis for 30 days. The business semantics and fingerprint remain the same, while the title, filename, and generation date can change. Select Run a fresh analysis only when you intentionally want ProcessGround to reassess the source; a successful fresh analysis replaces the saved result and uses one credit.

07 / DIAGRAM STYLING

Read the diagram's visual language

ProcessGround uses presentation-ready cross-functional layouts with consistent status colors, branch conventions, and editable metadata.



Visual treatment	Meaning
Green fill	At least one supplied control is mapped to the process step.
Red fill	A high-risk step has no mapped control.
Amber fill	A risk is mapped but no control is mapped.
Grey fill	No supplied risk or control data is mapped to the step.
Orange border	The step is flagged as a potential control gap without replacing its underlying fill meaning.
Solid navy connector	The standard or normal process path.
Dashed orange connector	An exception, rejection, failure, return, or rework path.
Route label card	The documented option for one branch of a multi-way decision.

Swimlanes show accountable functions or roles. Vertical phase bands show when work occurs. Subprocess shapes link to a procedure defined elsewhere. Multi-process packages use descriptive pages, and risk-mapped packages include a consolidated Risk & Control Index.

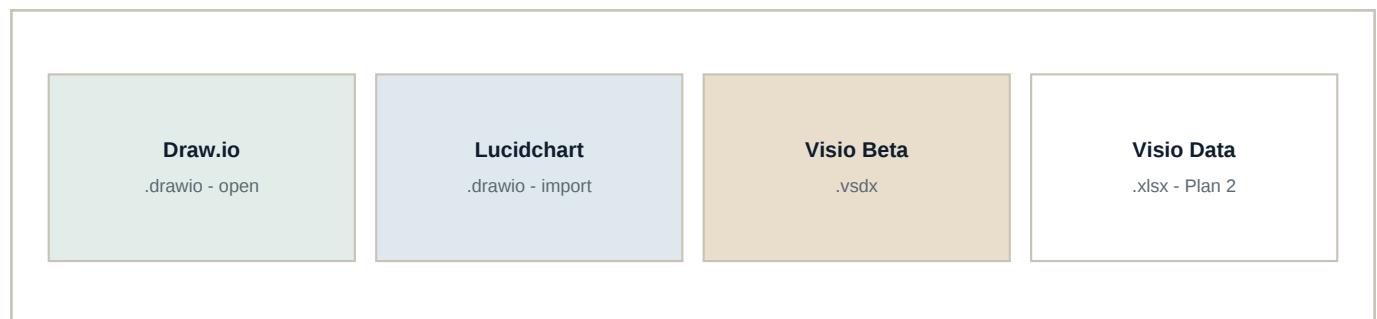
Concise labels, complete metadata

Shape labels are intentionally compact for readability. Full descriptions, evidence, risk and control details, review findings, source boundaries, and references remain available in editable properties, tooltips, the preview, or the index.

08 / DOWNLOADED FILES

Choose the output that matches your diagram tool

One generated package can include Draw.io, a Microsoft Visio Data workbook, and an experimental native Visio file when that feature is enabled.



Draw.io

01	Open diagrams.net From the editor, choose File, Open From, and the location where the .drawio file is saved.
02	Review each page Confirm lanes, phases, decision routes, metadata, and any Risk & Control Index before saving changes.
03	Save to your repository Choose a durable local or approved cloud location. ProcessGround does not retain a diagram-history copy for you.

Lucidchart

01	Start from Lucid Documents Select + New, then Import documents, and choose the ProcessGround .drawio file.
02	Review the conversion Confirm pages, editable shapes, connectors, colors, labels, and imported properties. Organization settings may restrict imports, and not every custom property is guaranteed to transfer identically.

03

Save as a Lucid document

The imported result is your Lucidchart copy. ProcessGround does not generate a native Lucidchart file.

Native Microsoft Visio when available

01

Download the .vsdx file

The native Visio export is labeled Beta because desktop compatibility should be reviewed for each package.

02

Open and inspect it

Check for repair warnings, attached connectors, page names, swimlanes, editable shape data, and branch labels before distribution.

Microsoft Visio Data Visualizer workbook

01

Open Visio Plan 2 desktop on Windows

Choose File, New, Templates, Flowchart, then Cross-Functional Flowchart - Data Visualizer, identified by the Excel icon.

02

Start the wizard

Choose Create, select Cross Functional Flow Chart (horizontal), then Browse to the downloaded workbook.

03

Select the process table

Choose ProcessMap for the first flow. Multi-flow workbooks also contain ProcessMap2, ProcessMap3, and later numbered tables.

04

Map the process fields

Map Function or Swimlane to Function, Phase or Timeline to Phase, Process Step ID to Process Step ID, Description to Process Step Description, Shape Type to Shape Type, and Accessibility to Alt Text.

05

Map the connections

Use Next Step ID with the Next Step relationship and Comma delimiter. Map connector labels from Connector Label.

