ARIS CONNECT
VIEWER USER MANUAL

VERSION 10.0 - SERVICE RELEASE 10

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This document applies to ARIS Version 10.0 and to all subsequent releases.

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6 Index i

1 ARIS Connect

This manual contains the online help that is provided for ARIS Connect users using an **ARIS Connect Viewer** license.

ARIS Connect is an integrated environment in which you can create, display, and change processes, as well as discuss and improve them jointly with other ARIS Connect users. When you open ARIS Connect in your Web browser, you obtain role-based access to the process descriptions that are relevant to you.

As a user with the **ARIS Connect Viewer** license privilege, you can check models. Therefore, the relevant views and options are offered for you to view models and enter comments.

As a user with the additional **Contribution** license privilege, you can edit attributes of various model items (page 206).

In ARIS Connect projects participants can directly enter comments pertaining to modeled processes and discuss improvement potential with others. With dashboards (page 403) KPIs can be visualized and controlled and relevant documents can be entered and distributed. The seamless integration with existing ARIS installations is ensured, which also allows users to cooperate with regard to existing processes using the integrated social media.

The functional scope of ARIS Connect depends on the license being used.

- Overview database content (page 352)
- Collaborate with users (page 357)
- Contribute as a viewer (page 206)
- Show dashboards (page 231)
- Use documents (page 205)
- Use favorites (page 83)
- Use filters (page 74)
- Highlight model items (page 176)
- Show models (page 157)
- Generate reports (page 132)
- Search content (page 382)
- Execute tasks (page 92)

News on ARIS is available in ARIS Community. (https://www.ariscommunity.com/system/files/files/ARIS_10_SR10_Features_Overview.pdf)

Note: You can watch videos for some procedures in the help. If your browser is unable to open the quick videos within the help, please use a different browser. The videos are also available in ARIS Community (http://www.ariscommunity.com/help/quick-videos).

2 Using the help system

This section contains information on how to use the help system.

The content of the online help in some way represents the user interface of the Classic view (page 30), which is delivered as standard.

The help structure of the subject area **Use ARIS Connect** thus reflects the entry points of the header of ARIS Connect: **Work in the portal**, **Use the Catalog**, **Collaborate with users**, and **Search content**.

You can use the Contents tab, the Index tab, and the help search to open the relevant help pages.

2.1 Text conventions

Menu items, file names, etc. are indicated in texts as follows:

- Menu items, key combinations, dialogs, file names, entries, etc. are displayed in **bold**.
- User-defined entries are shown as **<bold text in angle brackets>**.
- Example texts that are too long to fit on a single line, such as a long directory path, are wrapped to the next line by using ↵ at the end of the line.
- File extracts are shown in this font format:

  `This paragraph contains a file extract.`
- Warnings have a colored background:

  Warning

  This paragraph contains a warning.

2.2 What features does the online help offer?

The help system offers you various options for orientation and navigation. This page gives you an overview of the structure and functions of the help system. You will learn how to easily find the information you are looking for.

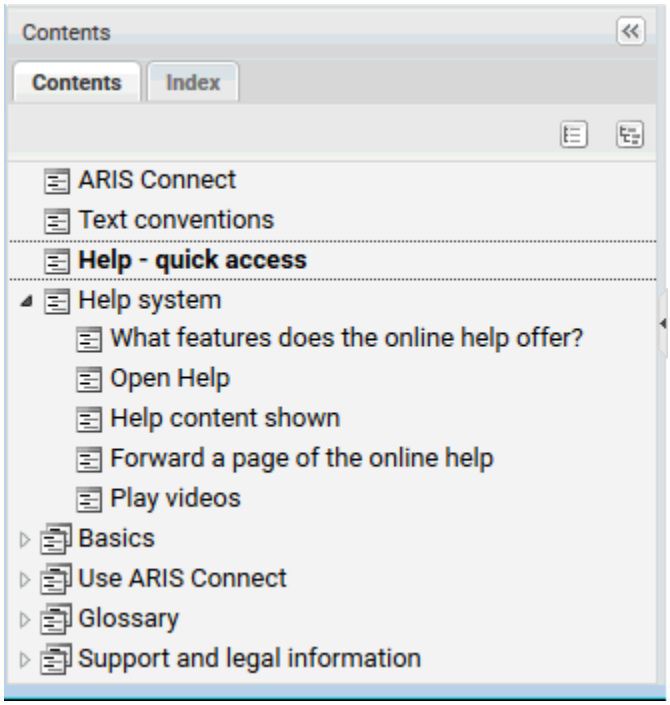
BUTTONS

The following buttons are available in the help viewer.

Buttons	Action
Home	Displays the **Contents** tab and the first topic.
Previous arrow	Selects the previous topic in the table of contents.
Next arrow	Selects the next topic in the table of contents. If the next topic is a subordinated topic of the selected topic, the superordinate topic is expanded.
E-mail this page	Opens an e-mail with the reference to the selected help page in the subject and the link to the selected help page in the body.
Print this page	Opens the **Print** dialog to print the selected help page.
Search Search field	Records the search text.
Search button	Searches for the text entered in the search field.
Match partial words (Disabled)	Searches for any word in the entered text that matches exactly. For example, if you search for **modeling convent**, the topics are found with **modeling**, but no topics with **conventions**.
Match partial words (Enabled)	Searches for any word in the entered text that matches partially. For example, if you search for **modeling convent**, the topics are found both with **modeling** and with **conventions**.
Collapse	Collapses the table of contents.
Expand all	Expands the table of contents.

CONTENTS TAB

The **Contents** tab contains the structure of the help topics as a tree.



The **Contents** tab provides access to general information, such as the purpose of the product described, basic information on operating the program and the online help system, or the structure of the program interface. You can expand and collapse the tree of the **Contents** tab using the **Expand all** and **Collapse** buttons of the help viewer.

REPRESENTATION OF THE USER INTERFACE

To a certain extent, the tree of the **Contents** tab represents the user interface of the standard Classic view (page 30) of ARIS Connect. Depending on the license you are using, you will find the topics Work in the portal, Use the Catalog, Collaborate with users, Search content, and Use the repository in this order, which corresponds to the arrangement of the program components.

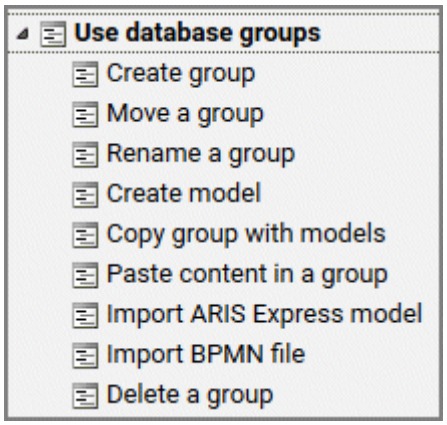
This makes it easy to assign the contents of the help to the program interface.

PROCEDURES AND CONCEPT DESCRIPTIONS

The tree also provides specific information such as procedures and concept descriptions.

THEMATICALLY GROUPED

Procedure descriptions show you how you can use the functionality of the program. They are provided with actively formulated headings such as **Create model**. Related topics are grouped thematically.



USE CASE ORIENTED

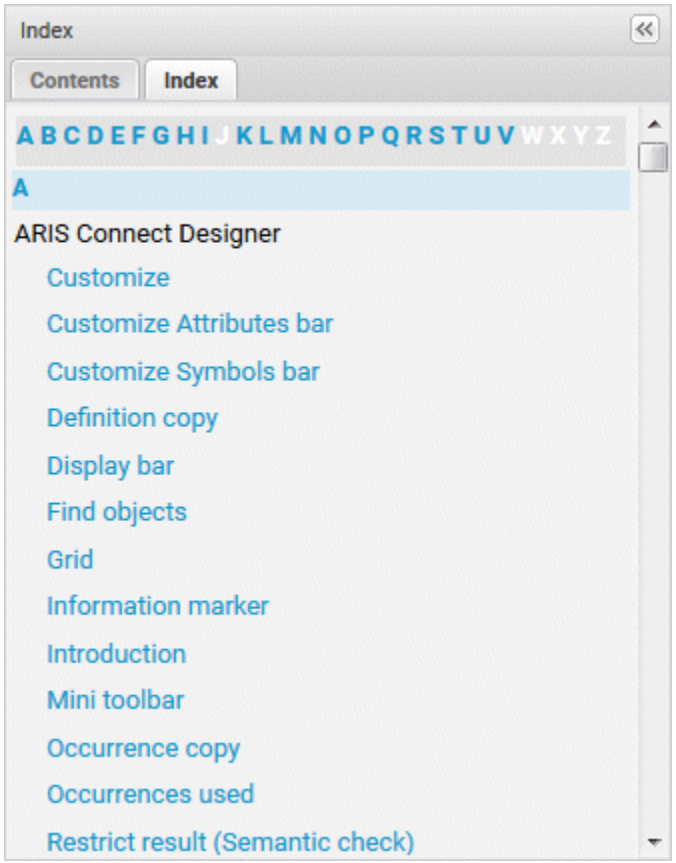
If possible, the procedure pages are arranged in such a way that they result in a use case. The following simple example shows the use case for groups: create group, manage group contents and, if no longer required, delete group.

DISTINCTION BETWEEN PROCEDURES AND CONCEPTS

You will find concept descriptions under **Valuable information**. Headings of concept descriptions are formulated as questions or marked by "How to" formulations, which makes it easy to distinguish between concept descriptions and procedure descriptions.

INDEX TAB

The **Index** tab provides keyword links to the respective help pages in alphabetical order.



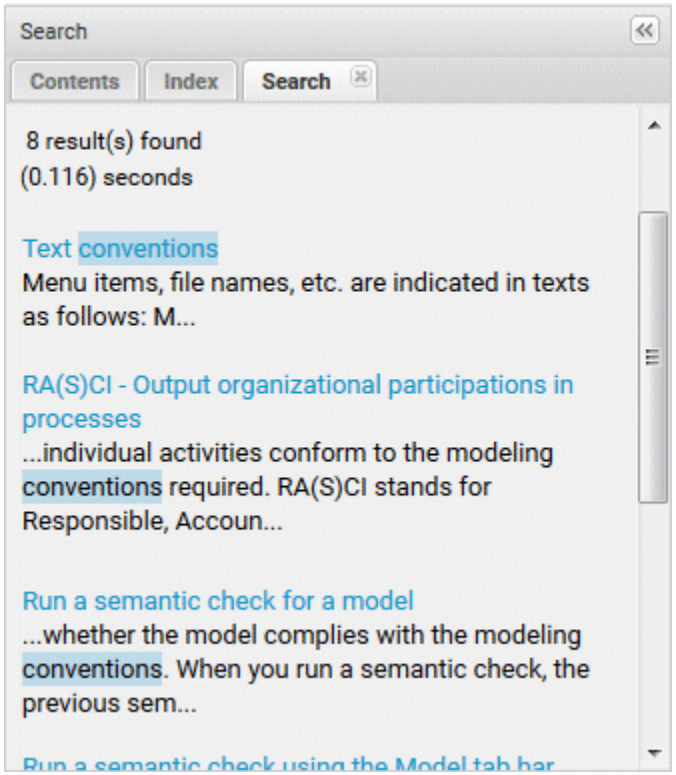
The alphabet is arranged above the keywords. For colored letters there are keywords. By clicking on these letters, you jump to the keywords that begin with this letter.

Click on a keyword to display the corresponding help page.

SEARCH

You can insert a search term in the search input field and execute the search.

The **Search** tab appears with the search result.



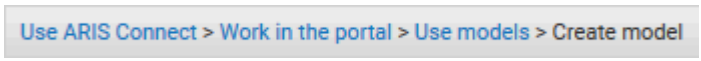
The search term is highlighted. You can extend the search by enabling the **Match partial words** check box to find every word of a term that partially matches.

Click on a page to display it.

HELP PAGES

BREADCRUMB

A breadcrumb navigation is displayed above the help pages.



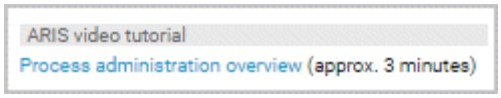
The breadcrumb represents the path in which a help page is stored in the content tree. This allows you to see the context of the information provided. You can click on the colored structure entries to navigate to a higher level.

HELP PAGE CONTENT

Help pages offer information as text, but also via videos, and illustrations.

Quick videos visualize described processes for certain functions. This enables you to follow basic and complex functions directly in the program. As the name **Quick video** says, the information given in very brief.

Task-related processes are presented in video tutorials.



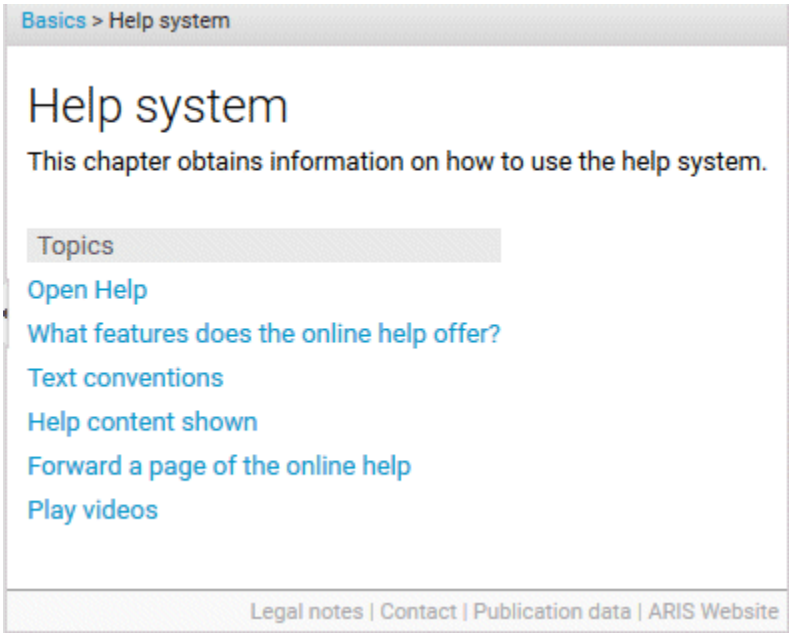
Due to the complexity of the topics, video tutorials run for several minutes. If you click on a video tutorial link, you will be redirected to the ARIS Community (http://www.ariscommunity.com) web site where the videos are stored.

Help pages often provide **See also** links. These links allow you to jump to content-related help pages.

SKIP LINKS

Help pages of related topics are grouped thematically under superior pages in the content tree.

If you select a parent page, you can access the skip links to open the corresponding help page.



Skip links are listed under the **Topics** section. They are at the beginning of the main content, so that screen readers have immediate access to the topics for reading aloud.

For more information that goes beyond the application help, see the technical documentation.

Technical documents are available on:

- ARIS DVD (...Documents\English\5 Customizing)
- Empower (https://empower.softwareag.com/) (login required)
- ARIS Download Center (https://aris.softwareag.com/)

FOOTER LINKS

The links lead to the corresponding web pages.

2.3 Open Help

You can open the online help to find out more about the range of functions normally delivered with ARIS Connect. Since ARIS Connect is fully configurable, the range of functions and the user interface in your product may differ significantly from what is described in the Help.

Procedure

1. Click **<user name>**.
2. Click **Help**.

A new tab opens. You will be offered different content depending on your role as a viewer, designer, or administrator. You can obtain the information you want using the **Contents** tab, the **Index** tab, and the **Search** field.

2.4 Help content shown

The ARIS Connect help content shown depends on your function or license privileges.

- If you are logged in with **ARIS Connect administrator** function privileges, the whole ARIS Connect help content is shown.
- If you are logged in with **ARIS Connect Designer** license privileges, you will see all the help content you need to work with models. This means that the **Administrate ARIS Connect** content is hidden, because you do not have access to administration features such as **Manage users** functionality.
- If you are logged in with **ARIS Connect Viewer** license privileges, you will see the entire help content describing how to navigate in the **Portal**. This means that the **Use ARIS Connect > Using the repository** content is hidden, because you do not have access to the repository to create and edit models. Even if you do not have the **Contribution** license privileges, the **Working in the portal > Contribute as viewer** descriptions are offered in the **Viewer** help. This is because the **Contribution** feature is an additional feature that is directly linked to the viewer features.

2.5 Forward a page of the online help

You can forward a link to the current page of the online help to others.

Prerequisite

- An e-mail program is associated with the **mailto** command.
- The recipients you are sending the link to can access the server on which the online help is located.

Procedure

1. Open the page of the online help that you want to refer to.
2. Click **E-mail this page**. An e-mail opens, in which the link to the current page is already inserted.
3. Enter the e-mail recipient and send the e-mail.

The link to the help page is available to the e-mail recipients.

2.6 Play videos

You can watch videos for some procedures. The procedure pages contain links for playing the videos.

Procedure

On the procedure page, click the video link. The video plays.

Note: If your browser is unable to open the quick videos within the help, please use a different browser. The videos are also available in ARIS Community (http://www.ariscommunity.com/help/quick-videos). If an empty page is displayed after you have opened a video page, please press **F5** to refresh the page.

3 Use ARIS Connect

ARIS Connect is an integrated environment in which you can create, display, and change processes, as well as discuss and improve them jointly with other ARIS Connect users. When you open ARIS Connect in your Web browser, you obtain role-based access to the process descriptions that are relevant to you.

3.1 Basics

This area lists some basic points that make your life easier when working with the ARIS Connect and its online help.

3.1.1 Select language

You can change the interface language, the language for Help, and the language for models all at the same time.

Procedure

1. Click **<user name>**.
2. Click **Languages**. The available languages are listed.
3. Click the language in which the interface language, Help, and model content are to be displayed.

The language is changed.

If content such as Help or model content is not available in the selected language, it is displayed in the alternative language. The alternative language is the database language in which database content is displayed if attribute values are not specified in the database language used. Using this, for example, you prevent names from being displayed as **(Untitled)** if they have not been specified in the relevant database language. When you create a database, **English (United States)** is selected automatically.

3.1.2 Edit your user account

Change the data of your user account. Data from LDAP users can be edited only to a limited extent.

Procedure

1. Click **<user name> > User settings**. If the Browser window is scaled-down, click **User icon > User settings** instead. The user data (details) is displayed.
2. Click **Edit** to change the e-mail address, telephone number, etc. Some entries cannot be changed, such as the user name.
3. Click **Save**.
4. Click **Change picture** to change or delete your picture. The corresponding dialog opens.
5. If you want to delete your picture, click **Clear**. The picture is deleted from your profile.
6. If you want to change your picture, click **Select file** to navigate to the picture file you want to upload.
7. In the **File Upload** dialog, select the picture file and click **Open**. The picture is displayed in the preview of the **Change picture** dialog.
8. Click **Upload**. The picture is added to your user account. If a different picture is uploaded in ARIS Connect or in Collaboration, it is automatically transferred to the other application.

You have changed your user account.

3.1.3 Change password

Change your password in the user profile after your first login or after the password was reset by the administrator. If an LDAP system is used for user management, please contact your LDAP administrator to request a new password.

Procedure

1. Click **<user name> > User settings**. If the Browser window is scaled-down, click **User icon > User settings** instead. The user data (details) is displayed.
2. Click **Edit**.
3. Enable the **Change password** check box. The **Old password**, **New password**, and **Confirm password** fields are displayed.
4. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
5. Click **Save**.

The password is changed. The user receives a notification by e-mail.

3.1.4 Switch your profile

You can switch between profiles (page 19) if more than one profile is assigned to you in ARIS Administration. Profiles provide you a profile based view of the portal. Depending on the profile, you have access to different content and functionality. Only one profile can be active at a time.

Procedure

1. Click **<user name>**.
2. Click **Profiles > <profile_xy>**.

The content and functionality of the selected profile is displayed.

3.1.5 Start quick search

You can begin the search for items directly on the start page of ARIS Connect.

Procedure

1. If more than one database is provided, select the database (page 66) your search is to be based on.
2. Click in the **Search** box.
3. Enter the relevant term.

A list with first results (page 392) is shown as you enter the term. As you complete the term, the list will be updated.

4. In the list, click the entry of the category to which you want to navigate. The categories displayed depend on the license you are using.

The item opens. For example, if you click the name of a model, the model opens in ARIS Connect Designer. If you click a collaboration entry, it is output in Collaboration.

3.1.6 Open the search area

Searching in ARIS Connect enables you to conveniently find items such as models, objects, documents, groups in Collaboration, etc., throughout the system.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.

You have opened the **Search** area and you can restrict the result to the items you want to find by using the search context and filters.

3.1.7 Open ARIS Download Client page

You can switch to the ARIS Download Client page to download and use an ARIS product, that is, ARIS Architect/Designer.

Prerequisite

Your administrator has enabled the use of download clients.

Procedure

1. Click **<user name>**.
2. Click **Download clients**.

A new tab opens with the **Download clients** page. You can download and start the ARIS products your administrator has configured for use.

3.1.8 Open ARIS Administration

You can open ARIS Administration, for example, to publish databases, create users, or activate Collaboration.

Prerequisite

You are logged in as a user with the **ARIS Connect administrator** function privilege.

Procedure

1. Click **<user name>**.
2. Click **Administration**.

The administration areas, such as **User management** and **Configuration** are opened for editing.

3.1.9 Open information window

You can view information about ARIS Connect.

Procedure

1. Click **<user name>**.
2. Click **About**.

Information about ARIS Connect will be displayed.

3.1.10 Log out of ARIS Connect

You can log out of ARIS Connect when you have finished editing.

Procedure

1. Click **<user name>**.
2. Click **Log out**.

You will be logged out and the ARIS Connect Log in page will be displayed.

You can log in with your current user name or another user name, if you have different user names for different roles.

3.1.11 Available ARIS Connect keyboard shortcuts

The following keyboard shortcuts are available to control the program.

ARIS Connect in general (page 21)

Keyboard shortcuts for Collaboration (page 23)

PORTAL

Portal in general (page 22)

Quick start page (page 25)

Quick search (page 26)

Database selection (page 27)

Hierarchies (page 29)

List views (page 24)

Comment bar (page 28)

3.1.12 Known issues

AD BLOCKERS

Some ad blockers may prevent ARIS Connect from being started correctly.

If you have logged in to ARIS Connect and a white screen is displayed instead of the start page, please configure the ad blocker to consider ARIS Connect secure.

POP-UP BLOCKERS

Under certain circumstances, if the response time is too long, a Web browser may consider the tab of ARIS Connect Designer as a pop-up. In this case, no new tab is created and no model opens.

If you attempt to open a model, but the tab with the model is not displayed, please check whether your pop-up blocker prevents the tab from opening and allow ARIS Connect pop-ups.

3.1.13 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.1.13.1 What profiles include which content?

Profiles provide users a profile based view of the portal. Depending on the profile, the information and functionality that users have access to varies. Example: For users to which the **Viewer** profile is assigned, the **Steps** fact sheet is displayed when a model is selected. They are unable to view the **Tasks** fact sheet and the **Contribute** function as they do not have an active role. Profiles are applied in addition to the function and license privileges. If more than one profile is assigned, the user can switch between these profiles via **<user name> > Profiles > <profile_xy>**. Only one profile can be active at a time. You can assign the following profiles to users or user groups in ARIS Administration.

Profile name	Views and functionalities
CoE member	The **Overview** fact sheet is displayed when a model is selected in the **Portal**.
Contributor	The **Steps** fact sheet is displayed when a model is selected in the **Portal**. If the **Steps** fact sheet is not available, the **Overview** fact sheet is displayed.
Designer	The **Diagram** fact sheet is displayed when a model is selected in the **Portal**.
Manager/Owner	The **Dashboards** fact sheet is displayed when a model is selected in the **Portal**.
Viewer	▪ The **Steps** fact sheet is displayed when a model is selected in the **Portal**. If the **Steps** fact sheet is not available, the **Overview** fact sheet is displayed. ▪ The **Tasks** area is not available. ▪ The **Contribute** function is not available.
Viewer (accessible)	▪ The **Steps** fact sheet is displayed when a model is selected in the **Portal**. If the **Steps** fact sheet is not available, the **Overview** fact sheet is displayed. ▪ The **Tasks** area is not available. ▪ The **Contribute** function is not available. ▪ ARIS document storage and Process Governance are not available.

These profiles are predefined in the XML configuration.

3.1.13.2 What licenses are available in ARIS Connect?

For working with ARIS Connect, the **Designer** and **Viewer** licenses are available.

DESIGNER

- The **ARIS Connect Designer** license gives users access to the entire repository. They can access models, documents, and dashboards and feeds. In the **Models & Object** area, for example, users can create, edit, and delete models in databases.
- The **ARIS Connect Designer** license can be extended with the **ARIS Aware** license. The **ARIS Aware** license allows users to view configured dashboards (page 403) for which they have view rights. The users can view the dashboards, for example, in the Dashboards fact sheet.

VIEWER

- The **ARIS Connect Viewer** license enables users to view models in databases. This means that these users use databases for review and information purposes.
- The **ARIS Connect Viewer** license can be extended with the **ARIS Aware** license. The **ARIS Aware** license allows users to view configured dashboards (page 403) for which they have view rights. The users can view the dashboards, for example, in the Dashboards fact sheet.
- The **Contribution** license is an additional license to users using an **ARIS Connect Viewer** license. If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you can change values of specific model types and objects (page 215), create new or reuse existing items (page 207), as well as delete items (page 209) in the **Portal**.

3.1.13.3 Keyboard shortcuts generally available

The following shortcuts refer to the web browser. They are relevant because, for example, they can close the contents of ARIS Connect. For example, pressing **Ctrl + F4** closes a ARIS Connect tab without asking if it does not contain content that has been changed.

Shortcut	Action
Alt + F4	Closes the web browser with all tabs. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Alt + left arrow	Moves backwards through previously visited areas of ARIS Connect, such as **My activities**, **Recent changes**, but also **Search** and **Catalog**.
Alt + right arrow	Moves forward through previously visited areas of ARIS Connect, such as **My** **activities**, **Recent changes**, but also **Search** and **Catalog**.
Ctrl + F	Opens the **Find** bar of the web browser to search the page for a term.
Ctrl + F4	Closes the ARIS Connect tab without asking.
Ctrl + Page down	Depending on the web browser: Switches to the next web browser tab from left to right if your web browser supports changing tabs using the keyboard.
Ctrl + Page up	Depending on the web browser: Switches to the next web browser tab from right to left if your web browser supports changing tabs using the keyboard.
F3	Depending on the web browser: Opens the **Find** bar of the web browser to search the page for a term.
F5	Updates the current view based on the database changes.
F11	Turns full screen mode on or off if your web browser supports full screen.

3.1.13.4 Keyboard shortcuts for the portal

The following shortcuts are generally available for the **Portal**.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Down arrow	Opens the focused drop-down menu, selects the first menu item, and jumps down through the menu items.
Enter	Invokes the action of the selected menu item.
Esc	Closes the drop-down menu.
Left arrow	Closes the submenu of a menu item.
Right arrow	Opens the submenu of a menu item.
Shift + tab	Focuses the previous control, such as **Portal**, **Search**, a menu, or an input field, that you can select with the **Enter** key, open with the **Down arrow** or **Up arrow** keys (menus) or enable with the **Space** key (check boxes). For users with **Contribution** license privileges, jumps from one input field to the previous one in **Edit** mode.
Space	Opens a menu and selects the first menu item. Invokes the action of a selected item, for example, **My favorites**.
Tab	Focuses the next control, such as **Portal**, **Search**, a menu, or an input field, that you can select with the **Enter** key, open with the **Down arrow** or **Up arrow** keys (menus) or enable with the **Space** key (check boxes). For users with **Contribution** license privileges, jumps from one input field to the next in **Edit** mode.
Up arrow	Opens the drop-down menu, selects the last menu item, and jumps up through the menu items.

3.1.13.5 Keyboard shortcuts for Collaboration

The following shortcuts are available in Collaboration.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
End	Moves to the lower entries if they cannot be displayed completely due to the window size or the screen resolution.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
Home	Moves to the upper entries if they cannot be displayed completely due to the window size or the screen resolution.
Tab	▪ Highlights the next control or input field. ▪ Jumps from the **Comment** box to the **Tag**, **Link**, and **File** symbols that you can use to attach tags, links, or files to your comment. It also jumps to the other input fields and to the **Post** button.
Shift + Tab	Highlights the previous control or input field.
Right arrow/ Left arrow	Moves the cursor through the text in input fields.
Up arrow/ Down arrow	Selects the previous/next item in lists.
Enter	Opens the attachment fields and places the cursor in the input field if the **Tag** or **Link** symbol is selected. Opens the **Select document** dialog when the **File** symbol is selected. ▪ Posts the comment when the **Post** button is selected. ▪ Executes the highlighted button. ▪ Opens the dialog/the selection list of the highlighted item.
Ctrl + Enter	Posts a comment when the **Post** button is active.

3.1.13.6 Keyboard shortcuts for list views

Elements are listed in list views. List views are, for example, areas such as My favorites, My activities, Recent changes, and Catalog.

Shows the current activities you are following in Collaboration or in the portal (page 360).

Provides direct access to saved filter criteria (Seite 71) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 83).

The following shortcuts are available for these areas.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Down arrow	Moves the entries down one entry if they cannot be displayed completely due to the window size or the screen resolution.
End	When in focus: Moves to the lower entries if the contents cannot be displayed completely due to the window size or the screen resolution.
Enter	Sorts the table entries column by column in descending or ascending order if the column name is selected. Glossary and Catalog: Displays and hides the Choose items starting with the same letter and opens and closes the filter for the catalog (page 354).
F5	Updates the current view.
Home	When in focus: Moves to the upper entries if the contents cannot be displayed completely due to the window size or the screen resolution.
Left arrow	Moves the entries to the left if they cannot be displayed completely due to the window size or the screen resolution.
Page down	When in focus: Moves to the lower entries if they cannot be displayed completely due to the window size or the screen resolution.
Page up	When in focus: Moves to the upper entries if they cannot be displayed completely due to the window size or the screen resolution.
Right arrow	Moves the entries to the right if they cannot be displayed completely due to the window size or the screen resolution.
Up arrow	Moves the entries up one entry if they cannot be displayed completely due to the window size or the screen resolution.

3.1.13.7 Keyboard shortcuts for the Quick start page

The following shortcuts are available for the Quick start page.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Alt + Down arrow Alt + Up arrow	Activates the area of the tiles for navigation.
Down arrow	If the main area has the focus: Moves the tiles up if they cannot be displayed completely due to the window size or the screen resolution.
End	Moves to the lower tiles if they cannot be displayed completely due to the window size or the screen resolution.
F5	Updates the current view.
Home	Moves to the upper tiles if they cannot be displayed completely due to the window size or the screen resolution.
Page down	Displays in the visible area as many of the next tiles as possible if they cannot be displayed completely due to the window size or the screen resolution.
Page up	Displays in the visible area as many of the previous tiles as possible if they cannot be displayed completely due to the window size or the screen resolution.
Shift + Tab	Jumps from the selected to the next left tiles.
Space	Activates the **Quick start** page if the focus is on **Quick start**.
Tab	Jumps from the selected to the next right tiles.
Up arrow	If the main area has the focus: Moves the tiles down if they cannot be displayed completely due to the window size or the screen resolution.

3.1.13.8 Keyboard shortcuts for the quick search

The following shortcuts are available for the quick search (page 15).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Arrow down	Selects the next entry of the result list downwards. If the last entry is selected, press the **Arrow down** key to select the first entry of the list.
Arrow right	Jumps to the selected entry, for example, to the fact sheets of a model in the portal, or opens the **Open** dialog, for example, to download a document from ARIS document storage.
Arrow up	Selects the next entry of the result list upwards. If the first entry is selected, press the **Arrow up** key to select the last entry of the list.
Enter	Opens the Search area (page 382) if no entry is selected or jumps to the selected entry.

3.1.13.9 Keyboard shortcuts for the search

The following shortcuts are available for the search (page 384).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Alt + Down arrow Alt + Up arrow	Activates the result area or the page selection area.
Enter	Opens the selected result entry, adds or removes a selected filter, or opens the selected page.
Esc	Closes the result entry list and removes the search term from the quick search field.
Shift + Tab	Jumps to the next element of the user interface or to the next entry from right to left and from bottom to top.
Tab	Jumps to the next element of the user interface or to the next entry from left to right and from top to bottom.

3.1.13.10 Keyboard shortcuts for the database selection

The following shortcuts are available for the database selection (page 66).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Down arrow	Opens the database selection menu, selects the first entry. If the down arrow is pressed again, the next entry below is selected.
Enter/Space	Opens the selected database.
ESC	Closes the database list.
Up arrow	Opens the database selection menu, selects the first entry. If the down arrow is pressed again, the last entry is selected. Each further press marks the next entry above.

3.1.13.11 Keyboard shortcuts for the Comment bar

The following shortcuts are available in the Comment bar (page 89) when the cursor is in the **Comment** field.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Tab	Jumps from the **Comment** box to the **Tag**, **Link**, and **File** symbols that you can use to attach tags, links, or files to your comment. It also jumps to the other input fields and to the **Post** button.
Enter	Opens the attachment fields and places the cursor in the input field if the **Tag** or **Link** symbol is selected. Opens the **Select document** dialog when the **File** symbol is selected. Posts the comment when the **Post** button is selected.

3.1.13.12 Keyboard shortcuts for hierarchies

The following shortcuts are available for hierarchies, such as the Groups hierarchy (page 33) in the Classic view (page 30).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Down arrow	Jumps down to the next entry.
Left arrow	Closes the selected hierarchy.
Right arrow	Opens and closes the selected hierarchy.
Space	Toggles the selected hierarchy.
Up arrow	Jumps up to the next the entry.
1 - 9	Jumps to one of the first nine items of the current level.
0	Jumps to the parent item of the selected item.

3.2 Work in the portal

ARIS Connect is an integrated environment in which you can create, display, and change processes, as well as discuss and improve them jointly with other ARIS Connect users. When you open ARIS Connect in your Web browser, you obtain role-based access to the process descriptions that are relevant to you.

If you click **Portal**, you can view all information relevant to you.

Depending on your role, the view, and the published databases your administrator selected, the function and content of the portal may vary. In the following, the functions of the Classic view and the Default view are described.

3.2.1 Views

The portal shows specific information for each user. Different views display information in different ways. By default, ARIS comes with two different views. The Classic view and the Default view. These views are defined in configuration sets that cannot be changed. However, administrators can define multiple modification sets based on these templates.

3.2.1.1 Classic view

If the administrator provides at least one database you have access to, this view shows all content relevant to you in a clear structure.

- Home (page 31)
- Groups (page 33)

Content filters restrict the information in specific areas of the portal to content that is relevant to you. Content filters can be defined in two ways:

- Content filters can be assigned via role. If a role object is assigned (page 76) in models to an existing user group you are member, the relevant filters are added to the **My content** area automatically.
- You can add filters (page 74) and activate them as content filters (page 78) to further restrict this content.

3.2.1.1.1 Home

Depending on your license, not all described tiles may be available.

There are several areas available:

QUICK START

MY CONTENT

Opens the **My content** area (page 80) where you can filter the portal content of the databases you have access to by various categories, e. g. **Role** and **Location**.

MY FAVORITES

Provides direct access to saved filter criteria (Seite 71) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 83).

MY ACTIVITIES

Shows the current activities you are following in Collaboration or in the portal (page 360).

DASHBOARDS

Opens the **Dashboards** area where you can access various dashboards sorted in categories such as Portal usage (page 254).

MY TASKS

Opens the list of tasks (page 92) for which you are responsible.

CONFIRMATIONS

Shows an overview of the confirmation processes (page 118) you initiated. Check the confirmation status in the list of confirmation processes, for example, if the process is already generated or how many addressees have already confirmed. Click a process to navigate directly to the related object or model.

For detailed information on confirmations, refer to the online help (**Use ARIS Connect > Work in the portal > Confirmations**).

MY GRC TASKS

Shows an overview of your current tasks from ARIS Risk & Compliance Manager (page 124) in ARIS Connect, as well as confirmation tasks (page 120).

RECENT CHANGES

Shows all links to models that were changed recently. In addition, for each model the time elapsed since the last change and the path are shown.

CONTACTS

Lists all users of the current ARIS Connect server with **User administrator** function privileges. If you have any requests regarding the privileges of your user account, you can get in touch with these ARIS Connect users.

3.2.1.1.2 Groups

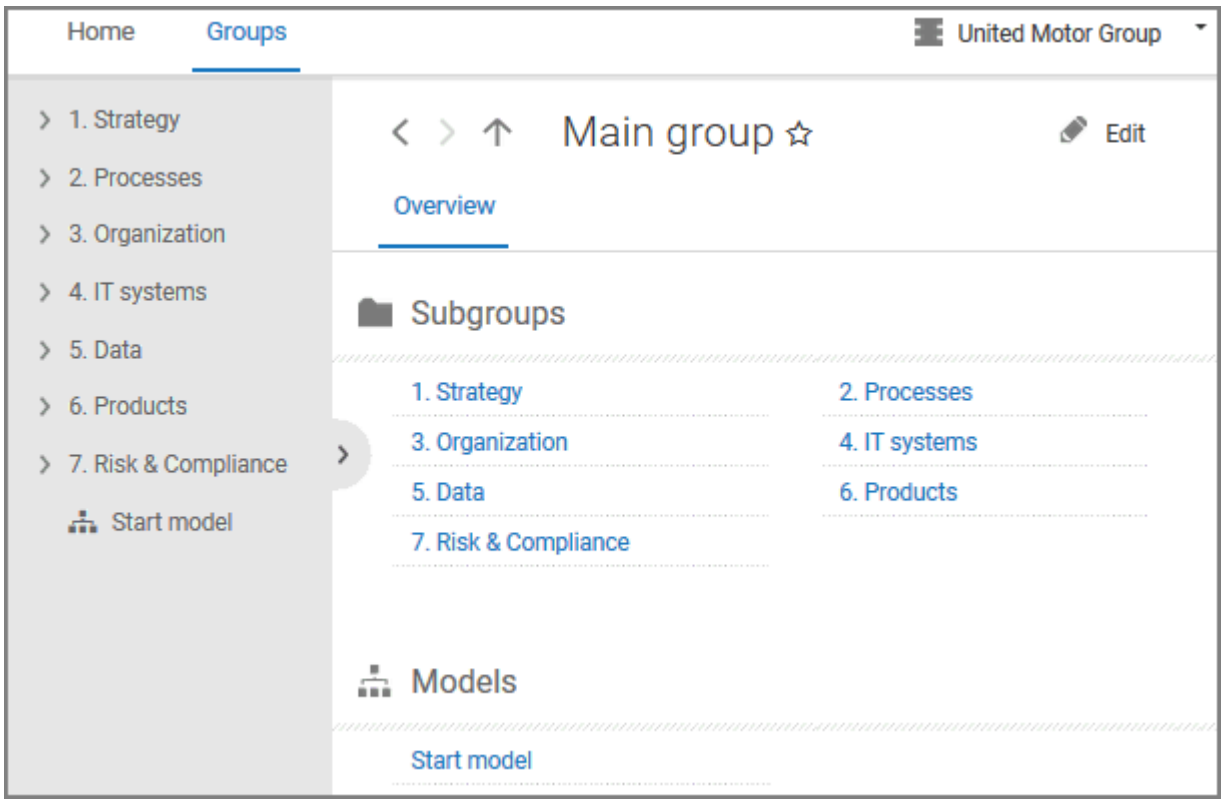
Use the tree to navigate to the entire contents of the portal you selected.

Depending on the license, the contents selected and the model type, different functions and fact sheets (page 404) are available.

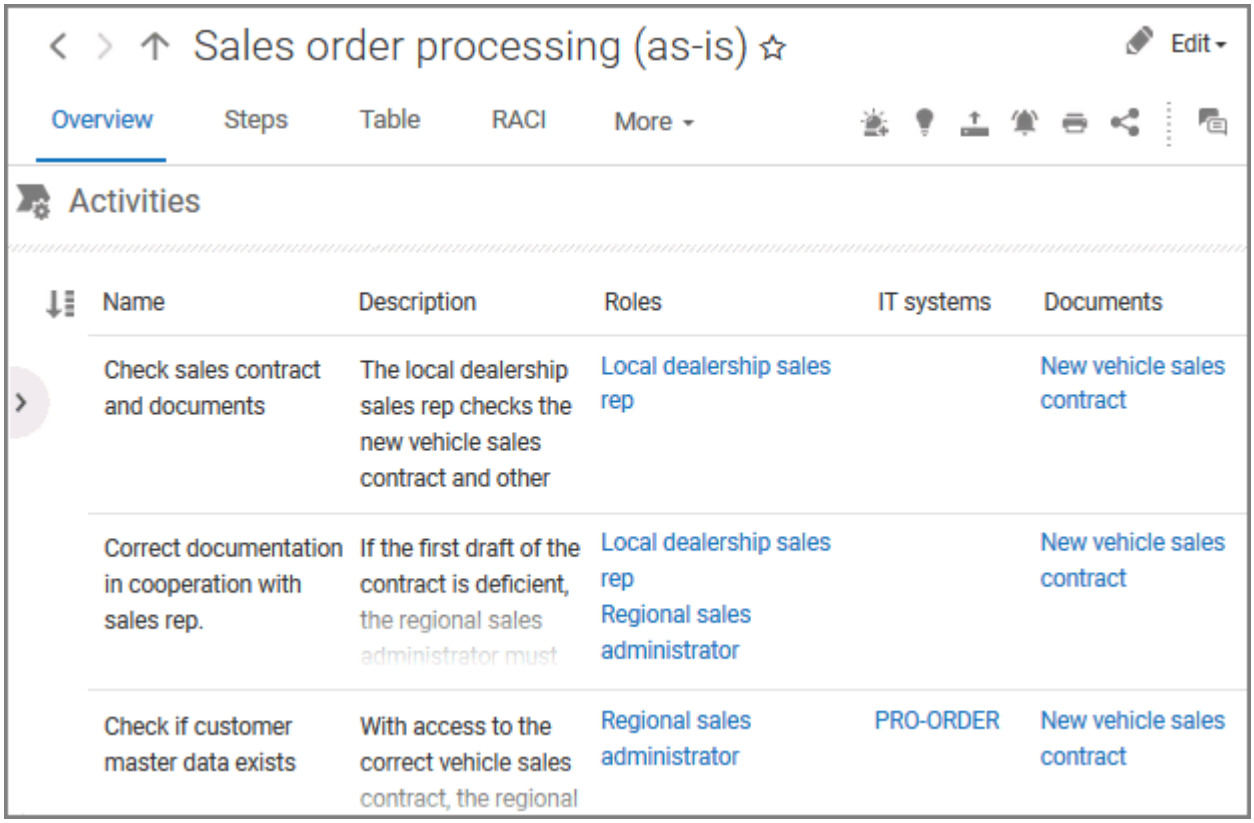
FACT SHEETS OF ARIS MODELS

OVERVIEW

Gives an overview of the item selected, for example, displays variant relationships of the selected item or the content of a selected group.



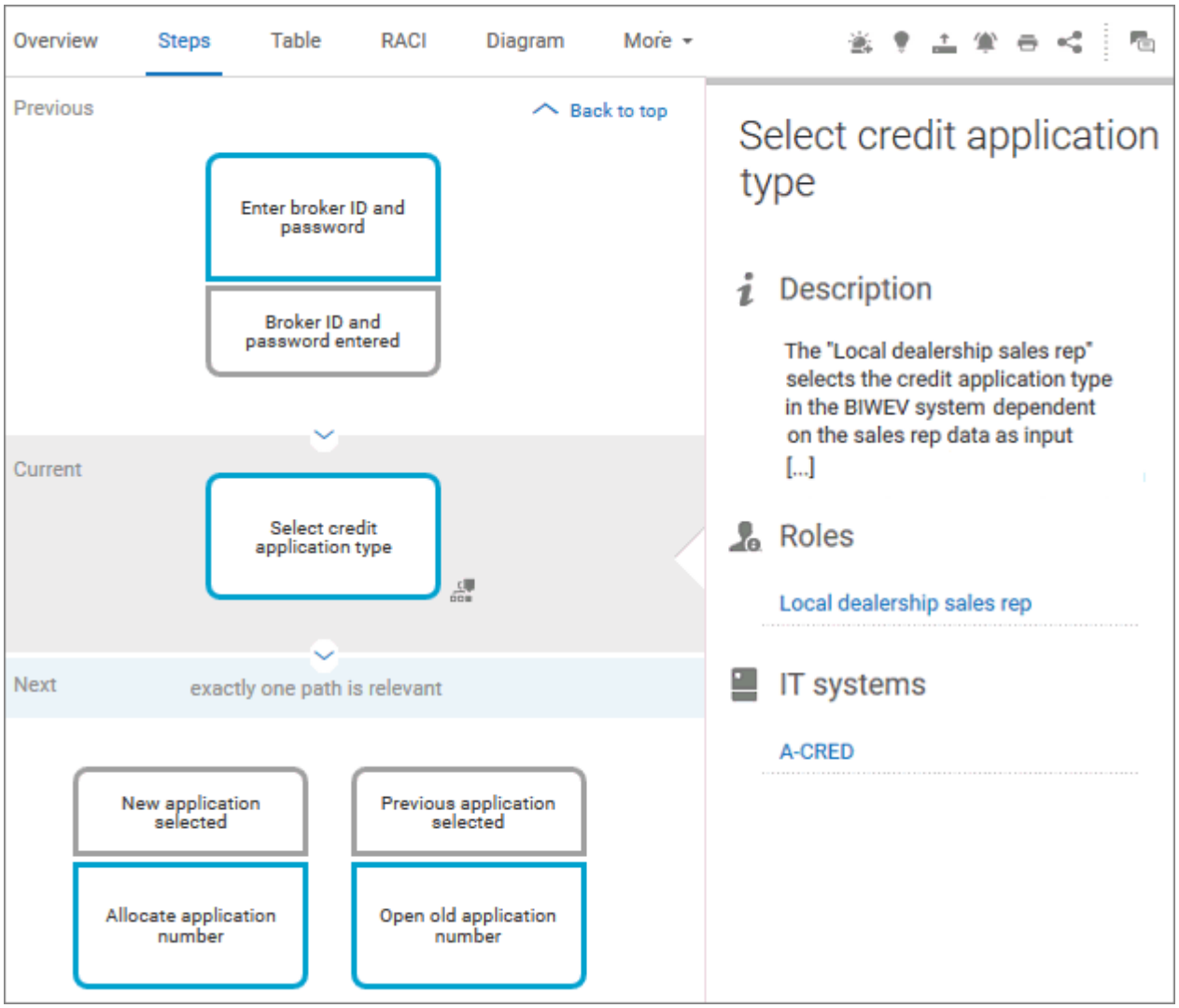
If you have selected a model, additional headings are shown depending on the context.



Content that can be used to navigate to other content is displayed as links.

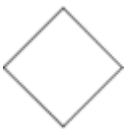
STEPS

Transparently displays all steps of a process (EPC) (page 69). Regardless of the process size you can view only the previous, current, and subsequent process steps. For the current step the relevant information is provided in the form of links.



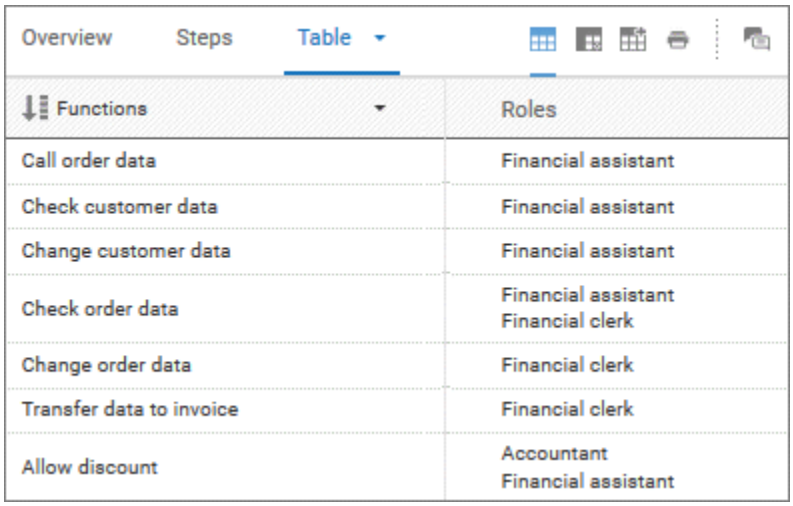
You can easily navigate to the top of the **Steps** fact sheet (page 73) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 72).

The following information is provided for operators:

Information	Operator	Symbol
all paths are relevant	AND	
	OR/AND	
	XOR/AND	
one or more paths are possible	AND	
	OR/AND	
	XOR/OR	
exactly one path is relevant	XOR	
	AND/XOR	
	OR/XOR	
	Gateway	
complex decision	Rule	

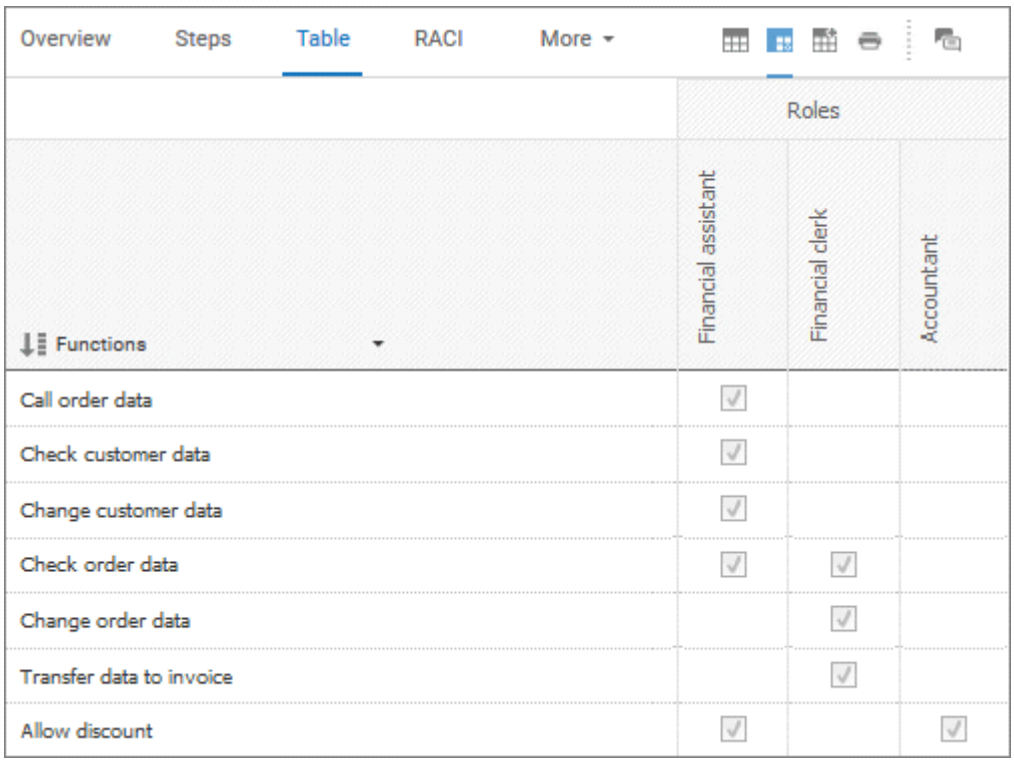
TABLE

Shows the functions that the process of type **EPC** and **BPMN** contains, as well as the roles assigned to them. In the tables, you can add columns (page 196) and remove added columns (page 196) again.



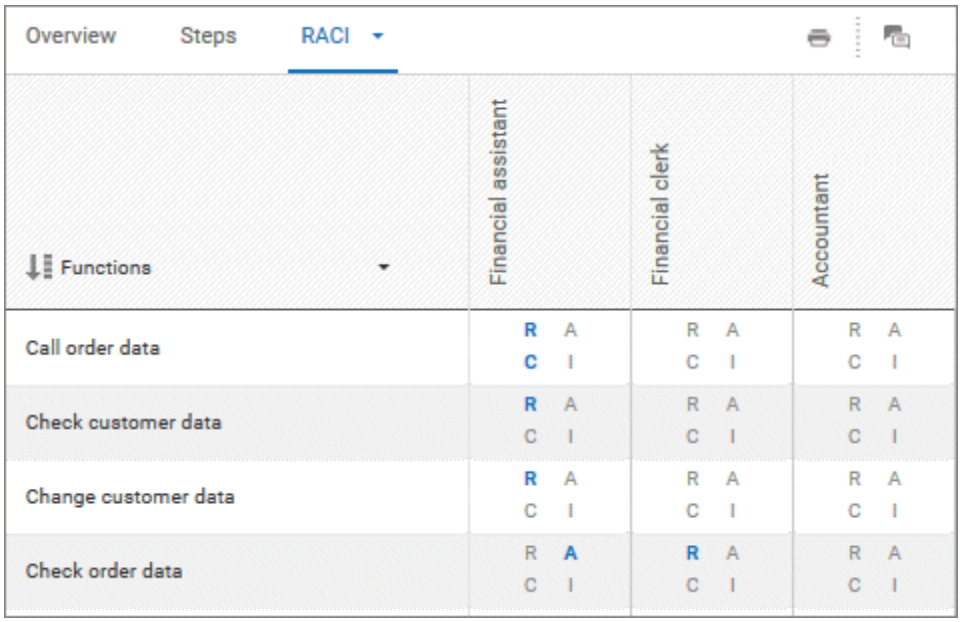
You can sort the functions in different ways by clicking the column title.

You can open a matrix (page 197) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.



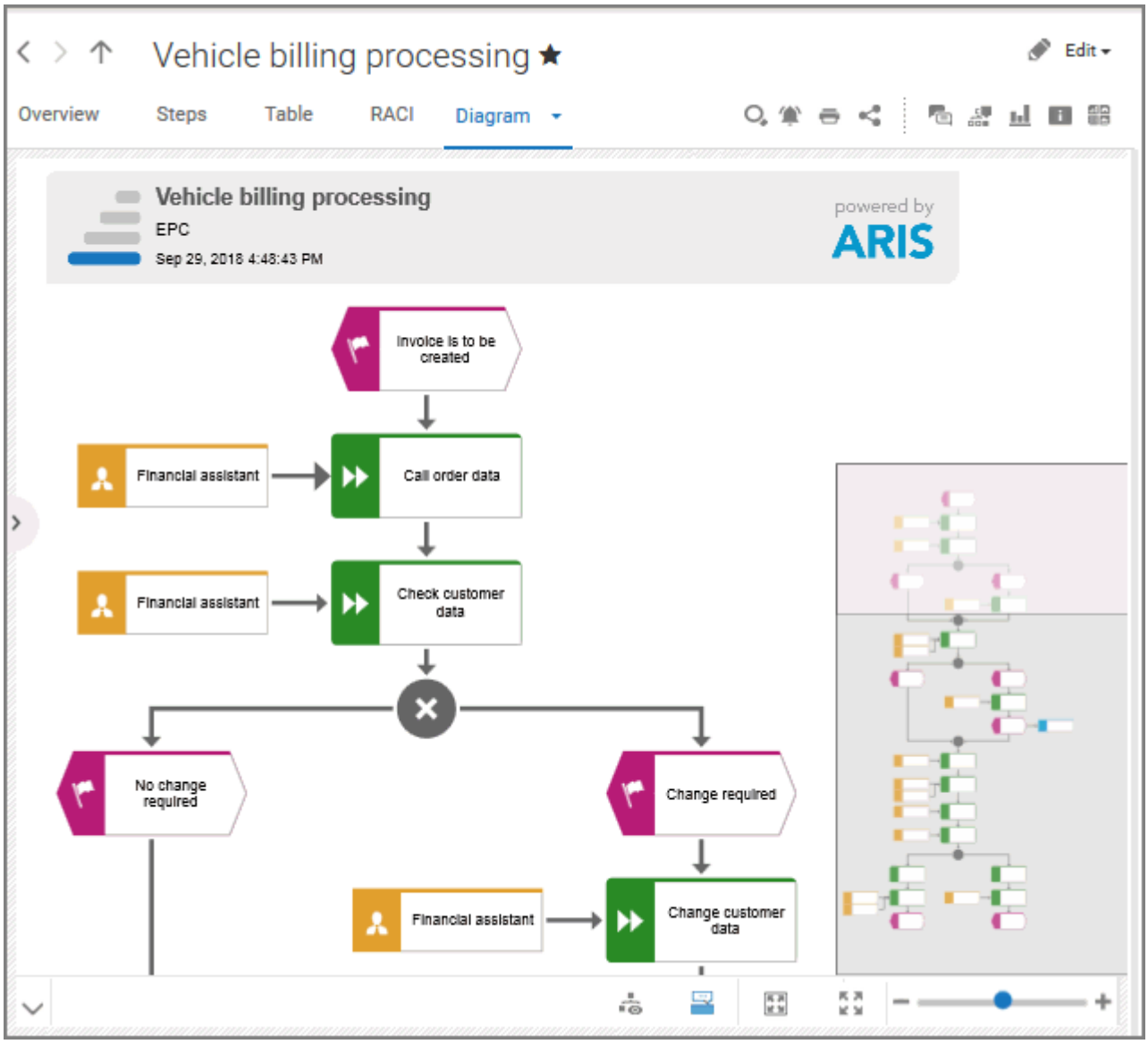
RACI

RACI matrices display the activity processes and the associated organizational responsibilities. RACI matrices are displayed only if RACI information is available for this process. You can sort the functions (page 198) of matrices.



DIAGRAM

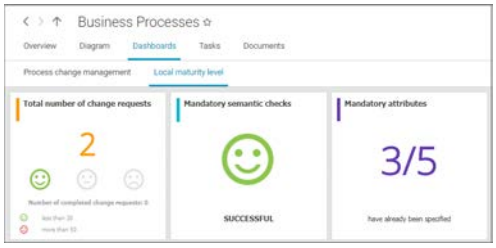
The Diagram fact sheet contains the Model Viewer, which graphically displays diagrams. Depending on the diagram type, different functions are available.



You can find model items (page 158) ( ) in the diagram. Click **Properties** to show the properties of a model or a model item. (page 161) You can highlight objects in the diagram (page 162) ( ) that meet a defined condition. In addition, you can open assigned models (page 163) ( ). You can change the view of the diagram (page 165) ( ) to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 159).

DASHBOARDS

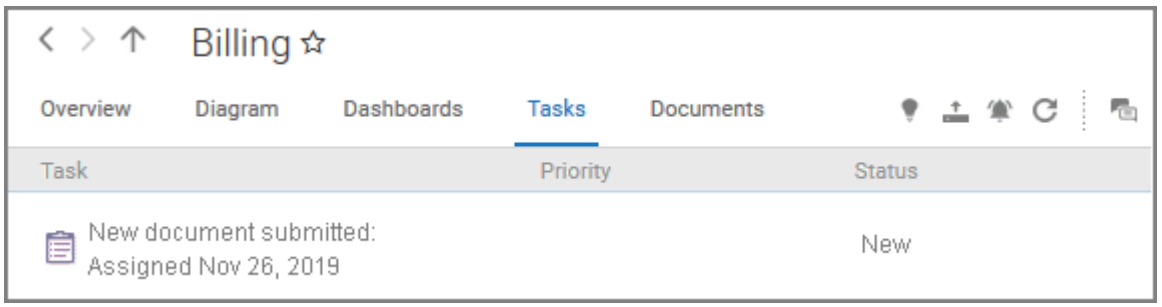
Shows the dashboards available for the selected diagram.



The **Dashboard** fact sheet is shown to users who have the **ARIS Aware** license (page 20).

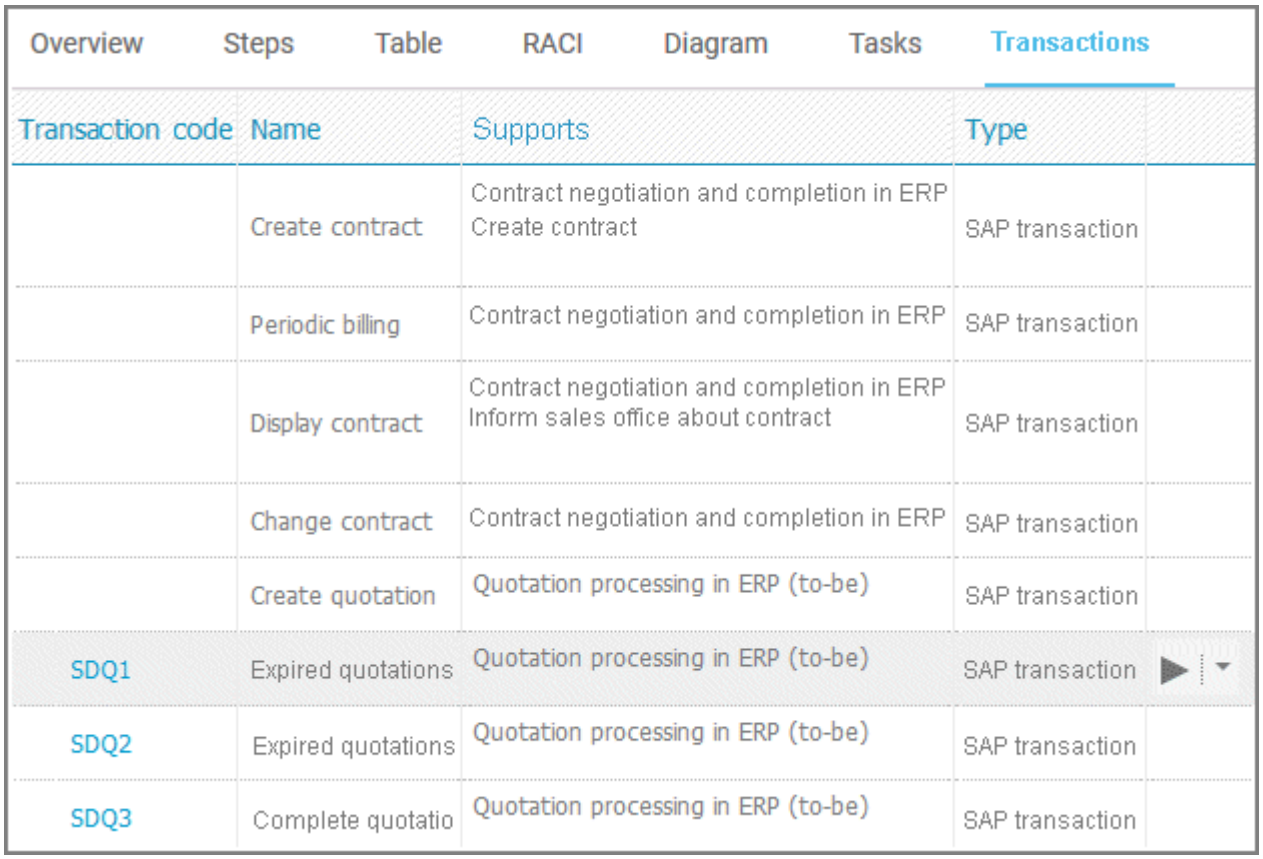
TASKS

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks.

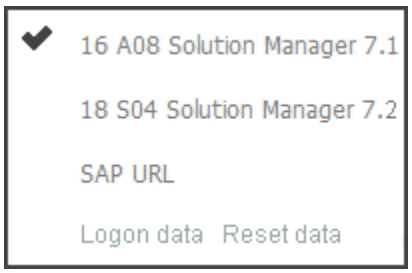


EXECUTABLES

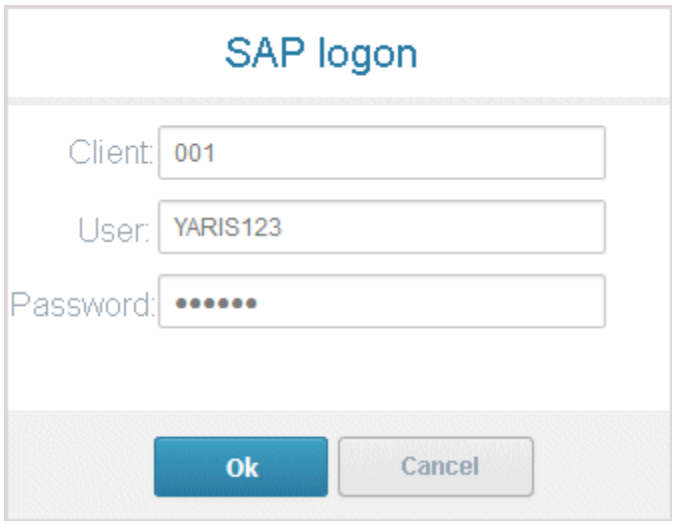
Executables are displayed if you are using ARIS for SAP Solutions and if this function has been configured in the **Portal**.



You can start (page 340) the ▶ executable automatically via the default server in each row displaying a Transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.

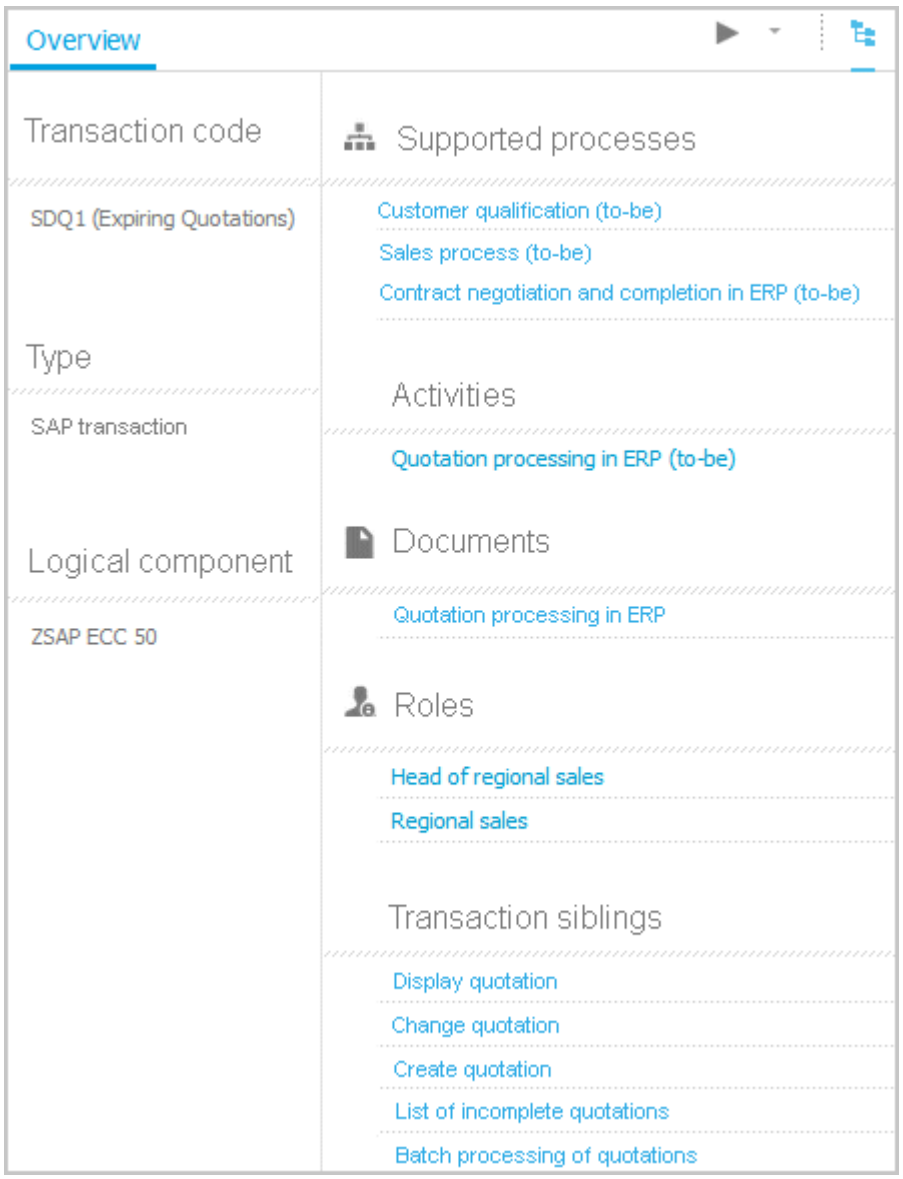


To start the executable, click an SAP Server or a URL. The Login dialog opens.



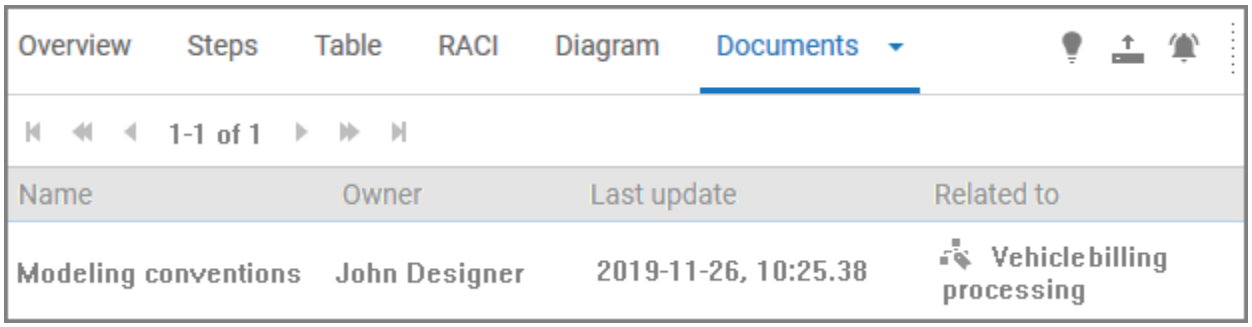
Log on to the SAP system in the current language and the executable starts. The login remains valid until you log out of the portal or enter different login data (page 342). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you click an executable on the **Executables** page, such as **SDQ1**, its fact sheet (page 404) including detailed information is displayed. If documents are available, you will be able to download (page 341) them.



DOCUMENTS

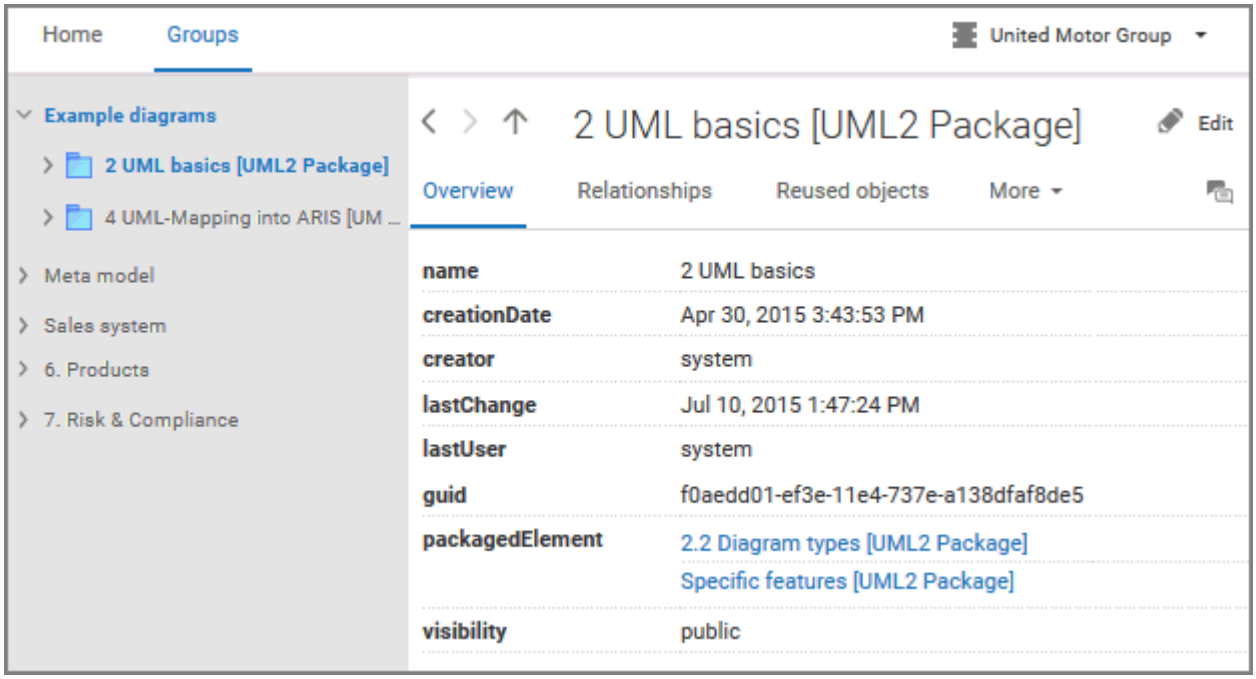
Lists documents assigned to models or objects, for example, by the **Link 1** - **Link 4** attributes. The list displays the latest approved version of each document. These documents are stored in ARIS document storage.



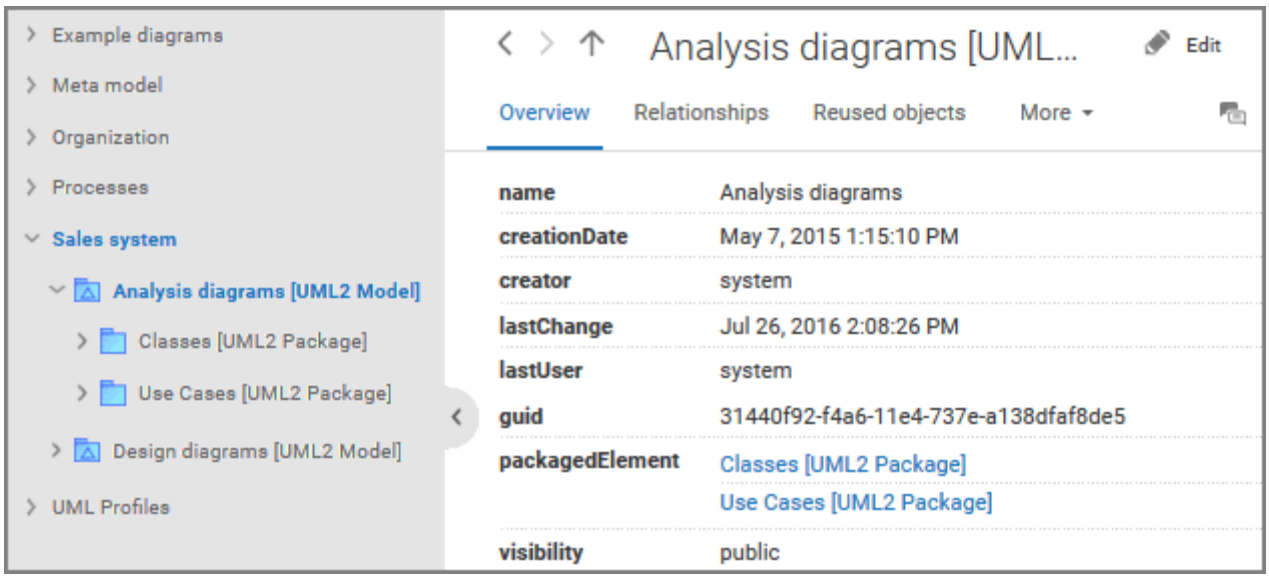
FACT SHEETS OF UML ELEMENTS

OVERVIEW

The relevant content is displayed based on the item selected. If you have selected a group, the group content is displayed. Content that can be used to navigate to other content is displayed as links.



For example, if you have selected a UML element, additional headings are shown depending on the context.



RELATIONSHIPS

Displays the relationships of the selected UML element as a link. If you click the link, the related element is displayed and highlighted in the tree.

REUSED OBJECTS

Lists the objects that the selected element reuses as a link. If you click the link, the related element is displayed and highlighted in the tree.

LINKED DIAGRAMS

Lists the diagrams with which the selected element is linked. If you click the link, the related element is displayed and highlighted in the tree.

PRESENTATIONS

Lists the diagrams in which the selected element occurs as a link. If you click the link, the related element is displayed and highlighted in the tree.

STEREOTYPES

Lists the stereotypes that were applied to the selected element as a link. If you click the link, the related element is displayed and highlighted in the tree.

PROFILES

Lists the profiles that were applied to the selected element.

TAGGED VALUES

Lists the tagged values with which the selected element is linked as a link. If you click the link, the related element is displayed and highlighted in the tree.

DIAGRAM

This entry is displayed if you have selected a UML diagram. It displays the UML diagram in Model Viewer graphically.

3.2.1.2 Default view

If you click **Portal**, you can view all information relevant to you.

If the administrator provides at least one database, you have access to, this view shows all content relevant to you in a clear structure:

- Home (page 31)
- Processes (page 50)
- Organization (page 62)
- IT systems (page 63)

In the default view, only assignments are shown that belong to the current hierarchy, for example, assignments from an object of Value-added chain diagrams (VAC) to process models like EPCs, but no assignments to organizational charts.

Content filters restrict the information in specific areas of the portal to content that is relevant to you. Content filters can be defined in two ways:

- Content filters can be assigned via role. If a role object is assigned (page 76) in models to an existing user group you are member, the relevant filters are added to the **My content** area automatically.
- You can add filters (page 74) and activate them as content filters (page 78) to further restrict this content.

3.2.1.2.1 Home

Depending on your license, not all described tiles may be available.

There are several areas available:

QUICK START

MY CONTENT

Opens the **My content** area (page 80) where you can filter the portal content of the databases you have access to by various categories, e. g. **Role** and **Location**.

MY FAVORITES

Provides direct access to saved filter criteria (Seite 71) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 83).

MY ACTIVITIES

Shows the current activities you are following in Collaboration or in the portal (page 360).

DASHBOARDS

Opens the **Dashboards** area where you can access various dashboards sorted in categories such as Portal usage (page 254).

MY TASKS

Opens the list of tasks (page 92) for which you are responsible.

CONFIRMATIONS

Shows an overview of the confirmation processes (page 118) you initiated. Check the confirmation status in the list of confirmation processes, for example, if the process is already generated or how many addressees have already confirmed. Click a process to navigate directly to the related object or model.

For detailed information on confirmations, refer to the online help (**Use ARIS Connect > Work in the portal > Confirmations**).

MY GRC TASKS

Shows an overview of your current tasks from ARIS Risk & Compliance Manager (page 124) in ARIS Connect, as well as confirmation tasks (page 120).

RECENT CHANGES

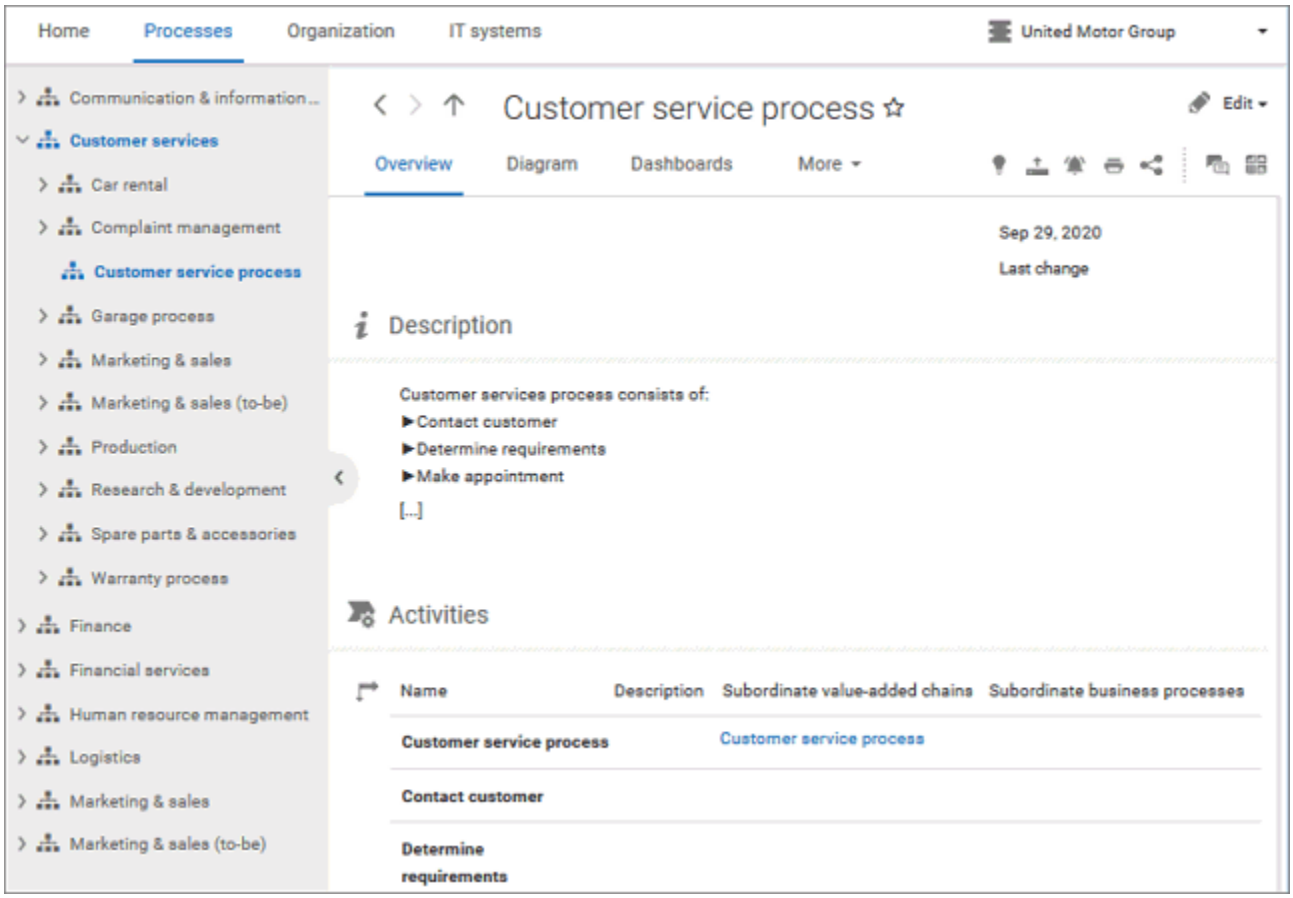
Shows all links to models that were changed recently. In addition, for each model the time elapsed since the last change and the path are shown.

CONTACTS

Lists all users of the current ARIS Connect server with **User administrator** function privileges. If you have any requests regarding the privileges of your user account, you can get in touch with these ARIS Connect users.

3.2.1.2.2 Processes

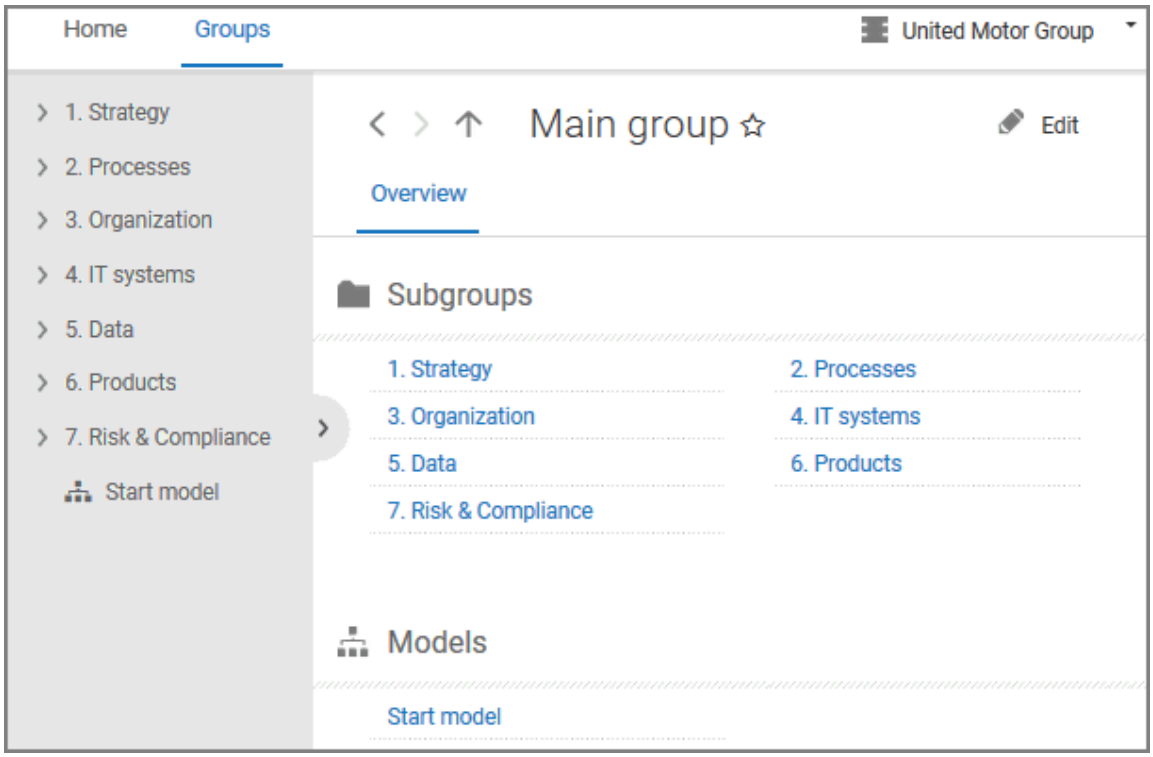
Quickly gain an overview of all processes that are relevant to you. Navigate via value-added chains to the process chains of the portal selected.



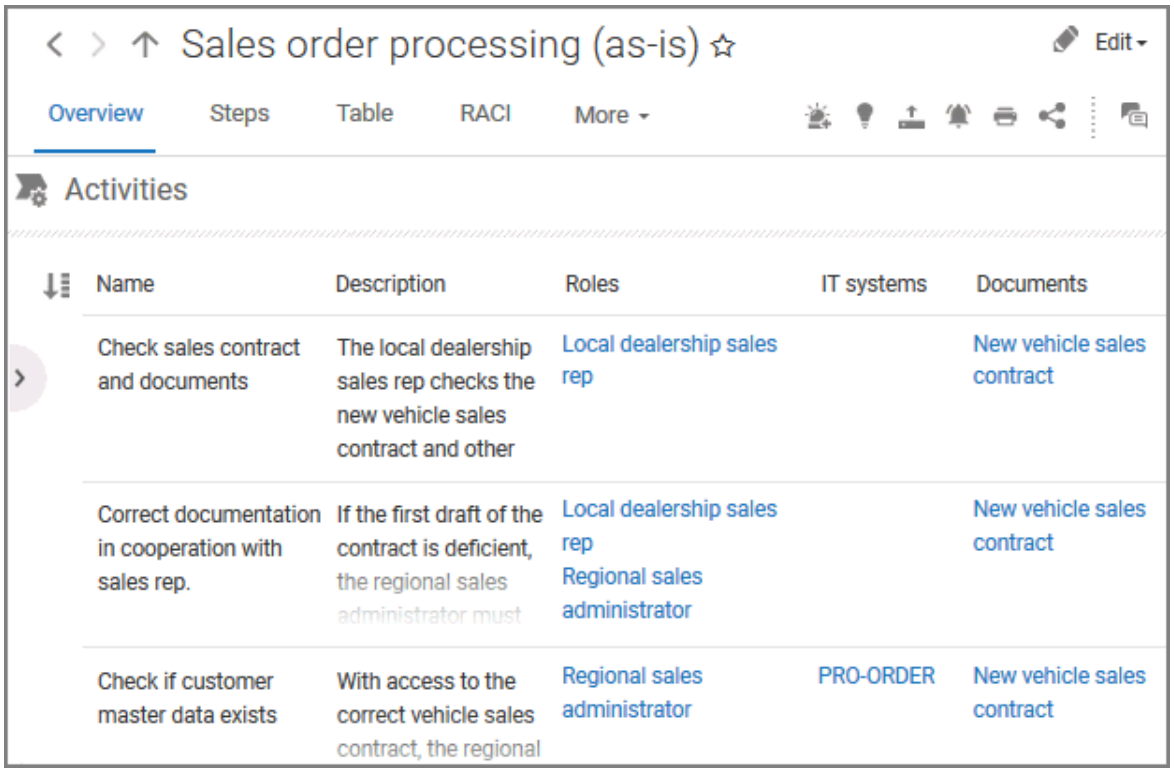
Depending on the installed components, the content selected, and the type of a diagram, different fact sheets (page 404) and functions are available.

OVERVIEW

Gives an overview of the item selected, for example, displays variant relationships of the selected item or the content of a selected group.



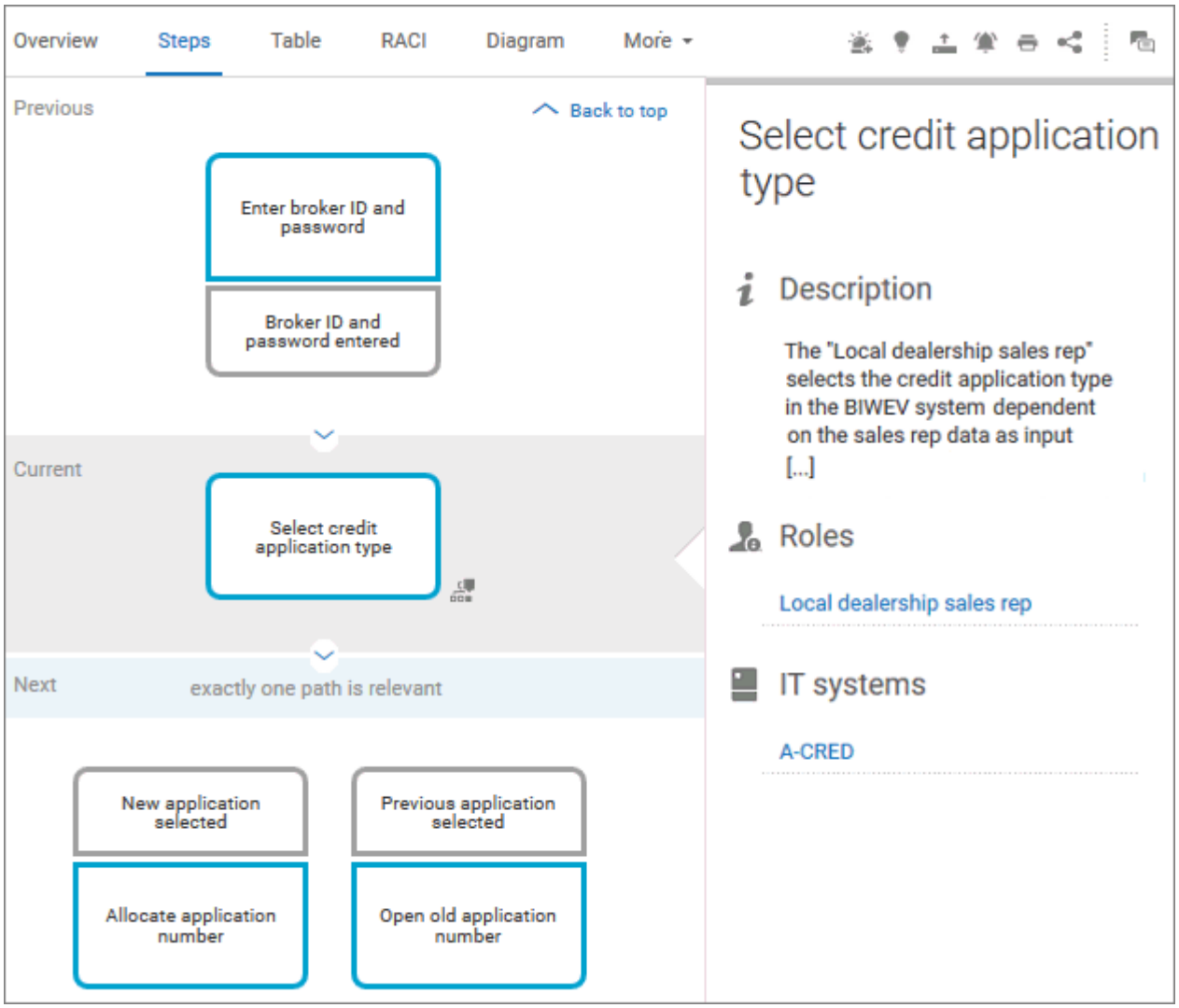
If you have selected a model, additional headings are shown depending on the context.



Content that can be used to navigate to other content is displayed as links.

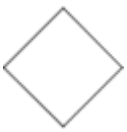
STEPS

Transparently displays all steps of a process (EPC) (page 69). Regardless of the process size you can view only the previous, current, and subsequent process steps. For the current step the relevant information is provided in the form of links.



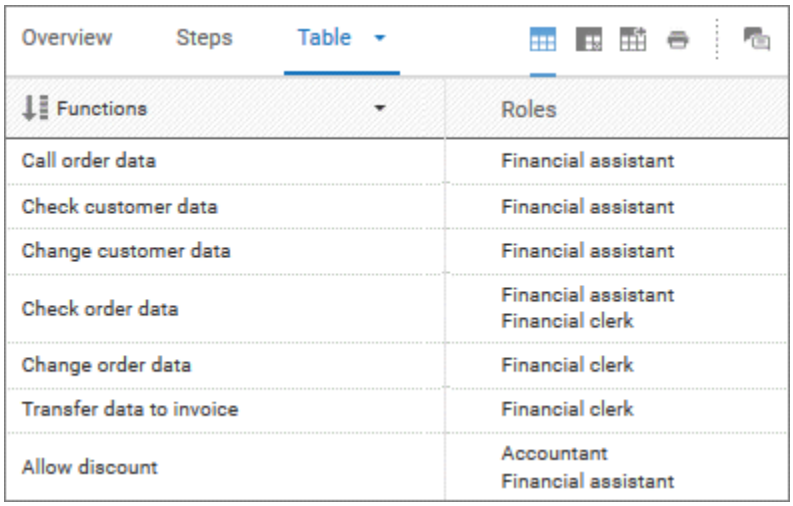
You can easily navigate to the top of the **Steps** fact sheet (page 73) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 72).

The following information is provided for operators:

Information	Operator	Symbol
all paths are relevant	AND	
	OR/AND	
	XOR/AND	
one or more paths are possible	AND	
	OR/AND	
	XOR/OR	
exactly one path is relevant	XOR	
	AND/XOR	
	OR/XOR	
	Gateway	
complex decision	Rule	

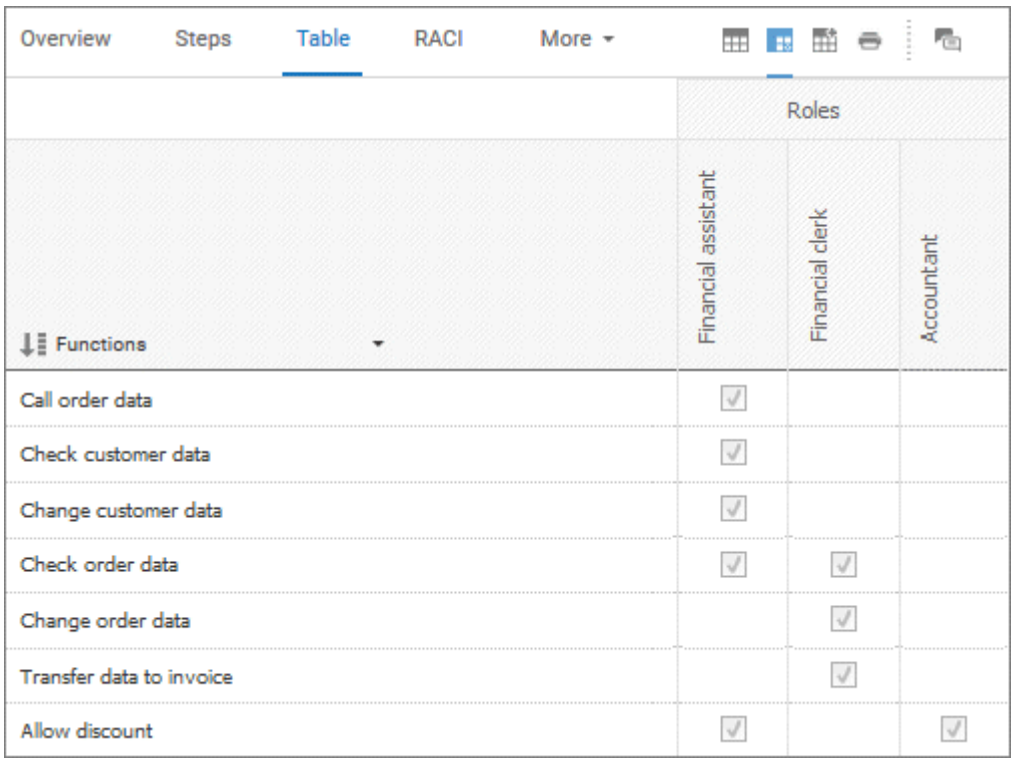
TABLE

Shows the functions that the process of type **EPC** and **BPMN** contains, as well as the roles assigned to them. In the tables, you can add columns (page 196) and remove added columns (page 196) again.



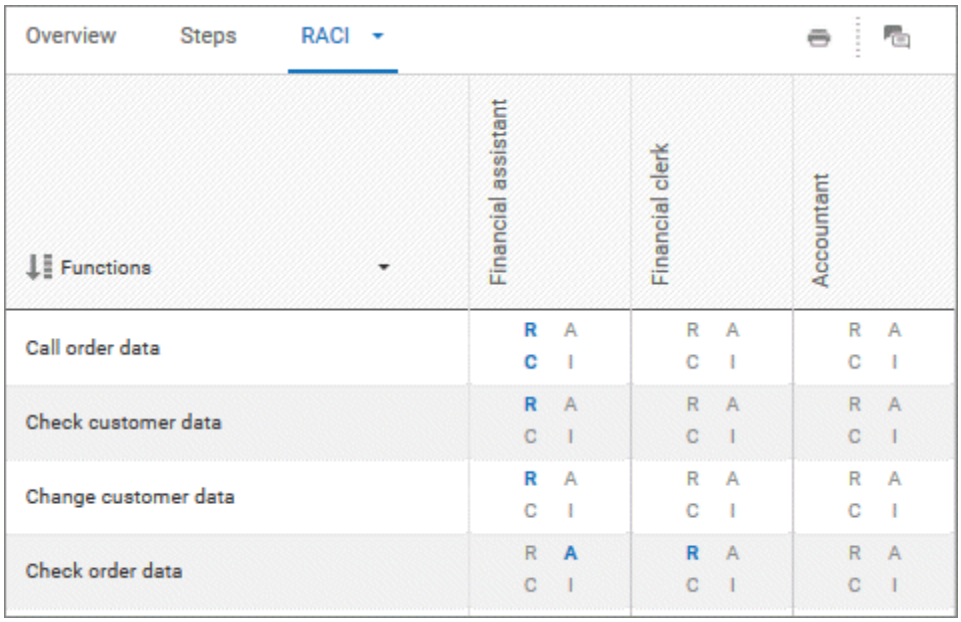
You can sort the functions in different ways by clicking the column title.

You can open a matrix (page 197) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.



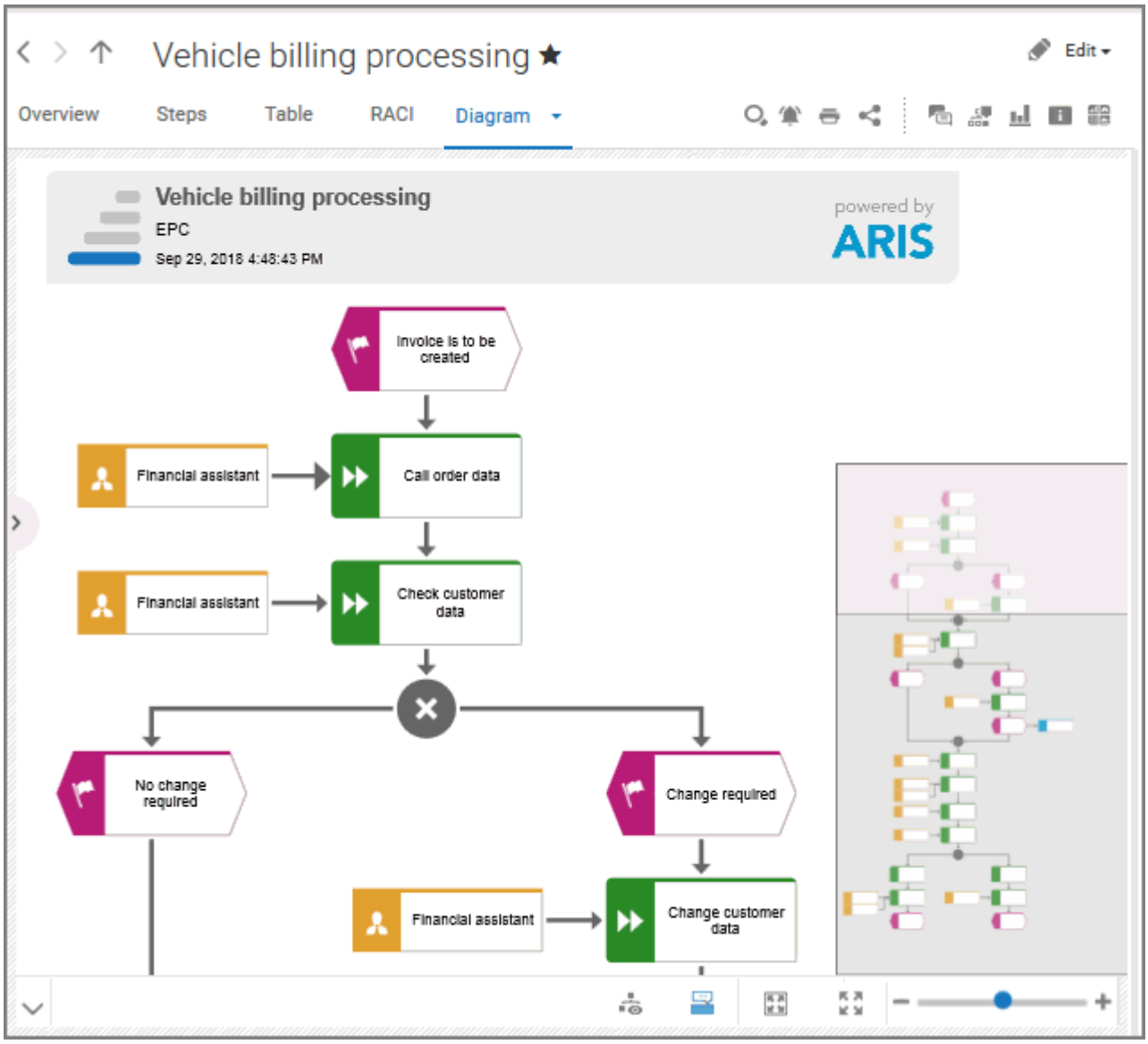
RACI

RACI matrices display the activity processes and the associated organizational responsibilities. RACI matrices are displayed only if RACI information is available for this process. You can sort the functions (page 198) of matrices.



DIAGRAM

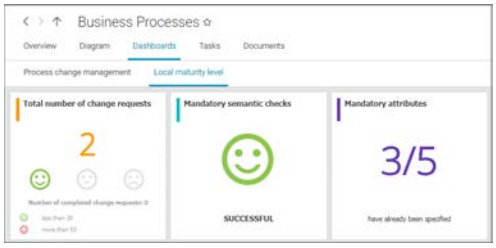
The Diagram fact sheet contains the Model Viewer, which graphically displays diagrams. Depending on the diagram type, different functions are available.



You can find model items (page 158) ( ) in the diagram. Click **Properties** to show the properties of a model or a model item. (page 161) You can highlight objects in the diagram (page 162) ( ) that meet a defined condition. In addition, you can open assigned models (page 163) ( ). You can change the view of the diagram (page 165) ( ) to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 159).

DASHBOARDS

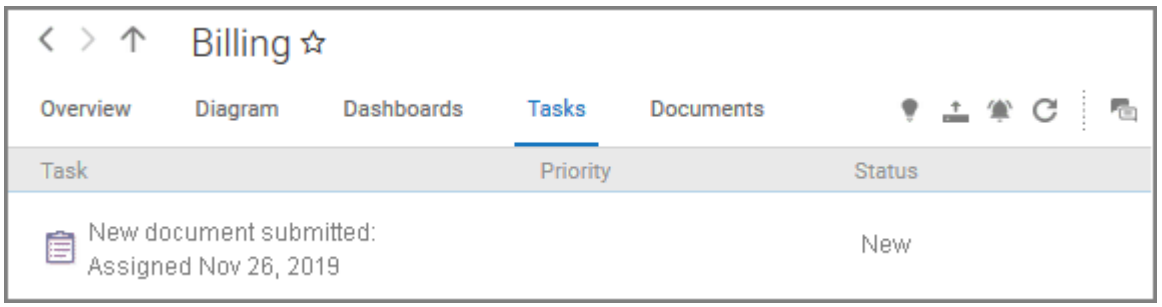
Shows the dashboards available for the selected diagram.



The **Dashboard** fact sheet is shown to users who have the **ARIS Aware** license (page 20).

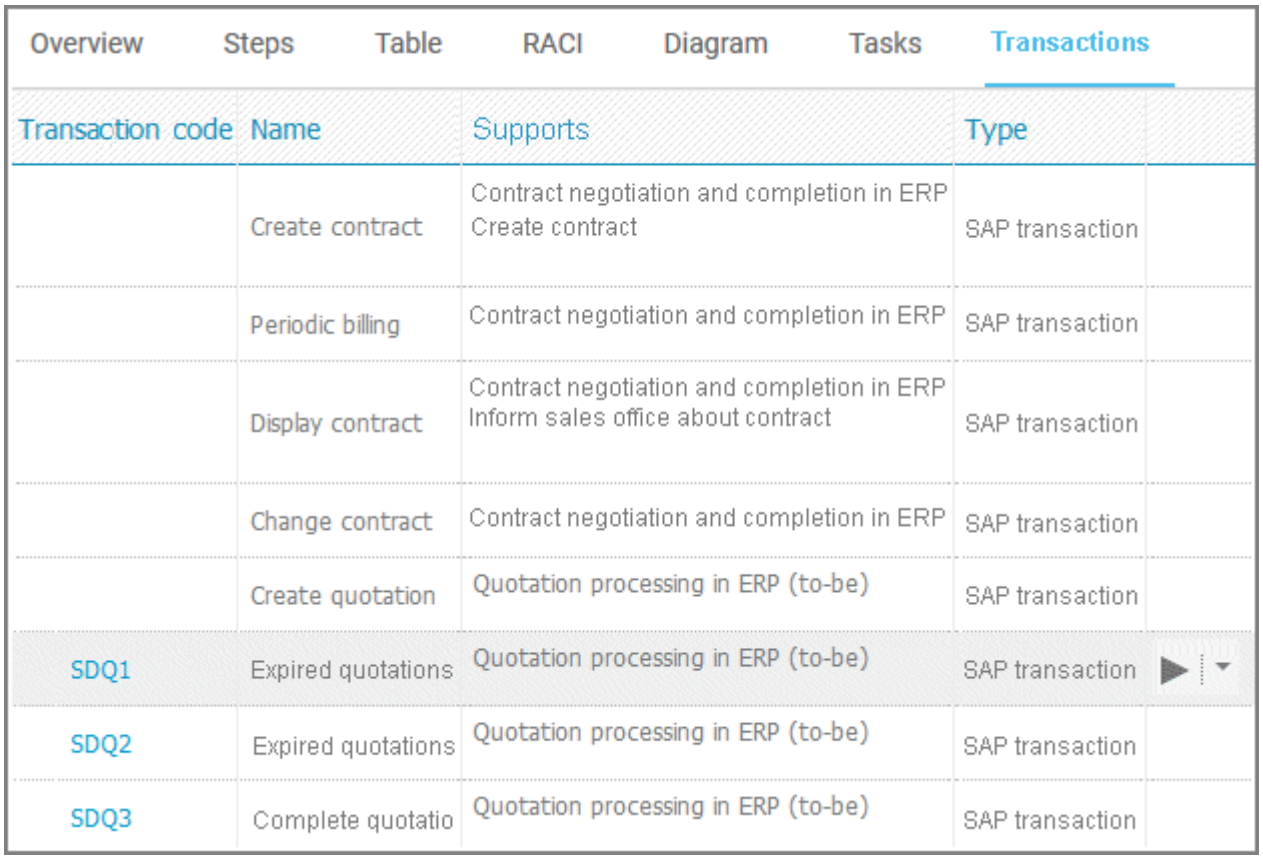
TASKS

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks.

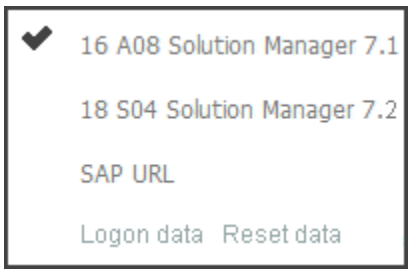


EXECUTABLES

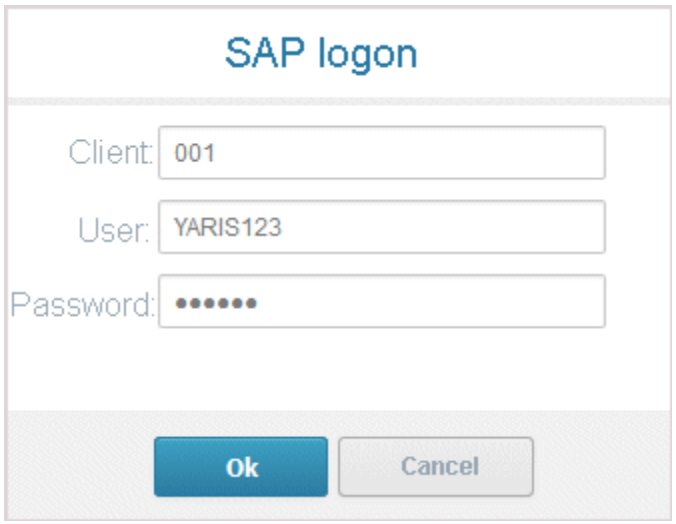
Executables are displayed if you are using ARIS for SAP Solutions and if this function has been configured in the **Portal**.



You can start (page 340) the ▶ executable automatically via the default server in each row displaying a Transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.

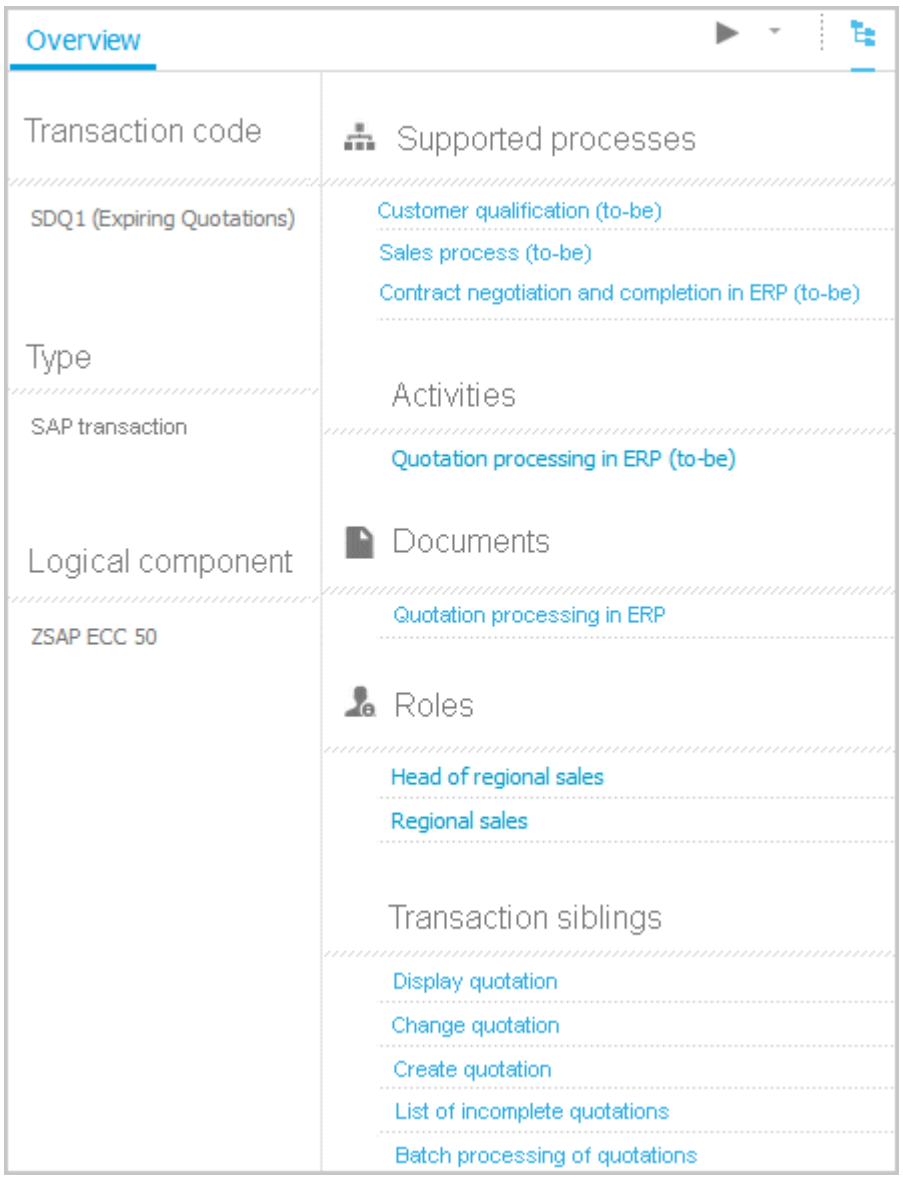


To start the executable, click an SAP Server or a URL. The Login dialog opens.



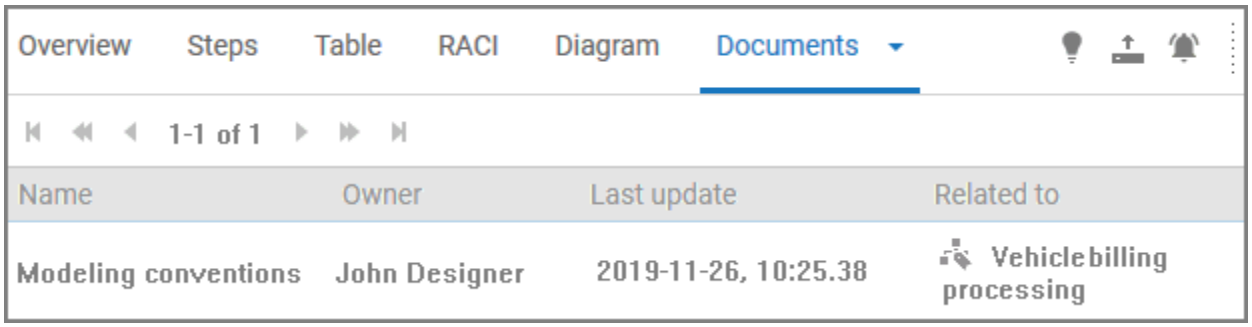
Log on to the SAP system in the current language and the executable starts. The login remains valid until you log out of the portal or enter different login data (page 342). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you click an executable on the **Executables** page, such as **SDQ1**, its fact sheet (page 404) including detailed information is displayed. If documents are available, you will be able to download (page 341) them.



DOCUMENTS

Lists documents assigned to models or objects, for example, by the **Link 1** - **Link 4** attributes. The list displays the latest approved version of each document. These documents are stored in ARIS document storage.



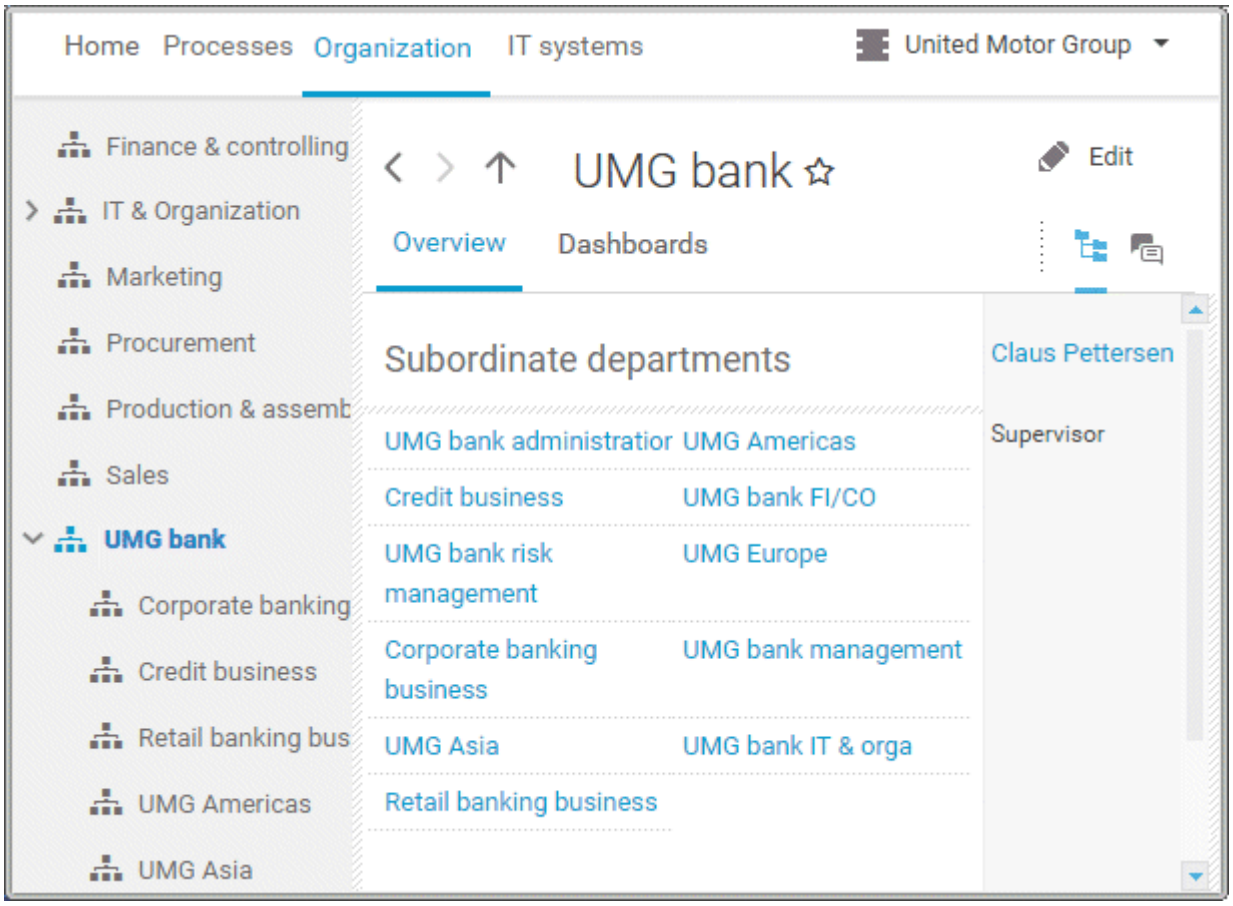
ARIS video tutorial

ARIS Connect - Process improvement (http://www.ariscommunity.com/videos/aris-connect-process-improvement-everyone)

3.2.1.2.3 Organization

Quickly gain an overview of the organizational structure. Navigate to all organizational elements of the portal selected.

The Overview gives you access to the relevant information. For example, if you click a supported process, the process information (page 50) is displayed. IT information (page 63) is available when clicking a system in use.



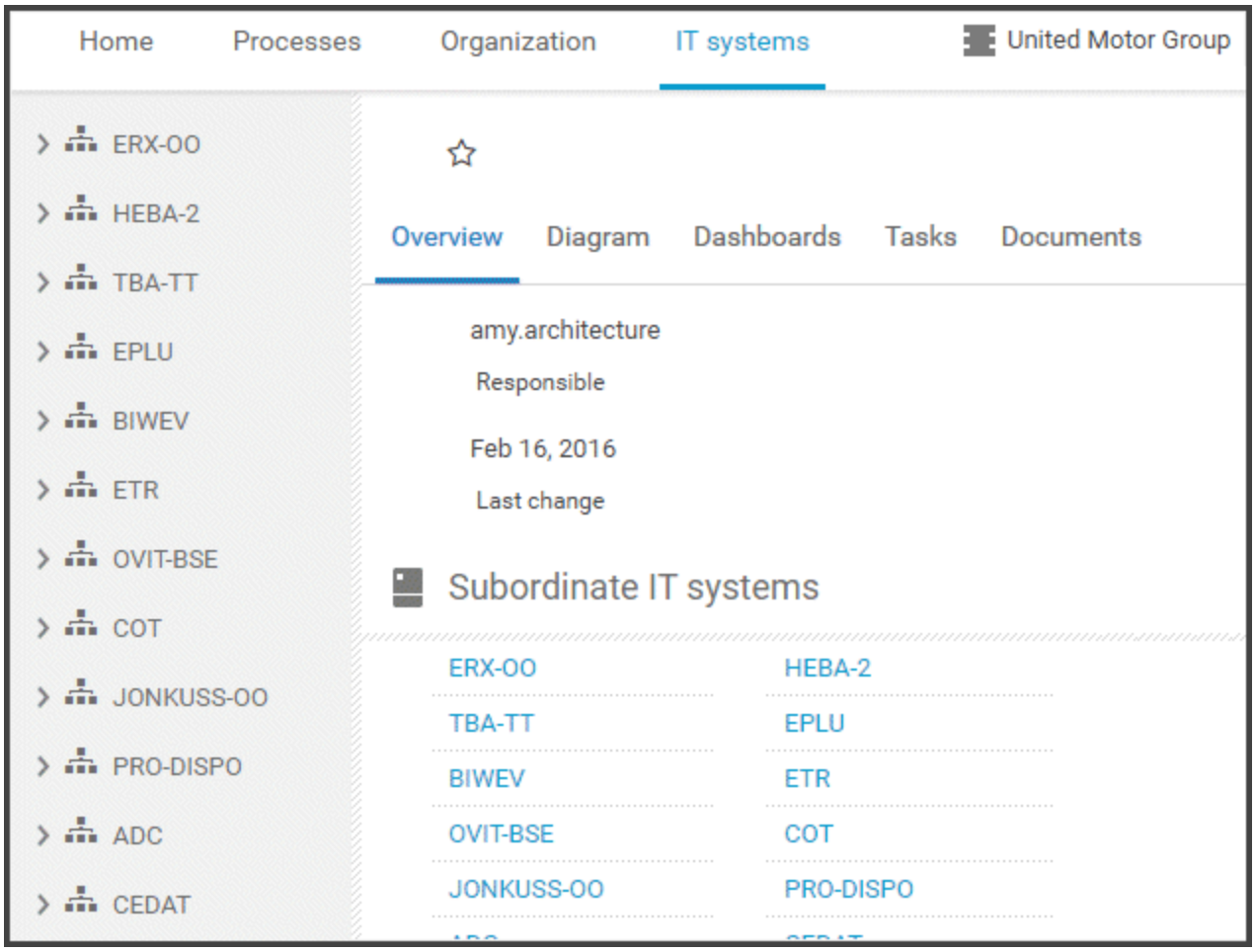
3.2.1.2.4 IT systems

Quickly obtain an overview of the IT landscape. Use the Explorer tree to navigate to all IT systems of the portal.