06

Finish and save

Retain source order for Function and Phase, select Finish, review the result, and save the diagram as a .vsdx file.

07

Refresh after workbook edits

Keep the workbook with the Visio file. Save workbook changes, then use Data Tools Design and Refresh Diagram in Visio.

Start and End share one Visio value

The workbook intentionally uses Microsoft's Start/End shape value for both starting and ending activities. Additional risk, control, gap, confidence, evidence, and reference columns remain available as shape data.

OFFICIAL REFERENCES

[Draw.io: Open an existing diagram file](#)

[Lucid Help Center: Import documents](#)

[Microsoft: Create a Data Visualizer diagram](#)

09 / ACCURACY CHECKLIST

Complete a professional review before distribution

Use this checklist for every package, especially when the source is broad, incomplete, or intended for audit, compliance, or executive use.

- Every process page has the correct trigger, business purpose, and documented ending or source boundary.
- Process families and subprocess links match the source rather than document-heading structure alone.
- Every activity is in the lane of the accountable role, with systems and supporting participants kept in notes where appropriate.
- Phases follow the business lifecycle and do not duplicate unrelated document sections.
- Every decision has a documented condition, distinct targets, and labels aligned to those targets.
- Exception, rejection, return, and rework paths do not incorrectly merge into the normal path.
- Inferred activities and source boundaries are acceptable and do not add undocumented downstream work.
- Referenced subprocesses point to the correct process page and source section.
- Mapped risks and controls belong to the selected process step, and ambiguous or unmatched rows have been resolved.
- Potential control gaps have been reviewed against the complete control environment, not only the uploaded matrix.
- The downloaded file opens cleanly in the intended destination tool and remains editable.
- The reviewed package is saved in an approved document repository with an appropriate version name.

Use ProcessGround as an analyst, not an authority

ProcessGround accelerates extraction, structuring, mapping, and presentation. The accountable process owner or qualified reviewer remains responsible for confirming business accuracy, control conclusions, and fitness for use.

10 / TROUBLESHOOTING AND PRIVACY

Recover safely when a source or package needs attention

Most failures can be resolved without losing the process name, selected files, or a diagram credit.

Situation	What it means	What to do
The process file cannot be read	The file may be corrupt, protected, image-only, or mislabeled.	Open it locally, confirm the format and selectable text, then export a clean DOCX, PDF, or TXT copy.
No usable risk rows were found	The spreadsheet headers or rows could not be interpreted.	Use a clean XLSX or CSV matrix, or remove the file to generate process-only.
A selected process family is missing	The complete selected scope could not be represented reliably after one focused retry.	Use the displayed request ID, retry the package, or change the selected families. No credit is used.
The result is an AI-assisted draft	A high-severity structural issue remains unresolved.	Download for review, compare the affected paths to the source, and correct the editable diagram before relying on it.
An imported diagram looks different	Destination tools do not preserve every Draw.io layout or custom property identically.	Review page colors, connectors, labels, and properties after import and make destination-specific adjustments.
A download is no longer available	Generated files are returned to your browser and are not kept in a ProcessGround diagram library.	Save every successful package immediately in your approved repository.

How customer content is handled

- ProcessGround processes uploaded file contents and generated files in memory and does not intentionally persist them in its application database.
- Process documents and structured risk and control content are sent to the OpenAI API for request-time analysis with storage disabled in the request.
- OpenAI states that API data is not used to train models by default unless the API customer opts in. Default abuse-monitoring logs may retain customer content for up to 30 days.
- For paid accounts, ProcessGround retains an encrypted normalized analysis for up to 30 days so exact reruns can reproduce the same business semantics without another credit. The cache is isolated to the account, does not contain the uploaded file or generated diagram, and is deleted at expiration or account deletion.
- Content-free operational records may include account identifiers, file type and size bucket, analysis mode, package status, diagnostic codes, usage, model stage, token counts, estimated cost, and processing duration. Process names and source filenames are not retained in generation telemetry.
- Do not upload protected health information, complete payment-card data, government identifiers, passwords, secrets, classified or export-controlled material, children's data, biometric identifiers, or similarly regulated information.

Managing Professional renewal

- Canceling Professional from the Account page stops the next renewal; it does not delete your ProcessGround account.
- Professional access and the remaining credits in the current billing cycle stay available until the displayed end date.
- You can select Keep Professional before that date to resume automatic renewal.
- At the end of the paid period, unused credits expire and the account changes to Sample Access with no custom generation.
- Permanent account deletion is separate. It cancels an active subscription immediately and removes operational account data as described in the Privacy Policy.

OFFICIAL REFERENCES

[ProcessGround Privacy Policy](#)

[ProcessGround Terms of Service](#)

[ProcessGround Security](#)

[ProcessGround Subprocessors](#)

[OpenAI API data controls](#)