Depending on the contents selected, different functions are available.

OVERVIEW

The **Overview** fact sheet gives you access to the relevant information. If you do not select any items in Explorer, all IT systems are listed in alphabetical order.



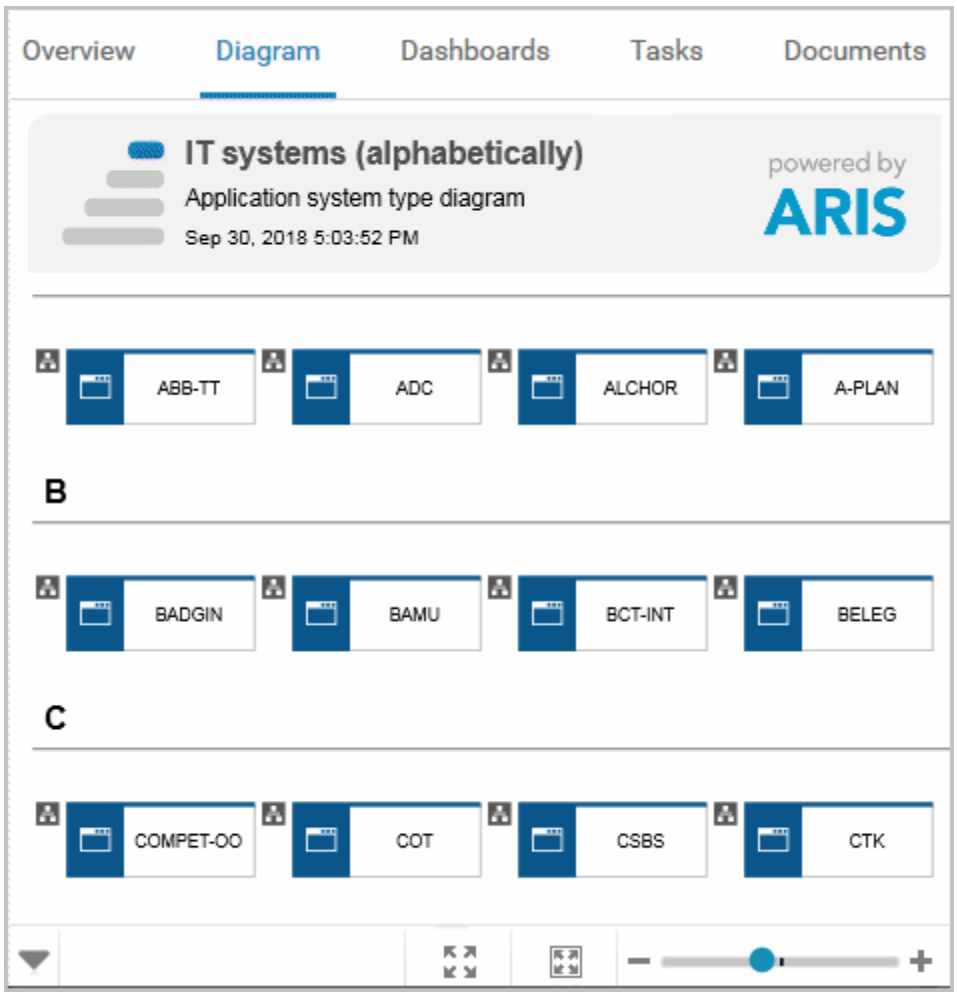
DIAGRAM

All information is also available via the **Application system type diagram** model type containing all IT systems.

Using the functions of the view bar you can change the size of appearance. Navigate in the model using the small frame of the thumbnail view above the slider. Clicking the ▼ arrow head will hide the bar.

Click **Properties** to view all attributes specified. If you have selected an object, the attributes for that object are displayed. Click **More** to view related objects or occurrences. The model properties are shown if no object is selected.

If you navigate by clicking an assignment icon of an IT system, all diagrams assigned are offered for selection. These diagrams provide detailed information on the given IT system, as well as on the related roles, persons, and items.



TASKS

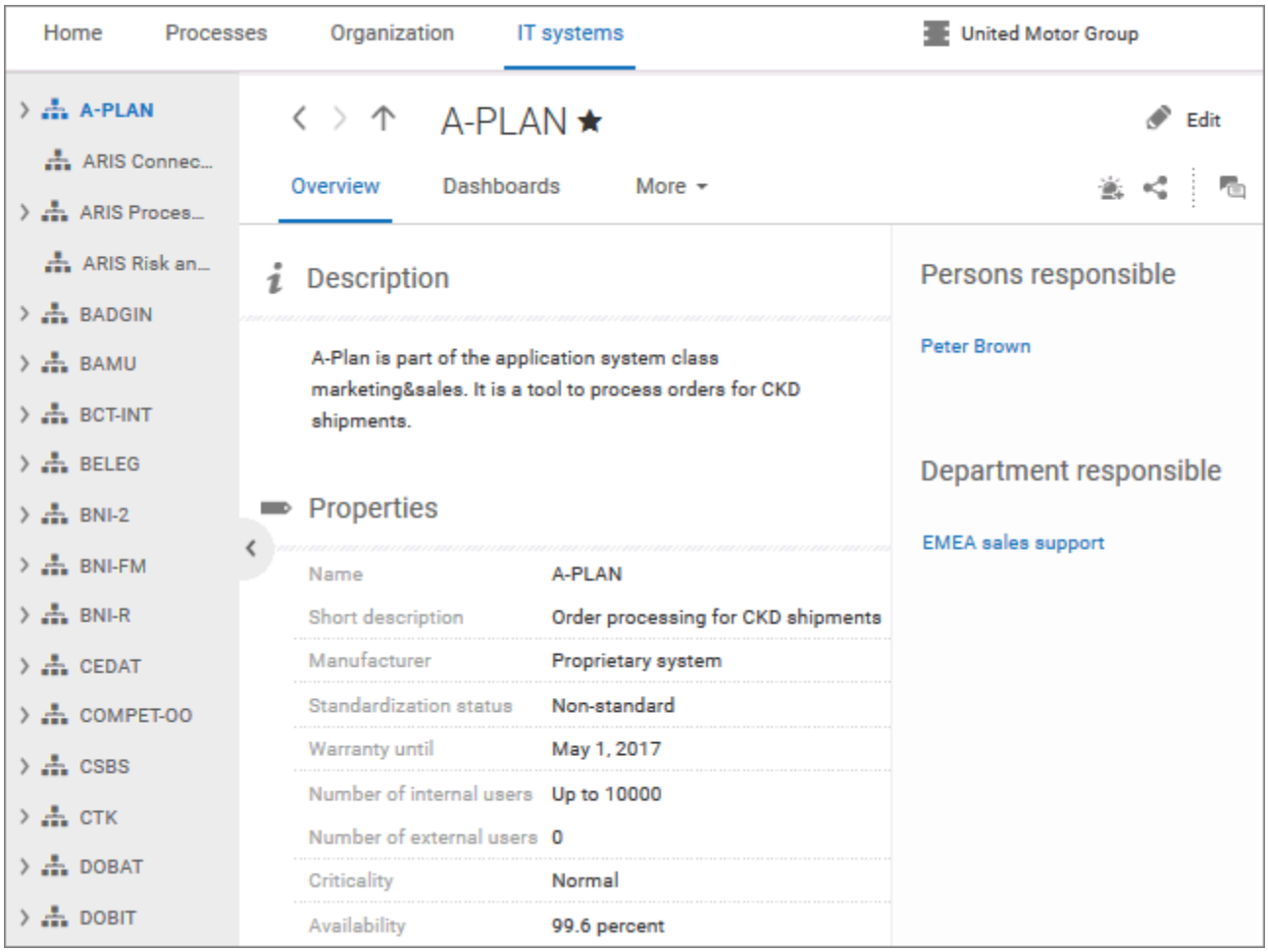
Lists the tasks for the logged in user regarding the selected item. For editing, selected tasks are opened in My tasks.

DOCUMENTS

Lists the documents connected to the selected item.

IT SYSTEM FACT SHEETS

If you click an IT system in the Explorer tree, the IT system fact sheets provide you with important information at a glance. There are fact sheets (page 404) like **Process architecture**, **Information architecture**, or **IT infrastructure**.



3.2.2 Navigate

The following describes the navigation features that you can use to easily access the database contents.

3.2.2.1 Select database

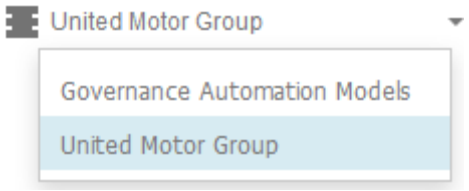
You can select one of the databases offered in the **Portal** to access its content.

Prerequisite

Several databases have been published. If only one database has been published, the down arrow symbol to select another database is not displayed.

Procedure

1. Click the name of the current database that follows the database symbol. In the standard ARIS Connect views, database selection is located top right of the screen. The list of available databases opens.



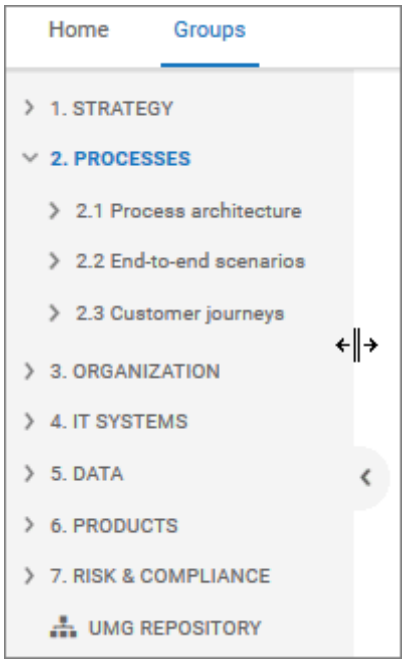
2. Click the name of the database you want to use.

The name of the selected database is displayed. The **Recent changes** area is updated according to the selected database. If you start a search, it is performed based on the current database.

3.2.2.2 Navigate in the portal

With the help of hierarchies, administrators control how portal users can quickly navigate to relevant information. These hierarchies map the relationships between superior and subordinate items.

In the **Classic** view, the **Groups** tree for the selected database is available.

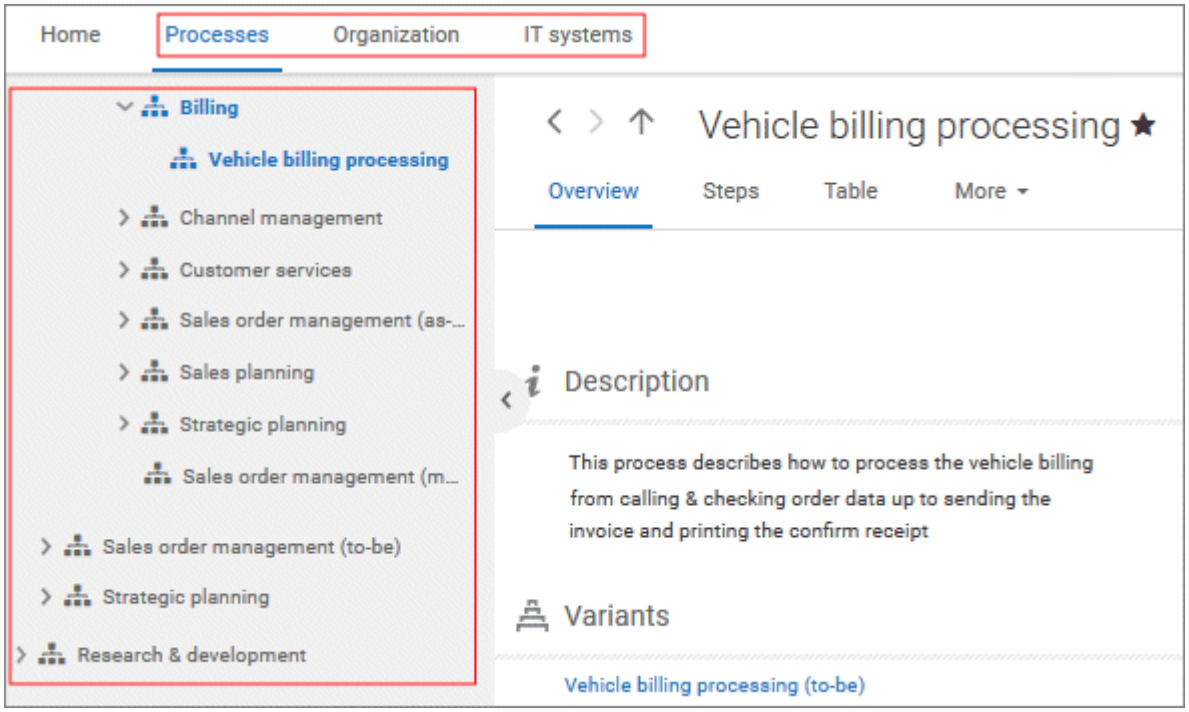


You can select a model, for example, **UMG REPOSITORY**, expand groups, for example, **2. PROCESSES**, and access to the group content. You can change the size of the **Groups** tree by clicking the bar border and moving it to the right or left.

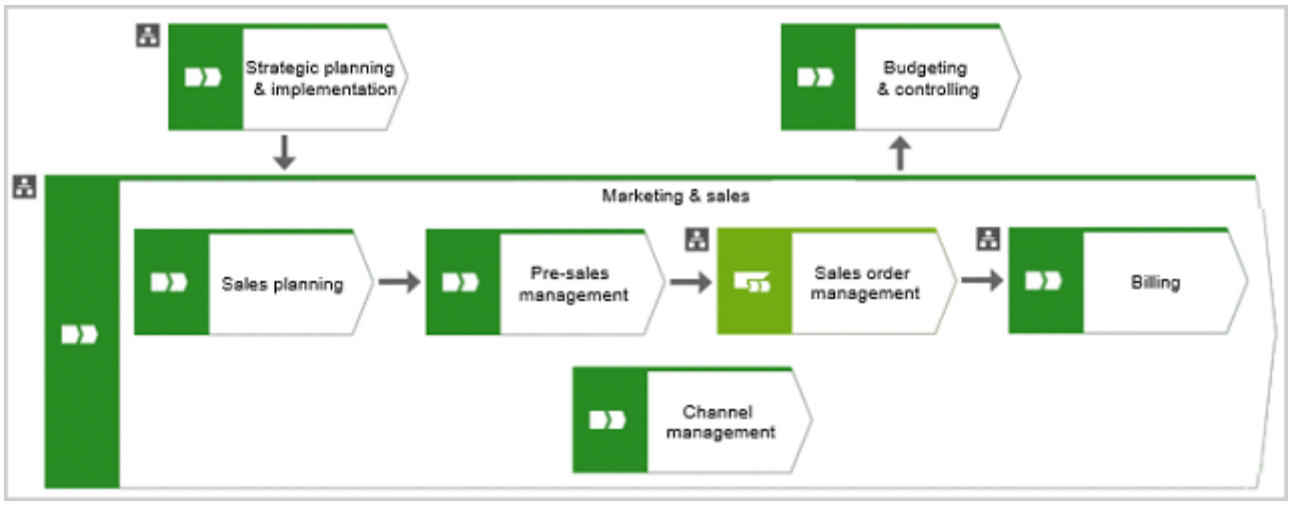
And you can hide the **Groups** tree by clicking the right arrow and show it again by clicking the left arrow.

In the following example for the **Default** view, the **Processes**, **Organization,** and **IT systems** hierarchies are defined. In the following example, the **Processes** hierarchy is activated where users have access to all processes of the current database. The fact sheets

(page 404) provide various information about selected processes. When you select a process, the **Overview** fact sheet is activated by default.



If the **Diagram** fact sheet is selected, you can navigate to assigned diagrams (page 163) by clicking an object's assignment icon, or by double-clicking an object with the assignment icon.



3.2.2.3 Navigate step by step

You can easily follow the process flow in process models of the **EPC** type. Predecessor and successor as well as the attributes of the selected object are displayed.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Select a process model. You are offered the fact sheets of the process model.
3. Click the **Steps** fact sheet. The first event of the process is shown at the top. It has no predecessor, therefore no object is placed in this field. Below, the event's successor is output. To the right, the attributes are shown.
4. Click the successor. The event as a predecessor is moved to the field above, the succeeding object is placed in the middle, and its successors are visible in the lower field. The attributes of this object are now visible.
   If event and function precede or succeed each other, they are displayed together.

You navigate through a process step by step.

3.2.2.4 Navigate using a Process interface

You can easily follow the process flow from one process model to another using process interfaces in models of the **EPC** type.

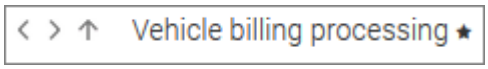
Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Select a process model that contains an object of **Process interface** type to which the other process model is assigned.
3. Click the **Steps** fact sheet.
4. Navigate to the process interface and click it.

The **Steps** fact sheet of the process assigned to the process interface is shown. If you want to navigate back to the **Steps** fact sheet of the previous model, click **Back** at the top left side of the fact sheet.

3.2.2.5 Navigate using fact sheet buttons

You can scroll between the fact sheets and hierarchy levels visited.



Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Select the groups and models whose content you want to edit. The fact sheets of the selected item are displayed.
3. Click through the relevant fact sheets (page 404) and complete your tasks.
   Click on the relevant fact sheets one after the other and complete your tasks.
4. Click **Back** to browse previously displayed fact sheets and hierarchy levels in backward direction.
5. Click **Forward** to browse previously displayed fact sheets and hierarchy levels in forward direction.
6. Click **Go up in hierarchy** to navigate to a parent folder or process.

You navigate through fact sheets and through the hierarchy using the fact sheet navigation buttons.

3.2.2.6 Filter using My Favorites

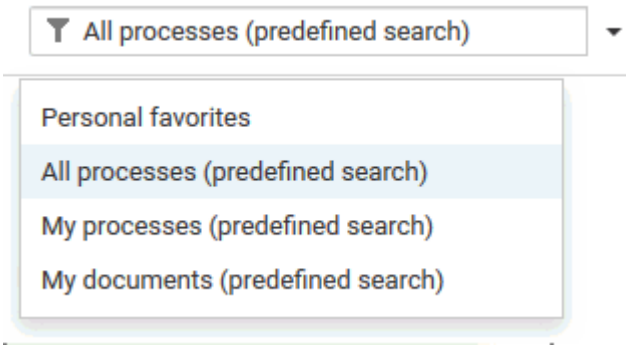
In the portal, you have direct access to all saved filter settings (page 84). The filters output the content of the selected database, while the personal favorites (page 83) of all published databases are listed and can be accessed.

Procedure

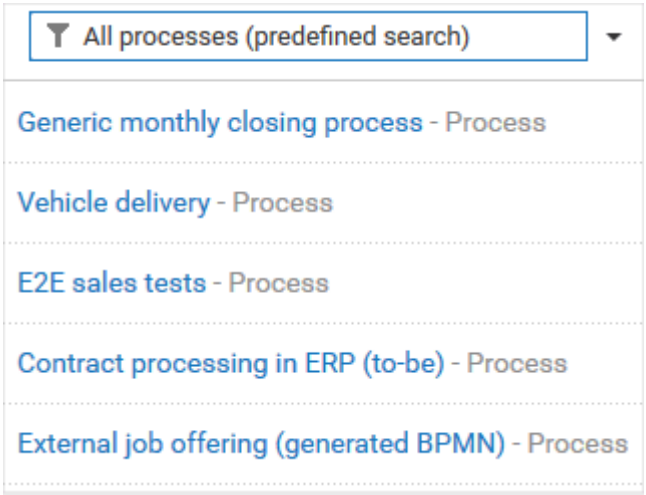
1. If you have access to more than one database, select the database (page 66) you want to work with.
2. Click ☆ **My favorites** in **Home** (page 31)

Provides direct access to saved filter criteria (Seite 71) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 83).

1. Click the ▼ **down arrow** of the **Filter selection** field.



2. Click the context caption to select the relevant filter settings, for example, **All processes (predefined search)**. The content of the selected database is filtered.



If the filter result does not fit on one page, page numbers are displayed behind the **Filter selection** field.

3. Click the page numbers to display the content of the corresponding pages.
4. Click the name of the item. The item opens.

You have filtered database content based on your filter setting and opened one of your favorites using the **Favorites** tab.

3.2.2.7 Switch from Steps to Diagram

For models of type **EPC**, you can switch from the **Steps** fact sheet to the **Diagram** fact sheet where the current object symbol is selected.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Steps** fact sheet and navigate to the relevant step.
5. Click **Show in diagram** next to the step.

The **Diagram** fact sheet is opened and the object symbol of the current step is selected. To return to the **Steps** fact sheet, click **Steps**. If you have selected another object in the **Diagram** fact sheet, this object is marked in the **Steps** fact sheet.

3.2.2.8 Switch from Diagram to Steps

For models of type **EPC**, you can switch from the **Diagram** fact sheet to the **Steps** fact sheet where the current object symbol is selected.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Select the object symbol of the structurally relevant object (page 412) that you want to select in the **Steps** fact sheet.
6. Activate the **Steps** fact sheet.

The object you have selected in the **Diagram** fact sheet is marked in the **Steps** fact sheet.

3.2.2.9 Return to the top of the Steps fact sheet

For models of type **EPC**, you can return quickly to the top of the **Steps** fact sheet.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Steps** fact sheet and navigate to the relevant step. In the **Steps** fact sheet, at the top right the link ^ **Back to top** is shown.
5. Click ^ **Back to top**.

The top of the **Steps** fact sheet is shown.

3.2.2.10 How is a process interface represented in the Steps fact sheet?

You can use process interfaces to navigate (page 69) from one process model of the **EPC** type to another. To do so, you must assign the corresponding process to the process interface.

In the **Steps** fact sheet, a process interface that is placed as the first object in a model is labeled **Previous process**, a process interface that is placed as the last object in a model is labeled **Next process**.

3.2.3 Use filters

You can define content filters (page 74) to restrict the content in the portal, so that only the content is displayed you want to focus on.

Content filters are available only if roles are assigned (page 76) to your user in models and the portal has been configured for the use of role filters.

3.2.3.1 Open My content to manage filters

You can manage your filters in the **My content** (page 80) area.

Procedure

1. Start ARIS Connect.
2. Click **Home >** **My content**.

The **My content** area opens and you can manage your filters.

3.2.3.2 Add filters

You can add individual filters to the **Selected filters** section, thus making them active.

Procedure

1. In the **Add filters** section, move the mouse pointer over the name of the relevant filter. A + plus sign is shown after the name.
2. Click the + plus sign.

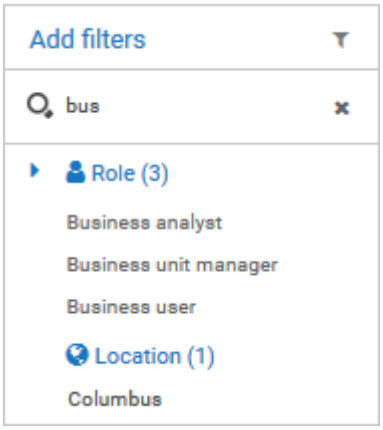
The filter is moved from the category of the **Add filters** section to the appropriate category of the **Selected filters** section and the content of the result pane is adjusted.

3.2.3.3 Add a number of filters

You can add a number of filters to the **Selected filters** section using the find functionality.

Procedure

1. In the **Add filters** section, click the **Type to find a role or location** field.
2. Enter a part of the name of the filters you want to add, e. g. **bus**. The found filters of the category **Role** or **Location** are shown under the appropriate category. The number of filters found is displayed after the category name.



3. Behind **Add filters**, click **Add all** to move all filters found from the **Add filters** section to the appropriate category of the **Selected filters** section.

The filters are moved and the content of the result pane is adjusted.

3.2.3.4 Assign roles for the use of content filters

You can define content filters using role assignment. In this case, these filters are added to the role filters under **Selected filters** of the **My content** (page 80) area.

Prerequisites

- You have the **User administrator** function privilege.
- You have the **ARIS Connect Designer** license privilege.

Procedure

1. Click **Portal**.
2. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
3. In the navigation, select a diagram containing an occurrence of the relevant role, for example, **Regional sales department specialist**. The fact sheets (page 404) are shown.
4. Click **Edit > Edit model**. The model opens in ARIS Connect Designer on a separate tab for editing.
5. Select the relevant **Role** type object in the model.
6. Click **Details**. The **Details** bar opens.
7. Click the **Properties** tab if it is not activated yet.
8. Add the **User / User group association** attribute if it is not displayed.
9. Move the mouse pointer to the **User / User group association** attribute.
10. Click **Select user**. The **Select user(s) / user group(s)** dialog opens.
11. Enter the user name in the **Filter** box.
12. Enable the check box for the user, and click **OK**.
13. Save the changes and close the diagram.

The role has been assigned to the user.

If this user activates (page 78) the content filters, information is restricted according to the role.

3.2.3.5 Activate content filters using the My content area

You can determine that the role filter is used to filter your access to the portal's content.

Procedure

1. Click **Home >** **My content**.
2. Check if the current filter setting is appropriate. If not, add an individual filter (page 74), add a number of filters (page 75), remove filters (page 79), or reset filter (page 78).
3. Turn the content filter switch on.

The filter is applied to the portal content. A symbol in front of your user name indicates the activated content filter.

3.2.3.6 Activate content filters using the button

You can turn on the content filters using the **Content filters** symbol.

Procedure

1. In front of your user name, click **Content filters**. The **Content filters** pop-up opens.
2. Click **On**.

The content filters are applied and the portal content restricted. A red symbol in front of your user name indicates the activated content filter.

3.2.3.7 Deactivate content filters

You can turn off the content filters using the **Content filters** symbol.

Procedure

1. In front of your user name, click **Content filters**. The **Content filters** pop-up opens.
2. Click **Off**.

The content filters are removed and the portal content is not restricted anymore. A blue symbol in front of your user name indicates the deactivated content filters.

3.2.3.8 Reset filter

You can reset the filters. The added filters are removed and only the content filters assigned by role stay active. The **Reset filters** button is only displayed if you are logged in as user to whom a content filter is assigned via roles (page 76).

Procedure

After **Selected filters**, click **Reset filters**.

All filters except the filters assigned by role assignment are removed and the content of the result pane is adjusted.

3.2.3.9 Remove selected filters

You can remove selected filters to remove their restrictions.

Procedure

1. In the **Selected filters** section, move the mouse pointer over the name of the relevant filter. A cross sign is shown after the name.
2. Click the × cross sign.

The filter is moved from the category of the **Selected filters** section to the appropriate category of the **Add filters** section. The content of the result pane is updated.

3.2.3.10 Remove all filters

You can remove all filters from the **Selected filters** section, the added filters as well as the filters assigned by role assignment (page 76).

Procedure

Behind **Selected filters**, click × **Remove all**.

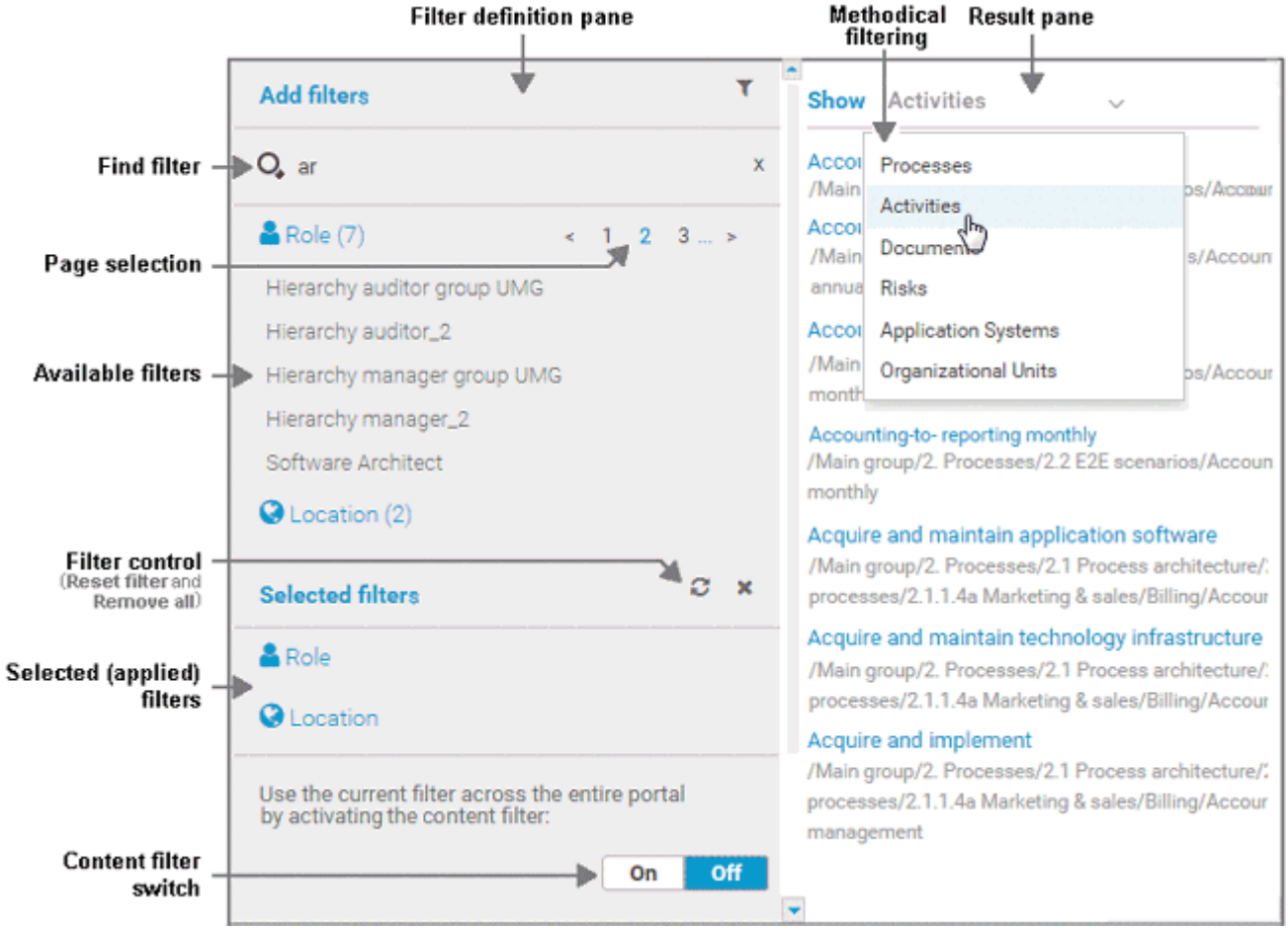
All filters including the filters assigned by role assignment are removed and the content of the result pane is adjusted.

3.2.3.11 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.3.11.1 What is the structure of the My content area?

If the administrator provides at least one database you have access to, the **My content** area is available. It provides a filter definition pane and a result pane. In the definition pane, you can define filters, refresh the filter result, delete filter definitions, turn on and turn off the defined filters. In the result pane, you can focus on specific aspects. Therefor you can, for example, switch between activities and processes.



In the **Add filters** section, all available filters for the current user are available. The filters assigned to the roles that are modeled for the current user are listed in the **Selected filters** section. You can add individual (page 74) or a number of filters (page 75) to the **Selected filters** section.

If the number of the selected filters is too large to be displayed, the filter category is collapsed and indicated by the number of filters contained. The category can be expanded. If the number of filters takes up more than one page, filters are offered on multiple pages. In that case, a page selection is displayed after the category name to navigate to the relevant pages.

You can remove selected filters (page 79) and selected filters can be reset (page 78), so that only those filters stay active that are assigned to you by role assignment. The **Reset filters** button is only displayed if you are logged in as user to whom a content filter is assigned via roles (page 76).

Selected filters can be used as content filter. That means that in the **Portal** only the content is shown that is allowed by the selected filters.

Finally you can remove the selected filters as well as the filters that are assigned to you (page 79) by role assignment.

3.2.3.11.2 What are content filters?

Content filters restrict the information in specific areas of the portal to content that is relevant to you. This is controlled in user management by administrators.

You can add filters (page 74) and activate them as content filters (page 78) to further restrict this content. Content filters are available only if roles are assigned (page 76) to your user in models and the portal has been configured for the use of role filters.

WHAT INFORMATION IS NOT FILTERED BY A CONTENT FILTER?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments.

Regardless of content filters, assignments are filtered by hierarchy in the views. In the **Classic** view, all assignments are shown, because all assigned models are stored in the group structure.

In the default view, only assignments are shown that belong to the current hierarchy, for example, assignments from an object of Value-added chain diagrams (VAC) to process models like EPCs, but no assignments to organizational charts.

WHAT INFORMATION IS FILTERED BY A CONTENT FILTER?

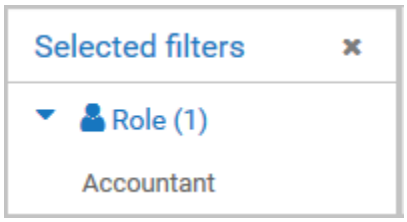
Filtered according to the selected role:

- All steps of the **Steps** fact sheet are displayed if you view processes step by step (page 69), but the detailed information about the satellites is filtered.
- Tables
- Fact sheets (page 404)
- RACI matrices (page 224)
- Search (page 382)
- Navigation (Groups (page 33) or Processes (page 50))

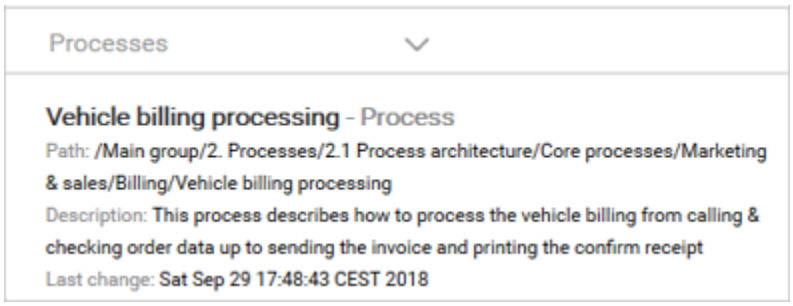
3.2.3.11.3 What is role-based highlighting?

In **My content** (page 80), you can select a role filter to restrict the contents of a database to those items in which the role is involved.

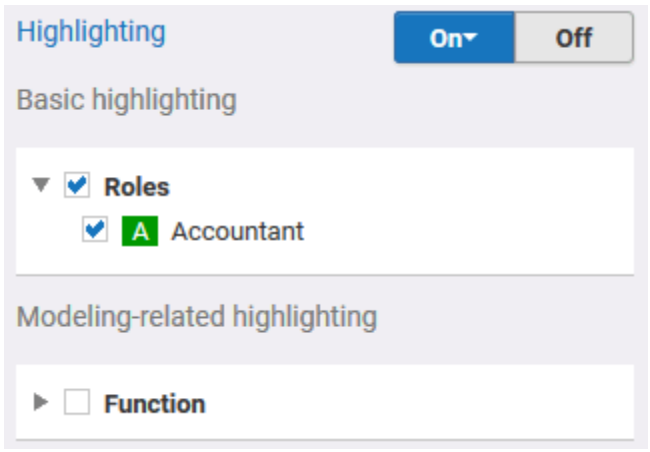
You can, for example, restrict the contents of the database **United Motor Group** to the role **Accountant**.



The model **Vehicle billing processing** is listed.



If you open the fact sheet **Diagram fact** and switch on the highlighting (page 162), the default highlighting is set to highlight the role **Accountant**.



You can activate the check boxes for additional roles and/or functions for highlighting (page 190). In this case, the highlighting switches to **User defined**.

3.2.4 Use favorites

Favorites enable you to quickly access database items you often need to work with.

In the **Search** area, you can save filter settings (page 84) and single database items as favorites (page 83). While you can define (page 84) and access the filter settings (page 86) in the Search area, you can access personal favorites and favorites based on filter settings in the Favorites area (page 71) of the portal.

3.2.4.1 Open My favorites

You can open your the **My favorites** area to access to the your personal (page 83) and the predefined favorites.

Procedure

1. Click **Portal** if it is not activated yet.
2. In the **Home** area, click **My favorites**.

You opened the **My favorites** area.

3.2.4.2 Save a model or group as a personal favorite

You can save a model as a favorite to access it quickly from the **My Favorites** area (page 83) of the portal.

Procedure

1. Navigate to the model or group you want to save as a personal favorite.
2. Behind the model or group name, click **Save as a favorite**.

The star is colored (★) and the model or group is added to the **Personal favorites** list. The stars of models or groups that you saved as favorites remain colored until you remove them from the **Personal favorites** list (page 84).

3.2.4.3 Remove a personal favorite

You can remove a personal favorite when it is no longer required.

Procedure

1. In the **Home** area, click **My favorites**.
2. Click the **down arrow** of the **Filter selection** field.
3. Click **Personal favorites**.
4. Move the mouse pointer over the relevant model or group name.
5. At the end of the line for the model, click **Remove favorite**.

The model or group is removed from the favorites list. Alternatively, you can click the colored star when you have navigated to the relevant item.

3.2.4.4 Save search settings as a favorite

In the **Search** area (page 393), you can save your search settings. Thus, you can search the content based on specific settings at any time.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.
3. Select the filter criteria to define your search.
4. Click **Save search query as a favorite**. The corresponding dialog opens.
5. Enter a name.
6. Click **OK**.

The search settings are saved in the **My Favorites** area. You can filter the content based on these settings (page 86) at any time from various devices.

3.2.4.5 Filter using My Favorites

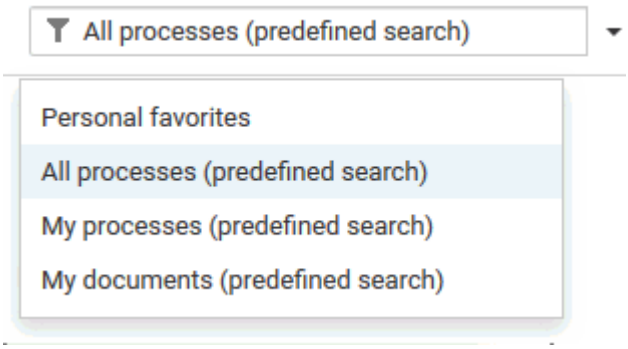
In the portal, you have direct access to all saved filter settings (page 84). The filters output the content of the selected database, while the personal favorites (page 83) of all published databases are listed and can be accessed.

Procedure

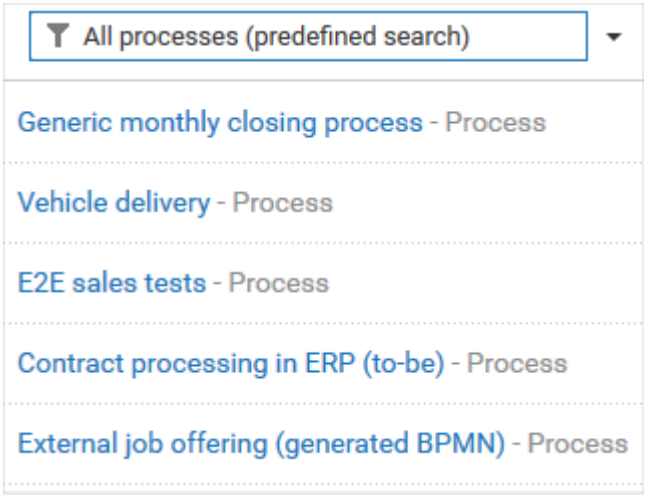
1. If you have access to more than one database, select the database (page 66) you want to work with.
2. Click ☆ **My favorites** in **Home** (page 31)

Provides direct access to saved filter criteria (Seite 71) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 83).

1. Click the ▼ **down arrow** of the **Filter selection** field.



2. Click the context caption to select the relevant filter settings, for example, **All processes (predefined search)**. The content of the selected database is filtered.



If the filter result does not fit on one page, page numbers are displayed behind the **Filter selection** field.

3. Click the page numbers to display the content of the corresponding pages.
4. Click the name of the item. The item opens.

You have filtered database content based on your filter setting and opened one of your favorites using the **Favorites** tab.

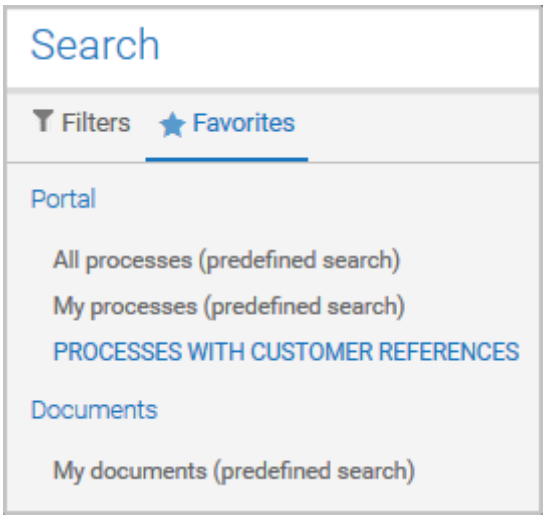
3.2.4.6 Use a favorite in the Search area

In the **Search** area (page 393), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.
3. Click **Favorites** in the **Filters** bar.



4. Click the favorite setting you want to use as the filter.

The filter criteria of the selected favorite setting are immediately applied and the list of filter results is updated.

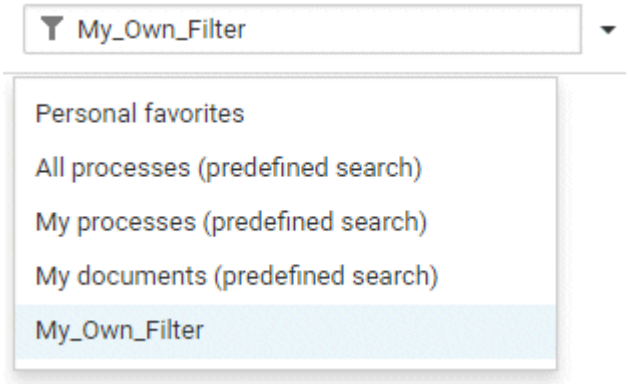
3.2.4.7 Use an own favorite setting in the My Favorites area

In the **Search** area you can define a filter setting that is used in the **Search** area and in the **My Favorites** area to filter the content based on your own filter criteria.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.
3. Select the filter criteria to define your search.
4. Click ☆ **Save search query as a favorite**. The corresponding dialog opens.
5. Enter a name.
6. Click **OK**. The search settings are saved in the ★ **Favorites** area. In the **Search** area, you can filter the content based on these settings at any time from various devices.
7. Click **Portal**.
8. Click **My favorites**.
9. Click the ▼ **down arrow** of the **Filter selection** field.



10. Click your own filter setting.

Based on your filter setting, the portal content is shown.

3.2.4.8 Delete a favorite setting

You can delete a Favorite setting when you no longer need it. The Favorite setting disappears from the **Favorites** area of the search and from the **My favorites** area.

Procedure

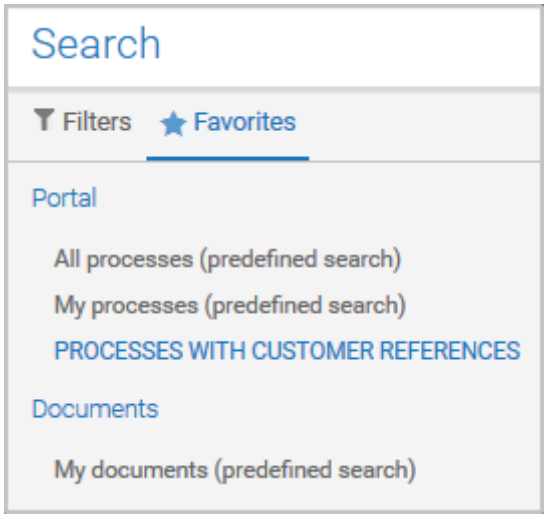
1. Click **Advanced** in the **Search** field.

2. Click **Favorites**.
3. Move the mouse pointer over the filter to be deleted. For user-defined filters, a **Delete** button is displayed to the right of the filter name.
4. Click **Delete**.

The filter setting is deleted.

3.2.4.9 How are favorites structured in the search?

The **Filter** area reflects the saved search context. The search contexts are structured by captions, for example, **Portal** or **Documents**. The saved favorites are grouped under the captions. Thus, you are able to immediately recognize the search contexts of the favorites.



3.2.5 Collaborate

The following describes the collaboration features.

3.2.5.1 Comment on portal content

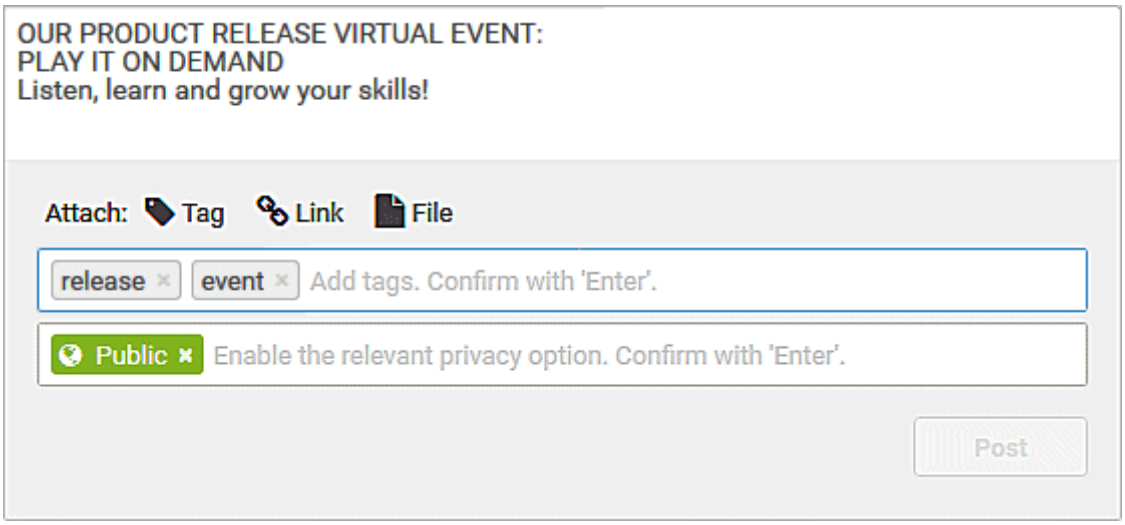
Add comments to models and post information that could be of interest to your colleagues. The following description shows how to post tags, links, and files along with the comment. Of course a comment can also be published without further information.

Prerequisite

You have the required access privilege (page 381) in ARIS Architect.

Procedure

1. Navigate to a process.
2. Click **Comment** in the button bar if the bar is not activated yet.
3. Enter or copy your text into the input field. Up to 250 characters are available. If you also want to add a link, note that the characters in the link are counted towards the 250 available characters.
4. Click **Tag**.
5. Enter the words to be used as keywords (page 380) in the tag input box, for example, BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press **Enter** after each keyword.



6. Click **Link**.
7. Insert a link to a Web site that contains more detailed information.
8. Click **Add link**. The link is checked and added.
9. Click **File**. The **Select document** dialog is displayed.
10. Click **Upload new document** to upload one of your own documents. The corresponding dialog opens.
11. Select the file you want to upload and enter the relevant additional information.

12. Click **Upload**.
13. Enable the check box of the document you want to add to your post.
14. Click **OK**. The document is added to the comment.

Your comment is posted.

3.2.5.2 Follow processes in the portal

Follow processes or other models to be informed about updates in the **Portal** and in Collaboration.

Procedure

1. Navigate to a process.
2. Click **Comment** in the button bar if the bar is not activated yet.
3. Click **Follow**.

The content you are following is displayed in the portal under **My activities** and in Collaboration under **My portal feeds**. To stop following content, click the relevant link, and in the content displayed click **Unfollow**.

3.2.5.3 Request feedback on processes

You can request feedback on processes from other users.

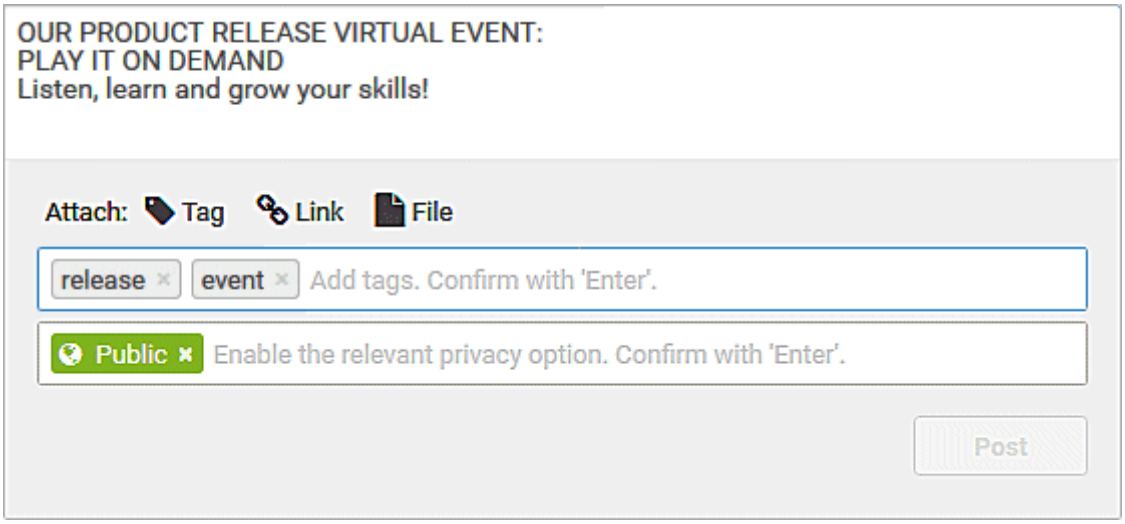
Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Click the model.
6. Click **Comment** in the button bar if the bar is not activated yet.
7. Enter your comment in the box provided.
8. Click **Tag**.

9. Enter the words to be used as keywords (page 380) in the tag input box, for example, BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press **Enter** after each keyword.



10. Click **Link**.
11. Insert a link to a Web site that contains more detailed information.
12. Click **Add link**. The link is checked and added.
13. Click **File**. The **Select document** dialog is displayed.
14. Click **Upload new document** to upload one of your own documents. The corresponding dialog opens.
15. Select the file you want to upload and enter the relevant additional information.
16. Click **Upload**.
17. Enable the check box of the document you want to add to your post.
18. Click **OK**.

The comment is displayed and can be commented on by other users.

All users can select the language to be used for the notification in their profile in ARIS Connect.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.6 My tasks

My tasks is used for editing tasks that are provided by Process Governance during process execution. In addition, My tasks provides an overview of a user's active tasks.

- **My tasks**

  Displays the list of tasks that you are responsible for in terms of processing. Use the filter (page 98) to limit the list. Initially, the tasks to be edited are displayed (status **New** and **Overdue**). If you want to display all tasks, change the filter.

- **Tracking**

  Displays the active tasks that you triggered by starting the process. As soon as a task is completed and the next task in the process is active, the completed task is removed the list.

You have one of the following license privileges: **ARIS Architect with Process Governance**, **ARIS Viewer**, **ARIS Connect Viewer**, or **ARIS Connect Designer**.

Statistics data in the form of charts for human tasks are available in ARIS Connect under **ARIS Administration > Charts > Governance > Human tasks**.

Note: You can watch videos for some procedures in the help. If your browser is unable to open the quick videos within the help, please use a different browser. The videos are also available in ARIS Community (http://www.ariscommunity.com/help/quick-videos).

3.2.6.1 Open My tasks

You can start My tasks to edit the tasks assigned to you, or to query information about the tasks that you triggered by starting a process. Initially, the tasks to be edited are displayed (status **New** and **Overdue**). If you want to display all tasks, change the filter.

Prerequisite

You have one of the following license privileges: **ARIS Architect with Process Governance**, **ARIS Viewer**, **ARIS Connect Viewer**, or **ARIS Connect Designer**.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal >** **My Tasks**.

My tasks opens.

Tip

Alternatively, you can use **Edit tasks** to open My tasks in ARIS Connect. Furthermore, you can use My tasks without ARIS Connect. The address required to access the latter is normally sent to you automatically by e-mail. Otherwise, you can request the address from your system administrator.

3.2.6.2 Tasks

3.2.6.2.1 Edit tasks

Edit the tasks assigned to you. You can complete a task the first time you edit it or continue editing it at a later time, for example, if information you require is not currently available. Initially, the tasks to be edited are displayed (status **New** and **Overdue**). If you want to display all tasks, change the filter. To find out if another user is already editing a task, display (page 98) the **Current editor** column in your list (**Select columns**).

Prerequisite

If double authentication is enabled in the ARIS Administration configuration (**ARIS Administration > Configuration > Process Governance > Workflow policies > E-signature (double authentication)** and **Enable user name field in e-signature (double authentication)**), you have to reenter the password and username when you complete tasks.

Procedure

1. Move the mouse pointer over the relevant task in the task list. The buttons of the available functions are displayed.
2. Click **Edit**. The dialog for editing the task opens.
3. Enter the required information and select the relevant options.
4. Click **OK** in the dialog to complete the task. After this, further editing is no longer possible (the status is **Completed**). The button for completing the task may also have a different name because this button can be customized by the modeler. Tasks in status **Completed** can be accessed only in read-only mode.

   Click **Save** in the dialog to save the current input and to continue editing the task at a later time (status is **In process**) or delegate it to another user (status is **Delegated**).

   Click **Cancel** to discard your changes.
5. Enter your password and user name, if you are requested to do so when finishing the task.

The task was edited and has a status (page 102) that corresponds to how it was completed.

Alternatively, you can click a task to open it for editing. To display detailed information of a task, select a task in the list, then click **Details** in the symbol bar.

3.2.6.2.2 Suspend editing

You can suspend editing of a task and resume editing of the same task at a later time.

Procedure

1. Move the mouse pointer over the relevant task in the task list. The buttons of the available functions are displayed.
2. Click **Edit**. The dialog for editing the task opens.
3. Edit the task.
4. Click **Save**.

Your current input and selected options are saved. The status of the task is set to **In process**. You can finish editing the task at a later time.

3.2.6.2.3 Refresh lists of tasks

You can refresh your list of tasks in order to check whether additional tasks have been assigned to you since you logged in.

Procedure

Above the list of tasks (**My tasks** or **Tracking**), click **Refresh**.

The list is updated with any newly assigned tasks.

3.2.6.2.4 Reset a task

You can reset the status of a task from **In process** to **New**. To find out if another user is already editing a task, display (page 98) the **Current editor** column in your list (**Select columns**).

Warning

This causes all current input and selected options to be deleted.

Procedure

1. Click the task you want to reset in the task list.
2. Click **More > Reset**.

The current details are deleted and the status of the task is set to **New**.

3.2.6.2.5 Display tasks in read-only mode

You can open tasks in read-only mode. This is particularly useful for tasks that cannot be edited, such as tasks with status **Completed**.

You can activate report support on the **Data** tab. If you do so, the data will be read from ARIS by report right before the dialog is displayed and will then be displayed in the dialog when the task is opened for editing. You can dynamically change the displayed name (label) of all elements using a report. If the task is displayed read-only, the report is not executed.

Procedure

1. Move the mouse pointer over the relevant task in the task list. The buttons of the available functions are displayed.
2. Click **View**.

The task opens in read-only mode.

3.2.6.2.6 Display task details

You can display additional details of a task, such as its creation date, priority, description, delegation history, etc.

Procedure

1. Click the task for which you want to display additional details.
2. Above the list of tasks, click **Details**.
3. Click **Delegation history** to see which people the task has been passed on to in the past. Initially, the latest entry is displayed at the top. **Delegation history** is displayed as soon as a task has been delegated once.

Detailed information about the selected task is displayed below the list.

3.2.6.2.7 Pass on tasks (substitute)

You can pass on your new tasks to a substitute for a specific period of time. This means that you can, for example, have another person complete the tasks assigned to you while you are on vacation. A task can only be passed on to the selected substitute if the status (page 102) of the task is **New**. To find out if another user is already editing a task, display (page 98) the **Current editor** column in your list (**Select columns**).

Prerequisite

The user to whom the task is passed on is assigned one of the following license privileges: **ARIS Architect** with **Process Governance** or **wM Integration**, **ARIS Designer**, **ARIS Publisher**, **ARIS Viewer**.

Procedure

1. Click **Specify substitution**. The corresponding dialog opens.
2. Enable the **Active** check box to activate the substitute immediately or start from a selected start date.
3. Select a **Start date** and **End date** to define the period of time for which you want to be represented by the substitute. After this period has elapsed, the task is automatically re-assigned to the original assignee.

   You can specify only one substitution period for all substitutions.
4. Double-click the table row of the user group for which you want to specify a substitute. The **Select user** dialog opens.
5. Enter the first characters of the group, user name, first name, or last name, and click **Find**. If hits exist for the current search, the results are displayed.
6. To select a group or user, select the relevant element. If you select a group, you also need to select a user. Click **OK**. The **Select user** dialog closes.
7. The selected user is entered in the **Executor** column of the **Specify substitution** dialog.
8. To delete a substitution, click the relevant executor in the table, and select **Delete**.
9. Click **OK**.

The options selected for the substitute are applied. Your new tasks are passed on in accordance with these options and their status (page 102) is displayed as **Passed on** in your task list. The substitute receives an automatic notification by e-mail about the duration of the substitution or when the substitution is canceled, if this option is enabled in the ARIS Administration configuration.

3.2.6.2.8 Delegate tasks

You can delegate a task, that is, pass it on permanently to another executor. To find out if another user is already editing a task, display (page 98) the **Current editor** column in your list (**Select columns**).

Prerequisites

- A task must have been selected in the list.
- The task must have been assigned to a user group.
- The status of this task is **New** or **In process**.
- The user to whom the task has been transferred belongs to the allowed group (data flow: **Group of allowed delegates**).
- The user to whom the task is passed on is assigned one of the following license privileges: **ARIS Architect** with **Process Governance** or **wM Integration**, **ARIS Designer**, **ARIS Publisher**, **ARIS Viewer**.

Procedure

1. Move the mouse pointer over the relevant task in the task list. The buttons of the available functions are displayed.
2. Click **More > Delegate**. The **Delegate task** dialog opens.
3. Enter the first characters of the group, user name, first name, or last name, and click **Find**. If hits exist for the current search, the results are displayed.
4. To select a group or user, select the relevant element. If you select a group, you also need to select a user.
5. Optionally, enter a comment, such as a reason or notes for the new executor.
6. Click **Delegate**.

The task is passed on to the selected executor. In the list belonging to the user who has delegated the task, it is displayed with the status (page 102) **Delegated**.

To display detailed information of a task, select a task in the list, then click **Details** in the symbol bar. Click **Delegation history** to see which people the task has been passed on to in the past. Initially, the latest entry is displayed at the top. **Delegation history** is displayed as soon as a task has been delegated once.

3.2.6.2.9 Organize and sort lists of tasks

You can specify the columns to be displayed in the lists (**My tasks** and **Tracking**). In addition, you can sort the lists in ascending or descending order according to the titles. Thus, you obtain a better overview of your tasks.

Procedure

1. Click **My tasks** or **Tracking**.
2. Click **Select columns** to specify the columns to be displayed in the list. The corresponding dialog opens.
3. Click the required columns in the **Hidden columns** box while holding down the Ctrl or Shift key, and select **Add**. The columns are transferred to the **Shown columns** box.

   To remove columns from the **Shown columns** box, click the relevant columns in that box while holding down the Ctrl or Shift key, and click **Remove**.
4. Click **OK**.
5. To sort the list in ascending or descending order according to a specific criterion, click in the table header of the column according to which you wish to sort. Depending on the sorting last selected, the icon for ascending sorting (▲) or descending sorting (▼) is shown next to the column name. Click the relevant sorting.

The list is organized according to your settings.

3.2.6.2.10 Use filter for list of tasks

A filter is provided for restricting the list of tasks to certain items in order to obtain a clearer overview. Initially, the tasks to be edited are displayed (status **New** and **Overdue**). If you want to display all tasks, change the filter.

Procedure

1. Above the list of tasks, click **Filter**. The **Filter** area is shown.
2. Select the relevant filter criteria, for example, the status **New tasks** and the priority **High**.
3. Click **Filter**.

The list is refreshed automatically. Tasks are only displayed if they match the selected filter criteria.

Tip

Alternatively, enter the relevant search term in the **Filter** box above the task list.

3.2.6.2.11 Delegate, pass on, or edit tasks of another user

You can display and edit the tasks of another user. To find out if another user is already editing a task, display (page 98) the **Current editor** column in your list (**Select columns**).

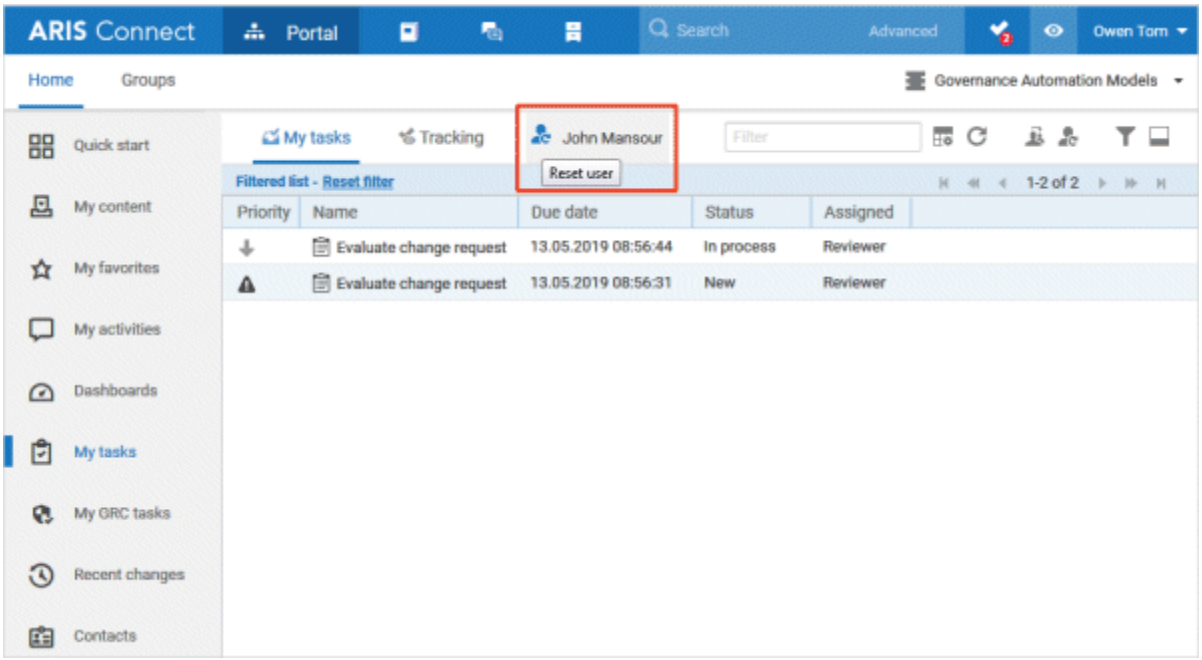
Prerequisite

You have the Process Governance administrator function privilege.

Procedure

1. Click **Change user**. The corresponding dialog opens.
2. Enter the first characters of the group, user name, first name, or last name, and click **Find**. If hits exist for the current search, the results are displayed.
3. To select a group or user, select the relevant element. If you select a group, you also need to select a user.
4. Click **OK**.

The tasks of the selected user are displayed. Instead of this user, you can now edit (page 93), delegate (page 97) (**Delegate to me** button), or pass on tasks. To return to your user, click **Reset user**. Statistics data in the form of charts for human tasks are available in ARIS Connect under **ARIS Administration > Charts > Governance > Human tasks**.



3.2.6.2.12 Display the tasks you started

You can display the active tasks that you triggered by starting the process.

Procedure

1. Click **Tracking**.
2. Click the task for which you want to display additional details.
3. Above the list of tasks, click **Details**.

Detailed information about the selected task is displayed below the list.

3.2.6.2.13 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.6.2.13.1 What status filters are available for the list of tasks?

A filter is provided for restricting the list of tasks to certain items in order to obtain a clearer overview. (**Filter)** Initially, the tasks to be edited are displayed (status **New** and **Overdue**). If you want to display all tasks, change the filter. The list is refreshed automatically after you select the filter option. Tasks are then only displayed if they match the selected filter criteria.

The following status filters are available:

- **Tasks to be edited**

  If you select this filter, only tasks with the status **New**, **In process**, and **Overdue** are displayed.

- **New tasks**

  If you select this filter, only tasks with the status **New** are displayed.

- **Tasks in process**

  If you select this filter, only tasks with the status **In process** are displayed.

- **Suspended tasks**

  If you select this filter, only tasks with the status **Suspended** are displayed.

- **Overdue tasks**

  If you select this filter, only tasks with the status **Overdue** are displayed.

- **Completed tasks**

  If you select this filter, only tasks with the status **Completed** are displayed.

- **Tasks delegated / passed on**

  If you select this filter, tasks are only displayed if their status is **Delegated** or **Passed on**.

- **All tasks**

  If you select this filter, all tasks are displayed, regardless of their status.

A corresponding status filter is not provided for every task status (page 102). The status filter is always applied to all tasks.

Alternatively, enter the relevant search term in the **Filter** box above the task list.

3.2.6.2.13.2 What statuses can tasks have?

Tasks can have the following statuses in **My tasks**:

- **New**

  The task has not been edited since it was assigned or it was reset (page 94).

- **In process**

  The task was partially edited and the editor then finished editing by selecting **Save** to save the current input and resume editing at a later time.

- **Active**

  Tasks to be edited, that is, tasks in the **New** or **In process** state.

- **Overdue**

  The specified processing time of the task has expired. If the list contains overdue tasks, the number is displayed in the top bar

.

- **Suspended**

  The process instance that triggers this human task has been suspended in the process administration.

- **Being edited by another user**

  This status is set automatically as long as a task that was assigned to several possible executors is currently being edited by one of them. Tasks with this status are displayed with a gray background in the list.

- **Failed**

  The task could not be performed because a problem occurred.

- **Completed**

  Editing of the task was completed with **OK**. Further editing is no longer possible. However, you can open the task with a double-click to view details. Tasks with this status are displayed with a gray background and with strikethrough formatting in the list.

- **Passed on**

  Editing of the task was passed on from the executor to another user for a specific period of time (page 93).

- **Delegated**

  Editing of the task was passed on permanently (page 97) from the original assignee to another user. The task remains in the list of the original assignee with this status.

- **Task assignment failed**

  The task was not completed by any executor before its due date. The group of executors contained either no executors or no active executors.

3.2.6.2.13.3 What statuses can tasks have in Tracking?

The following statuses are possible for tasks:

- **Active**

  Tasks to be edited.

- **Suspended**

  The process instance that triggers this human task has been suspended in the process administration.

- **Issue_resolution**

  A problem occurred during process execution, which the Process Governance administrator must solve in the process administration.

- **Failed**

  The task could not be performed because a problem occurred.

- **Completed**

  Editing of the task was completed.

3.2.6.2.13.4 What options are available for exiting the editing of a task?

Several options are available for exiting the editing of a task:

- Click **OK** in the dialog to complete the task. After this, further editing is no longer possible (the status is **Completed**). The button for completing the task may also have a different name because this button can be customized by the modeler. Tasks in status **Completed** can be accessed only in read-only mode.
- Click **Save** in the dialog to save the current input and to continue editing the task at a later time (status is **In process**) or delegate it to another user (status is **Delegated**).
- Click **Cancel** to discard your changes.

Depending on the task, additional buttons for exiting editing may be used in addition to the standard buttons (**Save**, **Cancel**). You can generate these buttons individually when creating dialogs.

Final processing of a task can be linked to entry of the user password to ensure that only authenticated users process tasks. This can also be defined when creating dialogs.

3.2.6.2.13.5 How to pass on editing of a task to another user

There are two ways to pass on editing of tasks to other users. To find out if another user is already editing a task, display (page 98) the **Current editor** column in your list (**Select columns**).

SPECIFY A SUBSTITUTE FOR A SPECIFIC PERIOD OF TIME

You can pass on editing of your new tasks to another user for a certain period of time, for example, you can set up a substitute for you while you are on vacation. With this option, tasks are only passed on to the selected user if their status (page 102) is **New**. These tasks are then displayed in your task list with the status **Passed on**.

DELEGATE TASKS

You can pass on certain tasks to another person on a permanent basis, that is, you can delegate (page 97) these tasks. Tasks can only be delegated if their status (page 102) is **New** or **In process**. These tasks are then displayed in your task list with the status **Delegated**.

3.2.6.2.13.6 How can user accounts be deleted and anonymized?

Users can only be deleted in ARIS Administration. To anonymize Process Governance users according to GDPR (page 405), use **ARIS Process Governance Command-Line Tool**. For detailed information, refer to the **ARIS Process Governance Command-Line Tool** manual. After anonymization, users and their activities are shown with **Anonymized user** instead of with the user name.

AUTOMATION DATA FLOWS

The Process Governance services can write user specific data to attributes. These attribute values can be anonymized with the help of customized reports in order to meet the requirements of the General Data Protection Regulation (GDPR (page 405)). Please contact your local Software AG sales organization (http://www.softwareag.com).

3.2.6.3 Documents

3.2.6.3.1 Download and edit a document

When editing a task, you can open attached documents for editing.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Select the document you want to edit.
4. Click **Actions**.
5. Click **Open document**.
6. Save the document on your hard drive.
7. Navigate to the location where you saved it, open the document, and edit it.
8. Save the document.

You can now upload (page 105) the modified document and move it to ARIS document storage.

3.2.6.3.2 Upload document

You can upload documents. We strongly recommend that you check documents for malicious software before uploading.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Click **Upload**. The Upload document dialog opens.
4. Click **Upload**.
5. Navigate to the document you want to upload and select the document.
6. If the dialog stipulates that an uploaded document is to be saved permanently in ARIS document storage, select the appropriate location. If this is not the case, this option is not offered and the location cannot be changed.
7. Click **OK**.

The document is uploaded.

3.2.6.3.3 Check out document

You can download (page 111) documents.

Prerequisite

The document is saved in ARIS document storage.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Click **Actions**.
4. Click **Check out document**.
5. Select the document you want to download.
6. Specify a local directory on your hard drive.

The document is downloaded and saved locally. The document is also locked in ARIS document storage.

3.2.6.3.4 Remove document

You can remove added documents when editing a task.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Select the document you want to remove.
4. Click **Remove**.

The document is removed from the list. ARIS document storage is not affected by this action.

3.2.6.3.5 Lock document

You can lock a document in ARIS document storage and thus prevent it from being edited by another user.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Select the document you want to lock.
4. Click **Actions**.
5. Click **Lock** in the list.

The selected document is locked for editing by other users.

3.2.6.3.6 Unlock document

If you locked a document to prevent it from being edited by other users you can unlock it again so that other users can work with the document again. A Process Governance administrator can unlock any locked document in ARIS Architect.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Select the document you want to lock.
4. Click ⋮ **Actions**.
5. Select **Unlock** from the list.

Other users can edit the document.

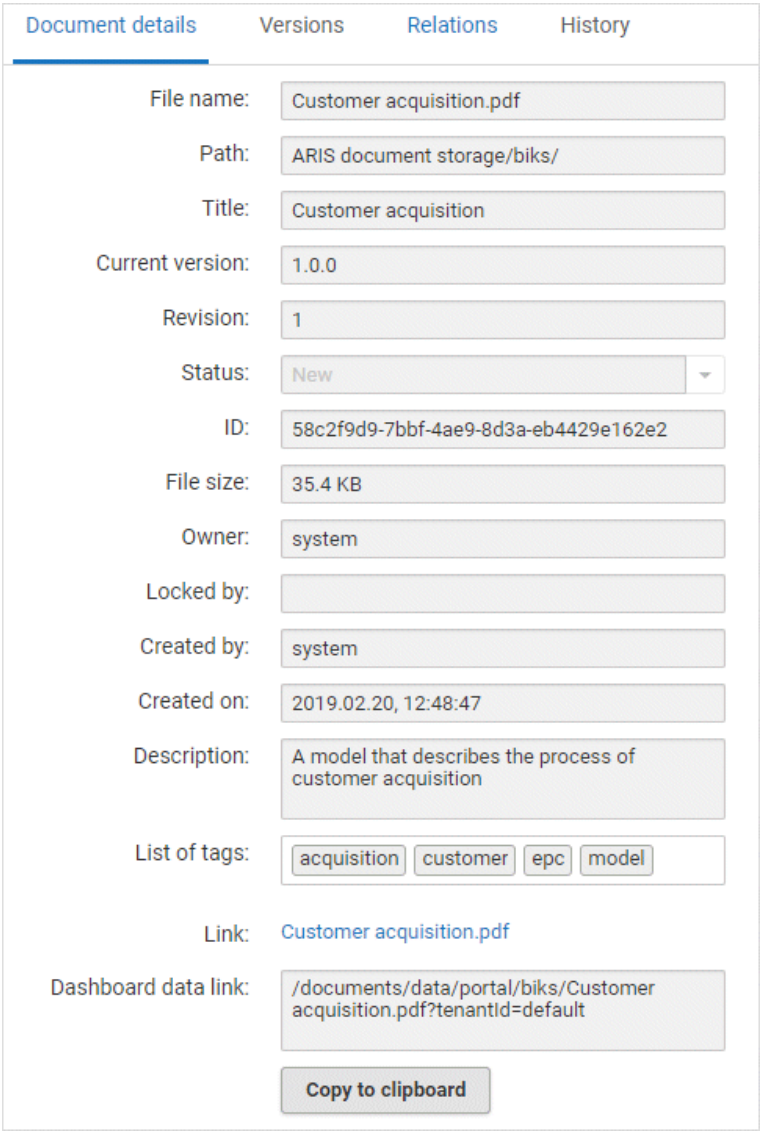
3.2.6.3.7 Display document details

You can view the properties (metadata) of a document.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Select the document whose details you want to display.
4. Click ⋮ **Actions**.
5. Click **Properties** in the list. The **Properties** dialog opens.

The properties (metadata) of the document are displayed, for example, change date, title, and description.



3.2.6.3.8 Edit document properties

You can edit the properties of a document.

Prerequisite

You have the **Document administrator** function privilege.

Procedure

1. Click **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.
5. Edit the document properties, for example, change the description.
6. Click **OK**.

You have edited the properties of the document.

3.2.6.3.9 Select document owner or responsible

You can edit the properties of a document.

Prerequisite

You have the **Document administrator** function privilege.

Procedure

1. Click **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.
5. Click **Open properties**.
6. Next to the **Owner** box, click **Edit**.

   The **Select owner** dialog opens. Start typing a user name. User names which contain the string you type are displayed. Select a user and click **OK**.

You can select the person responsible for the document.

3.2.6.3.10 Move document to ARIS document storage

You can move a temporary document to ARIS document storage and thus save it permanently.

Prerequisite

The document is already uploaded as a temporary document.

Procedure

1. Select the task you want to edit in the list.
2. Click **Edit**. The dialog for editing the task opens.
3. Select the document that you want to move to ARIS document storage.
4. Click ⋮ **Actions**.
5. Click **Move to ARIS document storage**.

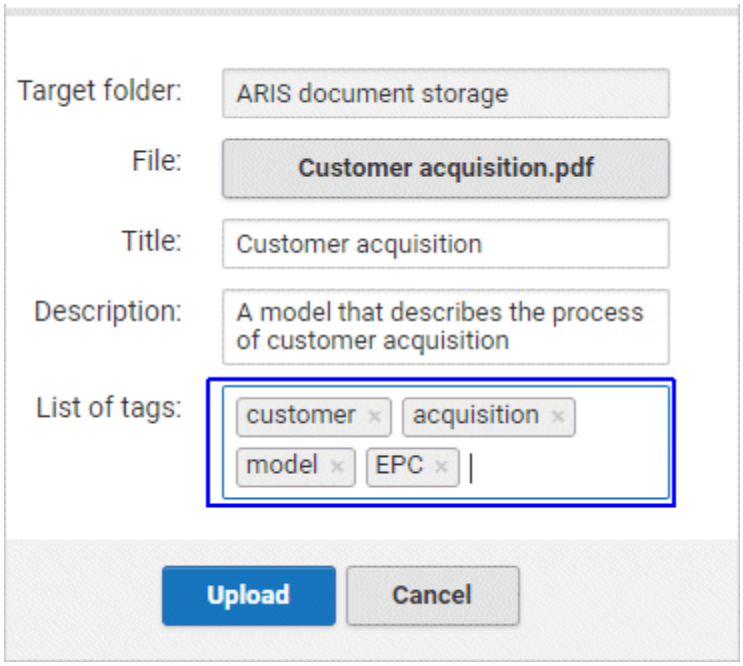
The document is saved permanently in ARIS document storage until it is deleted.

3.2.6.3.11 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.6.3.11.1 Tags

Tags (page 414) are used to provide additional data of documents. When you upload a document, you can add tags.



The tags are also displayed when opening the document details (page 107).

3.2.6.3.11.2 What are temporary documents?

Temporary documents are documents that were not explicitly uploaded to ARIS document storage, but added to the process during process instance runtime, for example, by adding an attachment to an e-mail. They are saved in the system in a particular safe location and are deleted when the process instance is completed.

Temporary documents can be uploaded (page 105) to ARIS document storage to become permanent documents.

3.2.6.3.11.3 What is checking in and checking out?

Checking out means copying a document from the ARIS document storage to a local drive and edit it. The document is locked for other users until it is checked in again.

Checking in means saving the new version in ARIS document storage after editing. The user enters a description of the change list that describes the changes. After checking in the document, another user can check it out again for editing.

3.2.6.3.11.4 Which documents can be found using the full text search?

The full text search can search all kinds of documents, including graphics. The following formats can be searched:

- XML files and documents with an XML-like structure
- Microsoft® Office documents
- Documents in OpenOffice format **OpenDocument** (file extension **.odf**)
- PDF documents
- Documents in electronic publication format (**epub**)
- RTF documents
- Text files
- Compressed formats (such as **zip**); the archive is unpacked and the documents contained are searched.
- Audio formats (such as **mp3**), Metadata will be extracted.
- Graphic formats (such as **jpeg**), Metadata will be extracted.
- Video formats (such as **flv**), Metadata will be extracted.
- Documents in **mbox** format. E-mails are extracted and searched.

3.2.7 Confirmations

With confirmations, a company can prove that users were informed about published ARIS content or related changes, for example, changes in guidelines or processes, and that the employees confirmed to adhere to these. Confirmations can be used, for example, for audits, corporate governance systems, or a quality management system. A confirmation process scheduler automatically generates the confirmation process and the confirmations at the specified start date. It can be defined that the process is generated only once or that the process is generated recurrently, for example, quarterly or annually.

What is a confirmation process?

3.2.7.1 Define a confirmation process scheduler

You can define confirmation process schedulers on factsheets of objects and models (ARIS Connect items). With confirmations, a company can prove that users were informed about published ARIS content or related changes, for example, changes in guidelines or processes, and that the employees confirmed to adhere to these. Confirmations can be used, for example, for audits, corporate governance systems, or a quality management system. A confirmation process scheduler automatically generates the confirmation process and the confirmations at the specified start date. It can be defined that the process is generated only once or that the process is generated recurrently, for example, quarterly or annually.

Prerequisite

- You have the **Confirmation administrator** function privilege.
- The **Create confirmation process scheduler** button for **Confirmations** tab is enabled for fact sheets.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. Click **Create confirmation process scheduler**. The dialog opens.
3. Under **Overview**, you can change the suggested name and optionally enter a description.
4. Change the suggested start date, if required.
5. Specify the number of days for the addressees to accept the confirmation.
6. If you want to generate confirmations only once, keep the frequency default **One-off**. In the case of a recurring event, specify the frequency and the recurrence end date.
7. Assign user groups/users. Enter the first characters of the user group or user name, then click **Find**. If hits exist, the results are displayed.

   Enable the check boxes of the relevant items in the **Search result** box, and click **Add**. The items are transferred to the **Selected items** box. To remove items from the **Selected items** box, enable the check boxes of the relevant items in this box, and click **Remove**.

8. If you want to change the confirmation text, the button label, or add a document, click **Content**.
   a. Change the default confirmation text, if required.
   b. Change the default button label, if required.
   c. Optionally, assign a document ( ) that provides the addressees with detailed information.
9. Click **Save and Close**. Your changes are saved.
10. You are prompted to decide whether or not you want to activate the confirmation process scheduler.

    Click **Yes** to activate it now. The confirmations are then generated on the specified start date.

    Click **No** to activate the scheduler later (page 116).

The confirmation process scheduler is specified. You can change (page 116) it at any time. After the confirmation process scheduler is activated and the start date has been reached, the confirmation process and the confirmations are automatically generated. The users in charge are notified automatically by e-mail.

You can still edit the confirmation process scheduler (page 115), assign/remove addressees (page 116), or extend the due date (page 117).

3.2.7.2 Edit a confirmation process scheduler

You can edit a confirmation process scheduler. If the confirmation process scheduler is already activated, the changes will take effect for the next confirmation process that is generated.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. In the row of the relevant confirmation process, click **More**, and then **Edit scheduler**. The dialog opens.
3. Change the description, the duration, or the recurrence pattern. You can change anything except the name and start date.
4. Assign additional user groups/users. Enter the first characters of the user group or user name, then click **Find**. If hits exist, the results are displayed.
5. Enable the check boxes of the relevant items in the **Search result** box, and click ▶ **Add**. The items are transferred to the **Selected items** box.
6. Click **Content** to change the confirmation text, the button label, or the assigned documents.
7. Click **Save and Close**.
8. If the confirmation process scheduler is not activated yet, you are prompted to decide whether or not you want to activate the confirmation process scheduler.

   Click **Yes** to activate it now. The confirmations are then generated on the specified start date.

   Click **No** to activate the scheduler later (page 116).

Your changes are saved. After the confirmation process scheduler is activated and the start date has been reached, the confirmation process and the confirmations are automatically generated. The users in charge are notified automatically by e-mail.

3.2.7.3 Activate a confirmation process scheduler

You can activate a confirmation process scheduler later if you did not activate it immediately after definition.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. In the row of the relevant confirmation process, click **More**, and then **Activate scheduler**. The dialog opens.
3. Click **Yes** to confirm.

After the confirmation process scheduler is activated and the start date has been reached, the confirmation process and the confirmations are automatically generated. The users in charge are notified automatically by e-mail.

3.2.7.4 Change assigned addressees of a running confirmation process

You can change the users/user groups assigned to a running confirmation process.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. In the row of the relevant confirmation process, click **Change assigned addressees**. The dialog opens.
3. Assign additional user groups/users. Enter the first characters of the user group or user name, then click **Find**. If hits exist, the results are displayed.

   Enable the check boxes of the relevant items in the **Search result** box, and click **Add**. The items are transferred to the **Selected items** box.
4. You can also remove assigned user groups/users. To remove items from the **Selected items** box, enable the check boxes of the relevant items in this box, and click **Remove**.
5. Click **Save**.
6. Click **Yes** to confirm.

Your changes are saved. Confirmations are generated for newly assigned addressees. Confirmations of removed addressees are closed. The users in charge are notified automatically by e-mail.

3.2.7.5 Check user groups for new or removed users

You can check if the assignment of users to the user groups assigned as addressees has changed since a process was generated. This is necessary to generate new confirmations and close obsolete confirmations.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. In the row of the relevant confirmation process, click **Apply addressee changes**. The dialog opens.
3. Click **Yes** to confirm.

Your changes are saved. New confirmations are generated for users who were assigned to the corresponding user groups in the meantime. Confirmations from users who were removed from the corresponding user groups in the meantime are closed. The users in charge are notified automatically by e-mail.

3.2.7.6 Extend the due date of a confirmation process

You can change the due date of a confirmation process.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. In the row of the relevant confirmation process, click **Extend due date**. The dialog opens.
3. Enter or select the new end date.
4. Click **Save**.

The end date of the confirmation process was changed.

3.2.7.7 Check confirmation status

You can check the status of confirmation processes you initiated.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Click **Portal >** **Confirmations.**
2. Check the confirmation status in the list of confirmation processes, for example, if the process is already generated or how many addressees have already confirmed.
3. Click a process to navigate directly to the related object or model.
4. To check who has confirmed and who has not yet confirmed, click the relevant confirmation process. The dialog opens.
   a. Click **Confirmations**. The addressees are listed with their respective status.
   b. Click **Cancel**.

You checked the status of the confirmation processes.

3.2.7.8 Terminate or reopen a confirmation process scheduler/confirmation process

You can terminate a confirmation process scheduler, for example, if you do not want the scheduler to create further confirmation processes. You can terminate a confirmation process, for example, if the open confirmations must be closed because they are redundant or obsolete. You can reopen confirmation process schedulers and confirmation processes again after you terminated them. You cannot reopen a confirmation process that belongs to a terminated confirmation process scheduler. In this case, you must first reopen the confirmation process scheduler.

Prerequisite

You have the **Confirmation administrator** function privilege.

Procedure

1. Open the **Confirmations** fact sheet of the relevant object or model.
2. In the row of the relevant confirmation process, click **More**, and then **Terminate scheduler** or **Terminate process**.
3. Click **Yes** to confirm.

   The scheduler/process is terminated. If you terminated a scheduler, no further confirmation process will be created. If you terminated a process, all open confirmations are closed.
4. To reopen a scheduler/process, click **More** in the row of the relevant confirmation process, and then **Reopen scheduler** or **Reopen process**. Reopen is only available if you terminated the confirmation process scheduler or confirmation process before.
5. Click **Yes** to confirm.

If you reopened a scheduler, confirmation processes will be generated according to the specified conditions. If you reopened a process, the open confirmations from before the termination are also reopened for confirmation by the addressees. The users in charge are notified automatically by e-mail.

3.2.7.9 Edit confirmations

You receive a notification when a new confirmation task is available for you.

Prerequisite

You have the required privileges in ARIS Connect.

Procedure

1. Open the notification.
2. Click the link in the e-mail.
3. If you are not logged in to ARIS Connect your browser opens and the login page is displayed. Log in to ARIS Connect.
4. **ARIS Connect** opens and the relevant item is displayed.
5. Check the information provided to you, for example, download the document.
6. Click the confirmation button, for example, **Confirmation**. However, the button can also have a different label, such as **Accept**.

You confirmed that, for example, you read and understood the information. The **CONFIRMED** status is displayed next to the item name.

Alternatively, open (page 124) **My GRC tasks**. From there, you can navigate directly to the ARIS item with the open confirmation and edit it as described above.

3.2.7.10 What is a confirmation process?

With confirmations, a company can prove that users were informed about published ARIS content or related changes, for example, changes in guidelines or processes, and that the employees confirmed to adhere to these. Confirmations can be used, for example, for audits, corporate governance systems, or a quality management system. A confirmation process scheduler automatically generates the confirmation process and the confirmations at the specified start date. It can be defined that the process is generated only once or that the process is generated recurrently, for example, quarterly or annually.

Users who have the **Confirmation administrator** function privilege can create, edit, activate, terminate, and reopen confirmation process schedulers.

You can define confirmation process schedulers on factsheets of objects and models (ARIS Connect items). After the confirmation process scheduler is activated and the start date has been reached, the confirmation process and the confirmations are automatically generated. As in large companies often several thousand confirmations must be generated, the generation is performed by a technical server task that is specified in the system configuration of ARIS Risk & Compliance Manager (**arcm.config.schedule.job.generator.confirmationprocess**). The server task is usually executed at night. For detailed information on how to configure server task schedules, refer to the online help of ARIS Risk & Compliance Manager.

The users in charge are notified automatically by e-mail. The users assigned to confirmation processes, the addressees, then confirm the published information. All users and user groups in ARIS Connect can be assigned as addressees. As soon as all addressees have accepted their confirmations, the confirmation administrator is notified that the confirmation process was completed. If not all addressees have accepted their confirmation by the due date, all open confirmations are closed and set to **Not completed** status and the confirmation administrator receives a notification with the number of accepted and not completed confirmations. Confirmations can have the status open, accepted, and not completed.

3.2.8 Compliance

The following describes the compliance features.

3.2.8.1 Synchronize ARIS Risk & Compliance Manager

You can transfer GRC-relevant master data objects from an ARIS database to ARIS Risk & Compliance Manager, for example, risks or survey tasks from ARIS Connect.

Objects and models are only included in the synchronization if the **Synchronize ARCM** attribute (AT_AAM_EXPORT_RELEVANT) is set to **true**. For detailed information on the **Synchronize ARCM** attribute, refer to the **ARCM - Modeling Conventions** guide.

The ARIS database whose content is used to synchronize data with an environment of ARIS Risk & Compliance Manager is specified in the environment of ARIS Risk & Compliance Manager. The data of an ARIS database can be synchronized with multiple ARIS Risk & Compliance Manager environments, but an ARIS Risk & Compliance Manager environment can receive data from only one ARIS database. For detailed information, refer to the online help in ARIS Risk & Compliance Manager.

Note that a synchronization cannot be undone.

Prerequisite

- The ARIS Connect integration is enabled in ARIS Risk & Compliance Manager (**Administration > General > System management > Environments > <Environment name> > ARIS Connect integration settings > ARIS Publisher integration**).
- You have the required privileges in ARIS Connect.
- The ARIS database used for this export must be the one specified in ARIS Risk & Compliance Manager (**Administration > Environments > <environment name> > Overview**).
- The **Transfer GRC data** report for ARIS Connect is enabled (**ARIS Architect > ARIS > Administration > Evaluations > Reports > ARIS Risk & Compliance Manager > Transfer GRC data > General > Available in ARIS Connect**) and specify the user groups whose members have access to the script (**Transfer GRC data > Restrict access**). By default this report is disabled, because you need extensive knowledge to run this report. For detailed information on how to manage scripts, refer to the ARIS Architect online help (**ARIS Configuration and Administration > Manage scripts**).
- By default the synchronization can be started in ARIS Connect on fact sheets of risks and survey tasks. You can specify the database items for which the script can be started (**ARIS Architect > ARIS > Administration > Evaluations > Reports > ARIS Risk & Compliance Manager > Transfer GRC data > Restrict access > Context**).

Procedure

1. In ARIS Connect, open the overview fact sheet of the item from which you want to start the synchronization.

2. Click **Reports**. The **Reports** bar opens.
3. Click the drop-down list box to display the list of available reports.
4. Click **Transfer GRC data**.
5. Click **Start**.
6. Select the ARIS Risk & Compliance Manager environment to which the data is to be transferred. If no environment is displayed or if you want to use another environment than the one displayed, you must specify the database in the environment of ARIS Risk & Compliance Manager (**Administration > Environments > <environment name> > ARIS database**). If several environments are specified for the database, select the relevant environment.
7. To verify whether the changes that would occur due to the transfer are correct and executed without errors, first simulate the synchronization, before you synchronize the data. To do so, enable **Simulate synchronization** and **Click OK**. Otherwise, skip this step.

   The simulation is performed. Click **Download result** and open the log file. If errors occurred, resolve them. Then repeat steps 2 - 9.
8. To start the synchronization, click **OK**.

The relevant master data objects are now transferred to ARIS Risk & Compliance Manager. To check the synchronization result, open the log file.

3.2.8.2 Open data from ARIS Connect in ARIS Risk & Compliance Manager

You can open risks and hierarchies from ARIS Connect in ARIS Risk & Compliance Manager.

Prerequisite

- The ARIS Connect integration is enabled in ARIS Risk & Compliance Manager.
- You have a role in ARIS Risk & Compliance Manager that allows you to open risks and/or hierarchy elements.
- You have the **ARIS Risk & Compliance Manager Contribute** or **ARIS Risk & Compliance Manager Operate** license privilege.
- You have the required privileges in ARIS Connect.

Procedure

1. In ARIS Connect, open the overview from which you want to display objects in ARIS Risk & Compliance Manager.
2. Click **Open in ARIS Risk & Compliance Manager**.

The selected element is opened in ARIS Risk & Compliance Manager.

3.2.8.3 Show my GRC tasks

Display an overview of your current tasks from ARIS Risk & Compliance Manager in ARIS Connect. For detailed information on how to work on tasks in ARIS Risk & Compliance Manager, refer to ARIS Risk & Compliance Manager online help.

Prerequisite

- The ARIS Connect integration is enabled in ARIS Risk & Compliance Manager.
- You have a role in ARIS Risk & Compliance Manager that allows you to edit objects.
- You have the **ARIS Risk & Compliance Manager Contribute** or **ARIS Risk & Compliance Manager Operate** license privilege.
- You have the required privileges in ARIS Connect.

Procedure

1. Click **Home >** **My GRC tasks**. Your ARIS Risk & Compliance Manager tasks are displayed.
2. Click the relevant task.

The task is displayed in ARIS Risk & Compliance Manager.

3.2.8.4 Show risk assessments from ARIS Risk & Compliance Manager in ARIS Connect

You can generate risk assessments in ARIS Connect.

Prerequisite

- The ARIS Connect integration is enabled in ARIS Risk & Compliance Manager.
- You have the **Risk owner** role in ARIS Risk & Compliance Manager.
- You have the **ARIS Risk & Compliance Manager Contribute** or **ARIS Risk & Compliance Manager Operate** license privilege.
- You have the required privileges in ARIS Connect.

Procedure

1. In ARIS Connect, open the risk for which you want to show the assigned risk assessments.
2. Click **Risk assessments**. The list of risk assessments is displayed in ARIS Connect.
3. Click the ID of the relevant risk assessment.

The risk assessment form is displayed below the list.

To open (page 123) the risk assessment in ARIS Risk & Compliance Manager, click **Open in ARIS Risk & Compliance Manager**.

3.2.8.5 Create issue in ARIS Risk & Compliance Manager

You can generate an issue in ARIS Risk & Compliance Manager to analyze and monitor a problem relating to a particular object. It is possible to assign several objects of different object types to an issue. You can generate issues for functions (processes and controls), organizational units, application system types, risks and risk categories.

Prerequisite

- The ARIS Connect integration is enabled in ARIS Risk & Compliance Manager.
- You have a role in ARIS Risk & Compliance Manager that allows you to create issues.
- You have the **ARIS Risk & Compliance Manager Contribute** or **ARIS Risk & Compliance Manager Operate** license privilege.
- You have the required privileges in ARIS Connect.

Procedure

1. In ARIS Connect, open the overview from which you want to create an issue in ARIS Risk & Compliance Manager.
2. Click **Create issue in ARIS Risk & Compliance Manager**.
3. The Issue form is displayed in ARIS Risk & Compliance Manager.
4. Edit the mandatory fields.
   a. Enter the **Name** for the issue.
   b. Enter the **Description** of the issue.
   c. Enter a description of the **Remediation measure**.
   d. Enter the date by which the issue is to be remediated (**Remediation planned before**) (becomes a mandatory field as soon as the **Release** creator status is selected).
   e. Assign an **Issue owner** and an **Issue reviewer** (becomes a mandatory field as soon as the **Release** creator status is selected).
5. Edit the optional fields.
   a. Enable **Financial details** to display the attributes for categorizing financial incidents.
      1. Select the **Business line level 2**. Level 1 is set automatically as a result.
      2. Select the **Incident type level 2**. Level 1 is set automatically as a result.
      3. Select the **Incident cause classification level 2**. Level 1 is set automatically as a result.
      4. Specify the expected loss.
      5. Select a currency. If a currency is specified at the system or environment, it is displayed here automatically, but can be changed.
   b. To describe the incident in greater detail, add reference **documents**.
   c. Insert a remark.

d. Use **Assignments** to assign the hierarchy elements that can be affected by the incident.

6. Assign an issue owner/issue reviewer.
   a. In the Issue owner or Issue reviewer row, click **Create assignment**. The list of assignable users opens.
   b. Click **Create assignment** in the row of the relevant user. The list closes.
   c. Click **Save**.
7. Click **Save**.
8. Click **OK**.

Your entries are saved. An issue was generated for the selected objects and added to the **My generated issues** list in ARIS Risk & Compliance Manager. The users in charge are notified automatically by e-mail.

3.2.8.6 Create incident in ARIS Risk & Compliance Manager

You can create an incident for certain objects to analyze and describe a trigger that can harm the organization or lead to a loss. By default, you can create incidents in ARIS Connect for functions, processes, systems, organizational units, risks, risk categories and documents.

Prerequisite

- The ARIS Connect integration is enabled in ARIS Risk & Compliance Manager.
- You have a role in ARIS Risk & Compliance Manager that allows you to create incidents.
- You have the **ARIS Risk & Compliance Manager Contribute** or **ARIS Risk & Compliance Manager Operate** license privilege.
- You have the required privileges in ARIS Connect.

Procedure

1. In ARIS Connect, open the overview from which you want to create an incident in ARIS Risk & Compliance Manager.
2. Click **Create incident in ARIS Risk & Compliance Manager**.
3. Depending on your assignments to owner groups and environments in ARIS Risk & Compliance Manager, you are asked to select the relevant owner group and environment.
4. Click **OK**. The **Incident** form is displayed in ARIS Risk & Compliance Manager.
5. If the object from which you create the incident is available in ARIS Risk & Compliance Manager, the object is automatically assigned to the corresponding assignments (hierarchies). Otherwise, copy the ARIS Connect URL of the object to the description field.
6. Edit the mandatory fields (*) and the optional fields.
7. Select the owner status.
8. Click **Save**. Your entries are saved and the status is automatically set to **In progress**. If you want to continue editing the incident at a later point in time, keep the status **In progress**. If you want to finish editing the incident, select the status **Closed**.
9. If you changed the status, save your entries again ().
10. Click **Save**. You are prompted to specify how you want to proceed.
11. Click the relevant option.
12. Click **OK**.

The incident is created. The incident is displayed to the assigned incident reviewer group for review in the **Incidents** list. The users in charge are notified automatically by e-mail. If you created the incident as a loss owner the incident is displayed only in the **Assignment between loss and incident** list and can be assigned to a loss. If you did not change the reviewer group in charge when creating the incident, you are responsible for reviewing the incident yourself as incident reviewer. (The loss owner group to which you are assigned is automatically assigned to the incident as the reviewer).

3.2.9 Use models

The following describes how you can use mini workflows (page 226) and how to create and edit models from the portal.

3.2.9.1 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 206). The process owner is automatically determined by the attribute **Person responsible**.

Prerequisite

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the items and change the relevant attributes (page 206). Depending on the attributes, various editing options (page 218) are available.
5. In the button bar, click **Inform owner of change**. The **Inform of change** dialog opens.
6. Insert a change description
7. Click **Submit**. The **Information** dialog opens.
8. Enable the **Do not show this message again** check box if you do not want to be informed again by the dialog when executing the mini workflow more than once during the current session.
9. Click **OK**.

The process owner receives an e-mail containing the information you entered. If he submits the human task, you will be informed via e-mail.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.9.2 Print graphic as PDF

In the **Portal**, you can print the graphic of the current model as PDF.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. In the button bar, click **Print graphic as PDF**. The **Select output options** dialog opens.
5. Specify your settings.
6. Click **OK**. After the report is generated, the **Print graphic as PDF** dialog opens.
7. Click **Download result**. Using the following dialog, open the file in a PDF viewer or save it.

In the **Portal**, you have printed the graphic of the current model as a PDF.

To the left of the user name, the **Reports notification** is inserted. Click the notification icon and **Export graphic as PDF** to download the result again. The result is also listed on the **Reports** bar. If you select the **Diagram** fact sheet, you can open the **Reports** bar and download the printed model graphic as a PDF.

3.2.9.3 Share model

You can share models with other users.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Click the model you want to send to another user.
6. In the button bar, click **Share** > **Share model**. The corresponding dialog opens.
7. Select the user you want to share the model with.
8. Enable **Send copy to me** to receive a copy of the message, if required.
9. You can also enter a subject and a comment.
10. Click **Send**.

The selected user receives an e-mail containing the information you entered and a link to the corresponding model.

All users can select the language to be used for the notification in their profile in ARIS Connect.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.9.4 Copy view code

You can copy the code of the views **Overview**, **Steps**, and **Diagram** to embed them, for example, in a wiki or in Microsoft® SharePoint.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Click the model you want to send to another user.
6. Activate the **Overview**, **Steps**, or **Diagram** view.
7. Click **Share.**
8. Under **< / > Copy current view code**, click **Copy to clipboard**.

The view code is copied to the clipboard. If you insert the view code as html in a wiki page, the connection to ARIS Connect is established and the view is loaded.

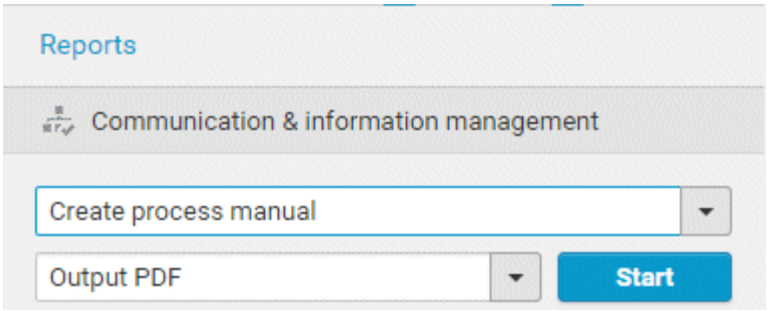
3.2.9.5 Generate report

You can start various reports (page 411) in the **Portal**.

Depending on the selected elements, reports are offered that provide a plausible evaluation for this context.

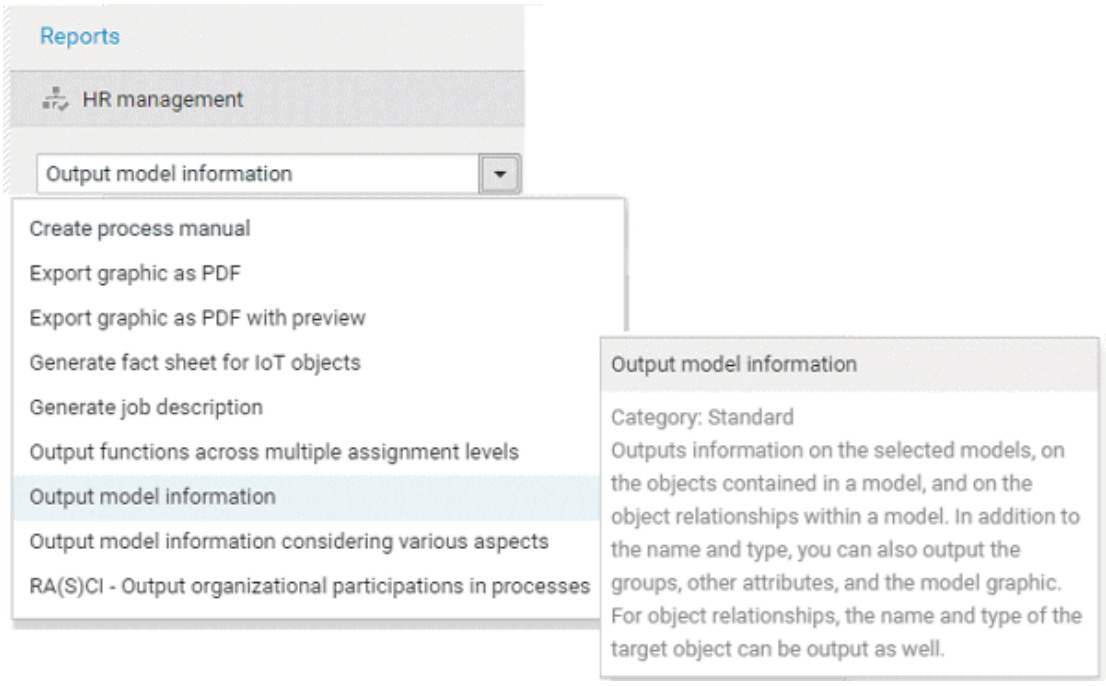
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
3. Navigate (page 67) to the relevant group.
4. Select the model for which you want to create a report.
5. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
6. Click **Reports**. The **Reports** bar opens showing the name of the item for which the report is to be generated.

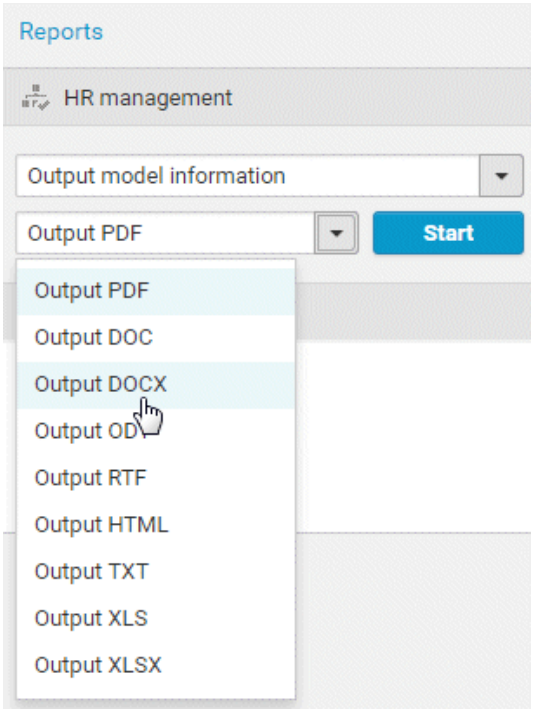


All reports you can generate for the selected model are displayed.

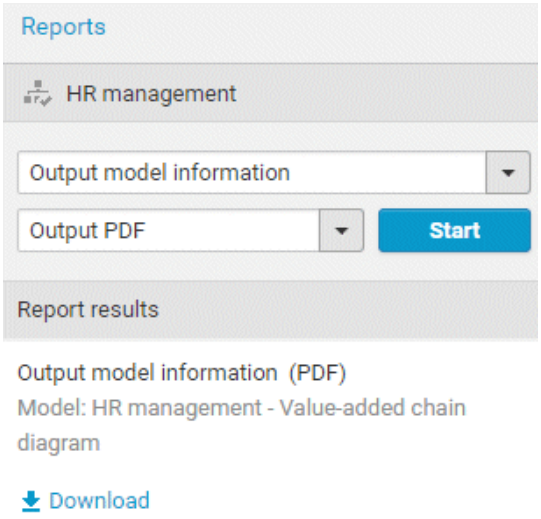
7. Click the ▼ down arrow next to the report name.
8. Select the relevant report. A report description is displayed.



9. Select the output format (page 156), for example, **Output DOCX**.



10. Click **Start**.
11. Depending on the report selected, a dialog with options is displayed. Specify your settings and click **OK**. The report is generated and a progress bar is displayed. After the report is complete, it is displayed in the **Report results** link list for downloading, and a dialog opens.
12. If you want to download the report immediately, click **Download result**.
13. If you want to download the report result later, click the **Download report** link in the **Report results** link list.



You have created a report. Only information you are authorized to view is included.

3.2.9.5.1 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.9.5.1.1 What reports are available?

The Evaluation bar provides various standard reports. Depending on the model type you have opened or the object type you have selected, the reports offered may vary because only the reports related to the corresponding model or object type are displayed.

Script administrators can make additional reports available in ARIS Architect.

3.2.9.5.1.1.1 Analyze classification

USE

This analysis classifies all objects of a type according to the selected attribute. You can use this to test the consistency of your processes and analyze process-relevant factors in a flexible manner.

If you start the analysis for models, for example, to compare an actual process with a target process, the analysis is automatically limited to functions. To examine other objects, select the relevant objects and run the analysis for the selection. Make sure that you only select objects of one type.

In this way, you can classify all process contents according to your own criteria. For example, you can find out quickly and easily whether your process steps include mainly value adding or non-value adding activities. You can also determine the degree to which your processes are automated. The parameters derived from this can be used as a basis for comparison.

For example, you can identify

- whether your target process has improved relative to the actual process based on your target parameters, or
- which process variants come closer to achieving your objective (for example, achieving the objective of the Collections department process in the Private customer business segment compared with the Business customer business segment).

This analysis evaluates all possible aspects, for example, including

- IT systems

  How many piloted systems are used?

  How many systems are scheduled to be shut down soon?
- Risks

  How many risks with a high probability of occurrence exist, as opposed to risks with a low probability of occurrence?

If you run this analysis in a Publisher export, the **Assessment of value added** attribute is automatically evaluated.

CONTEXT

- Models
- Objects of one type

OUTPUT

The analysis is summarized in an Excel workbook. The number of worksheets varies depending on whether you are analyzing models or objects.

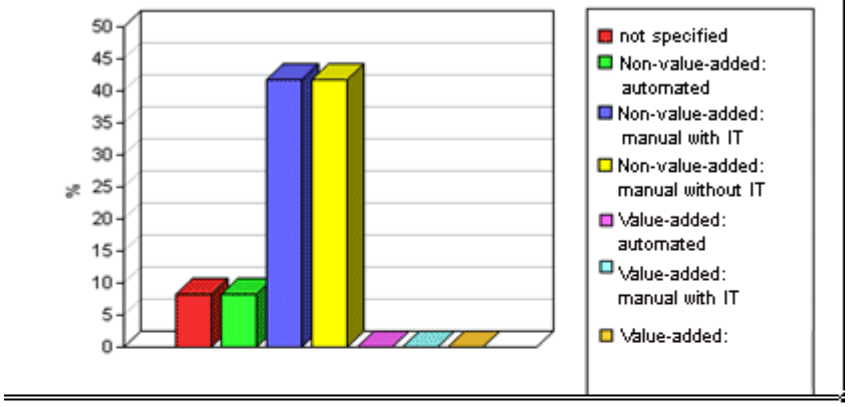
The following example is based on an analysis of the **Purchase order processing (actual)** and **Purchase order processing (target)** models. The **Assessment of value added** attribute is evaluated separately for each model. In this case, one worksheet is output with a table and one with charts.

TABLE

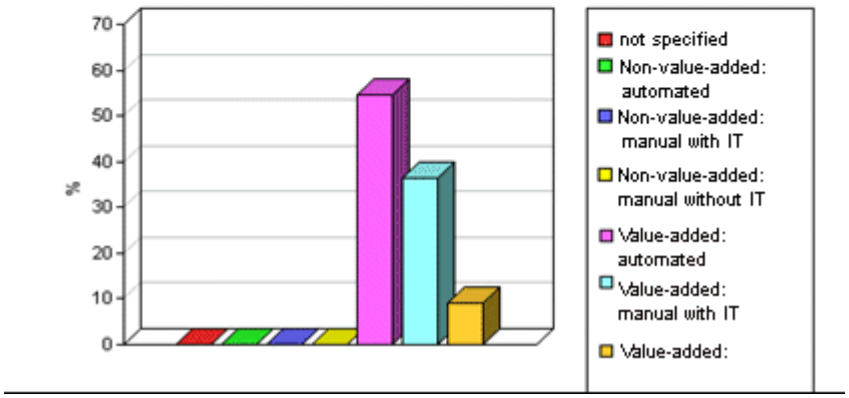
Analysis:Evaluate assessment of value added				
Created:5/25/09 11:21 AM				
Server:horus.me.corp.ids-scheer.com				
Database:DemoDB-United Motors Group				
User:system				
File:Report0.xls				
Analyze classification				
Models:				
1.) United Motors Group\2. Processes\Process Architecture\Core Processes\Marketing & Sales (As Is Processes)\Sales order management (As Is)\Sales order processing\Sales order processing (As Is) (EPC)				
1.) United Motors Group\2. Processes\Process Architecture\Core Processes\Marketing & Sales (As Is Processes)\Sales order management (To Be)\Sales order processing\Sales order processing (To Be) (EPC)				
Attribute: Assessment of value added	**1. Model**		**2. Model**	
	Number	**Percent**	**Number**	**Percent**
Analyzed functions	12	100	11	100
not specified	1	8,33	0	0
Non-value-added: automated	1	8,33	0	0
Non-value-added: manual with IT	5	41,67	0	0
Non-value-added: manual without IT	5	41,67	0	0

CHARTS

1) United Motors Group\2. Processes\Process architecture\Core processes\Marketing&Sales (as-is processes)\Sales order management\Sales order processing\Sales order processing (as-is) (EPC)



1) United Motors Group\2. Processes\Process architecture\Core processes\Marketing&Sales (to-be processes)\Sales order management\Sales order processing\Sales order processing (to-be) (EPC)



CONTEXT

- Models
- Objects of one type

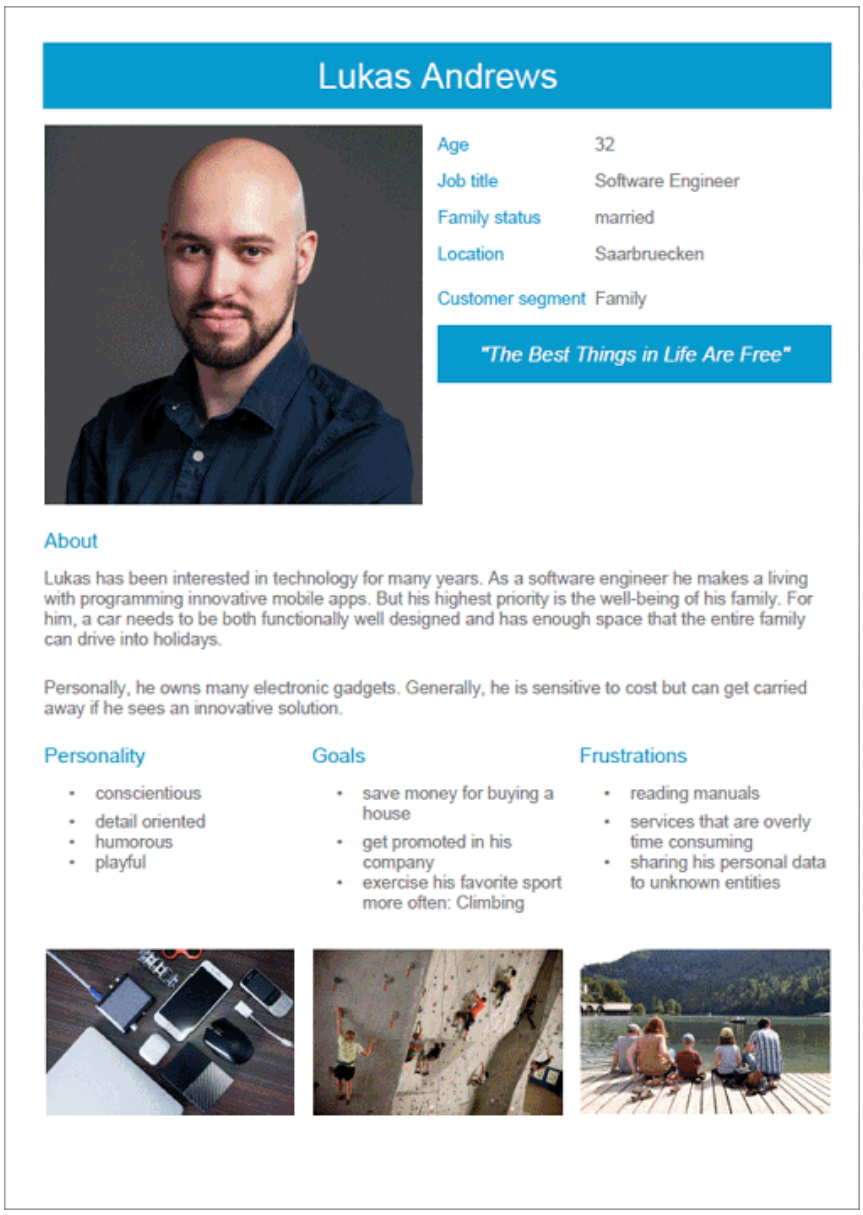
OUTPUT FORMAT

- XLS
- XLSX

3.2.9.5.1.1.2 Create infographic for persona

USE

This report outputs an infographic that visualizes all persona-related data you have specified. The following information is evaluated and displayed:



In order for the report to be run and for it to deliver meaningful results, make sure that the following attributes are specified for **Persona** objects:

Attribute	Example
Name	Lukas Andrews
Description/Definition	This text is shown beneath the **About** topic. Lukas has been interested in technology for many years. As a software engineer he makes a living with programming innovative mobile apps. But his highest priority is the well-being of his family. For him, a car needs to be both functionally well designed and have enough space to accommodate the entire family for holiday trips. Personally, he owns many electronic gadgets. Generally, he is sensitive to cost but can get carried away if he sees an innovative solution.

The following attributes must be specified for the **Customer Experience Management** attributes:

Attribute	Example
Age	32
Family status	married
Location	Saarbruecken
Job title	Software Engineer
Personality	▪ conscientious ▪ detail oriented ▪ humorous ▪ playful
Frustration	▪ reading manuals ▪ services that are overly time consuming ▪ sharing his personal data to unknown entities
Goals	▪ save money for buying a house ▪ get promoted in his company ▪ exercise his favorite sport more often: Climbing
Quote	The Best Things in Life Are Free

You can link images either in the **Customer Experience Management** attribute type group or in the **ARIS document storage attribute** type group.

Customer Experience Management **attribute**	ARIS document storage attribute	Image/position
Portrait image link	ARIS document storage Link 1	Portrait; at the top
Descriptive image Link 1	ARIS document storage Link 2	Electronic gadgets; image on the left.
Descriptive image Link 2	ARIS document storage Link 3	Climbing; image in the center.
Descriptive image Link 3	ARIS document storage Link 4	Family; image on the right.

Some content is only shown in the infographic if the **Persona** object is related to a **Customer segment** object. The **belongs to** relationship is evaluated.

In this example, the **Family** Customer segment is shown, because the **Lukas Andrews** Persona occurs in a Customer segmentation map and this **Persona** object is related to the **Family** Customer segment object.

CONTEXT

Object of **Persona** type

OUTPUT FORMAT

- DOC
- DOCX
- RTF
- ODT
- PDF

3.2.9.5.1.1.3 Create process manual

USE

This report outputs all data from the selected processes up to the selected assignment level.

CONTEXT

Models of type:

- BPMN process diagram (BPMN 2.0)
- BPMN process diagram (BPMN 1.x)
- E-Business scenario diagram
- EPC
- EPC (material flow)
- EPC (column display)
- EPC (horizontal table display)
- EPC (table display)
- EPC (row display)
- Industrial process
- Office process
- Process schedule
- UML Activity diagram
- PCD
- PCD (material flow)
- Value-added chain diagram

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

3.2.9.5.1.1.4 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

3.2.9.5.1.1.5 Generate job description

USE

Generates a job description for each selected organizational element and considers all processes and functions involved.

The following information can be output for each function:

- Organizational elements of the functions
- Data
- IT
- Improvement potential

If you start the report for models, only the modeled items are included. If you start the report for objects, all relevant object definitions are evaluated.

By default, the **carries out** connection is evaluated for the **Executing** relationship. The following connections are included for the **Participating** relationship:

- has consulting role in
- is IT responsible for
- is technically responsible for
- must be informed about
- must be informed on cancelation
- must inform about result of

Script administrators can change the content of the output.

If you output functional weak points, all information is output as for the job description. However, the selected organizational unit is listed along with all organizational units.

CONTEXT

MODELS OF TYPE

- EPC
- FAD
- Office process
- VACD

OBJECTS OF TYPE

- Group
- Organizational unit
- Organizational unit type
- Person
- Role

- Location
- Position
- System organizational unit
- System organizational unit type

OUTPUT FORMAT

- DOC
- XLS
- PDF
- DOCX
- ODT

3.2.9.5.1.1.6 Output functions across multiple assignment levels

USE

Outputs the following information for the selected models:

- Functions across multiple assignment levels
- Functions across multiple assignment levels according to ISO certification

The model attributes, the group, and the model graphic are output for the models, while the standard items are output additionally in the case of an evaluation according to ISO certification.

THE FOLLOWING INFORMATION IS OUTPUT FOR EACH MODEL EVALUATED

- Chapter number
- Model name
- Model type
- Function to which the model is assigned.
- Name of the group in which the model is saved.
- Specified model attributes
- Functions of the model are described in the order in which they are created within a partial path in the model. For each function, the chapter number and the name of the function are output.
- Model graphic (optional)
- Model type of the assigned models to be evaluated (optional)

Functions that occur in multiple models are only described once. Each subsequent occurrence in the report output contains a reference to this description.

ASSIGNED MODELS ARE HANDLED AS FOLLOWS

- All functions with assignments are determined.
- If an assigned model is a function allocation diagram, the evaluation is performed in the same way as for associations within the selected model.
- From the set of remaining assignments, select one to be examined in more detail. You can choose your own prioritization, for example, based on the model type. In turn, all functions are analyzed for the assigned model.

You have the option of restricting the report output by specifying the assignment level to be analyzed in detail. For each assignment outside this range, the report output shows only the model name and type.

OUTPUT

The output is created as text incorporating tables for the model and object information and is divided into chapters. The **REPORT1** to **REPORT4** styles are used for chapter headings. This enables you to create tables of contents in the output documents.

At the first level, the output is structured based on the models you have selected. The structural level is increased by one if the assigned model is a model with control flow. For all other assigned models, the structural level remains unchanged.

The descriptions of the functions in a model can be sorted numerically, alphabetically, by symbol type, or topologically. If you select numerical sorting, the functions in a model should be numbered. The numbering of a function uses the number specified in the **Type 1** attribute type in the **Function type** attribute type group.

The attributes, relationships, and assigned models for which the types can be determined are evaluated. Like selected models, the assigned models are evaluated up to a configurable structural level.

If you selected the topological sort criterion, the report output may contain additional information depending on the model class of the model in question.

The following table provides an overview of the model classes in question and the resulting special features of the output with topological sorting:

Model class	Special feature
Directed graph with associations	Beginning and end of process, as well as start and end of path.
Hierarchy	Chapter numbers of functions reflect the position of the object in the model hierarchy.
Central object type	If the model described is a function allocation diagram, the structural level in the report output is not increased. The allocations are described at the level of the object to which the model is assigned.
Process selection matrix	The scenarios in a process selection matrix and the processes assigned to them are evaluated in the same way as function trees, with the scenario taking on the function of the root. Main processes are not included.

CONTEXT

Model

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF
- HTML

3.2.9.5.1.1.7 Output functions with connected objects

USE

Outputs the model attributes, the model graphic, and the functions including the objects connected to them for the selected process models.

Optionally, you can select the following connected objects:

- Organizational elements
- Executing organizational elements
- Data elements (input/output data)
- Supporting application systems

You can specify the evaluation direction between the functions and the connected objects. In addition, you can also evaluate assigned function allocation diagrams.

CONTEXT

Models of type:

- EPC (event-driven process chain)
- EPC (column display)
- EPC (horizontal table display)
- EPC (table display)
- EPC (material flow)
- EPC (row display)
- Industrial process
- Office process
- PCD (process chain diagram)
- PCD (material flow)
- UML Activity diagram
- VACD (value-added chain diagram)

OUTPUT FORMAT

- RTF
- PDF
- HTML
- TXT
- DOC

3.2.9.5.1.1.8 Output model information

USE

Outputs information about the selected models, the objects contained in the model, and the relationships of the objects in the model. Apart from name and type, the groups, additional attributes, and model graphic can also be output.

For object relationships, you can also output the name and type of the target object.

CONTEXT

Models

OUTPUT FORMAT

- RTF
- PDF
- HTML
- TXT
- DOC
- XLS

3.2.9.5.1.1.9 Output model information considering various aspects

USE

Outputs model information including group structure as an Excel table.

A worksheet is created for each aspect. The worksheet lists all models in which the relevant aspect occurs.

The following aspects can be output:

- Data
- IT
- Organizational elements
- Targets/KPIs
- Products/Services
- Risks
- Others

For each aspect, the related functions can be listed, as well. Individual or integrated evaluations can be carried out for function allocation diagrams (FAD). For integrated evaluations, the functions from the FAD are integrated in the model.

CONTEXT

Models and groups

OUTPUT FORMAT

- XLS
- XLSX

3.2.9.5.1.1.10 Output object information

USE

Outputs the relationships and target objects at definition level for the selected objects. Optionally, you can output the groups and the attributes for both the source and target objects.

The output is in table format.

CONTEXT

Object

OUTPUT FORMAT

- RTF
- PDF
- HTML
- DOC
- XLS
- XLSX
- DOCX
- ODT

3.2.9.5.1.1.11 Output occurrences of objects

USE

The occurrences in models are listed for the selected object definitions.

CONTEXT

Object

OUTPUT FORMAT

- RTF
- PDF
- HTML
- TXT
- DOC
- DOCX
- ODT
- XLS
- XLSX
- XML

3.2.9.5.1.1.12 Process manual (example)

USE

This report script is a sample created in ARIS Architect in the design view. It shows how to create report scripts in ARIS Architect without having programming knowledge.

CONTEXT

Objects

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

3.2.9.5.1.1.13 RA(S)CI - Output organizational participations in processes

USE

This report supplies information on which organizational elements participate in the activities (functions) of a process and in what manner. Organizational responsibilities and participations are output in a matrix.

The report returns plausible results if your processes and the organizational responsibilities for the individual activities conform to the modeling conventions required.

RA(S)CI stands for **R**esponsible, **A**ccountable, (**S**upportive), **C**onsulted, **I**nformed.

By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g_bRASCI** variable to **true**.

The matrix shows which organizational unit participates in activities of a process and in what manner:

- **R**esponsible indicates who assumes execution responsibility. It shows who is responsible for performing an activity and who actually performs it, but also who assumes the disciplinary responsibility.
- **A**ccountable identifies the person ultimately answerable for the correct and thorough completion of a task. Thus, 'Accountable' may be the one in charge of managing the costs, that is, the one who assumes project budget responsibility. The **decides on** and **accepts** connections are evaluated in order to mark this responsibility.
- **C**onsulted shows who has a consulting role. This organizational unit - typically a group of subject matter experts - is asked for advice prior to a final decision being made or a final action being taken.
- **I**nformed specifies who must be informed. It indicates who is kept up to date on the progress or completion of a task.

In the RACI matrix, RACI data is displayed under the following conditions:

- The connections are used in the selected process model.
- The connections are used in a function allocation diagram that is assigned to a function of the selected process model.

The result of the report is an Excel workbook containing several tables. Each process model included creates a table. The first table consists of a full list of the functions and organizational units of the process models included.

Process steps	Function	Financial assistant	Financial clerk	Accountant
Vehicle billing (as-is)	Allow for discounts	R		I
Vehicle billing (as-is)	Call order data	R, A		
Vehicle billing (as-is)	Change customer	R		
Vehicle billing (as-is)	Change order data		R	
Vehicle billing (as-is)	Check customer data	R		
Vehicle billing (as-is)	Check order data	R	R	
Vehicle billing (as-is)	Enter payment type		R	
Vehicle billing (as-is)	Have customer	R		
Vehicle billing (as-is)	Print invoice		R	
Vehicle billing (as-is)	Send invoice		R	I
Vehicle billing (as-is)	Transfer data to		R	

CONTEXT

- Individual process
- List of processes
- Process hierarchy

OUTPUT FORMAT

- XLS

3.2.9.5.1.1.14 EPC-to-BPMN transformation

USE

Transforms a model of type **EPC** into a to a diagram of type **Enterprise BPMN collaboration diagram** or **BPMN collaboration diagram (BPMN 2.0)** depending on the option selected. You can select which diagram type the transformation should generate. If the report is run from a context containing multiple models of type **EPC**, a report with detailed transformation results is generated for each of the models.

CONTEXT

Groups, Models

OUTPUT FORMAT

- RTF
- PDF
- HTML
- DOC
- DOCX
- XLS
- XSLX
- ODT

3.2.9.5.1.2 What output formats exist?

You can change the output format on the **Reports** or **Semantic checks** tab of the **Evaluation** bar by clicking the down arrow. The selection of output formats may be restricted based on the report or semantic check. Possible output formats are:

PDF

DOC

DOCX

ODT

RTF

HTML

TXT

XLS

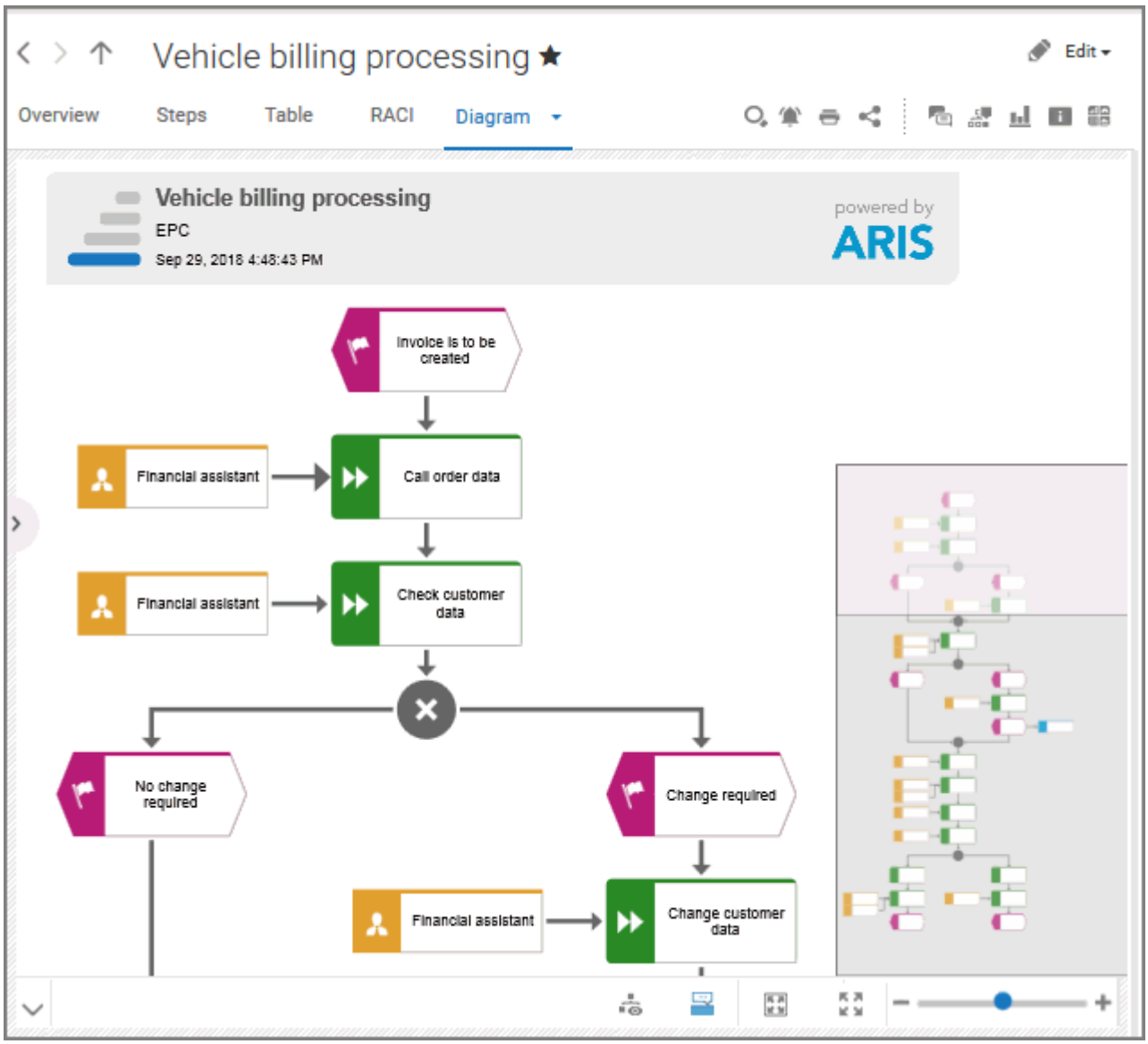
XLSX

XML

3.2.9.6 Model Viewer

The following describes how to use the Model Viewer.

The Diagram fact sheet contains the Model Viewer, which graphically displays diagrams. Depending on the diagram type, different functions are available.



You can find model items (page 158) ( ) in the diagram. Click **Properties** to show the properties of a model or a model item. (page 161) You can highlight objects in the diagram (page 162) ( ) that meet a defined condition. In addition, you can open assigned models (page 163) ( ). You can change the view of the diagram (page 165) ( ) to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 159).

3.2.9.6.1 Find in model

In the Model Viewer, you can quickly find the required model items.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. In the button bar, click **Find in model**. The input field opens.
6. Enter the term contained in the name of the model items you want to find. The first number indicates the item selected in the diagram and the second number the total number of items found.

   The finding identified by the first number in the search field is highlighted red in the model, the others yellow.
7. Click **Next** to highlight the next finding in red. The numbers in the search field are adjusted.
8. Click **Previous** to highlight the previous finding in red. The numbers in the search field are adjusted.

You have found the entered term.

3.2.9.6.2 Use the view bar

In the Model Viewer, you can adjust the display of a model.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer. The view bar is positioned at the bottom.
5. Click **Full screen view** to enlarge the model to the whole display range.
6. Click **Exit full screen** to show the model in the previous display range again.
7. Click **Fit to window** to fit in the whole model into the display range.
8. Move the slider to enlarge or reduce the display size of the model.

9. Click **Change view** to select a specific view (page 165) of process models.
10. On the left, click the arrow down to hide the view bar.
11. On the left, click arrow up to view the view bar again.

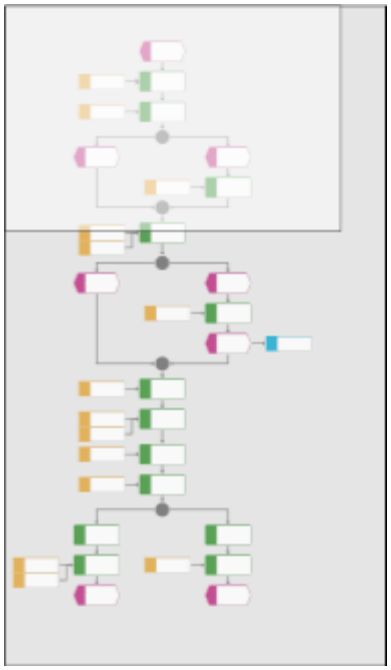
You have used the view bar to adjust the Model Viewer.

3.2.9.6.3 Navigate using the Model Viewer

You can navigate to different areas of a model.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer. The Model Viewer shows the model. The navigation pane is placed at the bottom right. The light gray area of the navigation panel shows the visible area of the model. When you change the resolution of the model (page 159), the size of the light gray area also changes.



5. Click the light gray area and hold down the mouse key.
6. Drag the mouse pointer in the direction of the model section you want to bring into the visible area.
7. Release the mouse button when the relevant model section is visible.

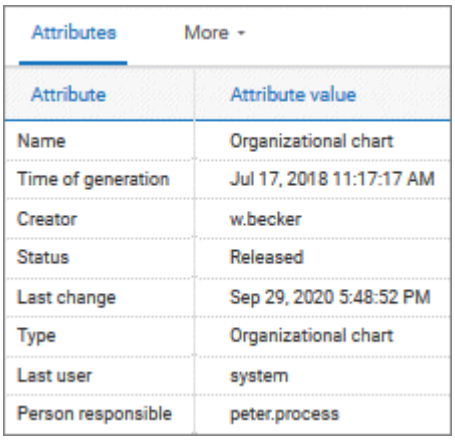
You have navigated to the relevant model section.

3.2.9.6.4 Show properties

In the Model Viewer, you can display the properties of the model or of model items.

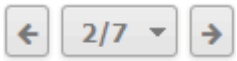
Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Properties**. The **Property** bar opens and the **Attributes** tab is activated.



If you have selected an object, the attributes for that object are displayed. Click **More** to view related objects or occurrences. The model properties are shown if no object is selected.

6. Click **More > Related objects** to show the related object of the selected object. The types of the connections and the names of the related objects are shown.
7. Click **More > Related models** to show the related models of the selected object. The occurrences of the selected object in the current and other models are displayed. If a model contains more than one occurrence of the selected object, you can select them directly or using arrows to the left or to the right.



You have used the **Property** bar.

3.2.9.6.5 Switch highlighting on

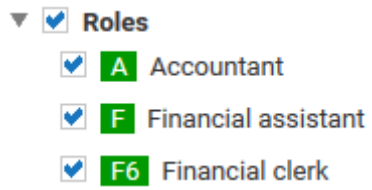
You can highlight model items to focus on aspects to be monitored (page 184). This example illustrates highlighting of a process model in the default view (page 47).

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Open the relevant category and activate the check boxes of the criteria you want to be highlighted. To highlight all criteria of a category, activate the category check box.



The model items that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch the highlighting off (page 178).

3.2.9.6.6 Open assignment

In Model Viewer, you can quickly open diagrams assigned to objects. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer. Assignment icons are displayed next to objects with assigned models.
5. Click the relevant assignment icon, or double-click the object at which the relevant assignment icon is shown.

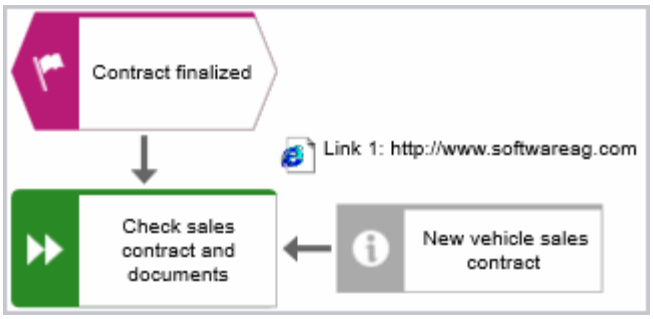
If only one diagram is assigned, it is opened directly. If more than one diagram is assigned, they are offered for selection in a dialog.

3.2.9.6.7 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer together with all placed link attributes.



5. Click the relevant link attribute.

The link opens. This is how you can easily open a text document or a new e-mail with the e-mail recipient entered, for example.

3.2.9.6.8 Print the graphic of the current model

In the **Portal**, you can print the graphic of the current model as PDF.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. In the button bar, click **Print graphic as PDF**. The **Select output options** dialog opens.
5. Specify your settings.
6. Click **OK**. After the report is generated, the **Print graphic as PDF** dialog opens.
7. Click **Download result**. Using the following dialog, open the file in a PDF viewer or save it.

In the **Portal**, you have printed the graphic of the current model as a PDF.

To the left of the user name, the **Reports notification** is inserted. Click the notification icon and **Export graphic as PDF** to download the result again. The result is also listed on the **Reports** bar. If you select the **Diagram** fact sheet, you can open the **Reports** bar and download the printed model graphic as a PDF.

3.2.9.6.9 Change view

In the Model Viewer, you can change the view of process models. Depending on the modeling content, views can have the same result despite different criteria. If a view based on the current option settings cannot be generated, the indication **No diagram available** is shown in the modeling area.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Change view**. The view options (page 167) are shown. The view options displayed depend on the type of the model. The view options of model type **EPC**, for example, differ from those of a model of type **Enterprise BPMN collaboration** or of type **Customer journey map**.
6. Click the options (page 167) to change the view of the model. Based on the options, the model view is adjusted.
7. To close the **Change view** bar, click in the modeling area.

As long as the view options are active, the **Change view** icon is colored in red and the selected view is indicated. You can reset the changed view (page 165).

3.2.9.6.10 Reset a changed view

In the Model Viewer, you can determine that models are displayed according to criteria you have selected (page 165). If you want to see the model without restrictions, you can reset all criteria.

Procedure

1. Click the red colored **Change view** icon if the view options (page 167) are collapsed.
2. Click **Reset to default** to the right of the title **Views**.
3. To close the **Change view** bar, click in the modeling area.

The model is displayed in the default view. It is displayed without restrictions and the **Change view** icon is not colored anymore.

3.2.9.6.11 Switch on the mini fact sheet display

In the Model Viewer, you can switch on the mini fact sheet display to display mini fact sheets for objects (page 174) you move the mouse pointer over or select.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
4. At the bottom, click **Show mini fact sheets**. **Show mini fact sheet** is colored and the Message **Mini fact sheets activated** is displayed.

If you move the mouse pointer over an object or select it, a mini fact sheet is displayed.

3.2.9.6.12 Show Mini fact sheets

In the Model Viewer, you can display mini fact sheets for selected objects (page 174) if you have turned on the display of mini fact sheets (page 166).

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Move the mouse pointer over an object or click an object.
   If you move the mouse pointer over an object, the mini fact sheet is displayed as long as the mouse pointer remains on the object.
   If you click an object, the mini fact sheet is displayed until you click in the modeling area.

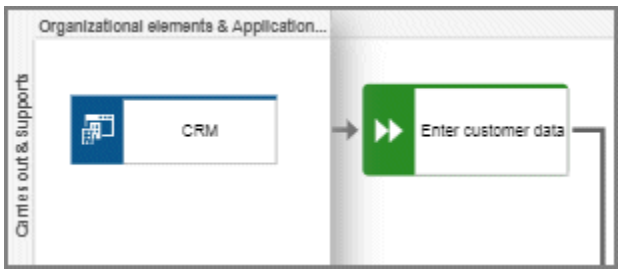
The mini fact sheet is displayed. Among other things, you can copy text content to the clipboard, go to the **Overview** fact sheet of the object, or jump to the **Overview** fact sheet of an object whose link is placed in the fact sheet.

3.2.9.6.13 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.9.6.13.1 What is the special feature for the Model Viewer navigation?

The first row or column of a swimlane model remains visible even if the model content is moved (page 160). If the content is moved next to the first row or column so that it is no longer visible, a shaded separator appears. In the example graphic, the content next to the first column was moved to the invisible area.



3.2.9.6.13.2 Which view options are available?

You can change the view (page 165) of all model types. For every model type at least the layout options **Horizontal** and **Vertical** are available.

The view options displayed depend on the type of the model. The view options of model type **EPC**, for example, differ from those of a model of type **Enterprise BPMN collaboration** or of type **Customer journey map**.

Group and **Layout** options can be combined with the selected view. If a view based on the current option settings cannot be generated, the indication **No diagram available** is shown in the modeling area.

VIEWS

RESET TO DEFAULT (↺)

Turns off all previous view settings and displays the model in its originally layout, in other words, how it is actually modeled. All model items, structurally relevant objects (page 412) and satellites (page 411), are shown.

LEAN

Displays only the structurally relevant objects (page 412) of a model. Satellites (page 411) are hidden.

If you have determined **Details**, **Group by**, or **Layout** options the presentation of the model is adjusted accordingly.

PEOPLE VIEW

Besides the structurally relevant objects (page 412), all objects of the following types are displayed.

- Internal person
- External person
- Position
- Role

IT SYSTEM VIEW

Besides the structurally relevant objects (page 412), all objects based on the **Application system type** are displayed.

- Application system type
- IT system
- IT software
- IT block

SWIMLANE VIEW

Displays the whole model, but restructured in rows and columns. If row and column labels exist, the rows and columns are labeled.

If you have determined **Details**, **Group by**, or **Layout** options the presentation of the model is adjusted accordingly.

EXTENDED PROCESS VIEW

Displays the entire process (page 172) across model boundaries by arranging the structurally relevant objects (page 412) of the process from left to right and the satellites (page 411) above and below them.

The options of **Details**, **Group by**, and **Layout** are disabled and cannot be selected.

DETAILS

SELECT/DESELECT ALL

You can show all details at a time (enable the check box) or hide all details at a time (disable the check box).

ROLES

You can show (enable the check box) and hide (disable the check box) objects based on the **Roles** object type.

If no object of this type exists in the model, the option button is disabled.

PERSONS

You can show (enable the check box) and hide objects (disable the check box) based on the **Persons** object type, namely the objects **Internal person** and **External person**.

If no object of this type exists in the model, the option button is disabled.

POSITIONS

You can show (enable the check box) and hide objects (disable the check box) based on the **Positions** object type.

If no object of this type exists in the model, the option button is disabled.

DOCUMENTS

You can show (enable the check box) and hide objects (disable the check box) based on the **Information carrier** object type, such as **Document**, **Test documentation**, and **Folder**.

If no object of this type exists in the model, the option button is disabled.

IT SYSTEMS

You can show (enable the check box) and hide objects (disable the check box) based on the **Application system type** type, such as **Application system type**, **IT system**, and **IT software**.

If no object of this type exists in the model, the option button is disabled.

CAPABILITIES

You can show (enable the check box) and hide objects (disable the check box) based on the **Capability** object type.

If no object of this type exists in the model, the option button is disabled.

RISKS

You can show (enable the check box) and hide (disable the check box) objects based on the **Risk** object type.

If no object of this type exists in the model, the option button is disabled.

KPI INSTANCES

You can show (enable the check box) and hide objects (disable the check box) based on the **KPI instances** object type.

If no object of this type exists in the model, the option button is disabled.

GROUP BY

ROLES

Opens the list of connections by which roles can be linked to functions. Enable an option button to group the model items by roles according to the connection you have selected. The previously selected grouping is deactivated. The model items are grouped in a swimlane model (page 407).

If no connection of a possible type is used in the model, the corresponding option button is disabled.

The **Group by** switch is turned on. To turn off the grouping, click **Off**.

POSITIONS

Opens the list of connections by which positions can be linked to functions. Enable an option button to group the model items by positions according to the connection you have selected. The previously selected grouping is deactivated. The model items are grouped in a swimlane model (page 407).

If no connection of a possible type is used in the model, the corresponding option button is disabled.

The **Group by** switch is turned on. To turn off the grouping, click **Off**.

OTHERS

Provides the **IT system** option button that allows you to group the model items according to objects based on the **Application system type** type (enable the **IT systems** option button). If no **Application system type**, **IT system**, or **IT software** object exists in the model, the option button is disabled.

The model is restructured in a swimlane model (page 407). The previously selected grouping is deactivated. The model items are grouped in a swimlane model (page 407).

The **Group by** switch is turned on. To turn off the grouping, click **Off**.

LAYOUT

HORIZONTAL

Arranges the model items from left to right.

The **Layout** switch is turned on. To turn off the selected layout, click **Off**.

VERTICAL

Arranges the model items top down.

The **Layout** switch is turned on. To turn off the selected layout, click **Off**.

3.2.9.6.13.3 How can comprehensive processes be modeled?

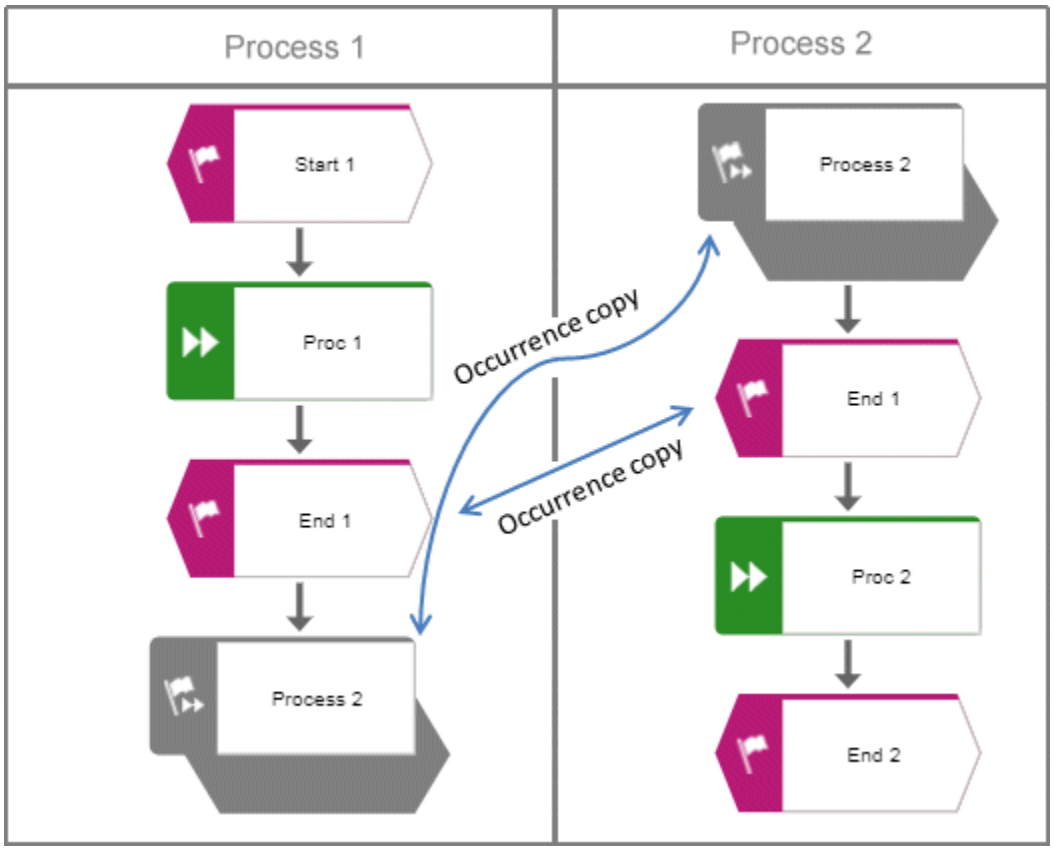
You can use the **Change view** functionality (page 165) in the **Diagram** fact sheet to show different views (page 167) on diagrams. This also allows you to choose the model-spanning Extended process view, which displays models that are connected by process interfaces.

To use the benefit of the Extended process view, the models of **EPC** type must be connected according to the following schemes.

PROCESS INTERFACE OCCURRENCE COPY

- Use an occurrence copy (page 410) of the end event of the first model as start event of the second model.
- In the first model, place a process interface below the end event.
- Copy the process interface of the first model and place its occurrence copy in the second model above the start event.

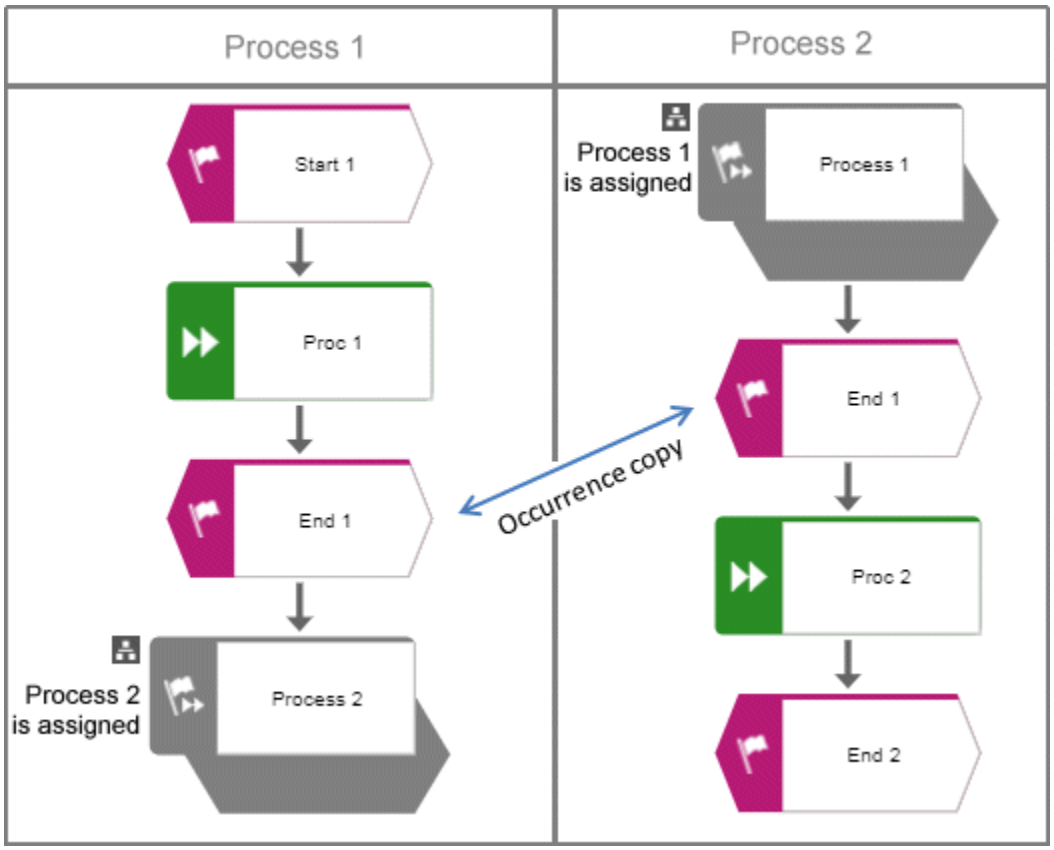
The following graphic shows the connection scheme of the models.



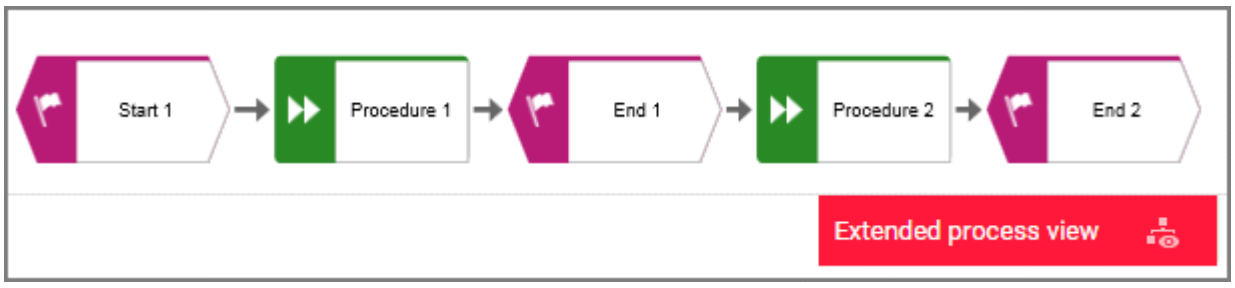
PROCESS INTERFACES WITH ASSIGNED MODELS

- Use an occurrence copy (page 410) of the end event of the first model as start event of the second model.
- In the first model, place a process interface below the end event and assign the second model (page 398) to the process interface.
- In the second model, place a process interface above the start event and assign the first model to the process interface.

The following graphic shows the connection scheme of the models.

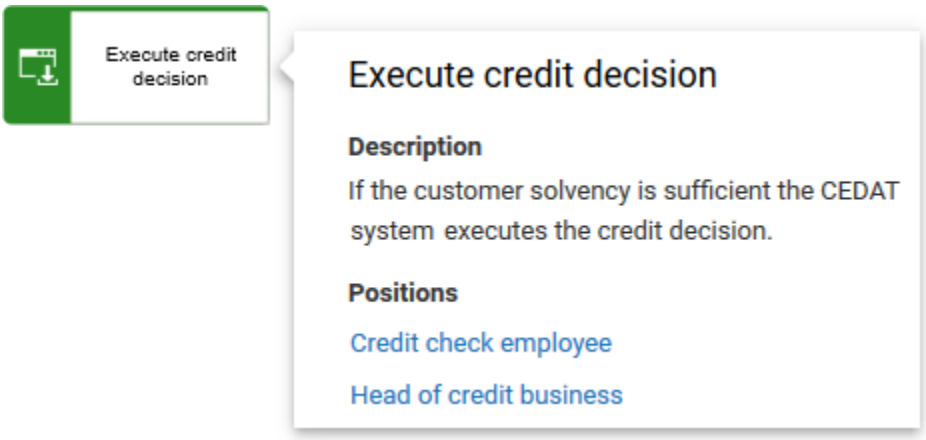


If the **Extended process view** is activated for one of the two models, the following cross-model process is displayed.



3.2.9.6.13.4 For which object types are mini fact sheets displayed?

In the default configuration of the Classic (page 30) and Default (page 47) view, you can display mini fact sheets (page 166). Among other things, you can copy text content to the clipboard, go to the **Overview** fact sheet of the object, or jump to the **Overview** fact sheet of an object whose link is placed in the fact sheet.



In the default configuration, the mini fact sheets are available for the following object types. The attributes listed below are displayed for an object type if a corresponding attribute value has been entered.

APPLICATION SYSTEM TYPE

- Name
- Description
- Occurrences in business processes. These links are listed under the heading **Used in**.
- Person responsible. Clickable if possible.
- Assignments

DATA OBJECTS

The following attributes are displayed, for example, for objects of type **List** and **Information career**.

- Name
- Description
- Links (clickable)
- Assignments

FUNCTION

The same attributes are displayed as for functions in the **Steps** fact sheet.

If, for example, an organizational unit, an application system type and an information carrier are connected to the function, the fact sheet displays the organizational unit under the heading **Departments**, the application system type under **IT systems**, and the information carrier under **Documents**.

PERSON, POSITION, ROLE

- Name
- Description
- Department
- Occurrences in business processes. These links are listed under the heading **Used in**.
- Assignments

RISK

- Name
- Description
- Probability
- Assessment frequency
- Assignments

3.2.9.7 Highlight model items

You can highlight model items to focus on aspects to be monitored (page 184).

3.2.9.7.1 Switch highlighting on

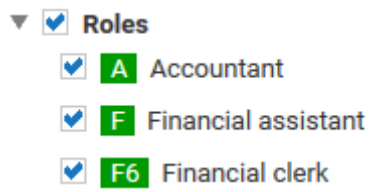
You can highlight model items to focus on aspects to be monitored (page 184). This example illustrates highlighting of a process model in the default view (page 47).

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Open the relevant category and activate the check boxes of the criteria you want to be highlighted. To highlight all criteria of a category, activate the category check box.



The model items that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch the highlighting off (page 178).

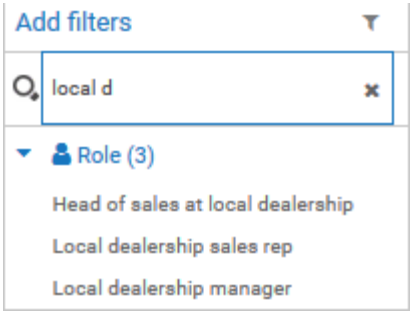
3.2.9.7.2 Switch between default and user-defined highlighting

You can highlight model items to focus on aspects to be monitored (page 184). If you use a view in which the user-defined highlighting is configured, you can switch between default and the user-defined highlighting for process models.

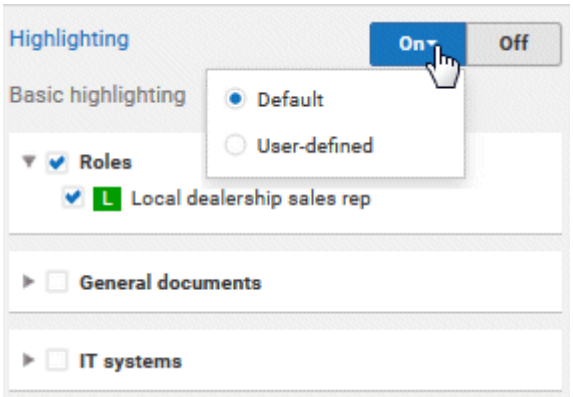
This example illustrates the user-defined highlighting with the **United Motor Group** database.

Procedure

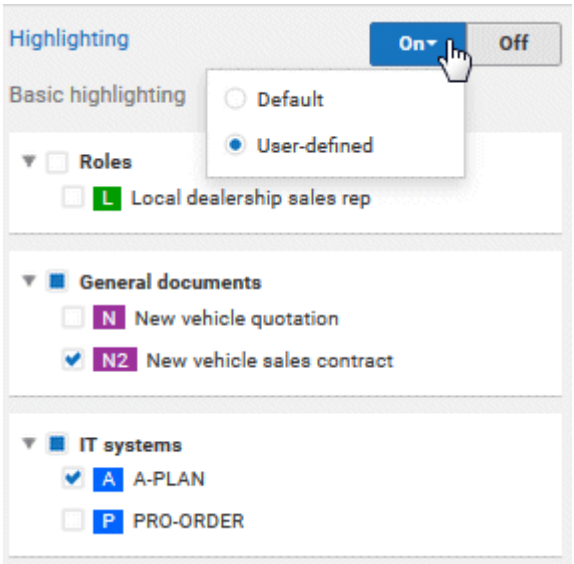
1. Select the **United Motor Group** database (page 66).
2. Click **My content**.
3. In the **Type to find a role or location** field, enter **local d**. Among others, the **Local dealership sales rep** role is listed.



4. Click **Local dealership sales rep**. The role **Local dealership sales rep** is moved to the **Selected filters** area and the processes in which the role occurs are listed.
5. Click the **Contract processing** process. The **Contract processing** fact sheets are displayed.
6. Click the **Diagram** fact sheet.
7. Click **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
8. Click **On** in the **Highlighting** bar. The **Default** option is enabled and the role **Local dealership sales rep** is enabled for highlighting.



9. Open the relevant category and activate the check boxes of the criteria you want to be highlighted. To highlight all criteria of a category, activate the category check box. The user-defined highlighting is enabled.



You can switch between the default and user-defined highlighting.

If, for example, you open another model via the search, the selected highlighting remains active. In addition, the defined highlighting is saved and used when you open the specific model and switch on the highlighting again.

The model items that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch the highlighting off (page 178).

3.2.9.7.3 Switch highlighting off

If you have switched highlighting on (page 162), it remains active for as long as you stay in the view or until you switch highlighting off.

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Highlighting**. The **Highlighting** bar is opened.
6. Click **Off** in the **Highlighting** bar.

The coloring and marks of the model items are removed.

3.2.9.7.4 Highlight the happy and/or exception path

You can highlight the happy path and/or the exception path.

This description is based on the standard configuration. Please note that your system may be configured differently, so that different attributes and values are relevant.

Prerequisites

The highlighting for the happy path and/or exception path is defined for the model you have selected.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Open the **Process paths** category and enable the **HP** check box to highlight the happy path (page 187).
8. Open the **Process paths** category and enable the **EX1** check box to highlight the exception path (page 188).
9. Enable the check box of the **Process paths** category to highlight both the happy path and the exception path (page 189).

You have highlighted the happy path and/or the exception path.

3.2.9.7.5 Highlight IT systems, general documents, roles

You can highlight items of the categories **IT systems**, **General documents**, and **roles**.

This description is based on the standard configuration. Please note that your system may be configured differently, so that different attributes and values are relevant.

Prerequisite

The relevant objects are inserted (page 185) in the selected model.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Activate the check box of the **IT systems** category to highlight Application system objects (page 190) contained in the model.
8. Activate the check box of the **General documents** category to highlight Information carrier objects (page 190) such as **Document**, **Bar code**, and **Folder** contained in the model.
9. Activate the check box of the **Roles** category to highlight Role objects together with connected functions (page 190) contained in the model.

You have highlighted items of the categories **IT systems**, **General documents**, and **Roles**.

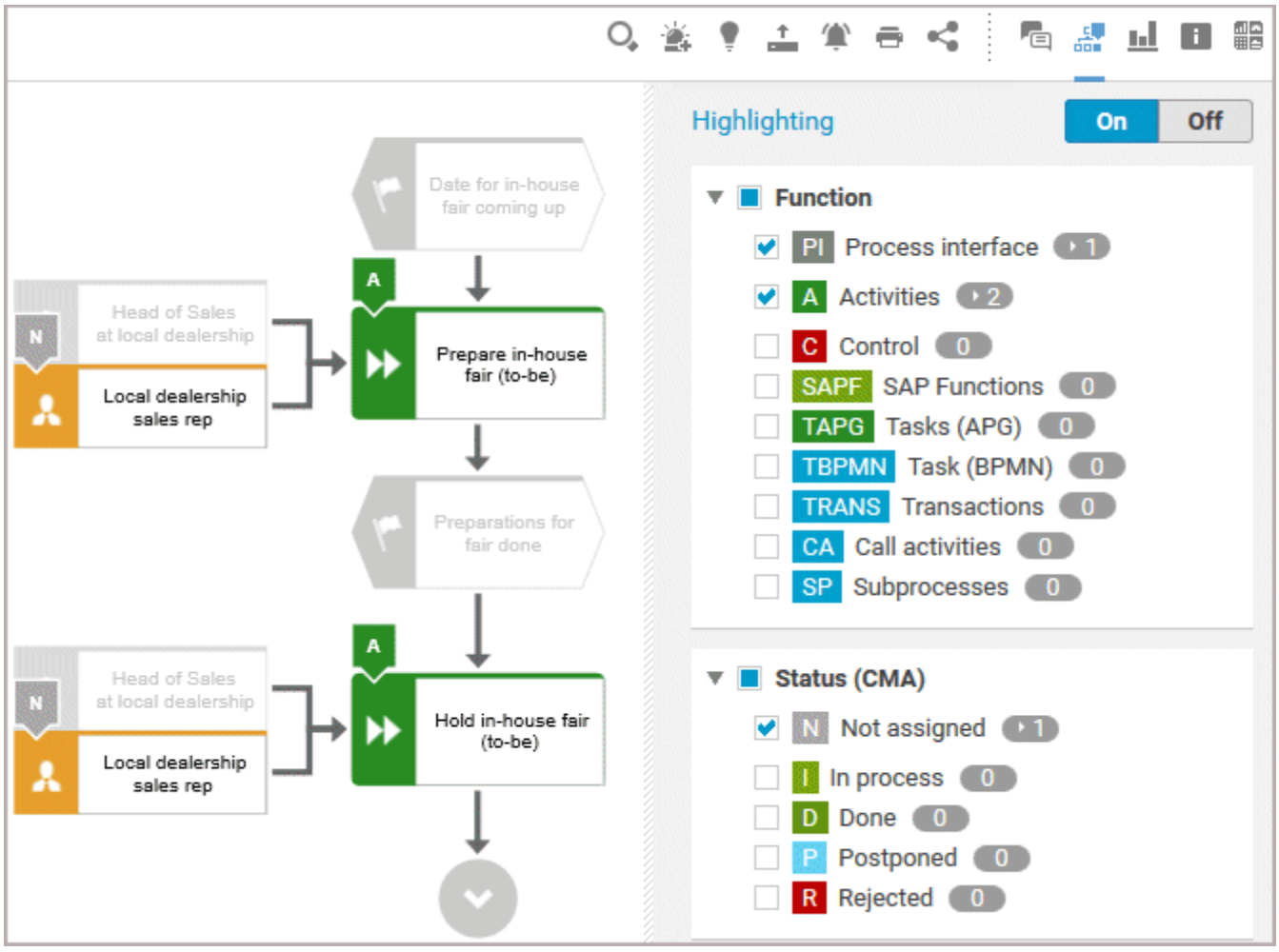
3.2.9.7.6 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

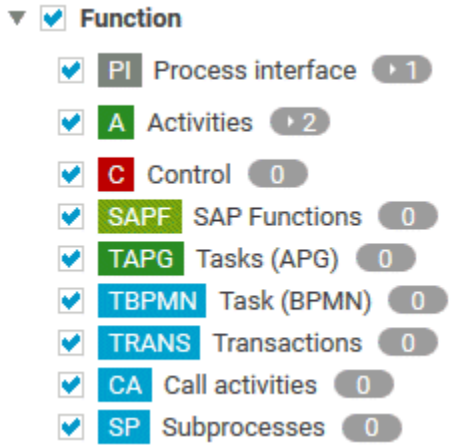
3.2.9.7.6.1 What is highlighting?

Highlighting is the visual emphasis of model content. If you have switched highlighting on (page 162), model items are colored and marked by criterion indicators based on the criteria you selected.

This description is based on the standard configuration. Please note that your system may be configured differently, so that different attributes and values are relevant.



If you switched highlighting on, all highlighting categories such as **Function** and **Status (CMA)** are listed. You can expand the categories to show its criteria. Furthermore, you can activate the check box of every single criterion.

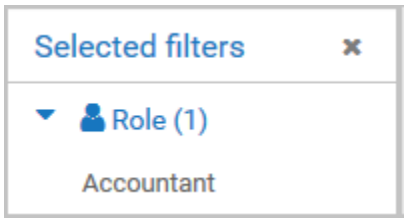


Every criterion has a criterion indicator that is shown in the model if the criterion is activated. Activities, for example, have the criterion indicator **A**. In the **Highlighting** bar, the number of occurrences is displayed behind the criteria. In the image above, activities occur twice (criterion indicator **A**), objects with the Change Management status **Not assigned** (criterion indicator **N**) only once. Note that in the example above, two object symbols have the **N** criterion indicator, although **1** is shown for the **Not assigned** criterion. The reason for this is that these object symbols are occurrence copies of one and the same object.

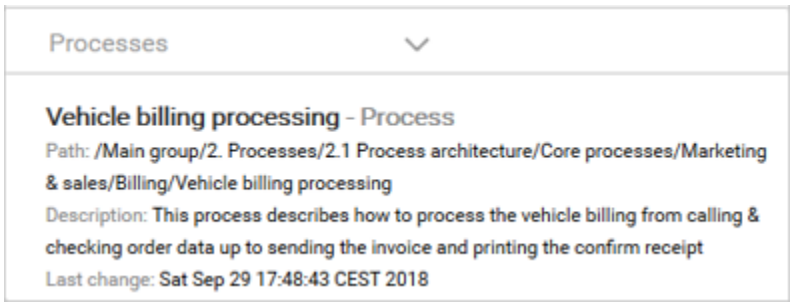
3.2.9.7.6.2 What is role-based highlighting?

In **My content** (page 80), you can select a role filter to restrict the contents of a database to those items in which the role is involved.

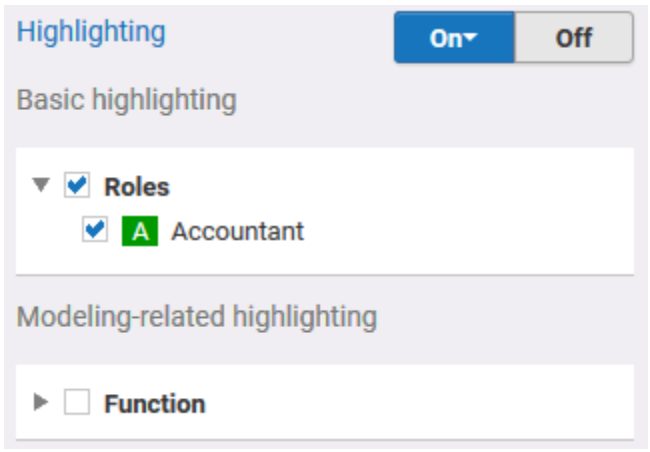
You can, for example, restrict the contents of the database **United Motor Group** to the role **Accountant**.



The model **Vehicle billing processing** is listed.



If you open the fact sheet **Diagram fact** and switch on the highlighting (page 162), the default highlighting is set to highlight the role **Accountant**.



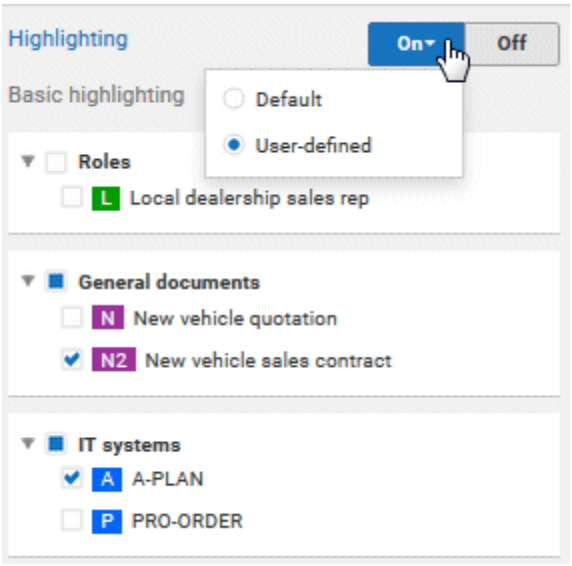
You can activate the check boxes for additional roles and/or functions for highlighting (page 190). In this case, the highlighting switches to **User defined**.

3.2.9.7.6.3 What are default and user-defined highlighting?

When default highlighting is configured or filter-based highlighting is enabled and defined (page 177), a menu is added to the On **On** button to switch between standard and user-defined highlighting.

- Default highlighting: The activated criteria are predefined criteria of the configuration or the activated filter (page 177). These criteria are automatically disabled when a user selects other criteria.
- User-defined: Selection by the user. This state is automatically activated after a user selects criteria. The user selection is saved and can be recalled.

If you use a view in which the user-defined highlighting is configured, you can select own criteria to be highlighted. Then you can switch between default and user-defined highlighting (page 177).



If default highlighting is not configured, the On **On** button has no menu.

The selected highlighting, default or user-defined, remains active. If, for example, you open another model via the search, the selected highlighting remains active. In addition, the defined highlighting is saved and used when you open the specific model and switch on the highlighting again.

3.2.9.7.6.4 Which models, items, and values are relevant for highlighting?

This description is based on the standard configuration. Please note that your system may be configured differently, so that different attributes and values are relevant.

HAPPY PATH AND EXCEPTION PATH

You can use the following model types to define and highlight the happy path and the exception path (page 179):

- EPC
- EPC (column display)
- EPC (horizontal table display)
- EPC (instance)
- EPC (material flow)
- EPC (row display)
- EPC (table display)
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram

The value for the happy path is HAPPY_PATH, the values for the exception paths are EXCEPTION_1 to EXCEPTION_4. Values are case-sensitive, so that only correctly written values are considered for the highlighting.

IT SYSTEMS AND INFORMATION CARRIERS

You can highlight items of the It systems and General documents categories (page 190) in the following models.

All objects of type **Application system**, **Application system type**, **IT software**, and **IT system** are grouped under the **IT systems** category.

All objects of type **Information carrier**, such as **Document**, **Bar code**, **Folder**, and **Letter**, are grouped under the **General document** category.

- EPC
- EPC (column display)
- EPC (horizontal table display)
- EPC (instance)
- EPC (material flow)
- EPC (row display)
- EPC (table display)

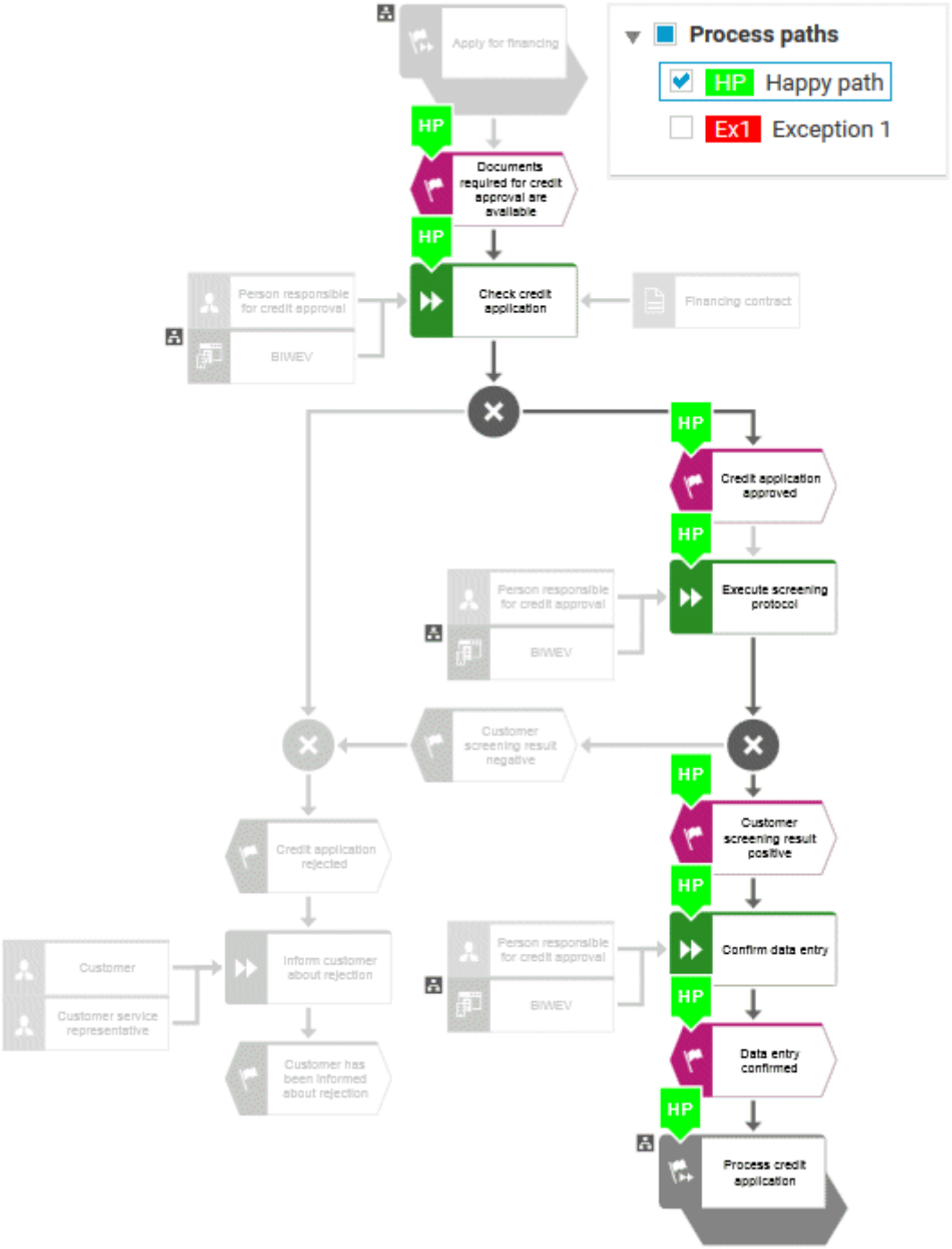
ROLES AND FUNCTIONS

You can highlight roles (page 190) in the following models. When you highlight a role, the executed function and the connection between the two objects are highlighted in addition to the role. If the role is assigned in an assigned Function allocation diagram (FAD) and is not visible in the current model, only the connected function is highlighted.

- EPC
- EPC (column display)
- EPC (horizontal table display)
- EPC (instance)
- EPC (material flow)
- EPC (row display)
- EPC (table display)
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram

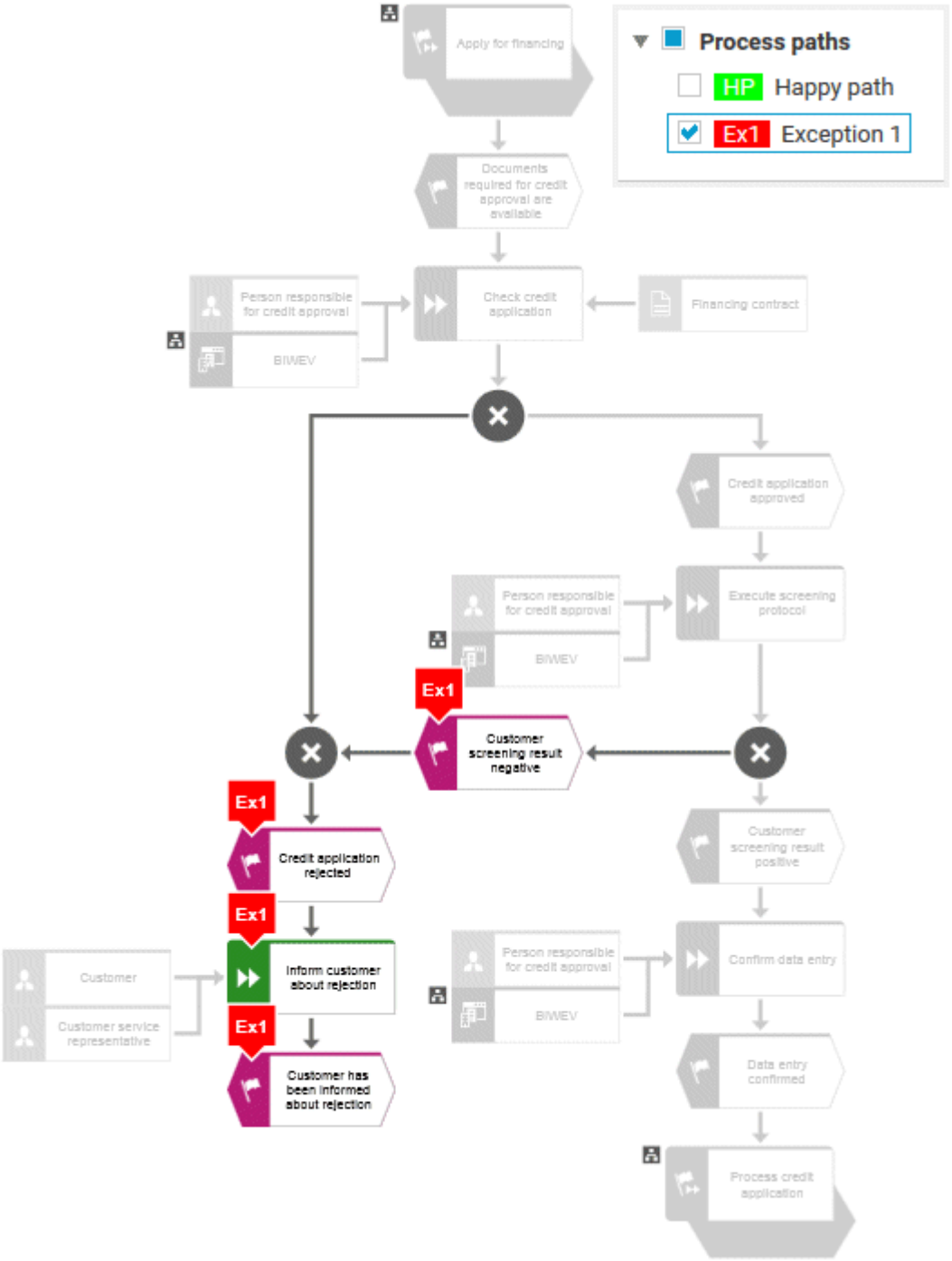
3.2.9.7.6.5 How is the happy path highlighted?

The happy path is highlighted.



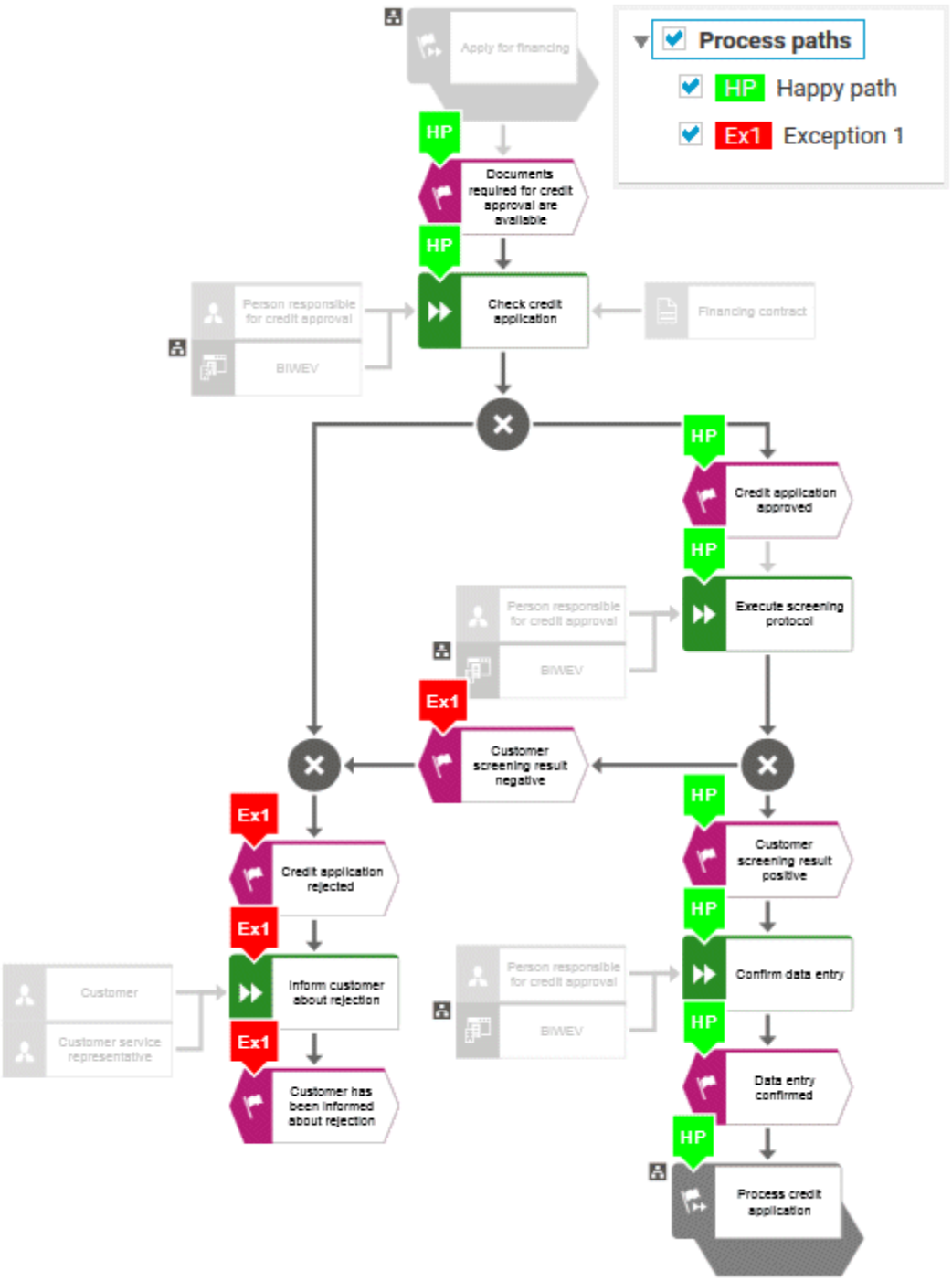
3.2.9.7.6.6 How is the exception path highlighted?

The exception path is highlighted.



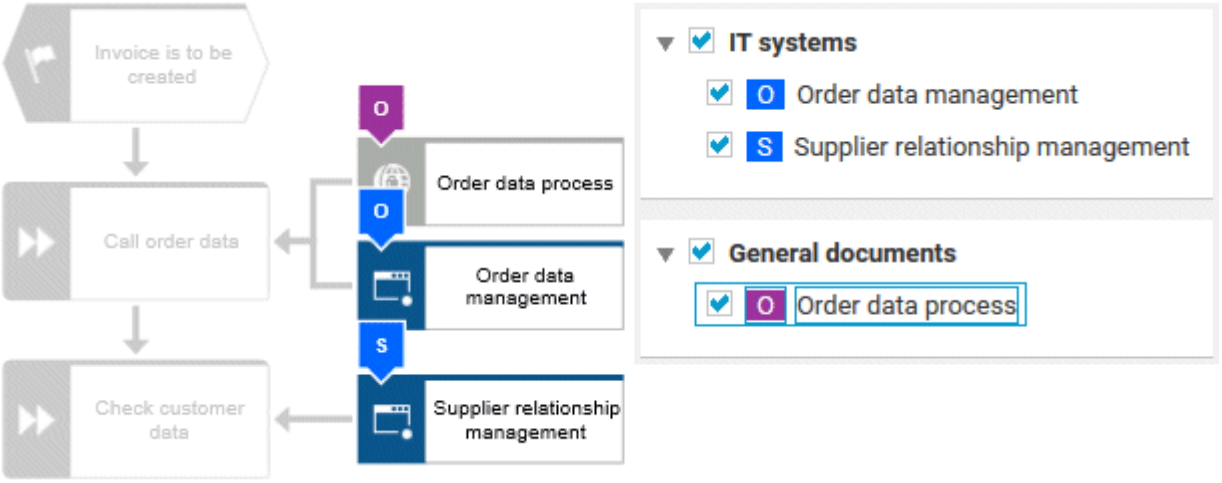
3.2.9.7.6.7 How are the happy path and exception path highlighted?

The happy path and the exception path are highlighted.



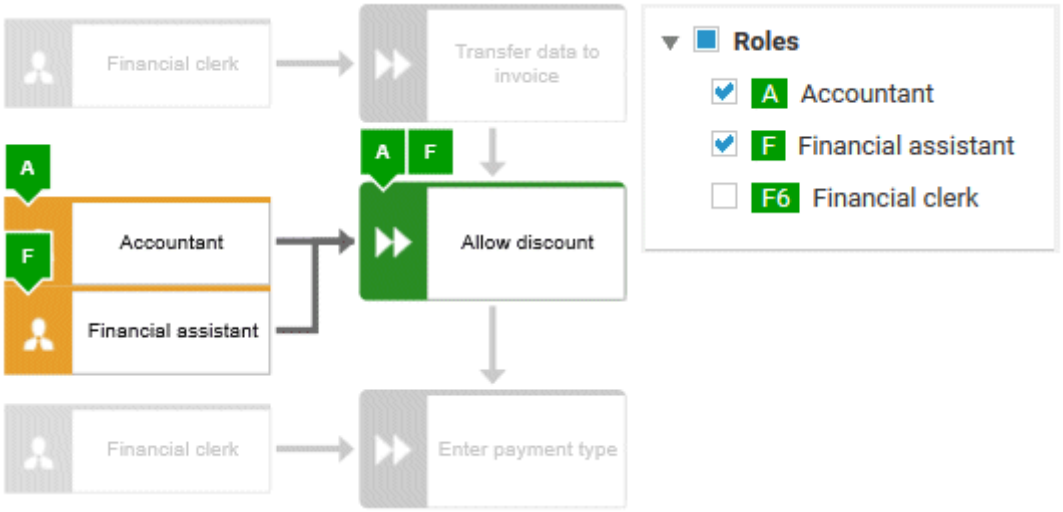
3.2.9.7.6.8 How are IT systems and general documents highlighted?

IT systems (**Application system** and **Application system type** objects) and general documents (**Information carrier** objects) are highlighted.



3.2.9.7.6.9 How are roles and functions highlighted?

Roles and functions are highlighted.



3.2.9.8 Compare model versions

Depending on the setting, you can compare model versions of a database or of models versions stored in different databases.

3.2.9.8.1 Compare model versions

You can compare model versions.

Prerequisite

The database in use is versionable and contains versions.

Procedure

1. Click **Portal** if it is not activated yet.
2. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
3. Navigate to the group where the relevant model is stored.
4. Select the model. The fact sheets (page 404) are shown.
5. Click the **Diagram** fact sheet.
6. Click **Model comparison** in the button bar. The Model comparison bar is opened. Differences found are listed in the **Model comparison** bar and displayed directly in the model.

You have compared a model with its version. You can change the criteria to be compared.

3.2.9.8.2 Control the model comparison for versions

You can specify which differences are listed in the **Model comparison** bar and displayed in the model.

Prerequisite

You have performed a model comparison (page 191).

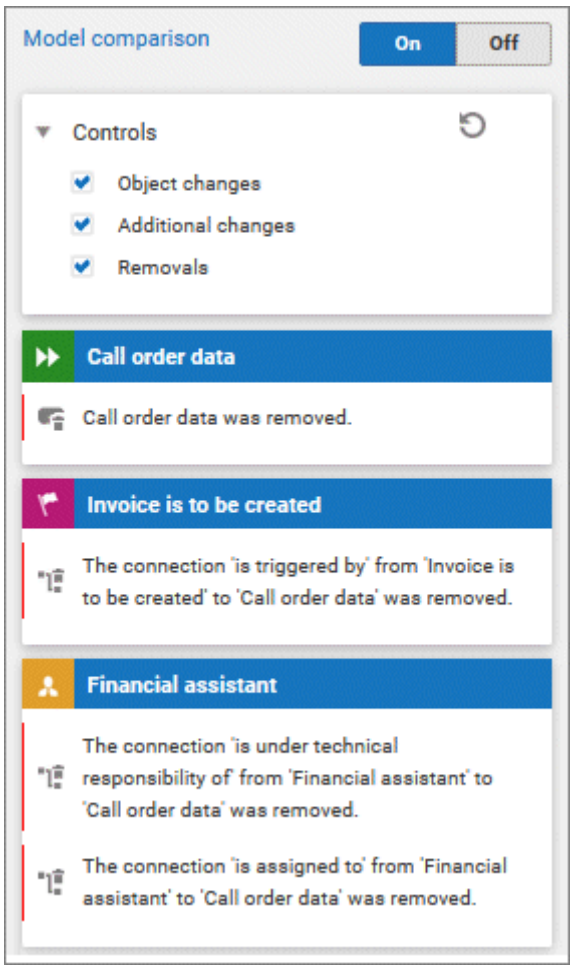
Procedure

1. Enable or disable the comparison of individual criteria (page 195) in the **Controls** area. The model display and the list of differences are updated immediately.
2. If you want to use the default setting again, click **Restore defaults** in the **Controls** area.
3. Click the **Controls** arrow to collapse the area to get more space for the list of differences..
4. Click a specific object in the comparison model (page 400) to display its differences to the visible area of the list of differences.
5. Scroll to a difference in the list of differences and click the object. The object with its differences is highlighted and in the model the object is selected and moved to the visible area.

You have used the **Model comparison** to display specific differences.

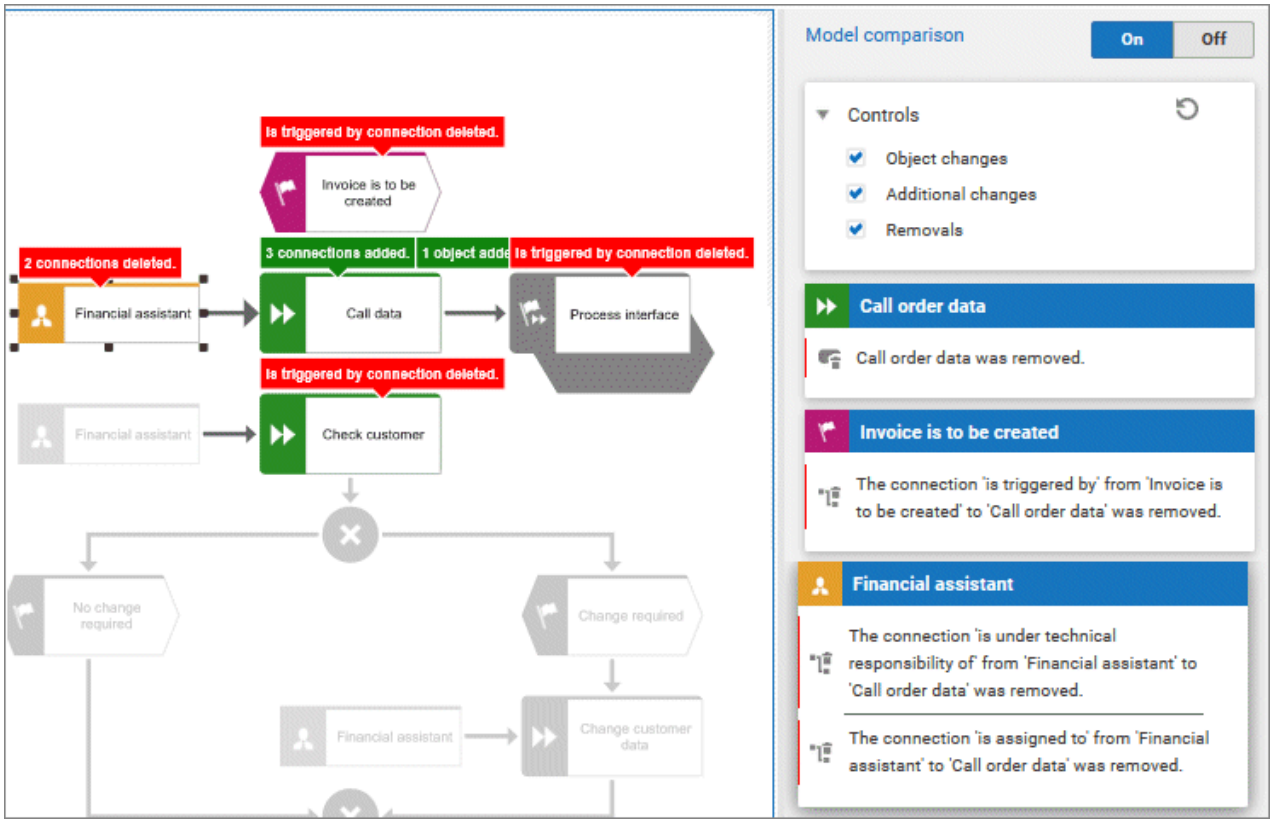
3.2.9.8.3 How are differences in highlighted in the differences list?

The differences displayed (page 195) in the **Model comparison** bar depend on the selected controls and the selected item.



The differences are described.

Select the object whose differences you want to see in detail.



The difference description in the differences bar is moved to the left to highlighting it, in this example, **Financial assistant**.

3.2.9.8.4 Which differences can be found for versions?

Depending the configuration used, you can display a comparison of the following criteria for the compared models.

OBJECT CHANGES

Displays which objects have been changed in the original model.

Examples for object changes:

- The names of objects have been changed.
- The attributes of objects have been added or deleted.

ADDITIONAL CHANGES

Displays additional differences between the original model and the comparison model.

Examples for additional changes:

- Objects have been added.
- Connections have been added.

REMOVALS

Displays items removed from the original model in the list of differences.

3.2.9.9 Table

The following describes the use of tables.

3.2.9.9.1 Open a table

You can open a table for a process model to list the functions and their roles.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. Activate the **Table** fact sheet (page 196).

You opened a table. You can sort the functions (page 198) or open the matrix (page 197).

3.2.9.9.2 Add a column to a table

You can add columns to a table. As long as you navigate in the fact sheets (page 404) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 196).
2. Click **Add column**. The available columns are shown.
3. Click the column name of the column you want to add.

You added a column.

3.2.9.9.3 Remove a column from a table

You can delete columns from a table that you have added before. As long as you navigate in the fact sheets (page 404) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 196).
2. Move the mouse cursor over the column header of the column you want to remove.
3. Click × **Remove** after the column title.

The column is removed without confirmation prompt.

3.2.9.9.4 Open the matrix of a table

You can open a matrix based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Procedure

1. Activate the **Table** fact sheet (page 196).
2. Click **Matrix**. The interrelations between the individual roles and functions are transparently displayed.
3. Click **Add column** to extend the table. You can delete added columns at any time.

You have opened a matrix based on the **Table** fact sheet.

3.2.9.9.5 Add a column to a matrix

You can add columns to a matrix. As long as you navigate in the fact sheets (page 404) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 196).
2. Click **Matrix**.
3. Click **Add column**. The available columns are shown.
4. Click the column name of the column you want to add.

You added a column.

3.2.9.9.6 Remove a column from a matrix

You can delete columns from a matrix that you have added before. As long as you navigate in the fact sheets (page 404) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 196).
2. Click **Matrix**.
3. Move the mouse cursor over the column header of the column you want to remove.
4. Click **Remove** after the column title.

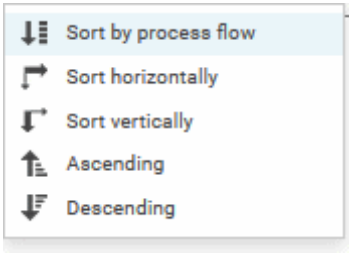
The column is removed without confirmation prompt.

3.2.9.9.7 Sort functions of fact sheets

You can sort the functions of fact sheets (page 404), for example, of the Table or RACI fact sheet.

Procedure

1. Activate the **Table** fact sheet (page 196).
2. Click the column title **Functions**. The sort options are displayed.



3. Click the relevant sort option. The functions are resorted.

You have re-sorted the functions.

3.2.9.10 Use matrix models

You can display a matrix model in ARIS Connect.

In a model of the **Matrix model** type, you can represent object connections. You can use existing objects or create new objects. You can conveniently select objects from the entire database. You can view all existing connections.

AREAS OF USE

- Assessment of the degree to which markets are opened up, displayed in a table (business segment matrix)
- Representation of technical and disciplinary structures and their dependencies
- Representation of hierarchies
- Quick and clear management of connections between objects
- Specify connections easily and efficiently, and create models later using model generation

3.2.9.10.1 Display a matrix model in ARIS Connect

You can display a matrix model in ARIS Connect.

Prerequisite

You have at least the **ARIS Connect Viewer** license privilege.

Procedure

1. Click **Portal** if it is not activated yet.
2. Click **Groups**.
3. Navigate to the group containing the relevant model.
4. Click the name of the matrix model.
5. Click the **Matrix** fact sheet to display the matrix model.

The matrix model is displayed.

3.2.9.10.2 Display use of connections for a matrix model in ARIS Connect

You can obtain information about the connections used in a matrix model.

Procedure

1. Open a matrix model in ARIS Connect. (page 199)
2. Place the mouse cursor over a connection cell.

The relevant connection (page 200) used in the matrix model is displayed as a tooltip. If the two object symbols are connected with more than one connection, a list of connections is displayed.

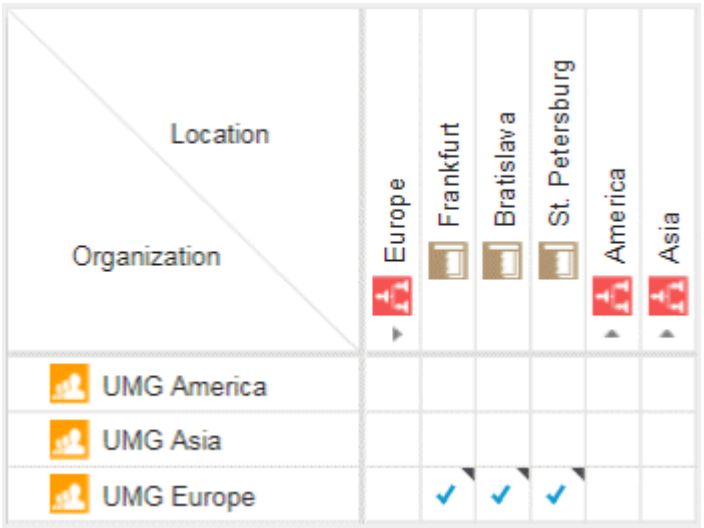
3.2.9.10.3 Show/Hide hierarchies in a matrix model in ARIS Connect

You can show or hide hierarchies in a matrix model.

Procedure

1. Open a matrix model in ARIS Connect. (page 199)
2. Click the arrow next to the object symbol, for example the ▶ **Right arrow**, to expand or collapse the hierarchy. The hierarchy is shown or hidden accordingly.

The hierarchy is shown or hidden.



3.2.9.10.4 How are connections displayed?

In general, check marks indicate existing connections between objects in the matrix model. An asterisk indicates that there is more than one connection between two objects. The following display options are also available:

INDICATION OF THE DIRECTION OF THE CONNECTION

In the matrix model, a small arrow indicates the direction of a connection.

✓	Indicates the direction from an icon placed in the column header to an icon placed in the row header.
✓	Indicates the direction from an icon placed in the row header to an icon placed in the column header.

INDICATION OF ABBREVIATIONS

If an abbreviation is defined, this abbreviation is displayed instead of the check mark.

3.2.9.10.5 How to control the matrix using the keyboard

You can control the matrix using the keyboard:

Shortcut	Selection	Action
+ key	Matrix	Zooms in the matrix.
- key	Matrix	Zooms out the matrix.
0	Matrix	Set zoom to 100 %
Home	Matrix	Scrolls to first cell of a column but does not change the selection
End	Matrix	Scrolls to last cell of a column but does not change the selection
Page up	Matrix	Scrolls page-wise up but does not change the selection
Page down	Matrix	Scrolls page-wise down but does not change the selection
Shift + Page up	Matrix	Scrolls page wise-left but does not change the selection
Shift + Page down	Matrix	Scrolls page-wise right but does not change the selection
Arrow keys	Matrix	Moves to the next/previous symbol in arrow direction.
Enter	Cell	Collapses or expands hierarchically grouped objects
Space	Cell	Collapses or expands hierarchically grouped objects
Backspace	Cell	Deletes the selected cells.

3.2.10 Use documents

ARIS document storage enables you to propose documents or to submit a change request for a document. You can use further functionality in the repository.

3.2.10.1 Propose a document to a model

You can submit new documents on ARIS Connect content that is evaluated by the person responsible for the content and that may be linked to the contents. We strongly recommend that you check documents for malicious software before uploading.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- The **Person responsible** document attribute must be specified for the relevant document with a user name that exists in user management.
- The person responsible must have the **ARIS Connect Viewer** or **ARIS Connect Designer** license.

Procedure

1. Click a model.
2. Click **Add**.
3. Click **Upload new document**. The **Upload new document** dialog opens.
4. Select the documents you want to submit.
5. Click **Upload**.
6. Enable the document and click **OK**.

The person responsible for the contents receives an e-mail and a task is generated. If the person responsible accepts the task, he can display the properties of the document. The properties contain a link and he can download the relevant document to check it. The person responsible can accept or reject the document and complete the task. He can now add the document to the model or object.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.10.2 Propose a document to an object

You can submit new documents on ARIS Connect content that is evaluated by the person responsible for the content and that may be linked to the contents.

Prerequisite

- You have at least the **ARIS Connect Viewer** license.
- The **Person responsible** document attribute must be specified for the relevant document with a user name that exists in user management.
- The person responsible must have the **ARIS Connect Viewer** or **ARIS Connect Designer** license.

Procedure

1. Click a model.
2. Select an object.
3. Click **Propose document**. The **Submit new document** dialog opens.
4. Select the documents you want to submit.
5. Click **Send**.

The person responsible for the contents receives an e-mail and a task is generated. If the person responsible accepts the task, he can display the properties of the document. The properties contain a link and he can download the relevant document to check it. The person responsible can accept or reject the document and complete the task. He can now add the document to the model or object.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.10.3 Submit a change request for a document

You can send change requests for documents to the document manager for documents in ARIS Connect.

Prerequisite

You have the **ARIS Connect Designer** license.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Open the model that contains the document you want to submit a change request for.
4. Click **Diagram** if not enabled yet.
5. Click **Edit > Edit model**.
6. Click **Properties**.
7. Activate the **Documents** tab.
8. Select the document for which you want to submit a change request.
9. Click **Submit change request**. The corresponding dialog opens.
10. Enter a title and a description for your request.
11. Select the priority with which the request is to be handled.
12. Click **Send**.

You will automatically receive a confirmation notification.

The document manager receives the change request by e-mail with a link to the relevant document and a link to edit the associated task in My tasks.

Once the document manager has processed the request, the applicant receives a message by e-mail.

If the change request is accepted, the person who is to implement the changes receives an e-mail including a link to the associated task in My tasks and the information added. After processing and approval - or rejection -, the applicant receives an e-mail including the information that the change requests have been implemented - or rejected.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.10.4 What is ARIS document storage?

ARIS document storage is a repository where documents can be stored temporarily or permanently to use them, for example, to specify objects and models and as a basis for displaying dashboards.

Access restriction on folder level is possible in ARIS document storage.

The documents saved there can be used during runtime of an executable process, for example, attached to an e-mail.

All file formats are allowed for documents.

Temporary documents are deleted automatically after the executable process is terminated. Permanent documents are kept until they are deleted explicitly.

You can work with documents in the repository or in the portal (page 202).

3.2.11 Contribute as a viewer

You can change values of specific model types and objects (page 215), create new or reuse existing items (page 207), as well as delete items (page 209) in the **Portal**.

Please note that the description is based on the sample configuration supplied with the **Classic** view of ARIS Connect. In your installation other items may have been configured to be editable and the editing options for items may be different.

3.2.11.1 Change values of items

You can change values of items (page 215) in the **Portal**.

Prerequisites

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- The **Workspace** database content was published for versionable databases.
- You have at least the **Write** access privilege for the items you want to edit.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Click **Edit >** **Contribute**. Edit mode (page 214) is enabled.
5. Navigate (page 67) to the required model based on a model type that you, as a contributor, can change (page 215).
6. On the **Overview** fact sheet, select the item you want to edit.
7. Change the relevant attribute. Depending on the attribute, various editing options (page 218) are available.
8. Confirm your changes.

Your changes are saved.

Text formatting is ignored and cannot be assigned. If you are expected to enter numbers, the field is colored red (page 218) if you do not enter a numerical value.

3.2.11.2 Create or reuse items in a table

In the portal, you can create new or reuse existing items.

The following description refers to items in a table (page 218). It uses the example of an object of the **Risk** type.

Prerequisites

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- The **Workspace** database content was published for versionable databases.
- You have at least the **Write** access privilege for the items you want to edit.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Click **Edit** > **Contribute**. Edit mode (page 214) is enabled.
5. Navigate (page 67) to the required model based on a model type that you, as a contributor, can change (page 215).
6. On the **Overview** fact sheet, select the item you want to edit.
7. Click the object to which you want to assign additional roles. To add objects of the **Role** type to the **Groups** table, you can select a risk from the sample configuration supplied.
8. In the **Activities** area, click the **plus sign**. The input box opens.
9. Enter the name of the role.
   If a role with the same name already exists, it is offered to you for selection. In addition, this name is listed with **(new item)** added to it.
10. To create a new role and assign the risk to it, click the entry with **(new item)** added to it. To reuse an existing role and assign the risk to it, click the other entry.
11. Click **Change**. A completion message is displayed.

The new role was created (page 223) and added to the list, or the existing role will be reused. If you selected a role to which the risk was already assigned, no new entry is added to the table.

3.2.11.3 Create or reuse items in a list

In the **Portal**, you can create new or reuse existing items.

The following description refers to items in a list (page 218). It uses the example of an application system type diagram.

Please note that new items you may have created are added to the diagram. At the same time, a new layout is automatically generated for the diagram. As a consequence, the arrangement of items in the diagram may differ from the original arrangement. If required, a user with the **ARIS Connect Designer** license privilege can adapt the layout of the diagram in ARIS Connect Designer.

Prerequisites

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- The **Workspace** database content was published for versionable databases.
- You have at least the **Write** access privilege for the items you want to edit.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Click **Edit > Contribute**. Edit mode (page 214) is enabled.
5. Navigate (page 67) to the required diagram and select it.
   To add objects of the **Application system type** type to the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
6. Activate the **Overview** fact sheet if it is not activated yet.
7. Click the **Subordinate IT systems** edit box. Existing objects are displayed one next to the other and the option **Insert item** is shown.
8. Enter the name of the required application system type.
   If an application system type with the same name already exists, it is offered to you for selection. In addition, this name is listed with **(new item)** added to it.
9. To create a new application system, click the entry with **(new item)** added to it.
   To reuse an existing application system type, click the other entry.
10. Enter other names for additional application system types.
11. Click **Change**. A confirmation prompt is shown listing all new application system types for confirmation.
12. Click **OK**.

New application system types (page 223) are added to the list, or existing application system types will be reused. Occurrences of new application system types are placed in the diagram window.

3.2.11.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 218). It uses the example of an object of the **Risk** type.

Prerequisites

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- The **Workspace** database content was published for versionable databases.
- You have at least the **Delete** access privilege for the items you want to delete.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Click **Edit >** **Contribute**. Edit mode (page 214) is enabled.
5. Navigate (page 67) to the required diagram and select it.
6. Click the object whose associated item you want to delete. To delete objects of the **Role** type from the **Groups** table, you can select a risk from the sample configuration supplied.
7. In the **Groups** area, click **Delete** for the role from which you want to remove the risk assignment. A confirmation prompt is shown.
8. Click **OK** to confirm the prompt if you really want to delete the assignment to the role.

The assignment to the role is then deleted. If the assignment was represented as a connection in diagrams, this connection will be deleted from these diagrams. Definitions are retained in the database.

3.2.11.5 Delete items from lists

In the **Portal**, you can delete items from lists and thus from diagrams.

The following description refers to items in a list (page 218). It uses the example of an application system type diagram.

Prerequisites

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- The **Workspace** database content was published for versionable databases.
- You have at least the **Delete** access privilege for the items you want to delete.

Warning

Please note that the deletion of items affects the layout of diagrams. Due to the delete operation, a new layout is automatically generated for the current diagram. As a consequence, the arrangement of items in the diagram may differ from the original arrangement. If required, a user with the **ARIS Connect Designer** license privilege can adapt the layout of the diagram in ARIS Connect Designer.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Click **Edit >** **Contribute**. Edit mode (page 214) is enabled.
5. Navigate (page 67) to the required diagram and select it. To delete objects of the **Application system type** type from the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
6. Activate the **Overview** fact sheet if it is not activated yet.
7. Click the edit box in the **Subordinate IT systems** area. Existing objects are displayed one next to the other with a delete sign (x) added to them.
8. Click the delete sign for the application system types you want to delete from the diagram.
9. Click **Change**. A confirmation prompt is displayed listing all application system types to be deleted.
10. Click **OK**.

The application system types are deleted from the list, and also from the application system type diagram together with their connections. Definitions are retained in the database.

3.2.11.6 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.11.6.1 What is ARIS Viewer Contribution?

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you are able to change items and values for the following predefined items in the **Portal**. 'Predefined' means that these items and their values were configured to be editable in the program by default.

This means that not all items of the following model and object types can be changed. Only those can be changed that were designed to be editable by the underlying concept and were set up accordingly by the configuration.

Please note that this is a sample configuration, which means that other items may have been configured to be editable in your installation.

MODEL TYPES

- Application system type diagram
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Business controls diagram
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram
- EPC
- EPC (material flow)
- EPC (column display)
- EPC (table display)
- EPC (horizontal table display)
- EPC (row display)
- Function allocation diagram
- Organizational chart
- Process schedule
- Risk diagram
- KPI allocation diagram

OBJECT TYPES

- Application system
- Application system class
- Application system type
- Cluster/Data model
- Entity type
- Event
- Technical term
- Function
- Information carrier
- KPI instance
- Class
- Lane
- List
- Message
- Organizational unit
- Participant
- Person
- Risk
- Risk category
- Role
- Location
- Position
- System organizational unit
- System organizational unit type
- Test definition

ATTRIBUTES

ARIS Viewer Contribution enables you to edit attributes (page 218) that are based on the following base types:

- Boolean
- Value
- Floating point number domain
- Integer domain
- Floating point number
- Integer
- Date
- One-liner
- Multi-line text
- Link/File

Text formatting is ignored and cannot be assigned. If you are expected to enter numbers, the field is colored red (page 218) if you do not enter a numerical value.

Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

3.2.11.6.2 Requirements for Contribution

For a user to be able to work with ARIS Viewer Contribution the following requirements must be met:

- The user has the **ARIS Connect Viewer** and **Contribution** license privileges.
- The **Workspace** database content was published for versionable databases.
- The user has at least the **Write** access privilege for the group content of the database to be edited. Deleting items requires the **Delete** access privilege.
- The administrator has activated the Classic view, Default view, or a view derived from these views.

3.2.11.6.3 How to identify whether the edit mode is active

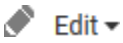
The edit mode is displayed in the header.

If it is not active:

For users with **Contribution** license, only **Edit** is displayed:

Clicking **Edit** enables the edit mode.

For users with **ARIS Connect Designer** license, the **Edit** symbol is extended by a down arrow:



Clicking **Edit > Contribute** enables the edit mode.

If the edit mode is active, this is shown in the header:

Clicking **Exit edit mode** disables the edit mode.

The availability of various edit boxes (page 218) is another clear indication that the edit mode is active.

3.2.11.6.4 Which items are you allowed to change using the Contribution privilege?

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you are able to change items and values for the following predefined items in the **Portal**. 'Predefined' means that these items and their values were configured to be editable in the program by default.

This means that not all items of the following model and object types can be changed. Only those can be changed that were designed to be editable by the underlying concept and were set up accordingly by the configuration.

Please note that this is a sample configuration, which means that other items may have been configured to be editable in your installation.

MODEL TYPES

- Application system type diagram
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Business controls diagram
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram
- EPC
- EPC (material flow)
- EPC (column display)
- EPC (table display)
- EPC (horizontal table display)
- EPC (row display)
- Function allocation diagram
- Organizational chart
- Process schedule
- Risk diagram
- KPI allocation diagram

OBJECT TYPES

- Application system
- Application system class
- Application system type
- Cluster/Data model
- Entity type
- Event
- Technical term
- Function
- Information carrier
- KPI instance
- Class
- Lane
- List
- Message
- Organizational unit
- Participant
- Person
- Risk
- Risk category
- Role
- Location
- Position
- System organizational unit
- System organizational unit type
- Test definition

3.2.11.6.5 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 218) that are based on the following base types:

- Boolean
- Value
- Floating point number domain
- Integer domain
- Floating point number
- Integer
- Date
- One-liner
- Multi-line text
- Link/File

Text formatting is ignored and cannot be assigned. If you are expected to enter numbers, the field is colored red (page 218) if you do not enter a numerical value.

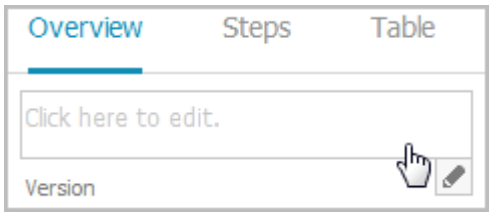
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

3.2.11.6.6 Which editing options are available?

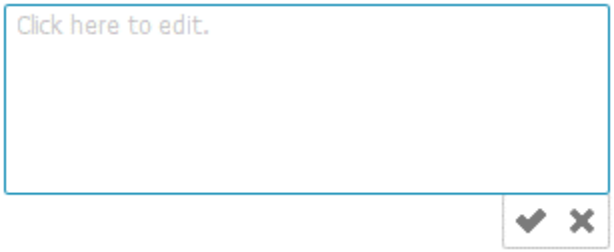
Depending on the attribute (page 217), various editing options are available.

EDIT BOX

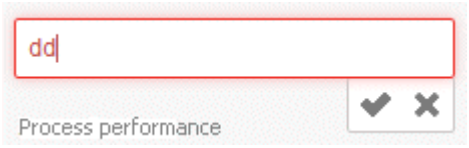
If the edit mode is active (page 214), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 206), the hint **Click here to edit.** is displayed:



Clicking in the field will open it for editing:



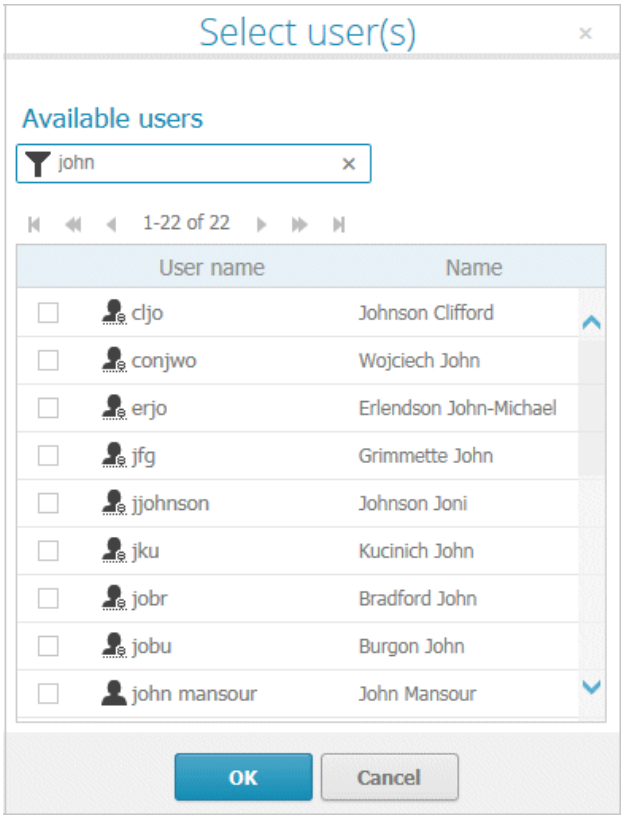
The field indicates whether or not the input corresponds to the type expected. If an entry differs from the type expected, the field is displayed with a red border:



If the entry is correct, the field is displayed without a special characteristic:

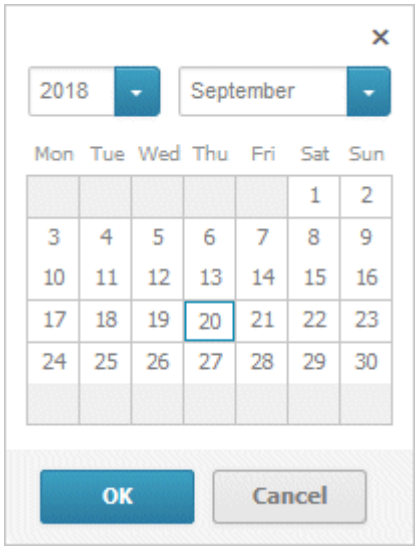
SELECT USER(S)

If you want to select a user, you will be offered a list of the users logged in to the system for you to select in a dialog, for example, for the **Responsible** attribute:



DATE INPUT

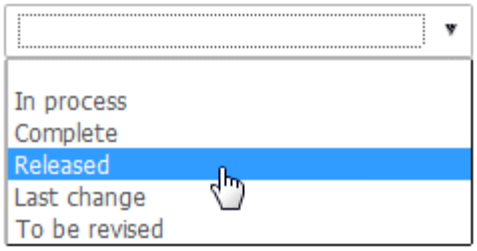
You can enter dates using the calendar. It opens when you click in the edit box:



DROP-DOWN LIST BOX

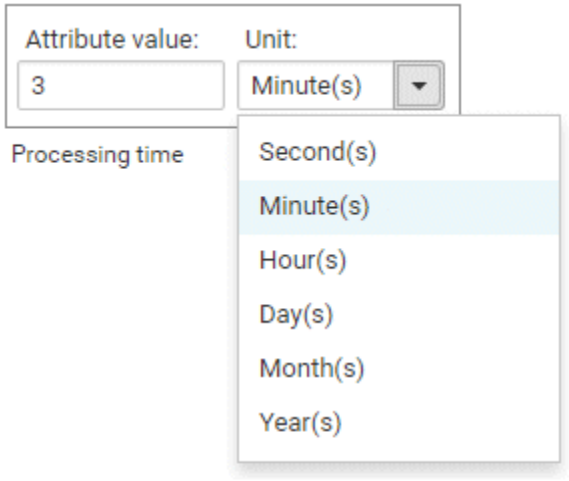
For attributes that require the entry of specific values or of Boolean attributes, you can select the appropriate entry, for example, for the **Model status** attribute:

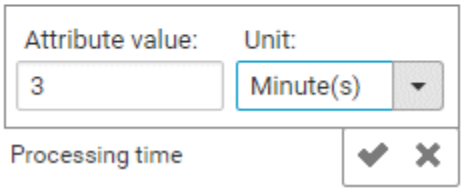
Clicking in the field will offer possible values for selection:



COMBO BOX

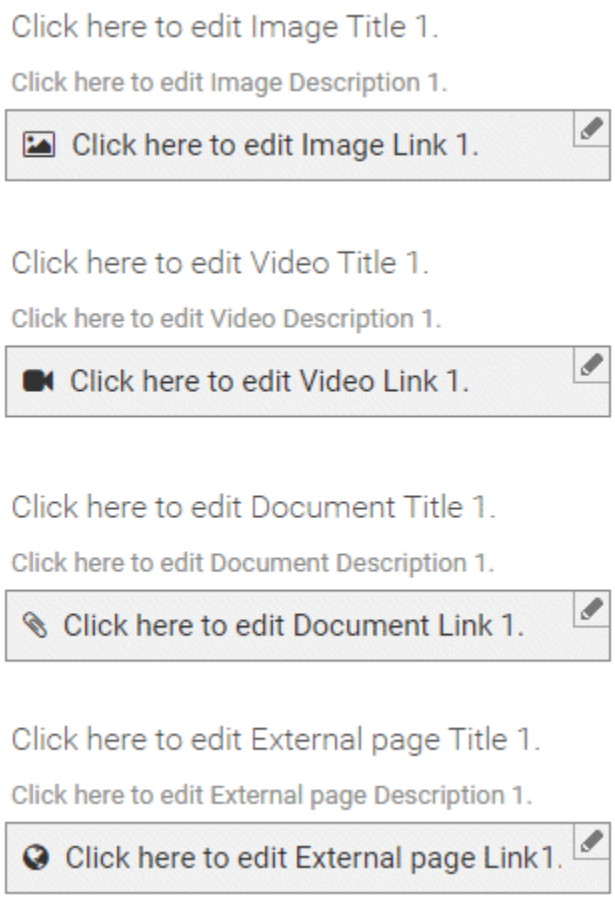
You can use a combo box to edit composite attributes. This makes it possible, for example, to assign values to a unit.





LINK ATTRIBUTE BOXES

You can use link attribute boxes to link images, videos, documents, and external pages to the current item.

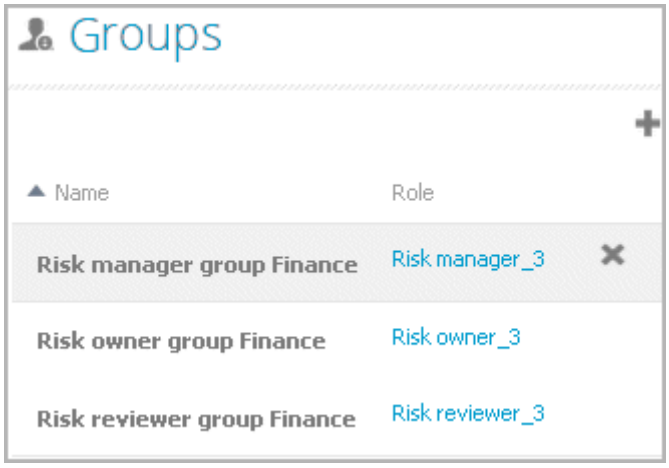


If you click in the title, description, or link row of a link attribute, the appropriate edit field opens and you can enter the relevant details.

CREATE AND REUSE OBJECTS

TABLE

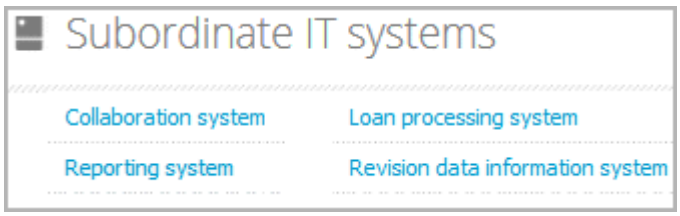
Existing objects are listed in a table. Additional information is displayed in the individual rows:



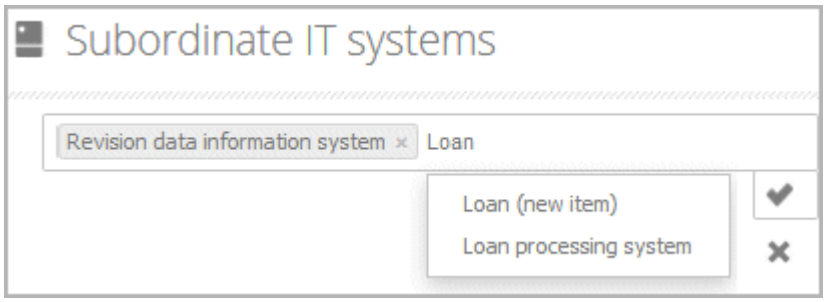
You can add individual objects to the table (page 207) or remove objects from the table (page 209).

LIST

Existing objects are displayed in a list:



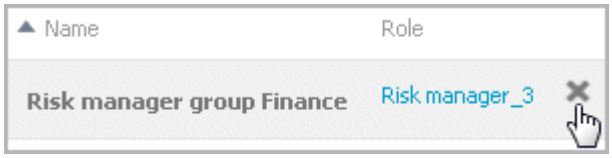
You can create new or reuse existing objects. It is possible to add multiple items at once. Click in the field and enter the names for the required items. Once your input is complete, click ✔ **Change**:



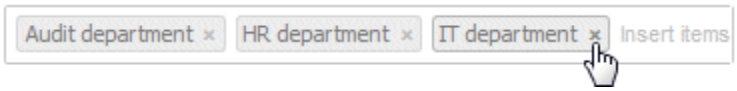
DELETE OBJECTS

You can delete objects from tables (page 209) and lists (page 210):

TABLE



LIST



3.2.11.6.7 Where to save new items

When a new item is created by a user with the **Contribution** license privilege, its definition is saved to the **Contribution** subgroup of the main group.

Contribution is further divided into other groups. For example, functions are saved to **Contribution / Activities**, while organizational units will be stored under **Contribution / Departments**.

Any group that does not yet exist in the database is automatically created.

3.2.12 Use RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process. RACI is short for **R**esponsible, **A**ccountable, **C**onsulted, and **I**nformed.

The matrix shows which organizational unit participates in activities of a process and in what manner:

- **R**esponsible indicates who assumes execution responsibility. It shows who is responsible for performing an activity and who actually performs it, but also who assumes the disciplinary responsibility.
- **A**ccountable identifies the person ultimately answerable for the correct and thorough completion of a task. Thus, 'Accountable' may be the one in charge of managing the costs, that is, the one who assumes project budget responsibility. The **decides on** and **accepts** connections are evaluated in order to mark this responsibility.
- **C**onsulted shows who has a consulting role. This organizational unit - typically a group of subject matter experts - is asked for advice prior to a final decision being made or a final action being taken.
- **I**nformed specifies who must be informed. It indicates who is kept up to date on the progress or completion of a task.

If you use the corresponding objects and connections in the process models, these can be evaluated by means of the RACI matrix, which is output in ARIS Connect.

3.2.12.1 Display RACI matrix

A RACI matrix can display the activities of a process and the associated organizational responsibilities.

Procedure

1. Click **Portal** if it is not activated yet.
2. If your administrator has published multiple databases, select the required database by clicking the current database name next to the database symbol and then clicking the name of the relevant database.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Show the **Navigation** bar if it is not visible yet.
5. In the **Navigation**, open the group in which the required process is stored.
6. Click the name of the process for which you want to display the RACI matrix. The **RACI** fact sheet is shown.
7. Click **RACI**.

The RACI matrix is displayed for the process model you have selected. The functions of the process are arranged in rows, the organizational elements are arranged in columns. In the portal, process participations are displayed by default as a RACI matrix in Classic view (page 33) and Default view (page 50). You can configure the representation as RASCI matrix. Please contact your local Software AG sales organization (http://www.softwareag.com).

You can use the RA(S)CI - Output organizational participations in processes (page 153) report to output the RACI matrix in Microsoft® Excel format from an open process model. By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g_bRASCI** variable to **true**.

3.2.13 Use Mini workflows

Mini workflows are some work steps that have to be processed from different people. The flow of the work steps is based on the information provided by the content.

If, for example, a change request for a model is submitted, the request is sent via e-mail to the person who is extracted from the **Person responsible** attribute of the relevant model. In My tasks, the request is entered as task. There, the Person responsible can assess if the change should be made.

3.2.13.1 Share model

You can share models with other users.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Click the model you want to send to another user.
6. In the button bar, click **Share** > **Share model**. The corresponding dialog opens.
7. Select the user you want to share the model with.
8. Enable **Send copy to me** to receive a copy of the message, if required.
9. You can also enter a subject and a comment.
10. Click **Send**.

The selected user receives an e-mail containing the information you entered and a link to the corresponding model.

All users can select the language to be used for the notification in their profile in ARIS Connect.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.13.2 Submit change request

You can send change requests for models to the person responsible.

Prerequisites

- You have at least the **ARIS Connect Viewer** license privilege.
- The **Person responsible** model attribute must be specified for the relevant model with a user name that exists in the user management.
- The models are saved in a versionable database.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Click the model for which you want to submit a change request.
6. In the button bar, click **Submit change request**. The corresponding dialog opens.
7. Enter a title and a description for your request.
8. Select the priority with which the request is to be handled.
9. Add any relevant documents, graphics, etc. that could be used as a basis for editing.
10. Click **Send**. A completion message is displayed.
11. Click **OK**.

The person responsible receives the change request by e-mail with a link to the relevant model and a link to edit the associated task in My tasks.

Once the person responsible has processed the request, the applicant receives a message by e-mail.

As soon as the first change request is made, the **ARIS Connect Governance Inbox** database is automatically created in ARIS. It contains a Requirements inbox for each person responsible with a model of the **Requirements tree** type. An object of the **Requirement** type is created for each change request. As the process continues, the realization status of the object is automatically changed depending on which status the person responsible has selected (**Approve**, **Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

All users can select the language to be used for the notification in their profile in ARIS Connect.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.13.3 Request feedback on processes

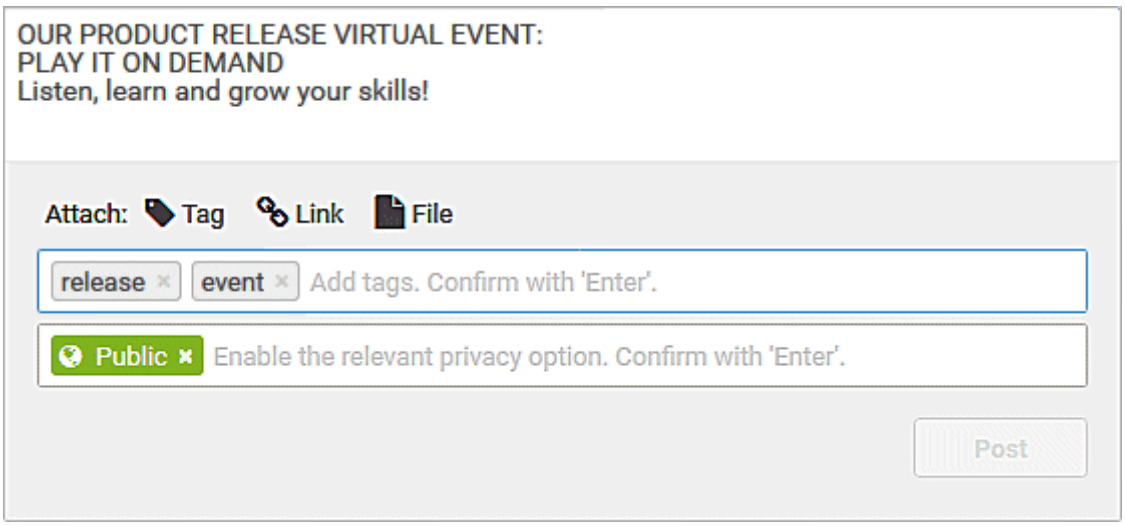
You can request feedback on processes from other users.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Click the model.
6. Click **Comment** in the button bar if the bar is not activated yet.
7. Enter your comment in the box provided.
8. Click **Tag**.
9. Enter the words to be used as keywords (page 380) in the tag input box, for example, BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press **Enter** after each keyword.



10. Click **Link**.
11. Insert a link to a Web site that contains more detailed information.
12. Click **Add link**. The link is checked and added.
13. Click **File**. The **Select document** dialog is displayed.
14. Click **Upload new document** to upload one of your own documents. The corresponding dialog opens.

15. Select the file you want to upload and enter the relevant additional information.
16. Click **Upload**.
17. Enable the check box of the document you want to add to your post.
18. Click **OK**.

The comment is displayed and can be commented on by other users.

All users can select the language to be used for the notification in their profile in ARIS Connect.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.13.4 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 206). The process owner is automatically determined by the attribute **Person responsible**.

Prerequisite

- You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.
- When using Microsoft® Internet Explorer version 8, the compatibility mode must be disabled.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the items and change the relevant attributes (page 206). Depending on the attributes, various editing options (page 218) are available.
5. In the button bar, click **Inform owner of change**. The **Inform of change** dialog opens.
6. Insert a change description
7. Click **Submit**. The **Information** dialog opens.
8. Enable the **Do not show this message again** check box if you do not want to be informed again by the dialog when executing the mini workflow more than once during the current session.
9. Click **OK**.

The process owner receives an e-mail containing the information you entered. If he submits the human task, you will be informed via e-mail.

This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.2.14 Show dashboards

If you have an ARIS Aware license (page 234), you can view the dashboards for which you have been granted privileges.

3.2.14.1 Show the Dashboards fact sheet

You can show dashboards (page 403) for various items. The following example is based on predefined standard dashboards that are contained in the supplied **United Motor Group** database and the Classic view (page 30).

Prerequisite

- The supplied database **United Motor Group** is published.
- Dashboards (page 403) are configured for the items selected.

Procedure

1. In the **Portal**, select (page 66) the **United Motor Group** database.
2. Click **Groups**. The Group tree opens.
3. Click **2. Processes > 2.1 Process architecture > Enterprise process map**. The **Overview** fact sheet of the **Enterprise process map** model opens. Click the **Dashboards** fact sheet. The model's dashboards are shown. You can switch between the Process Change Management (page 257) and the Local Maturity (page 252) dashboards.
4. Now click **Core processes > Marketing & sales > Billing > Vehicle billing processing**. The **Overview** fact sheet of the **EPC** model opens.
5. Click the **Dashboards** fact sheet. The GRC dashboard is shown.

You have shown different standard dashboards. The dashboard sidebar

3.2.14.2 Show dashboard in a sidebar

You can show dashboards (page 403) in a sidebar. The following example is based on predefined standard dashboards that are contained in the supplied **United Motor Group** database and the Classic view (page 30).

Prerequisite

- The supplied database **United Motor Group** is published.
- Dashboards (page 403) are configured for the items selected.

Procedure

1. In the **Portal**, select (page 66) the **United Motor Group** database.
2. Click **Groups**. The Group tree opens.
3. Click **2 Processes > 2.1 Process Architecture > Core processes > Marketing & sales > Billing > Vehicle billing processing**. The **Overview** fact sheet of the **EPC** model opens.
4. Click the **Diagram** fact sheet.
5. Click **Dashboards** in the button bar.

The **Dashboard** sidebar opens and shows the Local maturity level (page 252) dashboard.

3.2.14.3 Show system dashboards

You can show dashboards that give you information about the **ARIS Connect** system and its contents. The content of the dashboards depends in part on whether and which database has been published and selected.

Prerequisite

Dashboards (page 403) are configured for the system.

Procedure

1. Click **Portal**. The Home (page 31) area is activated.
2. Click **Dashboards**. The system dashboards are available.

You can select dashboards that displays information about the system and its contents.

3.2.14.4 Show dashboard on a separate tab

You can show a dashboard on a separate tab of the web browser.

Prerequisite

Dashboards (page 403) are configured for the system.

Procedure

1. Open a system dashboard (page 232), a dashboard of the Dashboards fact sheet (page 231) or of the sidebar (page 232).
2. Move the mouse pointer over the dashboard. The **On separate tab** icon appears.
3. Click **On separate tab**.

A new tab containing the dashboard opens.

3.2.14.5 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.14.5.1 What is ARIS Aware (dashboards)?

You can use the product ARIS Aware as visualizing component of ARIS Connect. Using ARIS Aware enables you to combine information from many sources and visualize data as KPIs by means of dashboards. ARIS Aware supports users in various departments across the enterprise by providing dashboards for evaluating a wide variety of data. It improves the transparency of the business and enables you to make the best decisions based on reliable data analyses. What users see and what they can do in ARIS Aware depends on their user role.

ARIS Aware is equipped with predefined templates for common scenarios in the context of business process management, including:

Center of Excellence (CoE) (page 241)

Collaboration (page 312)

Customer Experience Management (CXM) (page 261)

Business Strategy (page 319)

Enterprise Architecture Management (page 285)

Governance Risk and Compliance Management (page 329)

General Data Protection Regulation (GDPR) (page 338)

Portal usage (page 273)

Process Performance Management (page 297)

SAP Solutions data (page 236)

These templates can be extended and customized according to the individual requirements of a company.

3.2.14.5.2 What are the areas relevant to ARIS Aware?

You can use ARIS Aware to create dashboards and data feeds, store data, read data, configure dashboards, and show dashboards.

The following describes the data collection using reports. There are also other ways of collecting data, for example, using data files that are manually uploaded to ARIS document storage.

CREATE DASHBOARDS AND DATA FEEDS

You can create and connect dashboards and data feeds. Dashboards and data feeds are stored on the server you defined.

STORE DATA

Database information to be compiled for dashboard display is gathered by different reports.

For some reports parameters can be specified. These parameterized reports are to be started frequently using report schedules. This keeps the dashboards up to date. The scheduled reports themselves trigger related reports. Each report collects specific pieces of information. The results are stored in ARIS document storage as XML report output files. These pieces of information are formed into dashboards. That is why dashboards correlate very closely to the set of executed reports.

READ DATA

Data to be displayed in a dashboard is loaded from the ARIS document storage database and combined with ARIS attributes extracted from the XML files that are stored in the ARIS document storage database as well.

CONFIGURE DASHBOARDS

Dashboards can be configured for different items to be shown in different views in the ARIS Connect portal and in Collaboration.

SHOW DASHBOARDS

Dashboards can be shown in different views in the **Portal** and collaboration. You can use the supplied database United Motor Group to show various dashboards (page 231).

3.2.14.5.3 What standard dashboards are available?

ARIS Aware offers many standard demo dashboards. The predefined dashboards consist of charts or tables that show the results of various visual analyses of the **United Motor Group** database content.

3.2.14.5.3.1 Dashboards using ARIS for SAP Solutions data

Available dashboards (page 403) based on ARIS for SAP® Solutions.

3.2.14.5.3.1.1 SAP - Synchronization status (side-by-side)

This dashboard gives an aggregated overview of the SAP synchronization statuses based on the SAP functions contained in models related to the given context and on the corresponding SAP IDs.

AVAILABILITY

This dashboard is available on the **Dashboards** fact sheet of the **Sales order processing (to-be)** process model (EPC) in the **United Motor Group** demo database.

CHARTS

PROGRESS OF SAP SYNCHRONIZATION

This chart provides an overview of the progress of an SAP synchronization process in %.

The progress is visualized by a progress bar. This bar shows the percentage of modeled SAP functions for which synchronization is already complete. The progress is calculated as the ratio of the number of SAP functions that have already been synchronized to the total number of synchronization-relevant SAP functions related to the given context. Synchronized SAP functions are contained in assigned models and the **SAP ID** attribute is specified for them. In contrast, no SAP ID exists for SAP functions that have not yet been synchronized.

Report configurable?
Yes

Data source
ARIS Architect:

Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?
Yes

Data feed

- SAP - Synchronization progress
- SAP - Object information

Calculation

Ratio of the number of SAP functions for which the **SAP ID** attribute is specified to the total number of SAP functions related to the given context.

SAP functions already synchronized

This chart lists the names of all synchronization-relevant SAP functions for which SAP synchronization is already complete.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation

Checks the SAP functions that are contained in subordinate models related to the context and lists all functions whose **SAP function type** and **SAP ID** attributes are specified.

SAP FUNCTIONS NOT YET SYNCHRONIZED

This chart lists the names of all synchronization-relevant SAP functions for which SAP synchronization has not yet been performed.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation
Checks the SAP functions that are contained in subordinate models related to the context and lists all functions whose **SAP function type** attribute is specified, but whose **SAP ID** attribute is not specified.

FUNCTIONS NOT RELATED TO SAP

This chart lists the names of all functions that are contained in subordinate models related to the context, but are not related to SAP.

Report configurable?
Yes

Data source
ARIS Architect:

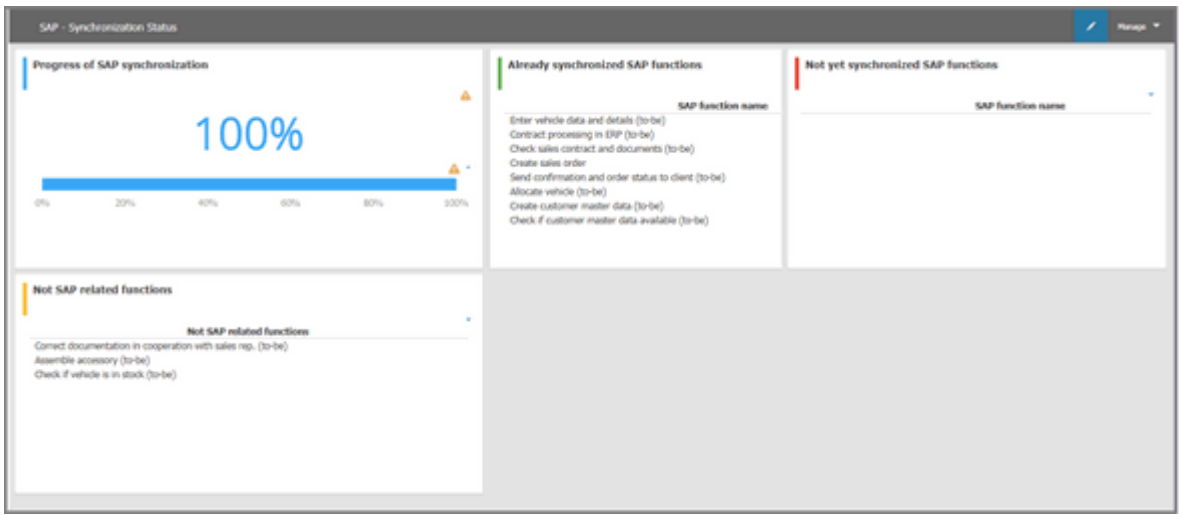
Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?
Yes

Data feed
SAP - Object information

Calculation
Checks the functions that are contained in subordinate models related to the context and lists all functions whose **SAP function type** attribute is not specified.

EXAMPLE



3.2.14.5.3.1.2 SAP - Function details (side-by-side)

This dashboard visualizes all SAP items that are assigned to SAP functions.

AVAILABILITY

This dashboard is available on the **Dashboards** fact sheet of the **Sales order processing (to-be)** process model (EPC) in the **United Motor Group** demo database.

CHARTS

ASSIGNED SAP DOCUMENTS

Lists all SAP documents that are related to an SAP function.

Report configurable?
Yes

Data source
ARIS Architect:

Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?
Yes

Data feed
SAP - Object information

Calculation
Collects all documents that are related to the context and are connected to functions using the **provides input for** connection type. The possible context is a process model or an activity.

ASSIGNED SAP EXECUTABLES

Lists all executables that are related to an SAP function.

Report configurable?
Yes

Data source
ARIS Architect:

Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?
Yes

Data feed
SAP - Object information

Calculation
Collects all executables related to the context. The possible context is a process model or an activity. Executables are **Screen** objects whose **Transaction code** and **Transaction type**

attributes are specified. These **Screen** objects occur in related models and are connected to an SAP function.

ASSIGNED SAP COMPONENTS

Lists all application systems that are related to an SAP function.

Report configurable?
Yes

Data source
ARIS Architect:

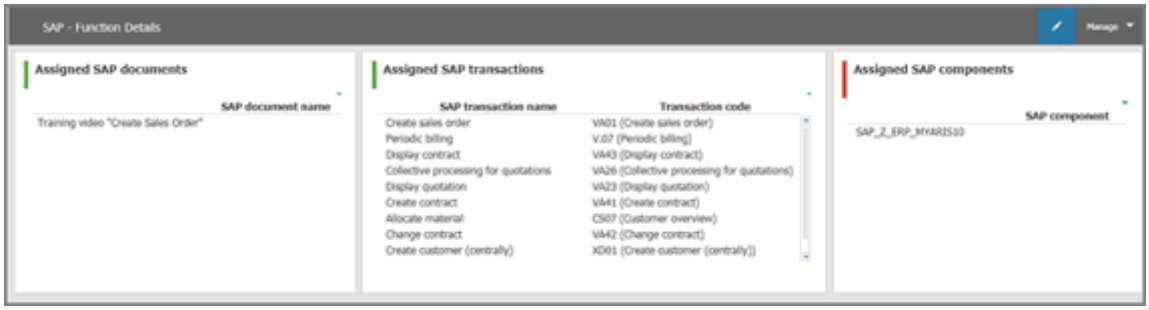
Report: Export item data to tables. For this report, the **SAP objects to processes** value set must be used for execution.

Report configurable?
Yes

Data feed
SAP - Object information

Calculation
Collects all application systems related to the context. The possible context is a process model or an activity. Relevant application systems are **Application system** objects whose **SAP component** attribute is specified. These **Application system** objects are contained in related models and are connected to an SAP function.

EXAMPLE



3.2.14.5.3.2 Dashboards using Center of Excellence (CoE) data

Here you can find information about Center of Excellence dashboards (page 403) delivered by default. Consequently, the dashboards provide information about leadership and best practice for the focus area business concept via Business Process Modeling.

3.2.14.5.3.2.1 CoE - Aggregated maturity - (side by side)

The dashboard shows an aggregated view of all process models based on hierarchy of models in the ARIS Connect configuration. That is, starting with the top-level model, for example, a value-added chain diagram, and ending with the process model of the lowest level, for example, an EPC of level 4. The progress of models that are at a lower level of the hierarchy is weighted with 70 % by default.

AVAILABILITY

This dashboard is shown on the **Diagram** fact sheet of value-added chain diagrams.

CHARTS

AGGREGATED MODELING PROGRESS

Overview of the mandatory properties that have already been specified.

Data source
ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?
Yes

Data collection
Context - process model:

Collection of all processes in the hierarchy starting from the top level model, for example, Value-added chain, down to the last level process model, for example, Level 4 EPC, and aggregated evaluation of all mandatory properties.

Data feed
CoE - Aggregated maturity level

Calculation
Aggregated progress of the mandatory attributes calculated for all process models in the hierarchy. The calculation is based on the mandatory attributes to be maintained, for example, person responsible, validity date etc. Hereby, the progress of the subordinate result (children in the hierarchy) is weighted with 70% by default.

MANDATORY PROPERTIES SUMMARY

Shows all mandatory properties and lists the number of properties that have not been specified.

Data source
ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?
Yes

Data collection
Context - process model:

Collection of all mandatory properties in the hierarchy.

Data feed
CoE - Mandatory attributes

Calculation
Aggregation of the mandatory properties in the hierarchy level.

MODEL AGE (PERCENT DISTRIBUTION)

Shows the aggregated age distribution of process models (how long process models have remained unchanged) based on the **Last change** property.

Data source
ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?
Yes

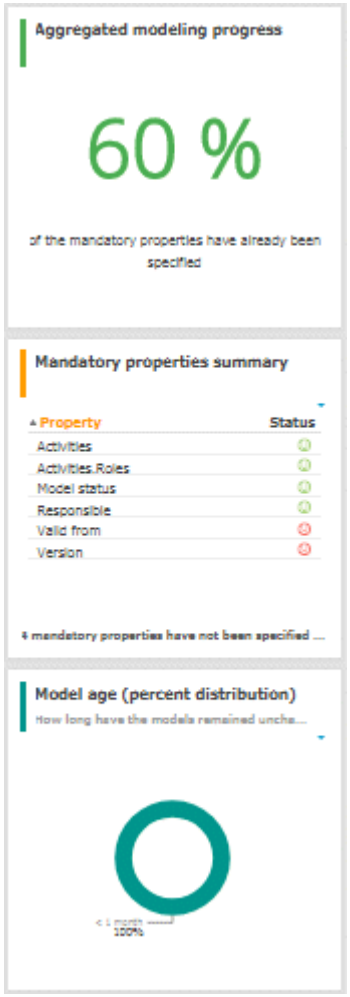
Data collection
Context - process model

Collection of the **Last change** property for all process models in the hierarchy.

Data feed
CoE - Model age

Calculation
Aggregation of the **Last change** property in the hierarchy level.

EXAMPLE


Aggregated modeling progress
60 %
of the mandatory properties have already been specified
Mandatory properties summary
Property
Status
Activities
Activities.Roles
Model status
Responsible
Valid from
Version
4 mandatory properties have not been specified ...
Model age (percent distribution)
How long have the models remained uncha...
< 1 month
100%

3.2.14.5.3.2.2 CoE - Aggregated maturity level (overview)

The dashboard shows an aggregated view of all process models based on hierarchy of models in the ARIS Connect configuration. That is, starting with the top-level model, for example, a value-added chain diagram, and ending with the process model of the lowest level, for example, an EPC of level 4. The progress of models that are at a lower level of the hierarchy is weighted with 70 % by default.

AVAILABILITY

This dashboard is shown for value-added chain diagrams in the dashboard sidebar of the **Overview** fact sheet.

CHARTS

AGGREGATED MODELING PROGRESS

Overview of the mandatory properties that have already been specified.

Data source
ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?
Yes

Data collection
Context - process model:

Collection of all processes in the hierarchy starting from the top level model, for example, Value-added chain, down to the last level process model, for example, Level 4 EPC, and aggregated evaluation of all mandatory properties.

Data feed
CoE - Aggregated maturity level

Calculation
Aggregated progress of the mandatory attributes calculated for all process models in the hierarchy. The calculation is based on the mandatory attributes to be maintained, for example, person responsible, validity date etc. Hereby, the progress of the subordinate result (children in the hierarchy) is weighted with 70% by default.

AGGREGATED MODEL COUNT FOR CURRENT PROCESS

Shows how many processes are modeled in the corresponding hierarchy level.

Data source
ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?
No

Data collection
Context - process model:

Collection and count of all processes in the hierarchy.

Data feed
CoE - Number of process models

Calculation
Aggregated number of processes in the hierarchy level.

MODEL RELEASE STATUS

Shows the aggregated release progress considering the aggregated value of the property **Model status**.

Data source
ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?
Yes

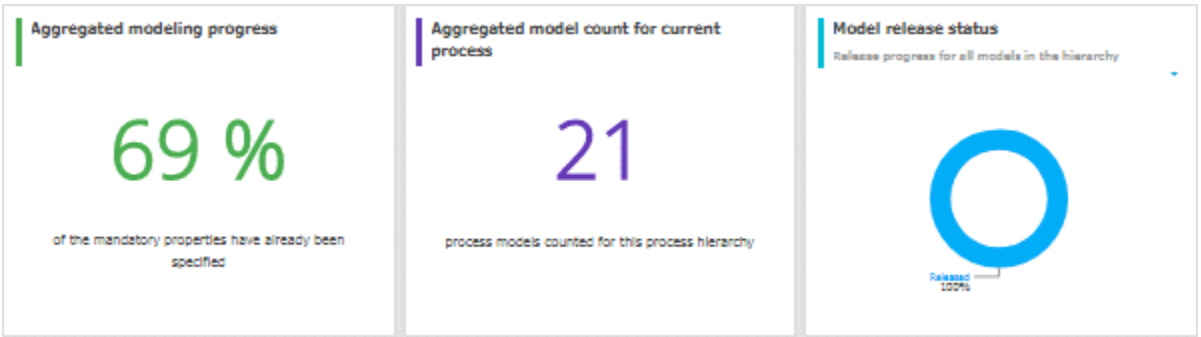
Data collection
Context - process model:

Collection of all processes in the hierarchy considering the aggregated value of the property **Model status**.

Data feed
CoE - Model status

Calculation
Aggregation of the property **Model status** in the hierarchy level.

EXAMPLE



3.2.14.5.3.2.3 CoE - Global maturity level

This dashboard provides different types of information on all process models and organizational charts within a database.

AVAILABILITY

ARIS Connect > Portal > Dashboards

CHARTS

VALIDITY DATE STATUS

Overview of validity date statuses for models. Shows when models will expire based on the value that was specified for the **Validity** attribute.

Data source
ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?
Yes

Data collection
Context - database:

Collection of all models of the database, and evaluation and grouping of their validity dates into the following categories:

- **undefined**: no validity date is maintained
- **next 5 days**: validity date is next week
- **next 14 days**: validity date is within the next two weeks
- **next 30 days**: validity date is within the next 30 days
- **later**
- **expired**: validity date is in the past

Data feed
CoE - Validity date

Calculation
Collection of all models of the database, and evaluation and grouping of their validity dates into the following categories:

- **undefined**: no validity date is maintained
- **next 5 days**: validity date is next week
- **next 14 days**: validity date is within the next two weeks
- **next 30 days**: validity date is within the next 30 days
- **later**
- **expired**: validity date is in the past

VALIDITY DATE OVERVIEW

Lists the process models and organizational charts in a table and shows the expiration status for each model based on the value of the **Validity** attribute.

Data source
ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?
Yes

Data collection
Context - database:

Collection of all models of the database and evaluation and grouping their validity dates.

Data feed
CoE - Validity date

Calculation
Collects the values of the **Validity** attribute for every model in a table.

MOST SHARED MODELS

Shows the top-7 most shared models.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of the number of all instances of the **Share model** mini workflow.

Data feed
CoE - Process Instances (Share)

Calculation
Collection of the number of all instances of the **Share model** mini workflow and display of the top seven models which are the most frequently selected context of the mini workflow.

OWNERS WITH THE MOST MODEL RESPONSIBILITY

Shows the seven responsible people with the most process models in their responsibility (maintained as **Person responsible** attribute value for these models).

Data source

ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?

Yes

Data collection

Context - database:

Collection of all models in the database and evaluation of their process owners.

Data feed

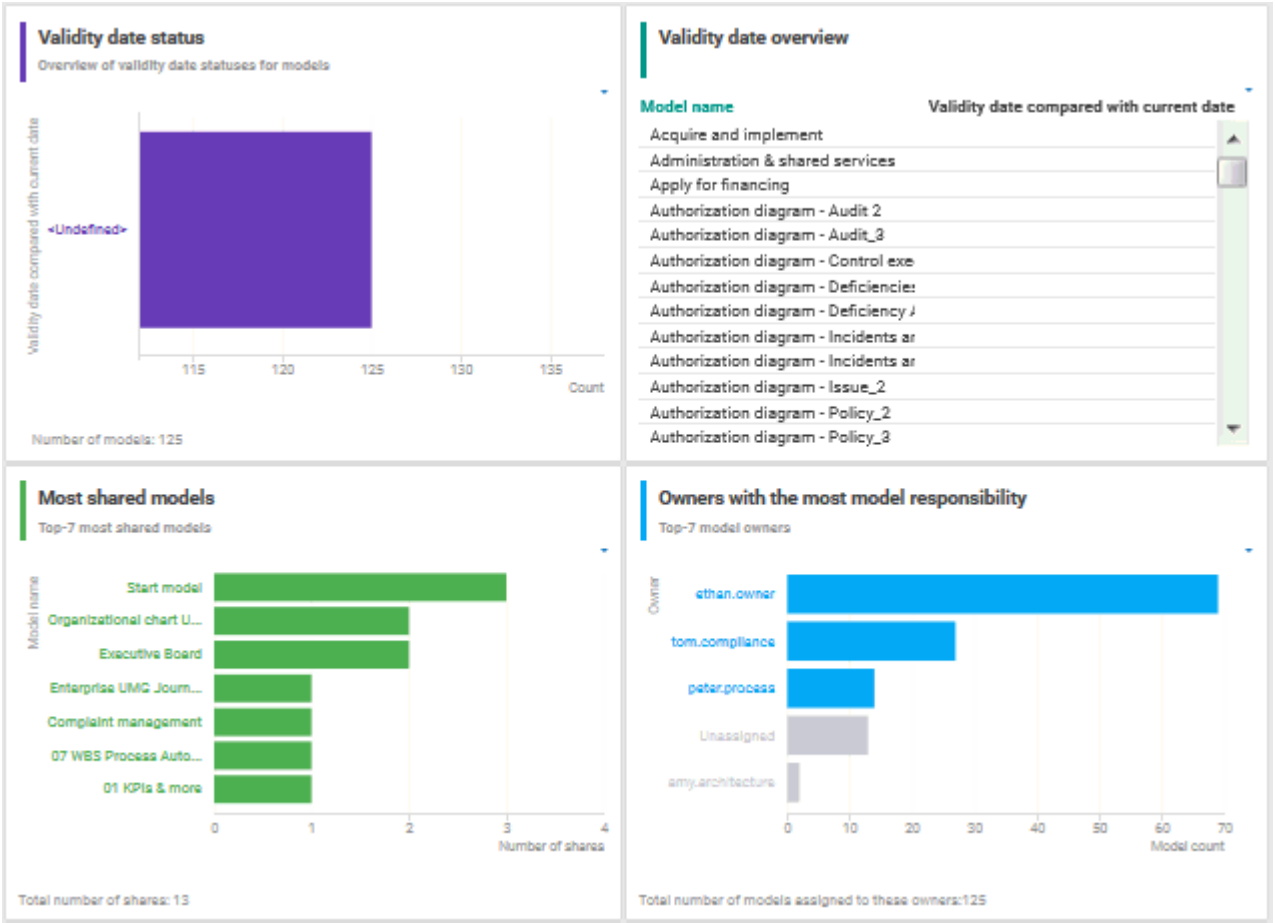
CoE - Process Owners

Calculation

Collection of all models in the database and evaluation and count of the most frequent process owners maintained as **Person responsible** attribute value.

By default the top 7 owners with the most models are shown. This can be configured.

EXAMPLE



3.2.14.5.3.2.4 CoE - Human tasks

This dashboard shows overall governance information about the human tasks submitted via Process Governance

AVAILABILITY

ARIS Connect > Portal > Dashboards

CHARTS

TOTAL NUMBER OF HUMAN TASKS

Shows the total number of human tasks regardless of the Process Governance process they belong to. For example, it includes the human tasks belonging to the **Submit change request** and **Inform owner of change** mini workflow, but also the ones from custom APG workflows.

The **CoE - Human tasks** dashboard can be filtered based either on database and model context, or on task-related information such as status and priority.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
No

Data collection
Context - APG:

Collection of the number of all human tasks in APG.

Data feed
CoE - Process Instances and Human Tasks

Calculation
Collection of the number of all human tasks in APG.

HUMAN TASKS OVER TIME

Shows the timeline of the human tasks based on their creation date.

The **CoE - Human tasks** dashboard can be filtered based either on database and model context, or on task-related information such as status and priority.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
No

Data collection
Context - Process Governance:

Collection of the creation date of all human tasks in Process Governance.

Data feed
CoE - Process Instances and Human Tasks

Calculation
Collection of the creation date of all human tasks in Process Governance.

HUMAN TASK DETAILS

Lists all human tasks including specific details such as priority, creation date, status, and participant.

The **CoE - Human tasks** dashboard can be filtered based either on database and model context, or on task-related information such as status and priority.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
No

Data collection
Context - APG:

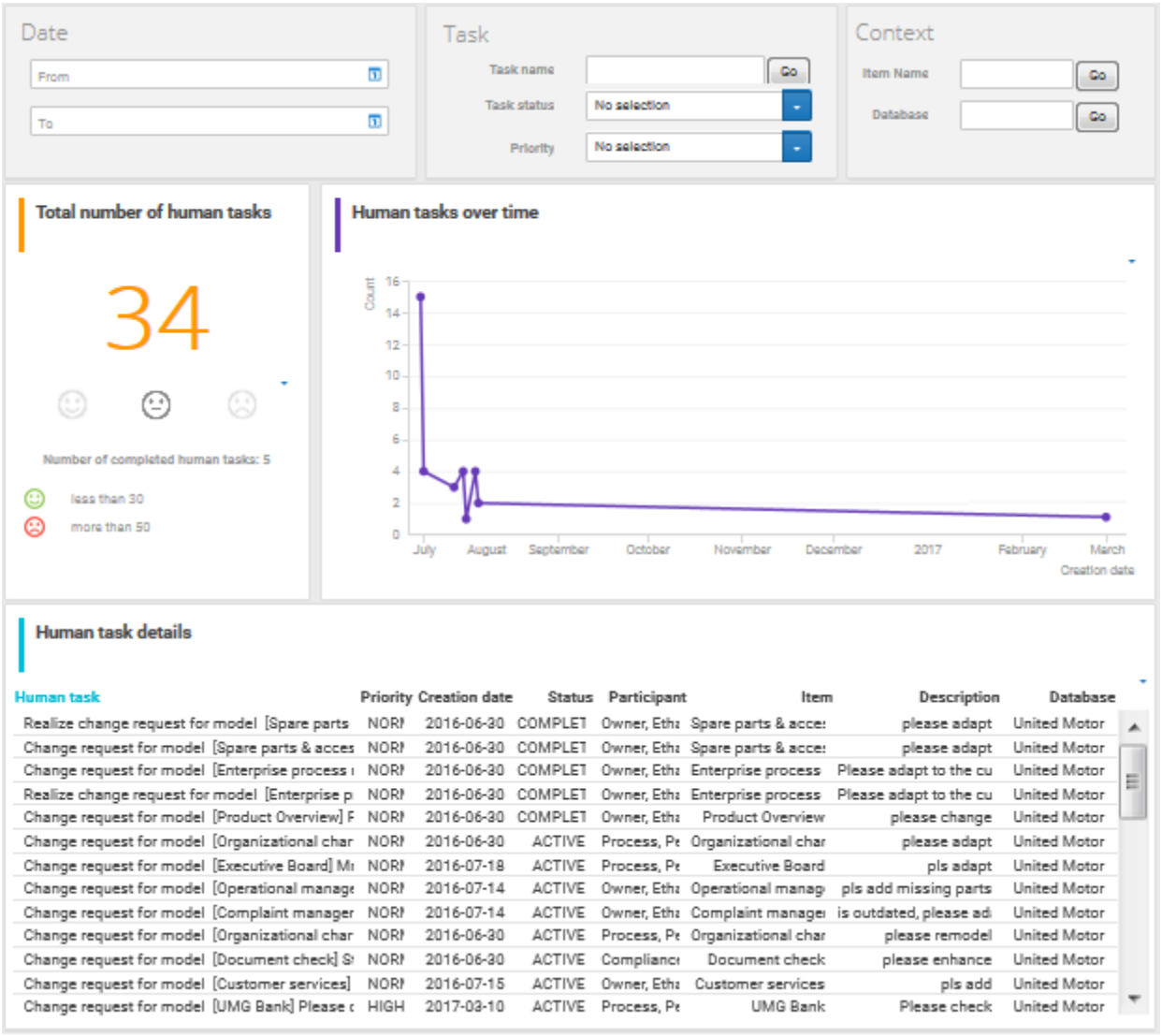
Collection of all human tasks in APG and their details.

Data feed
CoE - Process Instances and Human Tasks

Calculation
Collect all human tasks in APG and display the details:

- **Human task name** (as it appears in Process Board)
- **Human task priority** (HIGH, LOW, NORMAL)
- Creation date of the human task
- Human task status (ACTIVE or COMPLETED)
- Human task participant (the user to whom the human task is assigned)
- Item (the selection context for this human task, for example, the model for which the change request has been submitted or for which approval has been initiated)
- Description (the human task description as it appears in Process Board)
- Database (in which the workflow has been started to which the human task belongs)

EXAMPLE


Date
From
To
Task
Task name
Go
Task status
No selection
Priority
No selection
Context
Item Name
Go
Database
Go
Total number of human tasks
34
Number of completed human tasks: 5
less than 30
more than 50
Human tasks over time
Count
16
14
12
10
8
6
4
2
0
July
August
September
October
November
December
2017
February
March
Creation date
Human task details
Human task
Priority
Creation date
Status
Participant
Item
Description
Database
Realize change request for model [Spare parts
NORI
2016-06-30
COMPLET
Owner, Ethi
Spare parts & acce
please adapt
United Motor
Change request for model [Spare parts & acces
NORI
2016-06-30
COMPLET
Owner, Ethi
Spare parts & acce
please adapt
United Motor
Change request for model [Enterprise process
NORI
2016-06-30
COMPLET
Owner, Ethi
Enterprise process
Please adapt to the cu
United Motor
Realize change request for model [Enterprise p
NORI
2016-06-30
COMPLET
Owner, Ethi
Enterprise process
Please adapt to the cu
United Motor
Change request for model [Product Overview] F
NORI
2016-06-30
COMPLET
Owner, Ethi
Product Overview
please change
United Motor
Change request for model [Organizational char
NORI
2016-06-30
ACTIVE
Process, Pe
Organizational char
please adapt
United Motor
Change request for model [Executive Board] Mi
NORI
2016-07-18
ACTIVE
Process, Pe
Executive Board
pls adapt
United Motor
Change request for model [Operational manage
NORI
2016-07-14
ACTIVE
Owner, Ethi
Operational manag
pls add missing parts
United Motor
Change request for model [Complaint manager
NORI
2016-07-14
ACTIVE
Owner, Ethi
Complaint manage
is outdated, please ad
United Motor
Change request for model [Organizational char
NORI
2016-06-30
ACTIVE
Process, Pe
Organizational char
please remodel
United Motor
Change request for model [Document check] S
NORI
2016-06-30
ACTIVE
Compliance
Document check
please enhance
United Motor
Change request for model [Customer services]
NORI
2016-07-15
ACTIVE
Owner, Ethi
Customer services
pls add
United Motor
Change request for model [UMG Bank] Please c
HIGH
2017-03-10
ACTIVE
Process, Pe
UMG Bank
Please check
United Motor

3.2.14.5.3.2.5 CoE - Local maturity level

This dashboard is shown for selected process models and organizational charts.

AVAILABILITY

This dashboard is shown for process models (EPCs) in the dashboard sidebar of the **Diagram** fact sheet and on the **Dashboard** fact sheet of value-added chains.

CHARTS

TOTAL NUMBER OF CHANGE REQUESTS

Shows the total number of change requests submitted for a specific model using the **Submit change request** mini workflow.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - model:

Collection of the number of all change requests started on the context of this model.

Data feed
CoE - Process Instances (Change Request)

Calculation
Calculation of the number of change requests for which this model was the selected context (by default using the **Submit change request** mini workflow).

MANDATORY SEMANTIC CHECKS

Shows the result of the **Mandatory semantic checks** semantic check as a symbol.

Data source
ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?
Yes

Data collection
Context - model:

Collection of the result of the configured semantic check.

Data feed
CoE - Local maturity - Conventions

Calculation
Collection of the result of the configured semantic check - by default the **Mandatory semantic check** semantic check with the result **SUCCESSFUL** or **FAILED**.

MANDATORY ATTRIBUTES

Identifies the number of mandatory properties specified and compares it with the total number of mandatory properties. The default mandatory attributes include **Model status**, **Person responsible**, **Version**, **Validity**, and **Activities**.

Data source
ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?
Yes

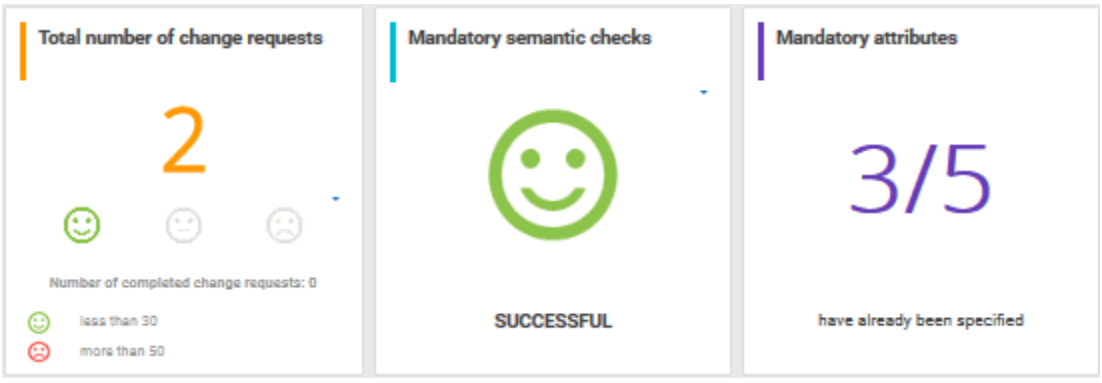
Data collection
Context - model:

Collection of the statuses of the mandatory attributes - whether they are maintained or not.

Data feed
CoE - Local maturity - Conventions

Calculation
Collection of the statuses of the mandatory attributes - whether they are maintained or not.

EXAMPLE



3.2.14.5.3.2.6 CoE - Portal usage

Dashboard that gives an overview of the use of the models in the ARIS Connect portal.

AVAILABILITY

ARIS Connect > Portal > Dashboards

CHARTS

MODELS WITH ASSIGNED CHANGE REQUESTS

Shows models with the most assigned pending change requests.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of all instances of the **Submit change request** mini workflow for models.

Data feed
CoE - Process Instances and Human Tasks (Change Request)

Calculation
Collection of all instances of the **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of their context (the models for which the change requests have been started). Display of the top 7 of these models.

MODEL OWNERS WITH ASSIGNED CHANGE REQUESTS

Model owners with the most assigned pending change requests.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of all instances of the **Submit change request** mini workflow for models.

Data feed
CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of the number of requests per owner (the responsible person for the model for which the change request has been submitted). Display of the top 7 process owners. The ID of the workflow to be considered can be configured.

MODELS WITH ASSIGNED APPROVAL REQUESTS

Models with the most assigned pending approval requests.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of the number of requests per owner (the responsible person for the model for which the change request has been submitted). Display of the top 7 process owners. The ID of the workflow to be considered can be configured.

MOST SHARED MODELS

Shows the top-7 most shared models.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of the number of all instances of the **Share model** mini workflow.

Data feed

CoE - Process Instances (Share)

Calculation

Collection of the number of all instances of the **Share model** mini workflow and display of the top seven models which are the most frequently selected context of the mini workflow.

MOST FOLLOWED MODELS

The top seven most followed models in Collaboration.

Data source

ARIS models in Collaboration

Data feed

Collaboration – Most followed ARIS content

MOST COMMENTED MODELS

The top seven most commented models in Collaboration.

Data source

ARIS models in Collaboration

Data feed

Collaboration – Most commented ARIS content

EXAMPLE

3.2.14.5.3.2.7 CoE - Process change management

The dashboard shows governance information based on Process Governance.

AVAILABILITY

ARIS Connect > Portal > Dashboards

CHARTS

STATUS OF CHANGE REQUESTS FOR MODELS

Shows the processes with change requests in the PENDING and COMPLETED status. This is based on the **Submit change request** mini workflow.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of all process instances of **Submit change request** mini workflow and grouping them into the following categories:

- PENDING (running change requests)
- COMPLETED (realized change requests)

Data feed
CoE - Process Instances (Change Request)

Calculation
Collection of the number of all instances of **Submit change request** mini workflow (by default) and grouping them by status PENDING or COMPLETED. The ID of the workflow to be considered can be configured.

CHANGE REQUEST COUNT IS

Shows the change requests submitted for models with the **Submit change request** mini workflow within the last 3 months.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of the number of all instances of the **Submit change request** mini workflow for models.

Data feed
CoE - Process Instances (Change Request)

Calculation
Collection of the number of all instances of the **Submit change request** mini workflow for models (by default). The ID of the workflow to be considered can be configured.

MODEL CHANGE REQUESTS OVER TIME

Shows the change requests submitted within the last 3 months.

Timeline of the change requests over time based on the assignment date of the **Submit change request** mini workflow for models.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of the assignment date of all instances of the **Submit change request** mini workflow for models.

Data feed
CoE - Process Instances (Change Request)

Calculation
Collection of the assignment date of all instances of the **Submit change request** mini workflow for models (by default) and count per date. The ID of the workflow to be considered can be configured.

MODELS WITH ASSIGNED CHANGE REQUESTS

Shows models with the most assigned pending change requests.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of all instances of the **Submit change request** mini workflow for models.

Data feed
CoE - Process Instances and Human Tasks (Change Request)

Calculation
Collection of all instances of the **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of their context (the models for which the change requests have been started). Display of the top 7 of these models.

MODEL OWNERS WITH ASSIGNED CHANGE REQUESTS

Model owners with the most assigned pending change requests.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of all instances of the **Submit change request** mini workflow for models.

Data feed
CoE - Process Instances and Human Tasks (Change Request)

Calculation
Collection of all instances of the **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of the number of requests per owner (the responsible person for the model for which the change request has been submitted). Display of the top 7 process owners. The ID of the workflow to be considered can be configured.

STATUS OF CHANGE REQUESTS AND CHANGE REQUEST DETAILS

Shows both the Status of change requests as well as Change request details. Both charts depend on each other.

Data source
ARIS Architect:

Report: CoE - Governance

Report configurable?
Yes

Data collection
Context - APG:

Collection of all instances of the **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

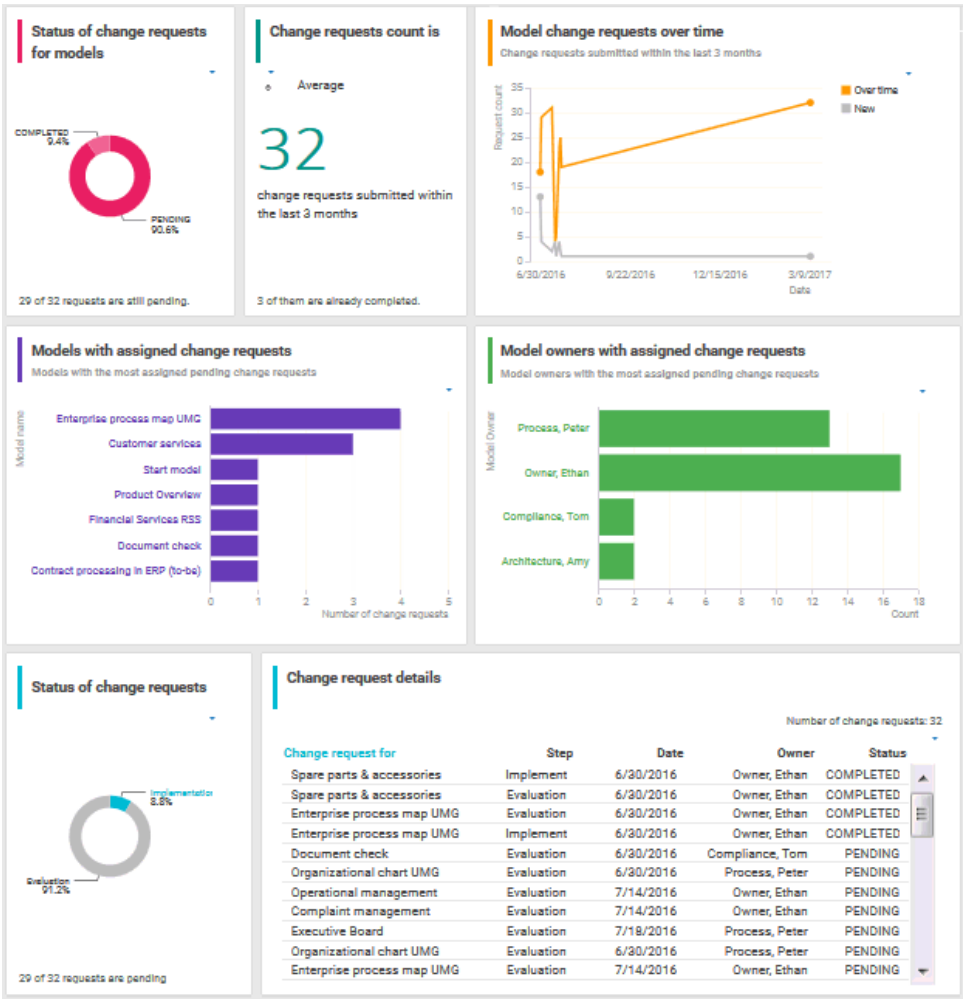
Calculation

Collection of all instances of the **Submit change request** mini workflow for models (by default) and display of the details:

- The name of the model for which the change request has been submitted.
- The current active step in the mini workflow
  (evaluation step: change request not yet evaluated or
  realization step: change request has been evaluated and is now being realized).
- The assignment date of the change request (start date of the process instance).
- The owner of the human task - the person to whom this task has been assigned.
- The change request status (RUNNING or COMPLETED).

The ID of the workflow to be considered can be configured.

EXAMPLE



3.2.14.5.3.3 Dashboards using Customer Experience Management (CXM) data

Available dashboards (page 403) using content that is retrieved from Customer Experience Management (CXM)-related models.

Since Customer Experience is based on expectations, experiences and attitudes, ABC offers the possibility to model personas (page 410) and create their infographics (page 347). In this way, target groups can be clearly distinguished from each other and their needs can be addressed.

3.2.14.5.3.3.1 Customer experience

Dashboard providing an overview of how customers experience their interaction with the company during a so-called customer journey. This dashboard includes various charts that illustrate the customer experience from different angles.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of model of type **Customer journey landscape**.

CHARTS

NUMBER OF AFFECTED INTERNAL PROCESSES

Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Retrieves customer touchpoint data from all customer journeys contained in customer journey maps that are assigned to a selected model of the Customer journey landscape type. Identifies the customer touchpoints of each customer journey map. In addition, the following data is collected:

- checks whether the customer touchpoints have a connection to an internal process.
- counts all customer touchpoints that have a connection to an internal process.
- checks whether the **Pain point** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Pain point** attribute type is set to **true**.

- checks whether the **Moment of truth** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Moment of truth** attribute type is set to **true**.
- checks whether the **Best practice** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Best practice** attribute type is set to **true**.

Data feed
CXM - Analyze customer experience

Calculation
Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

PERCENTAGE OF CRITICAL CUSTOMER TOUCHPOINTS

Overview of the percentage of critical customer touchpoints.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection
-.-

Data feed
CXM - Analyze customer experience

Calculation
Number of customer touchpoints for which the **Moment of truth** attribute type is specified over the aggregated number of customer touchpoints multiplied by 100.

OVERALL CUSTOMER EXPERIENCE

Percent distribution of customer feelings calculated for an entire customer journey landscape.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Data is retrieved from all customer journeys related to a selected model of the **Customer journey landscape** type.

All customer touchpoints contained in the customer journey maps assigned to the selected customer journey landscape are retrieved. The following data is counted:

- All customer touchpoints for which the **Customer feeling** attribute is specified as **Positive**.
- All customer touchpoints for which the **Customer feeling** attribute is specified as **Neutral**.
- All customer touchpoints for which the **Customer feeling** attribute is specified as **Negative**.

Data feed
CXM - Overall customer experience

Calculation
Aggregated number of values (Positive, Neutral, and Negative) retrieved from the **Customer feeling** attribute.

CUSTOMER JOURNEYS LEADING TO A GOOD EXPERIENCE

Top seven customer journeys creating a good customer experience.

Data source
ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**EA**.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the **Customer experience** CXM dashboard (page 261).

CONTEXT

Database

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Data is retrieved from all customer journeys related to a selected model of the **Customer journey landscape** type.

All customer touchpoint contained in customer journey maps are retrieved, and all customer touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive** are counted.

Data feed
CXM - Analyze customer journeys

Calculation
Number of customer touchpoints for which the **Customer feeling** attribute type is set to **Positive** over the number of customer touchpoints per customer journey.

CUSTOMER JOURNEYS LEADING TO A BAD EXPERIENCE

Top seven customer journeys creating a bad customer experience.

Data source
ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**EA**.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the **Customer experience** CXM dashboard (page 261).

CONTEXT

Database

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

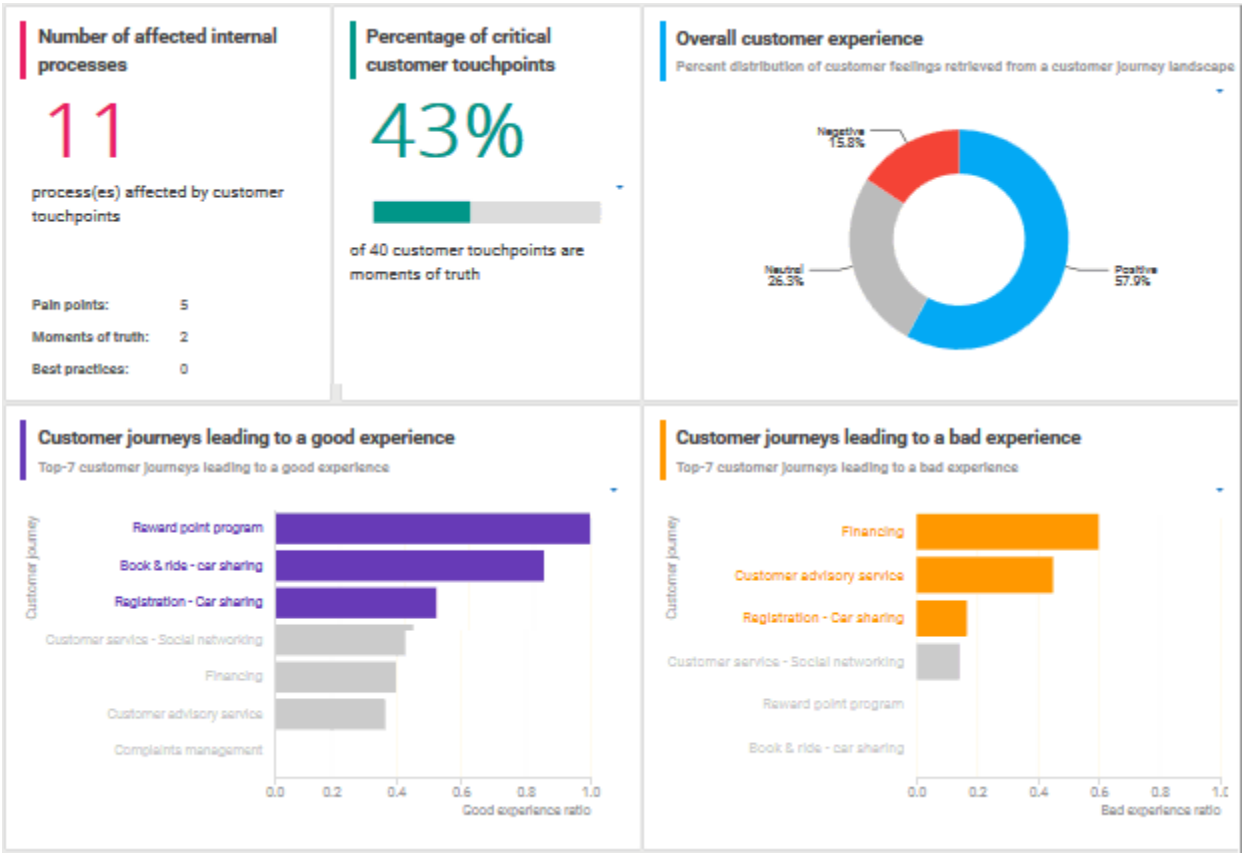
Data is retrieved from all customer journeys related to a selected model of the **Customer journey landscape** type.

All customer touchpoints contained in customer journey maps are retrieved, and the customer touchpoints for which the value of the **Pain point** attribute type is set to **true** are counted.

Data feed
CXM - Analyze customer journeys

Calculation
Number of customer touchpoints for which the **Pain point** attribute type is specified over the number of customer touchpoints per customer journey.

EXAMPLE



3.2.14.5.3.3.2 Responsibilities

Customer experience dashboard evaluating business units and channels.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of model of type **Customer journey landscape**.

CHARTS

BUSINESS UNITS ASSOCIATED WITH GOOD EXPERIENCE

Top seven business units associated with a good customer experience.

Data source
ARIS Architect:

Report: CXM - Responsibility (Ownership)

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all owners specified in the **Ownership** row and their associated customer touchpoints are retrieved from all assigned customer journey maps. Checks whether the **Customer feeling** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive**.

Data feed
CXM - Responsible owner

Calculation
Good experience ratio: Number of customer touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive** divided by the total number of customer touchpoints.

BUSINESS UNITS ASSOCIATED WITH BAD EXPERIENCE

Top seven business units associated with a bad customer experience.

Data source
ARIS Architect:

Report: CXM - Responsibility (Ownership)

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all owners specified in the **Ownership** row and their associated customer touchpoints are retrieved from all assigned customer journey maps. Checks whether the **Pain point** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Pain point** attribute type is set to **true**.

Data feed
CXM - Responsible owner

Calculation
Number of customer touchpoints for which the value of the **Pain point** attribute type is set to **true** divided by the total number of customer touchpoints (bad experience ratio).

CHANNELS ASSOCIATED WITH GOOD EXPERIENCE

Top-7 channels associated with a good customer experience.

Data source
ARIS Architect:

Report: CXM - Responsibility (Channel)

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all channels specified in the **Channel** row and their associated customer touchpoints are retrieved for all assigned customer journey maps. Checks whether the **Customer feeling** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive**.

Data feed
CXM - Responsibility channel

Calculation
Good experience ratio: Number of customer touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive** divided by the total number of customer touchpoints.

CHANNELS ASSOCIATED WITH BAD EXPERIENCE

Top-7 channels associated with a bad customer experience.

Data source
ARIS Architect:

Report: CXM - Responsibility (Channel)

Report configurable?
No

Data collection

Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all channels specified in the **Channel** row and their associated customer touchpoints are retrieved for all assigned customer journey maps. Checks whether the **Pain point** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Pain point** attribute type is set to **true**.

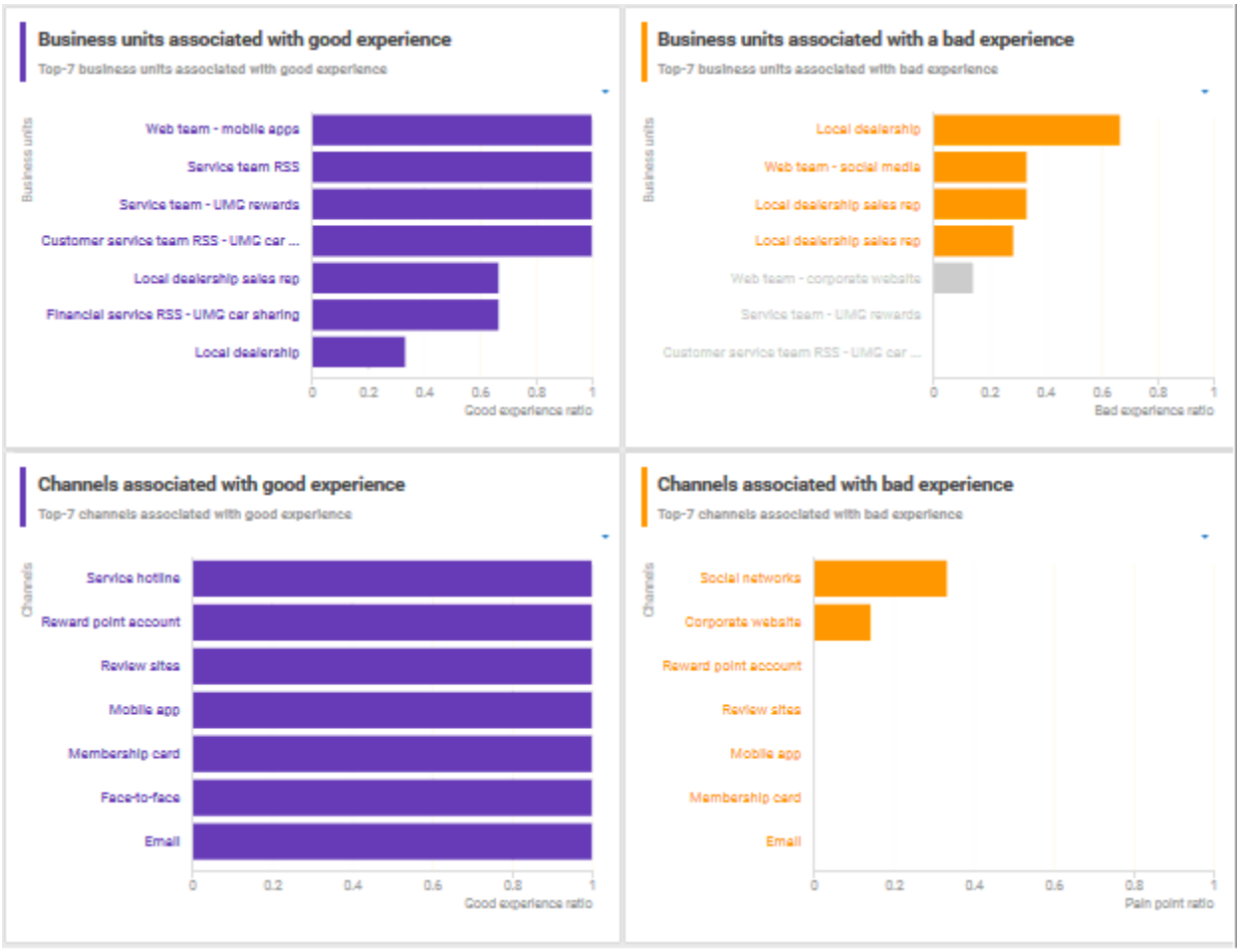
Data feed

CXM - Responsibility channel

Calculation

Number of customer touchpoints for which the value of the **Pain point** attribute type is set to **true** divided by the total number of customer touchpoints (bad experience ratio).

EXAMPLE



3.2.14.5.3.3.3 Customer experience overview

Customer journey map dashboard that evaluates customer touchpoints and retrieves the customer touchpoints with high market potential.

AVAILABILITY

This dashboard is shown for model of type **Customer journey map** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

NUMBER OF AFFECTED INTERNAL PROCESSES

Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection
Context: **Customer journey landscape** model type.

Retrieves customer touchpoint data from all customer journeys contained in customer journey maps that are assigned to a selected model of the Customer journey landscape type. Identifies the customer touchpoints of each customer journey map. In addition, the following data is collected:

- checks whether the customer touchpoints have a connection to an internal process.
- counts all customer touchpoints that have a connection to an internal process.
- checks whether the **Pain point** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Pain point** attribute type is set to **true**.
- checks whether the **Moment of truth** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Moment of truth** attribute type is set to **true**.
- checks whether the **Best practice** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Best practice** attribute type is set to **true**.

Data feed
CXM - Analyze customer experience

Calculation
Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

PERCENTAGE OF NEGATIVE CUSTOMER TOUCHPOINTS

Overview of the percentage of negative customer touchpoints.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection
-.-

Data feed
CXM - Analyze customer experience

Calculation
Number of pain points divided by the number of customer touchpoints multiplied by 100.

PERCENTAGE OF CRITICAL CUSTOMER TOUCHPOINTS

Overview of the percentage of critical customer touchpoints.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection
-.-

Data feed
CXM - Analyze customer experience

Calculation
Number of customer touchpoints for which the **Moment of truth** attribute type is specified over the aggregated number of customer touchpoints multiplied by 100.

PERCENTAGE OF POSITIVE CUSTOMER TOUCHPOINTS

Overview of the percentage of positive customer touchpoints.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?
No

Data collection

-.-

Data feed

CXM - Analyze customer experience

Calculation

Number of customer touchpoints with the value **Positive** set for the **Customer feeling** attribute divided by the number of customer touchpoints multiplied by 100.

EXAMPLE

3.2.14.5.3.3.4 Business driver distribution & social media conversation rate

Customer experience dashboard evaluating business units and channels.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of model of type **Customer journey landscape**.

CHARTS

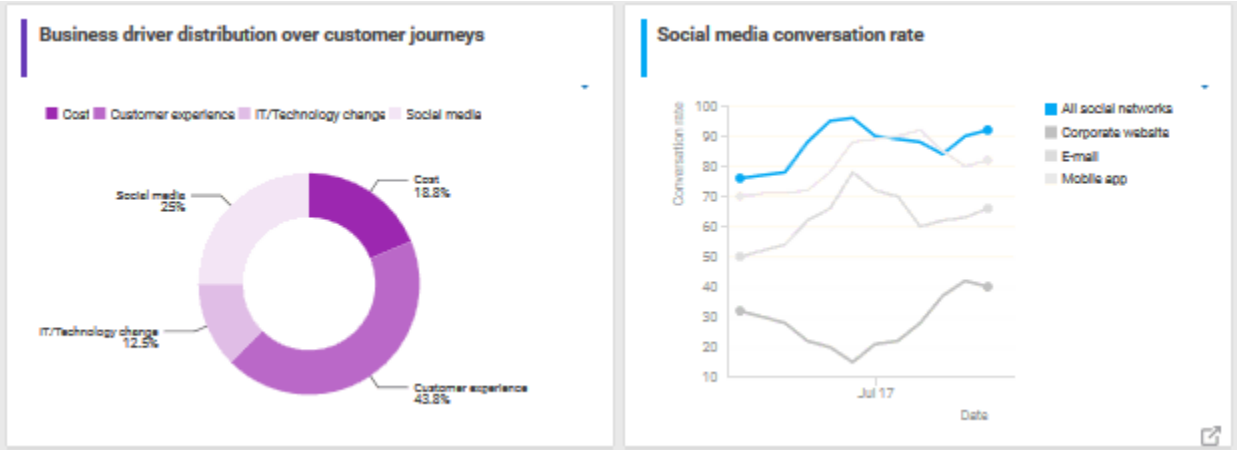
BUSINESS DRIVER DISTRIBUTION OVER CUSTOMER JOURNEYS

Displays the distribution of business drivers, such as **Cost** and **IT/Technology change**, across customer journeys.

SOCIAL MEDIA CONVERSATION RATE

Displays the conversation rate for each medium and the aggregated conversation rate for a specific time period.

EXAMPLE



3.2.14.5.3.4 Dashboards using content that is retrieved by ARIS reports that access Matomo data

Available dashboards (page 403) using content that is retrieved by ARIS reports that access Matomo data. Matomo is an open-source analytics platform.

3.2.14.5.3.4.1 Matomo - Publications

Dashboard that includes an overview of the ARIS portal usage. It provides charts that consider various aspects for which you can select different evaluation periods, such as last week, last month, and last year.

AVAILABILITY

ARIS Connect > **Portal >** **Dashboards**

CHARTS

NUMBER OF VISITS OVER TIME

Shows the number of visits (visits/unique visitors) over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **VisitsSummary** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 280) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed
Matomo - Summary of visits over time

MOST VIEWED ITEM TYPES (E.G., 'PROCESS', 'ROLE')

Top seven item types most viewed over the selected time period, for example, processes.

Data source
ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 273) dashboard.

CONTEXT

Database

Data feed
Matomo - Most viewed item types

MOST VIEWED ITEMS

Top seven items most viewed over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 273) dashboard.

CONTEXT

Database

Data feed
Matomo - Most viewed items

MOST SEARCHED KEYWORDS

Top seven of the keywords most searched over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 273) dashboard.

CONTEXT

Database

Data feed
Matomo - Most searched keywords

MOST VIEWED ITEM TYPES LIST

Top-fifty list of item types most viewed over the selected time period, for example, processes.

Data source
ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 273) dashboard.

CONTEXT

Database

Data feed
Matomo - Most viewed items types

MOST VIEWED ITEMS LIST

List of top fifty items most viewed over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 273) dashboard.

CONTEXT

Database

Data feed
Matomo - Most viewed items

MOST SEARCHED KEYWORDS LIST

Top-fifty list of the keywords most searched over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

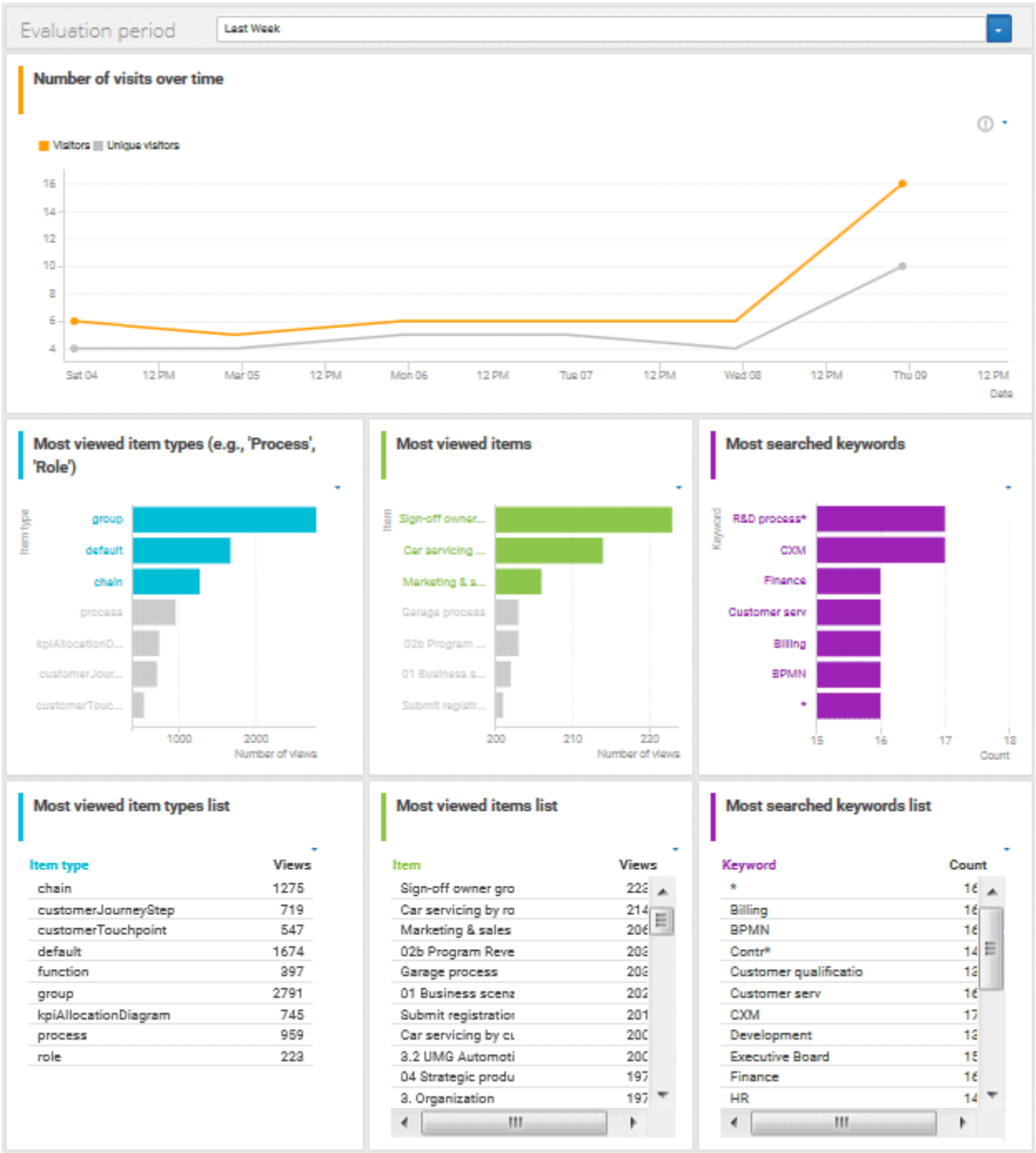
The report result is used as input for the Matomo - Publications (page 273) dashboard.

CONTEXT

Database

Data feed
Matomo - Most searched keywords

EXAMPLE


Evaluation period
Last Week
Number of visits over time
Visitors
Unique visitors
16
14
12
10
8
6
4
Sat 04
12 PM
Mar 05
12 PM
Mon 06
12 PM
Tue 07
12 PM
Wed 08
12 PM
Thu 09
12 PM
Date
Most viewed item types (e.g., 'Process', 'Role')
Item type
group
default
chain
process
kpiAllocationD...
customerJour...
customerTouc...
1000
2000
Number of views
Most viewed items
Item
Sign-off owner...
Car servicing ...
Marketing & s...
Garage process
02b Program ...
01 Business s...
Submit registr...
200
210
220
Number of views
Most searched keywords
Keyword
R&D process*
CXM
Finance
Customer serv
Billing
BPMN
*
15
16
17
18
Count
Most viewed item types list
Item type
Views
chain 1275
customerJourneyStep 719
customerTouchpoint 547
default 1674
function 397
group 2791
kpiAllocationDiagram 745
process 959
role 223
Most viewed items list
Item
Views
Sign-off owner gro 223
Car servicing by ro 214
Marketing & sales 206
02b Program Reve 203
Garage process 203
01 Business scena 202
Submit registratio 201
Car servicing by cu 200
3.2 UMG Automoti 200
04 Strategic produ 197
3. Organization 197
Most searched keywords list
Keyword
Count
* 16
Billing 16
BPMN 16
Contr* 14
Customer qualificatio 13
Customer serv 16
CXM 17
Development 13
Executive Board 15
Finance 16
HR 14

3.2.14.5.3.4.2 Matomo - Technical KPIs

Dashboard that shows technical KPIs regarding the ARIS usage. It provides charts that consider various technical aspects for which you can select different evaluation periods, such as last week, last month, and last year.

AVAILABILITY

ARIS Connect > Portal > Dashboards

CHARTS

PERCENT DISTRIBUTION OF BROWSER ENGINES

Percent distribution of the browser engines used over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **BrowserEngines** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 280) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed
Matomo - Browser engines

MOST USED OPERATING SYSTEMS

Operating systems most used over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **OsVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 280) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed
Matomo - Operating system version

MOST USED BROWSER VERSIONS (LIST)

List of browser versions most used over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **BrowserVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 280) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed
Matomo - Browser version

MOST USED PORTAL LANGUAGES (LIST)

List of portal languages most used over the selected time period.

Data source
ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **Language** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 280) dashboard.

CONTEXT

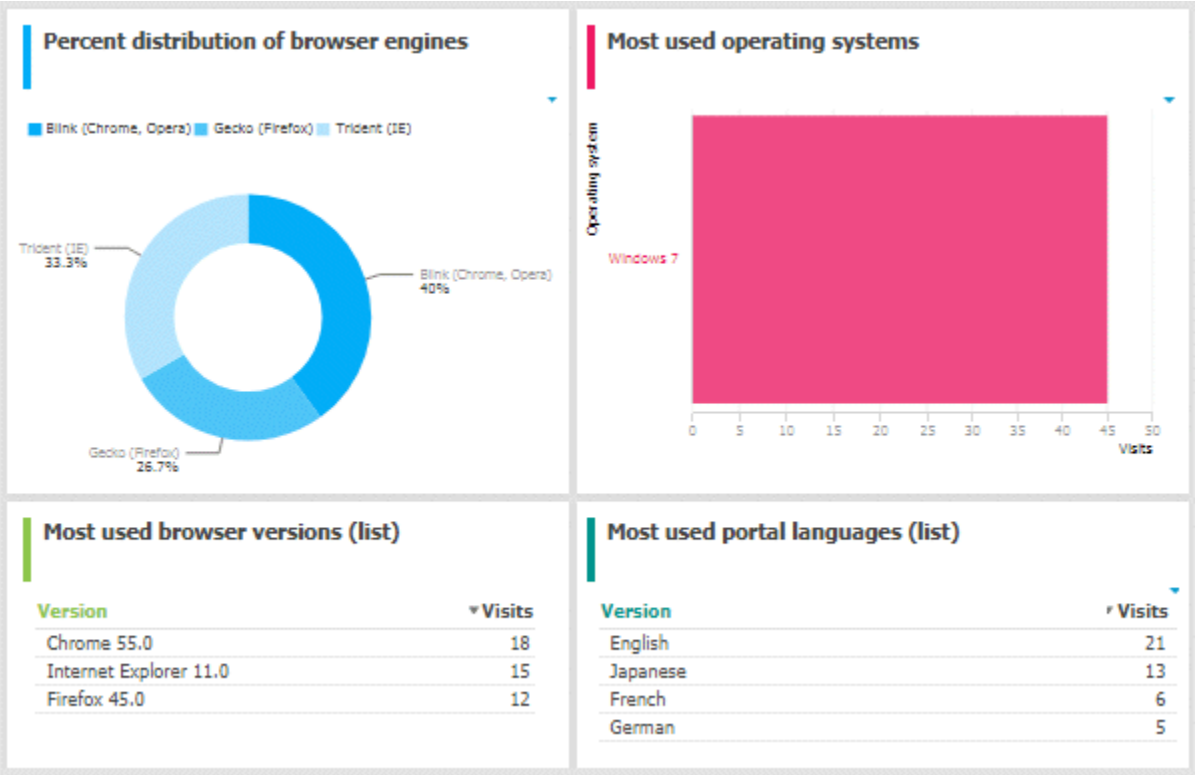
Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed

Matomo - Portal language

EXAMPLE



3.2.14.5.3.5 Dashboards using Enterprise Architecture (EA) data

Available dashboards (page 403) based on Enterprise Architecture (EA) information.

3.2.14.5.3.5.1 EA dashboard for organizational units

Displays the dashboard for IT systems, that is, for object of type **Application system type**.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of objects of type **Organizational unit**.

CHARTS

SYSTEMS HAVING EXPIRED

Number of systems that are no longer standard.

Data source
ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?
No

Data feed

- EA - OrgUnit - Systems expired
  Uses the **EA - OrgUnit - Systems with lifecycle data** data feed as a sub-feed.
- EA - OrgUnit - Systems with lifecycle data

Calculation
Checks for the **End** attribute to see whether a system has expired.

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEMS PHASING IN

Number of systems that will become standard within 12 months.

Data source
ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?
No

Data feed

- EA - OrgUnit - Systems phasing in
  Uses the **EA - OrgUnit - Systems with lifecycle data** data feed as a sub-feed.
- EA - OrgUnit - Systems with lifecycle data

Calculation
Checks via the **Phase-in phase (start)** attribute if a system is phasing in

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEMS PHASING OUT

Number of systems used by the selected organizational unit which will be retired within the next twelve months.

Data source
ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?
No

Data feed

- EA - OrgUnit - Systems phasing out
  Uses the **EA - OrgUnit - Systems with lifecycle data** data feed as a sub-feed.
- EA - OrgUnit - Systems with lifecycle data

Calculation
Checks via the **Phase-out phase (start)** attribute if a system is phasing out

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEMS EXPIRING

Number of systems used by the selected organizational unit which will become non-standard within the next twelve months.

Data source
ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?
No

Data feed

- EA - OrgUnit - Standard systems expiring
  Uses the **EA - OrgUnit - Systems with lifecycle data** data feed as a sub-feed.
- EA - OrgUnit - Systems with lifecycle data

Calculation
Checks via the **Start** attribute if a system is expiring

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEM USAGE

Distribution of standard and non-standard systems used by the selected organizational unit.

Data source
ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?
No

Data feed
EA - OrgUnit - Standard vs. non-standard systems)
Uses the **EA - OrgUnit - Systems with lifecycle data** data feed as a sub-feed.

Calculation
Checks via the **Standardization status** attribute if a system used is non-standard

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEMS COMPARED BY COST AND CRITICALITY

Portfolio of systems used by the selected organizational unit categorized by cost, criticality, and interface count.

Data source
ARIS Architect:

- Report: EA - Relations between organizational units and systems
- Report: EA - Systems with data

This report creates a table listing all IT systems of the database. For each system, various types of information are provided, such as the **Data center costs** and **Criticality** attributes, or the number of interfaces.

The **Enterprise Architecture Management** extension pack is required for ARIS Architect or ARIS Designer.

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **EA_SYSTEMS_WITH_DATA.XML** file. The **Systems with data** document is stored within this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**EA**.

The report result is used as input for the **EA - Organizational unit - Systems with data** data feed. This data feed is related to the EA dashboard for organizational units (page 285) dashboard.

CONTEXT

Database

Report configurable?
Yes

Data feed
EA - Organizational unit - Systems with data

Calculation
Compares systems via the **Costs per unit** and **Critically** attributes

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEM REPLACEMENT CANDIDATES BY CAPABILITY OVERLAP

Top 7 pairs of systems with the most overlap in capabilities used by the given organizational unit.

Data source
ARIS Architect:

- Report: EA - Relations between organizational units and systems
- Report: EA - Systems redundancies

This report creates a table listing all IT system pairs that have common capabilities. In each pair, **System A** is considered to be the potential replacement for **System B**. For each pair, the capability overlap is shown as a percentage.

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **EA_SYSTEM_REDUNDANCIES.XML** file. **The System redundancies in the use of capabilities** document is stored in this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**EA**.

The report result is used as input for the **EA - System - System redundancies** data feed. This data feed is related, for example, to the EA dashboard for organizational units (page 285) dashboard.

CONTEXT

Database

Report configurable?
Yes

Data feed
EA - System - System redundancies

Calculation
Compares systems regarding their common capabilities.

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

System A is considered as potential replacement of system B.

OPERATING AND CAPITAL EXPENSES FOR SYSTEMS OVER TIME

Operating and capital expenses for the systems used by the selected organizational unit over time.

Data source

ARIS Architect:

Report: EA/Alfabet - CAPEX/OPEX for organizational units

Report configurable?

Yes

Data feed

EA - OrgUnit - CAPEX/OPEX

Calculation

Lists the capital expenses (CAPEX) and operational expenses (OPEX) over time for all organizational units of the database that also exist in a connected Alfabet system.

EXAMPLE

3.2.14.5.3.5.2 EA dashboard for IT systems

Displays the dashboard for objects of type **Organizational unit**.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of objects of type **Application system type**.

CHARTS

MOST SUPPORTED ORGANIZATIONAL UNITS

Based on process support maps, Top-7 organizational units with the highest number of associated processes actively supported by the given system.

Data source
ARIS Architect:

Report: EA - System support

Report configurable?
No

Data feed
EA - System - Supported organizational units

Calculation
Lists all supported objects of **Application system type** object type. These objects are identified using the Process support unit, the Organizational unit, and Function objects connected to the IT system.

SUPPORT DISTRIBUTION BY ORGANIZATIONAL UNIT

Based on process support maps, list of organizational units and the corresponding system support distribution.

Data source
ARIS Architect:

Report: EA - System support

Report configurable?
No

Data feed
EA - System - Supported organizational units

Calculation
Shows the distribution of supported objects of **Application system type** object type. These objects are identified using the Process support unit, the Organizational unit, and Function objects connected to the IT system.

MOST SUPPORTED PROCESSES

Top-7 processes with the highest number of functions actively supported by the given system.

Data source
ARIS Architect:

Report: EA - System support for VACDs

Report configurable?
No

Data feed
EA - System - Supported processes

Calculation
Counts and ranks the systems supported per processes.

Traversing the hierarchy of value-added chain diagrams (VACDs), searches for all functions supporting IT systems. Functions support IT systems if they are connected using the connection type **supports** in event-driven process chains (EPCs) that are assigned to VACDs.

SUPPORT DISTRIBUTION BY PROCESSES

List of processes and the corresponding system support distribution.

Data source
ARIS Architect:

Report: EA - System support for VACDs

Report configurable?
No

Data feed
EA - System - Supported processes

Calculation
Lists the systems supported per processes together with the percentage distribution, based on the rank.

Traversing the hierarchy of value-added chain diagrams (VACDs), searches for all functions supporting IT systems. Functions support IT systems if they are connected using the connection type **supports** in event-driven process chains (EPCs) that are assigned to VACDs.

SYSTEM REPLACEMENT CANDIDATES BY CAPABILITY OVERLAP

Top-7 options for replacing the selected system (as a source or target).

Data source
ARIS Architect:

Report: EA - System redundancies

Report configurable?
No

Data feed
EA - System - System redundancies

Calculation
Compares systems regarding their common capabilities.

OPERATING COSTS BY COST TYPE

Operating expenses for the given IT system by cost type over time.

Data source
ARIS Architect:

Report: EA/Alfabet - System costs

Report configurable?
No

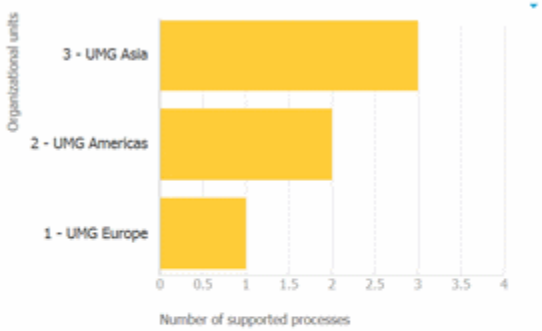
Data feed
EA - System - Costs over time

Calculation
Lists all IT systems of the database that also exist in Alfabet. All cost values are listed per system and year for the various cost types specified.

EXAMPLE

Most supported organizational units

Top-7 org. units with the highest number of associated processes ...



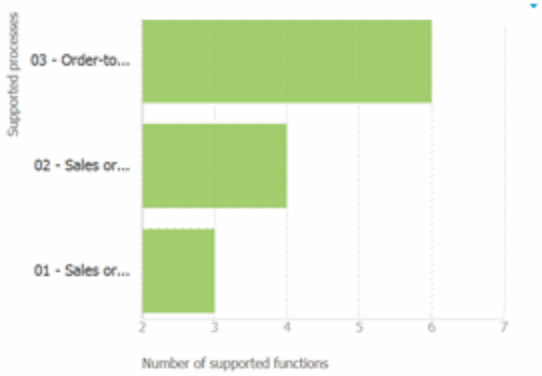
Support distribution by organizational units

List of organizational units and the corresponding system support ...

Organizational unit	Supported activ...	Distribution in %
UMG Asia	3	50
UMG Americas	2	33
UMG Europe	1	16

Most supported processes

Top-7 processes with the highest number of functions actively...



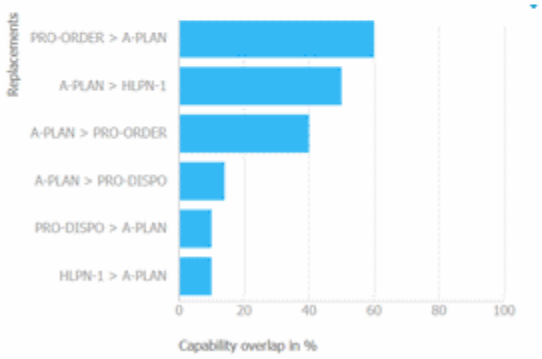
Support distribution by processes

List of processes and the corresponding system support distribution

Process	Supported activit...	Distribution in %
Order-to-cash	6	46
Sales order mana...	4	31
Sales order mana...	3	23

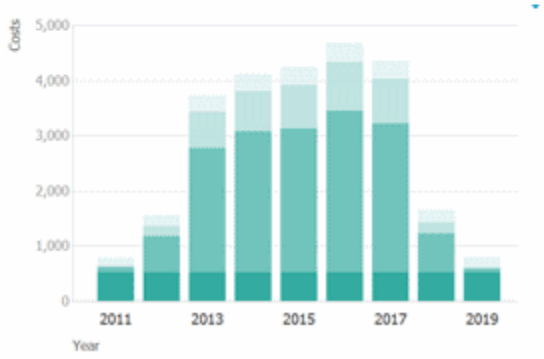
System replacement candidates by capability over...

Top-7 options for replacing the selected system (as a source or target)



Operating costs by cost type

Operating expenses for the given IT system by cost type over time



3.2.14.5.3.5.3 EA dashboard for objectives

Displays the goal accomplishment for objectives across all KPIs and per KPI.

AVAILABILITY

This dashboard is shown for the model types **Strategy diagram** and **Objective diagram** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

OBJECTIVES

Shows all objectives in the model and their goal accomplishments over all KPIs.

Data source
ARIS Architect:

- Report: Strategy - Models and objectives
- Report: Strategy - Objectives with data

Report configurable?
No

Data feed
Strategy - Goal accomplishment - Objectives

Calculation
Lists all **Strategy diagram** and **Objective diagram** model types and the objectives contained with their goal accomplishments.

KPIS PER OBJECTIVE

Displays the KPIs of the objective selected in the diagram and their respective values.

Data source
ARIS Architect:

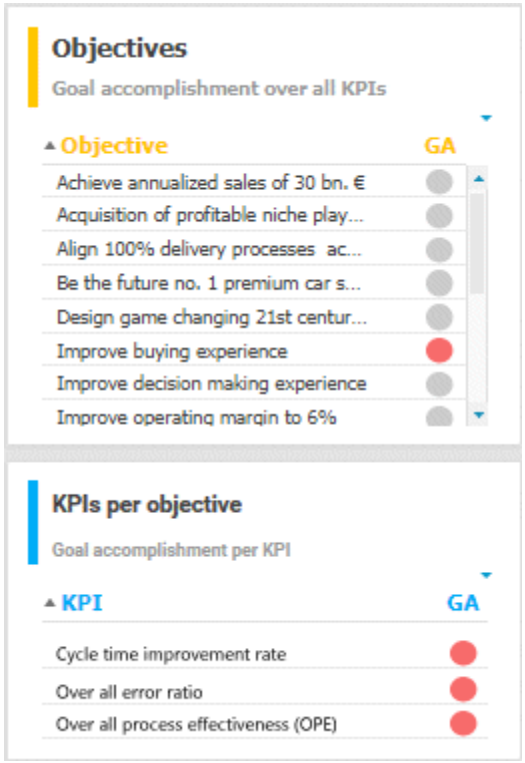
- Report: Strategy - Objectives and KPIs
- Report: Strategy - KPIs with data

Report configurable?
No

Data feed
Strategy - Goal accomplishment - KPIs per objective

Calculation
Lists all objectives including their KPIs whose achievement is calculated based on the Balanced Scorecard methodology.

EXAMPLE


Objectives
Goal accomplishment over all KPIs
Objective
GA
Achieve annualized sales of 30 bn. €
Acquisition of profitable niche play...
Align 100% delivery processes ac...
Be the future no. 1 premium car s...
Design game changing 21st centur...
Improve buying experience
Improve decision making experience
Improve operating margin to 6%
KPIs per objective
Goal accomplishment per KPI
KPI
GA
Cycle time improvement rate
Over all error ratio
Over all process effectiveness (OPE)

3.2.14.5.3.6 Dashboards using ARIS Process Performance Manager data

Available dashboards (page 403) based on ARIS Process Performance Manager data.

3.2.14.5.3.6.1 Process and Finance KPIs dashboard

Displays an overview of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database on the **Dashboards** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

FINISHED PROCESS INSTANCES

Number of process instances measured by ARIS Process Performance Manager.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances per day (persisted)

Calculation
Counts the number of recorded process instances over the entire period.

PROCESS INSTANCES INCLUDING PRODUCTION FAULTS

Shows the percentage of process instances for which the quality checks (mentioned in the process) failed.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances (persisted)

Calculation
Calculates the percentage of process instances for which the quality checks (mentioned in the process) failed.

NUMBER OF TRACTORS PRODUCED WITHOUT FAULTS

Shows the number of finished process instances over time (on an hourly scale).

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances per hour (persisted)

Calculation
Number of finished process instances over time (on an hourly scale).

TRACTORS SOLD

Shows the overall number of sold tractors without production faults.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances (persisted)

Calculation
Counts the overall number of sold tractors without production faults.

MATERIAL COST PER TRACTOR VARIANT

Shows the average material cost per tractor variant.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM - Cost per tractor variant (persisted)

Calculation
Average sum of the values of all cost attributes in all trace entries of all process instances per variant.

AVERAGE MATERIAL COSTS

Shows the overall average material costs.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data collection
In the side-by-side view: Reacts to the function selection and shows the average cost of the assembled part.

Data feed

PPM - Function details (persisted)

Calculation

Average sum of the values of all cost attributes in all trace entries of all process instances.

REVENUE

Shows the overall revenue over all sold tractors.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances (persisted)

Calculation

Number of sold tractors multiplied by the price per tractor.

EXAMPLE

3.2.14.5.3.6.2 Process variant comparison

Displays modeled process variants side-by-side.

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database on the **Dashboards** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

PROCESS VARIANT WITH THE SHORTEST CYCLE TIME (MINUTES)

Shows the function flow that describes the process variant with the shortest process cycle time in minutes of all recorded instances.

Data source
PPM instances (persisted)

Data feed
PPM - Workflow with shortest cycle time (persisted)

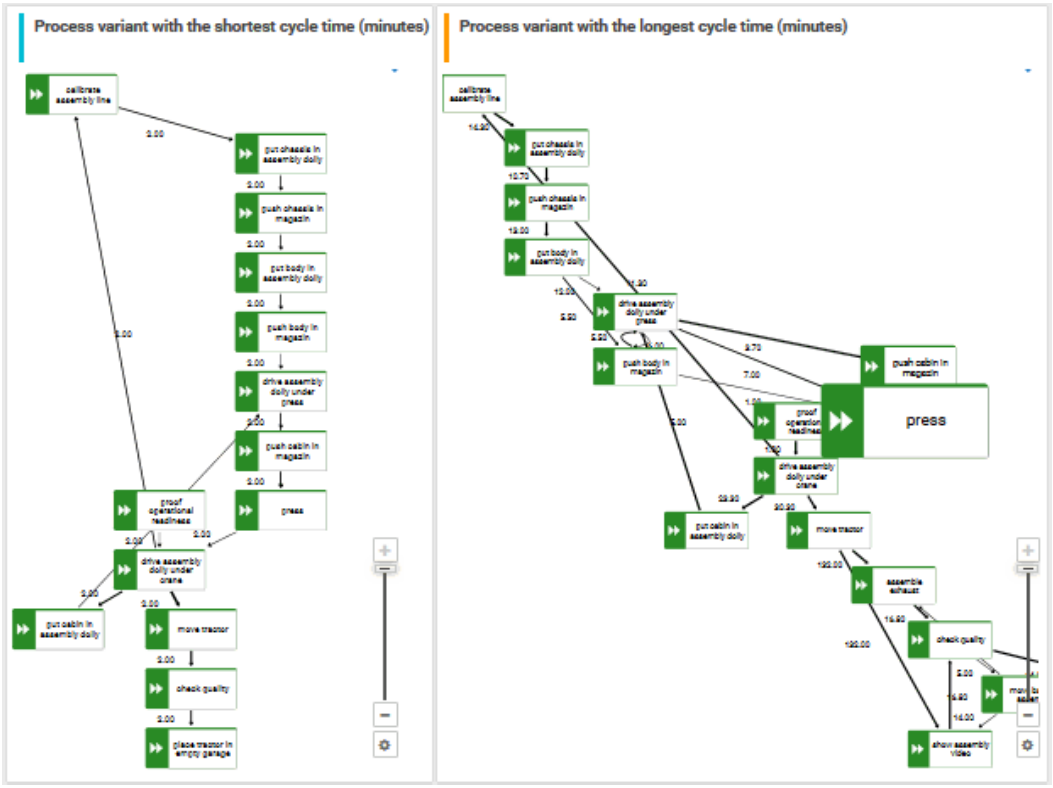
PROCESS VARIANT WITH THE LONGEST CYCLE TIME (MINUTES)

Shows the function flow that describes the process variant with the longest process cycle time in minutes of all recorded instances.

Data source
PPM instances (persisted)

Data feed
PPM - Workflow with shortest cycle time (persisted)

EXAMPLE


Process variant with the shortest cycle time (minutes)
Process variant with the longest cycle time (minutes)
press

3.2.14.5.3.6.3 Performance

Displays financial overview of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

FINISHED PROCESS INSTANCES

Number of process instances measured by ARIS Process Performance Manager.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances per day (persisted)

Calculation
Counts the number of recorded process instances over the entire period.

PROCESS INSTANCES INCLUDING PRODUCTION FAULTS

Shows the percentage of process instances for which the quality checks (mentioned in the process) failed.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances (persisted)

Calculation
Calculates the percentage of process instances for which the quality checks (mentioned in the process) failed.

AVERAGE PROCESS THROUGHPUT TIME (MINUTES)

In the side-by-side view: Delivers the average process throughput time over all recorded process instances as well as min./max. values and the planned value.

Data source

Process Performance Manager favorite persisted for the use case demo. Alternatively, regarding planned value, you can use the report **Export item data to tables** report or an individual ARIS query.

Data collection

The KPI reacts to the function selection. If nothing is selected, it presents the average throughput time over all instances. If a function is selected, it presents the average throughput time over all instances that include the function.

Min./Max. values always consider all recorded instances. The planned value is entered in the underlying data feed (this is the case in the example) or is requested from the ARIS repository via report or query.

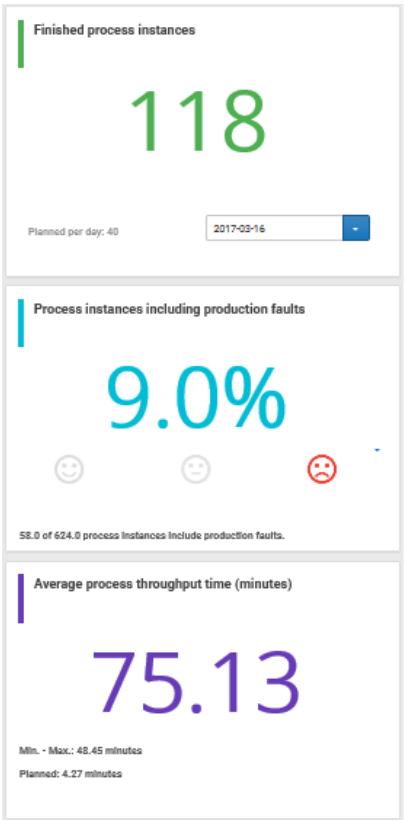
Data feed

PPM instances (persisted)

Calculation

Average sum of the values of all cost attributes in all trace entries of all process instances.

EXAMPLE



3.2.14.5.3.6.4 Finance

Displays financial overview of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

AVERAGE MATERIAL COSTS

Shows the overall average material costs.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data collection
In the side-by-side view: Reacts to the function selection and shows the average cost of the assembled part.

Data feed
PPM - Function details (persisted)

Calculation
Average sum of the values of all cost attributes in all trace entries of all process instances.

TRACTORS SOLD

Shows the overall number of sold tractors without production faults.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances (persisted)

Calculation
Counts the overall number of sold tractors without production faults.

REVENUE

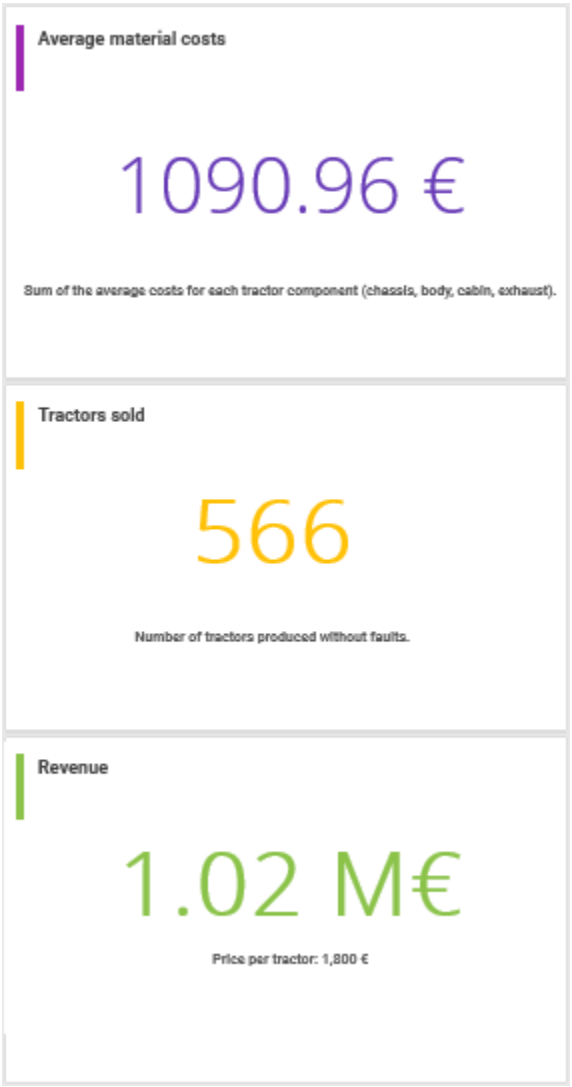
Shows the overall revenue over all sold tractors.

Data source
Process Performance Manager favorite persisted for the use case demo.

Data feed
PPM instances (persisted)

Calculation
Number of sold tractors multiplied by the price per tractor.

EXAMPLE



3.2.14.5.3.6.5 IoT - Device status (persistet)

Displays the device status of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

SELECT DEVICE

Device type and device instance selection to filter the downtime rate.

Data source
Report: Exports item data to tables with the value pair **IoT objects to processes** (Cumulocity API).

Report configurable?
No

Data collection
Context - process model: Collects all IoT device types and device instances (Cumulocity) relevant in the process model.

Data feed
IoT - Object information and **IoT - Devices**

Calculation
-.-

SELECT DATA RANGE

Date selection for selecting a date range to filter the downtime rate.

DOWNTIME RATE [%]

Displays the downtime rate of the selected device type and device instance in the selected date range.

Data source
Report: Exports item data to tables with the value pair **IoT objects to processes** (Cumulocity API).

Report configurable?
No

Data collection

Context - process model: Collects all downtimes of all IoT devices (Cumulocity) relevant in the process model.

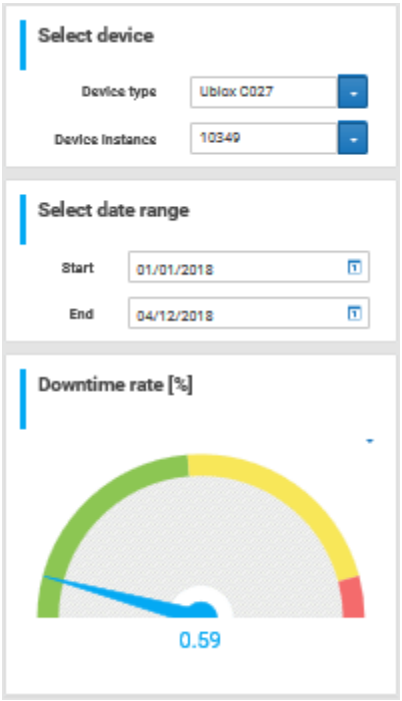
Data feed

IoT - Object information and **IoT - Devices**

Calculation

Aggregates the downtimes of the selected data.

EXAMPLE



3.2.14.5.3.6.6 IoT - Alarm status (persistet)

Displays the alarm status of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

SELECT DATA RANGE

Date selection for selecting a date range to filter the dashboard.

CRITICAL IOT ALARMS

Shows the number of critical IoT alarms.

Data source
Report: Exports item data to tables with the value pair **IoT objects to processes** (Cumulocity API).

Report configurable?
No

Data collection
Context - process model: Collects all alarms from all IoT devices (Cumulocity) relevant in the process model.

Data feed
IoT - Device alarms and **IoT - Object information**

Calculation
Counts the number of critical IoT alarms.

IOT ALARMS AT A GLANCE

Provides an overview of all IoT alarms by device and severity.

Data source
Report: Exports item data to tables with the value pair "IoT objects to processes" (Cumulocity API).

Report configurable?
No

Data collection

Context - process model: Collects all alarms from all IoT devices (Cumulocity) relevant in the process model.

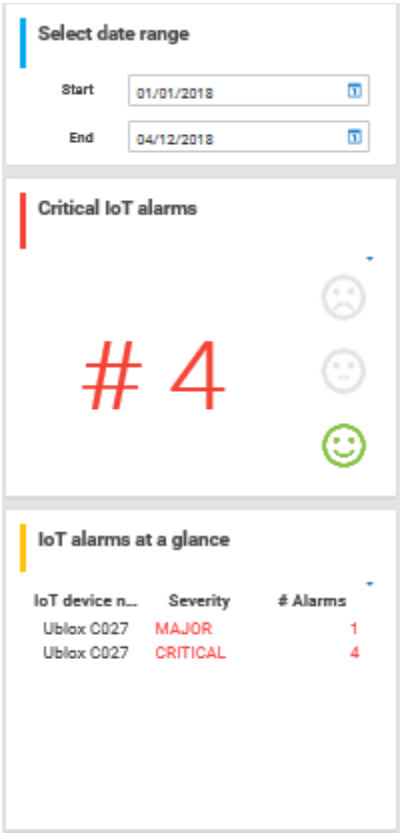
Data feed

IoT - Device alarms and **IoT - Object information**

Calculation

Counts the number of IoT alarms by device and severity.

EXAMPLE



3.2.14.5.3.6.7 IoT project status

Displays the project status of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

PROGRESS OF IOT PROJECT IMPLEMENTATION

Gives an overview of how many of the planned IoT resources are already implemented.

Data source
Report: Exports item data to tables with the value pair **IoT objects to processes**.

Report configurable?
No

Data collection
Context - process model/activity/IoT object: Collects all IoT objects that are connected to the context (can be **process model**, **activity**, or **IoT object**). Evaluates whether the attribute **Cumulocity type** is true.

Data feed
IoT - Implementation progress and **IoT - Object information**

Calculation
Ratio of the number of IoT objects whose **Cumulocity type** attribute is true to the total number of IoT objects that relate to the context.

PROCESS COST RATE SINCE IOT PROJECT IMPLEMENTATION

Displays the impact of the IoT implementation on the process costs.

Data source
PPM: Standard private favorite **01 Process cycle time** extended by the process dimension **Time**, filtered by **month** with selected function measure **Process cost rate**.

Report configurable?
No

Data collection
Context - process model: Aggregates the process cost rate measured by PPM.

Data feed
No data feed, direct connection to PPM.

Calculation
Aggregates the process costs over all process instances per month.

PROCESS DURATION SINCE IOT PROJECT IMPLEMENTATION

Shows how the process duration has developed since the implementation of the IoT project.

Data source
PPM: Standard private favorite **01 Process cycle time** extended by the process dimension **Time**, filtered by **month**.

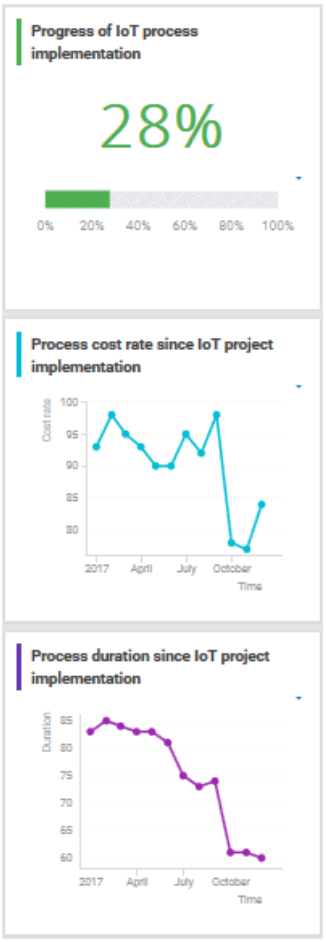
Report configurable?
No

Data collection
Aggregates process duration measured by PPM.

Data feed
No data feed, direct connection to PPM.

Calculation
Aggregates the process duration over all process instances per month.

EXAMPLE



3.2.14.5.3.7 Dashboards using Collaboration

Here you can find information about Collaboration dashboards delivered by default.

3.2.14.5.3.7.1 Collaboration overview

Shows the amount of content and the number of active users, as well as the types of content and user groups in Collaboration.

AVAILABILITY

- **ARIS Connect >** **Portal >** **Dashboards**
- **ARIS Connect >** **Collaboration > Administration >** **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

CONTENT ADDED OVER TIME

Amount and type of Collaboration content created in the last three months.

Data source
Posts, comments, tags, etc. of Collaboration.

Data feed
Collaboration - Content overview

NUMBER OF ACTIVE USERS OVER TIME

Number of active Collaboration users in the last five days.

Data source
Users of Collaboration who posted and commented on content.

Data feed
Collaboration - Usage overview

NUMERICAL CONTENT TYPE DISTRIBUTION

Percentage distribution of Collaboration content created in the last three months.

Data source
Posts, comments, tags, etc. of Collaboration.

Data feed
Collaboration - Content overview

NUMERICAL GROUP TYPE DISTRIBUTION

Numerical distribution of private and public groups created in Collaboration.

Data source

Private and public groups in Collaboration

Data feed

Collaboration - Largest groups

EXAMPLE

3.2.14.5.3.7.2 Content overview (Collaboration)

Shows the most frequently used Collaboration and ARIS content by users.

AVAILABILITY

- **ARIS Connect >** **Portal >** **Dashboards**
- **ARIS Connect >** **Collaboration > Administration >** **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

MOST FOLLOWED MODELS

The top seven most followed models in Collaboration.

Data source
ARIS models in Collaboration

Data feed
Collaboration – Most followed ARIS content

MOST COMMENTED MODELS

The top seven most commented models in Collaboration.

Data source
ARIS models in Collaboration

Data feed
Collaboration – Most commented ARIS content

MOST BOOKMARKED POSTS

The top seven most bookmarked posts in Collaboration.

Data source
Posts in Collaboration

Data feed
Collaboration – Most bookmarked posts

MOST LIKED POSTS

The top seven most liked posts in Collaboration.

Data source
Posts in Collaboration

Data feed
Collaboration – Most liked posts

MOST COMMENTED POSTS

The top seven most commented posts in Collaboration.

Data source
Posts in Collaboration

Data feed
Collaboration – Most commented posts

MOST SHARED POSTS

The top seven most shared posts in Collaboration.

Data source
Posts in Collaboration

Data feed
Collaboration – Most shared posts

EXAMPLE

3.2.14.5.3.7.3 Group monitoring (Collaboration)

Shows the most frequently used groups and details of Collaboration groups.

AVAILABILITY

- **ARIS Connect >** **Portal >** **Dashboards**
- **ARIS Connect >** **Collaboration > Administration >** **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

MOST FOLLOWED GROUPS

The top seven most followed groups in Collaboration.

Data source
Groups in Collaboration

Data feed
Collaboration – Largest groups

GROUPS WITH THE MOST POSTS ADDED

The top seven groups with the most posts in Collaboration.

Data source
Groups and posts in Collaboration

Data feed
Collaboration – Most active groups

MOST COMMENTED GROUPS

The top seven most commented groups in Collaboration.

Data source
Groups and comments in Collaboration

Data feed
Collaboration – Most active groups

PERCENT DISTRIBUTION OF GROUP TYPES

Percentage distribution of private and public groups created in Collaboration.

Data source
Private and public groups in Collaboration

Data feed
Collaboration – Largest groups

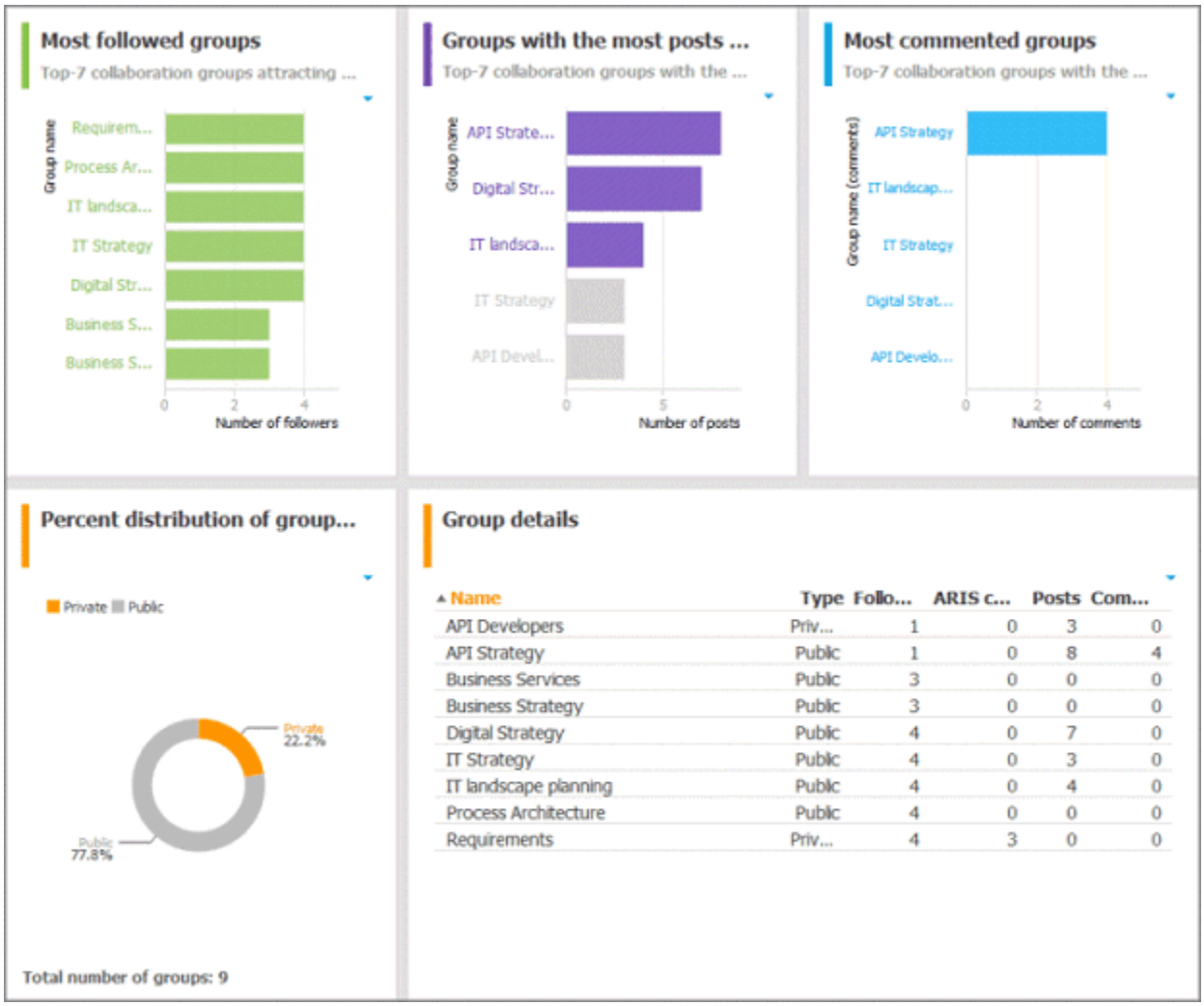
GROUP DETAILS

Details of the largest Collaboration groups: group type, number of followers, amount of ARIS content, number of posts, and number of comments. If a group type is selected in the **Percent distribution of group types** chart, the details are filtered according to the selected group type.

Data source
Private and public groups in Collaboration

Data feed
Collaboration – Largest groups

EXAMPLE



3.2.14.5.3.7.4 Users

Shows details of Collaboration users.

AVAILABILITY

ARIS Connect > Collaboration > Administration > Dashboards (only for users with the **Collaboration administrator** function privilege)

CHARTS

USERS GENERATING THE MOST CONVERSATIONS

The top seven users most involved in conversations in Collaboration.

Data source
Users in Collaboration

Data feed
Collaboration – Most active users

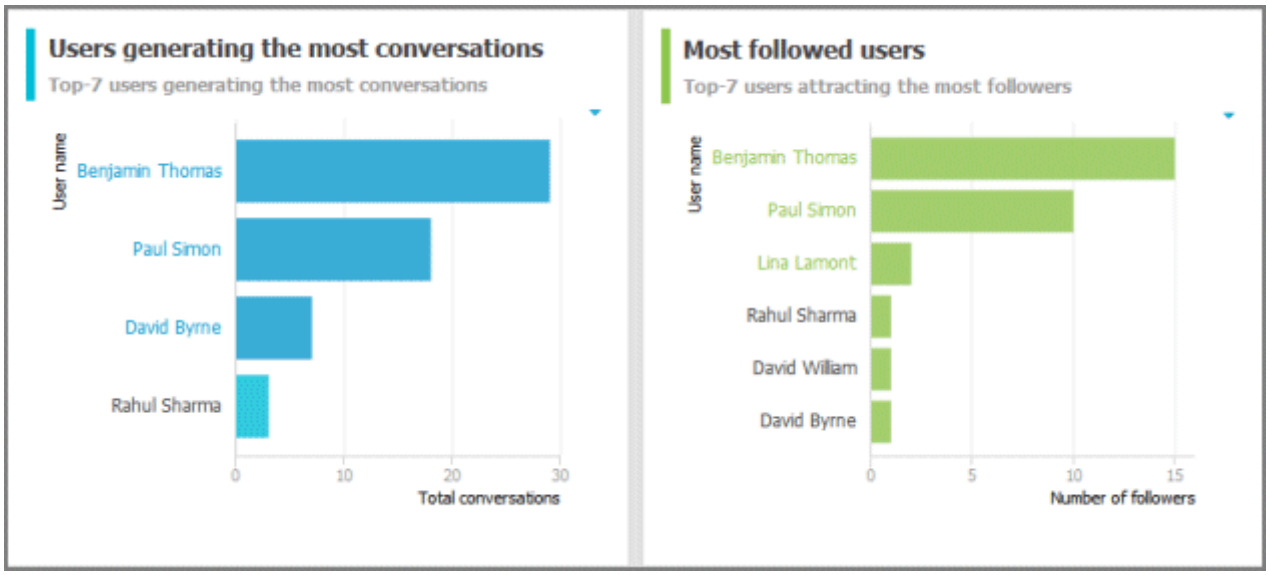
MOST FOLLOWED USERS

The top seven most followed Collaboration users.

Data source
Users in Collaboration

Data feed
Collaboration – Most followed users

EXAMPLE



3.2.14.5.3.8 Business Strategy dashboards

Here you can find information about Business strategy dashboards (page 403) delivered by default. Consequently, the dashboards provide information about leadership and best practice for the focus area business concept via Business Process Modeling.

3.2.14.5.3.8.1 Strategy map - Balanced scorecard (BSC)

Dashboard that provides an overview of the aspects of the strategy scorecard. In the **Scorecard perspectives** area, you can filter the input of the charts. The charts are adjusted immediately.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of models of type **BSC Cause-and-effect diagram**.

CHARTS

FINANCE

Displays the average financial KPI for the selected time period.

Data source
Report: Strategy - BSC Objectives

Report configurable?
No

Data collection
Collects all key performance indicators regarding finances.

Data feed
Strategy - UMG strategy balanced scorecard - perspectives

Calculation
The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

CUSTOMER

Displays the average customer KPI for the selected time period.

Data source
Report: Strategy - BSC Objectives

Report configurable?
No

Data collection
Collects all key performance indicators regarding customers.

Data feed
Strategy - UMG strategy balanced scorecard - perspectives

Calculation
The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

PROCESS

Displays the average process KPI for the selected time period.

Data source
Report: Strategy - BSC Objectives

Report configurable?
No

Data collection
Collects all key performance indicators regarding the process.

Data feed
Strategy - UMG strategy balanced scorecard - perspectives

Calculation
The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

LEARNING & GROWTH

Displays the average **learning & growth** KPI for the selected time period.

Data source
Report: Strategy - BSC Objectives

Report configurable?
No

Data collection
Collects all key performance indicators regarding learning & growth.

Data feed
Strategy - UMG strategy balanced scorecard - perspectives

Calculation
The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

STRATEGY OBJECTIVES

Displays all objectives of the model **BSC** as well as the achievements and the trend from a Microsoft® Excel spreadsheet.

Data source
Report: Strategy - BSC Objectives

Report configurable?
No

Data collection
Collects all the objectives of the **BSC** model and the achievements and trends obtained from a Microsoft® Excel file.

Data feed
Strategy - UMG strategy balanced scorecard - perspectives

Calculation
The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

KEY PERFORMANCE INDICATOR

Displays all current and plan values of all **KPIs** or from the scorecard details.

Data source
Report: Strategy - BSC Objectives

Report configurable?
No

Data collection
Collects all **KPI** values from the KPIs of the Microsoft® Excel spreadsheet.

Data feed
Strategy - UMG strategy balanced scorecard - perspectives

ACTION PLAN

Shows all initiatives with the responsible roles from selected scorecard details or from selected targets.

Data source
Report: Strategy - BSC Objectives

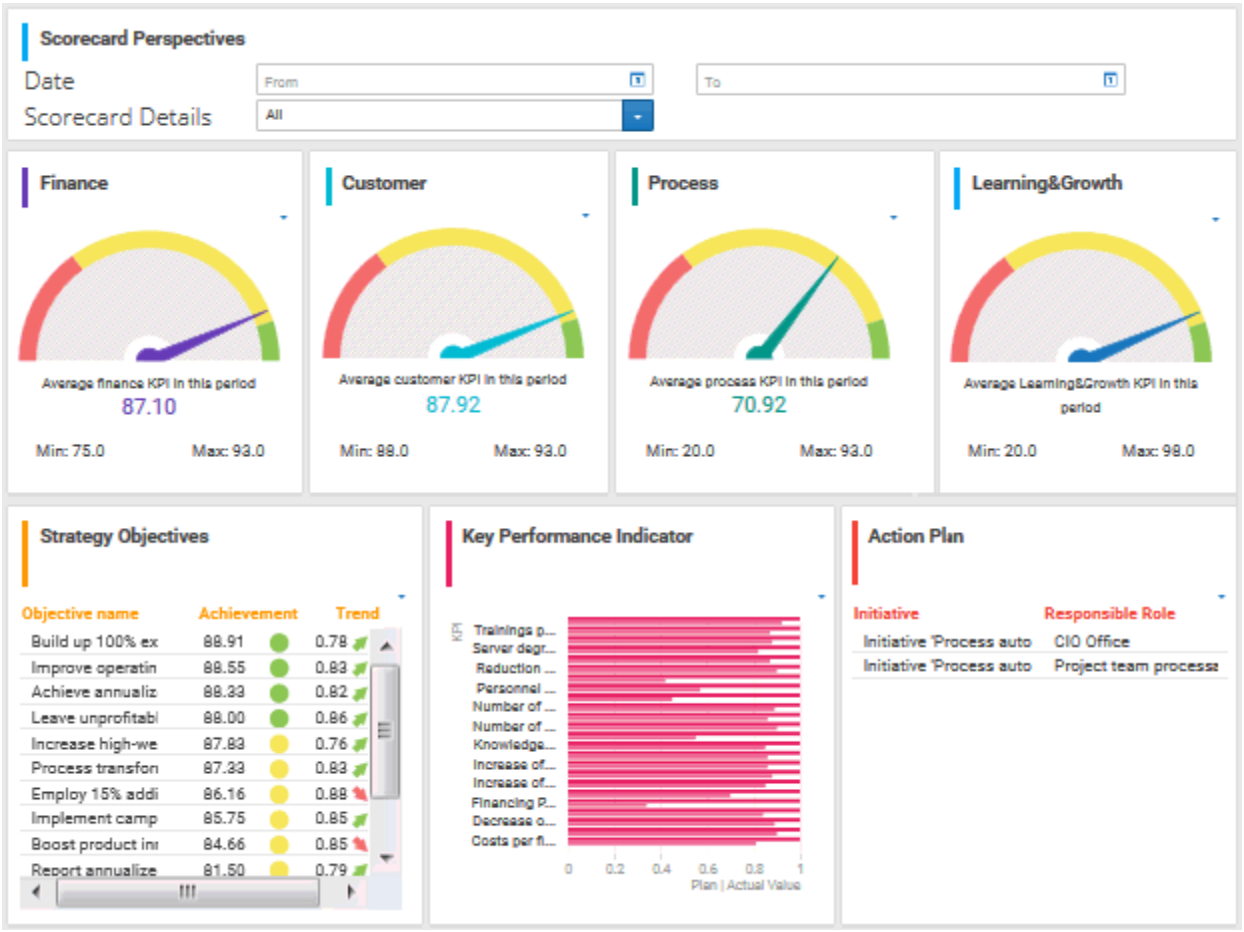
Report configurable?
No

Data collection
Collects all initiatives and responsible roles from the connected models.

Data feed

Strategy - UMG strategy balanced scorecard - initiatives

EXAMPLE



3.2.14.5.3.8.2 Objectives per strategy

Dashboard that provides an overview of strategy objects and the association of objectives to strategy objects.

AVAILABILITY

This dashboard is shown for models of type **Strategy diagram** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

STRATEGY

Gives an overview of the existing objects of type **Strategy** in models of type **Strategy diagram** of the database.

Data source
Report: Strategy - Strategies with objectives

Report configurable?
No

Data collection
Collects all objects of type **Strategy** from models of type **Strategy diagram** of the database.

Data feed
Strategy - Strategy and Objectives

Calculation
-.-

OBJECTIVES FROM STRATEGY

Gives an overview of the existing objectives associated with objects of type **Strategy**.

Data source
Report: Strategy - Strategies with objectives

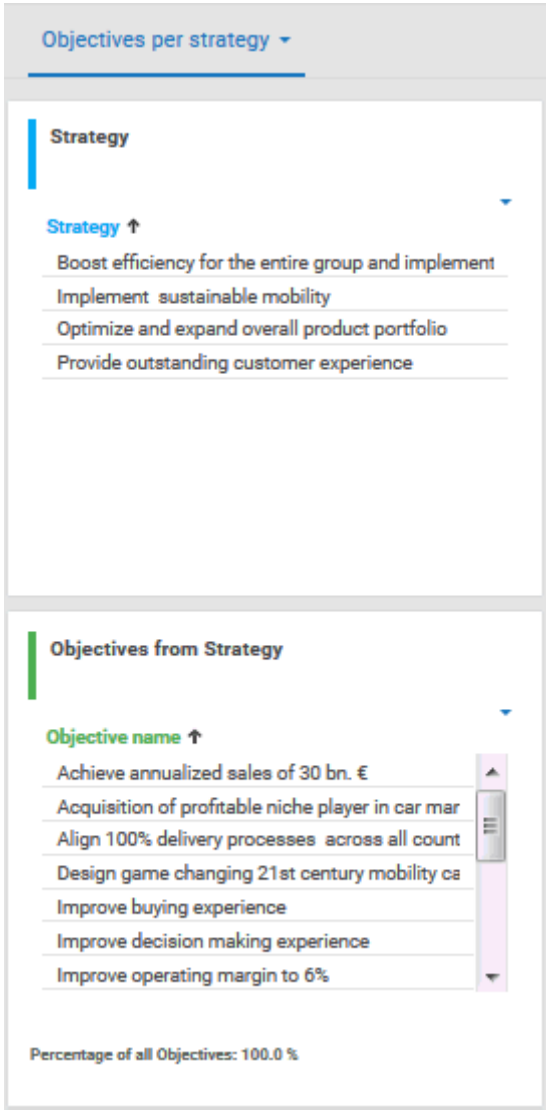
Report configurable?
No

Data collection
Collects all objectives connected to an object of type **Strategy** contained in a model of type **Strategy diagram** of the database.

Data feed
Strategy - Strategy and Objectives

Calculation
-.-

EXAMPLE


Objectives per strategy
Strategy
Strategy
Boost efficiency for the entire group and implement
Implement sustainable mobility
Optimize and expand overall product portfolio
Provide outstanding customer experience
Objectives from Strategy
Objective name
Achieve annualized sales of 30 bn. €
Acquisition of profitable niche player in car mar
Align 100% delivery processes across all count
Design game changing 21st century mobility ca
Improve buying experience
Improve decision making experience
Improve operating margin to 6%
Percentage of all Objectives: 100.0 %

3.2.14.5.3.8.3 Process transformation

Dashboard that provides an overview of strategy objects and the association of objectives to strategy objects.

AVAILABILITY

This dashboard is shown for models of type **KPI allocation diagram** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

KPI VALUES

Displays the previous, actual, and planned values of the existing KPIs.

Data source
Report: Strategy - KPI values

Report configurable?
No

Data collection
Collects all KPI objects from the models of type **KPI allocation diagram** in the database.

Data feed
Strategy - Process transformation KPI Values

Calculation
-.-

KPI TREND

Displays the increase and trend of the KPIs.

Data source
Report: Strategy - KPI values

Report configurable?
No

Data collection
Collects information about the KPI trend.

Data feed
Strategy - Process transformation KPI Values

Calculation
Aggregation of the previous and current values to calculate the increase and trend.

ACHIEVEMENT OF OBJECTIVES

Indicates whether the objectives were achieved with at least 75%, with at least 50% or not.

Data source

Report: Strategy - KPI values

Report configurable?

No

Data collection

Collects the achievement of the KPIs objectives.

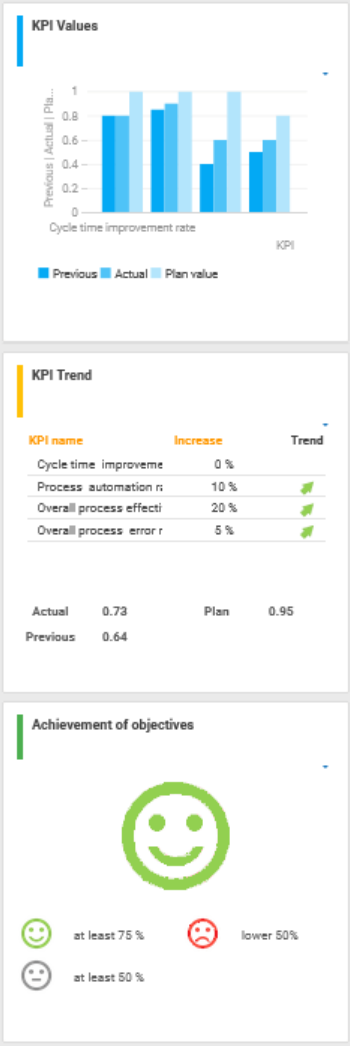
Data feed

Strategy - Achievement of Objectives

Calculation

Aggregation of the number of KPIs whose objectives have been met.

EXAMPLE



3.2.14.5.3.8.4 Increase of IoT enablement of production processes

Dashboard that displays the IoT enablement of production processes.

AVAILABILITY

This dashboard is shown for the model **Increase IoT enablement in production** of the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet (1. Strategy > 1.1 Business strategy > Strategy implementation).

CHARTS

PROCESSES OF PRODUCTION

Displays an overview of all processes of production.

Data source
Report: Strategy - IoT objects

Report configurable?
No

Data collection
Collects all processes of production.

Data feed
Strategy - IoT increase

Calculation
-.-

INCREASE OF IOT

Indicates whether at least one of the subordinate processes of the selected process is associated with an IoT object. If yes, the smiley is green, if not, the smiley is red.

Data source
Report: Strategy - IoT objects

Report configurable?
No

Data collection
Selected process.

Data feed
Strategy - IoT increase

Calculation
Aggregates the number of the IoT-enabled processes.

PERCENTAGE OF ALL IOT ENABLED PROCESSES

Displays the percentage of IoT-enabled processes.

Data source
Report: Strategy - IoT objects

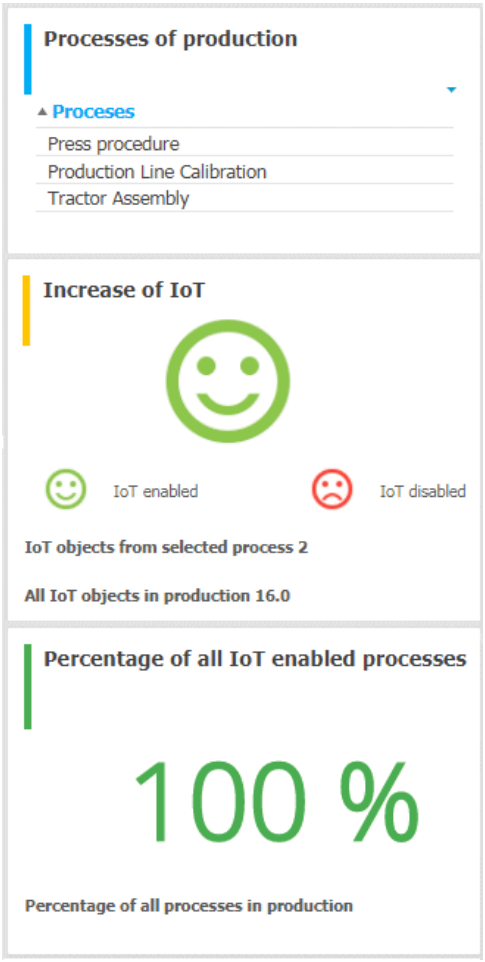
Report configurable?
No

Data collection
Collects the number of the IoT object of the processes contained in the **Production** group of the **United Motor Group** database (2. Processes > 2.1 Process architecture > Core processes > Production).

Data feed
Strategy - IoT increase

Calculation
Aggregates the number of the IoT-enabled processes divided by the number of all processes multiplied by 100.

EXAMPLE



3.2.14.5.3.9 Governance, Risk and Compliance (GRC) dashboards

The following GRC dashboards (GRC = Governance, Risk and Compliance) are available: GRC overview, GRC management, and GRC portfolio. The dashboards show an overview of GRC-related objects and workflows, such as risks, controls, or issues. The dashboards use data from ARIS and, if available, from ARIS Risk & Compliance Manager. The dashboards use the **Export item data to tables** ARIS Report in ARIS Architect (**ARIS >** **Administration > Evaluations > Reports > Dashboard data**). To update the data, run this report at the database level, select **Dashboard data** category, **Export item data to tables** report, and **GRC management** parameter value set.

3.2.14.5.3.9.1 GRC overview

The **GRC overview** dashboard only uses data from the ARIS database that is filtered by the selected process. Data from ARIS Risk & Compliance Manager is not included. This dashboard gives an overview of different GRC indicators and objects regarding a process item.

AVAILABILITY

By default, it is available for two processes:

- **Sales order processing (as-is)**, (GUID: 0adfca71-2960-11dc-2729-000bcd0cce4e)
- **Generic monthly closing process** (GUID: a55af59c-19cb-4b78-bc41-07fae048a864)

CHARTS

FUNCTIONS WITH RISKS

Displays the number of functions that have risks assigned.

Data source
ARIS

Calculation
Counts the number of functions in the selected process that are connected with risks.

NUMBER OF RISKS

Displays the number of risks assigned to functions.

Data source
ARIS

Calculation
Counts the number of risks in the selected process that are connected with functions.

CONTROL COVERAGE

Displays the percentage of risks that have at least one control assigned.

Data source
ARIS

Calculation
Calculates the percentage of risks in the selected process that are connected with at least one control in relation to the total number of risks in the selected process.

CONTROL TEST COVERAGE

Displays the percentage of risks that have at least one control assigned that is connected to a control test definition.

Data source
ARIS

Calculation
Calculates the percentage of risks in the selected process that are connected to at least one control that is connected with a control test definition, in relation to the total number of risks in the selected process.

RISK DETAILS

Displays details of each risk assigned to a function:

- **Risk** name (to open the object, click the name)
- **Related function** (to open the object, click the name)
- **Basis of valuation**
- **Data source**

Data source
ARIS

Calculation
Uses the risks calculated in the **Number of risks** chart.

CONTROL TEST DETAILS

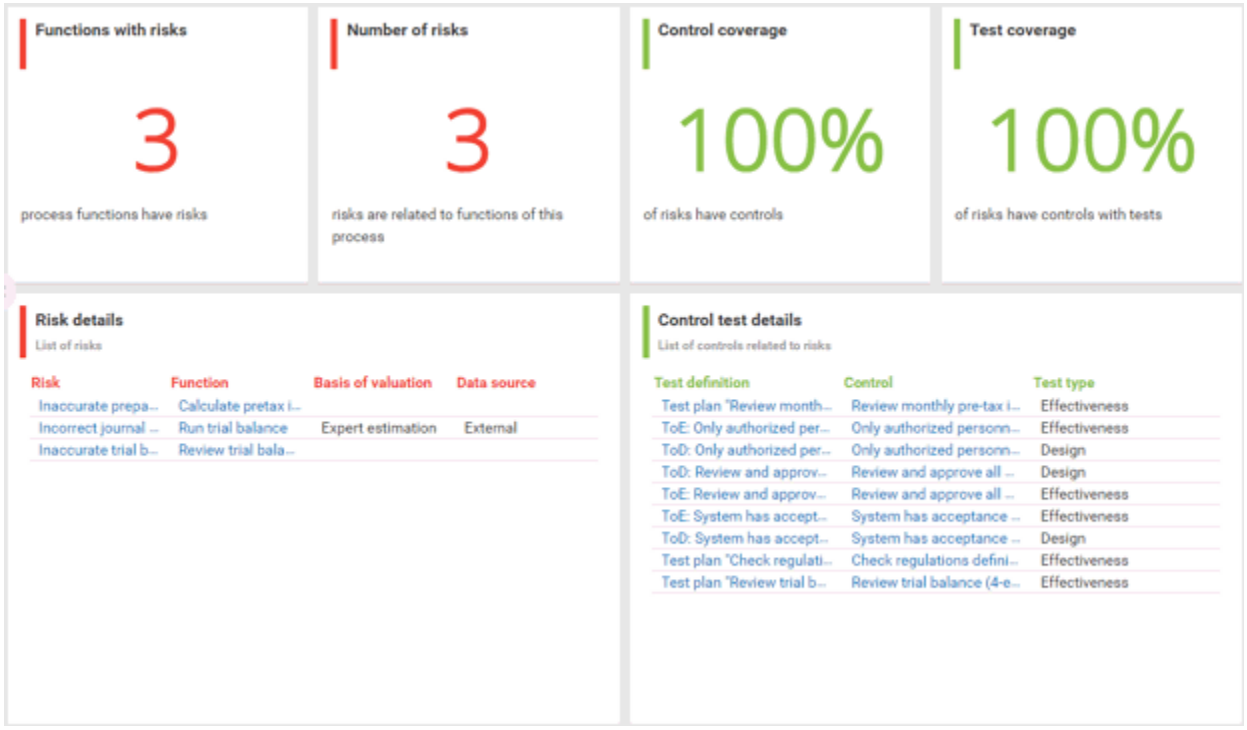
Displays details of each control test assigned to a risk by a control:

- **Test definition** name (to open the object, click the name)
- **Control** name (to open the object, click the name)
- **Test type** (Test of design/Test of effectiveness)

Data source
ARIS

Calculation
Uses the control tests calculated in the **Control test coverage** chart.

EXAMPLE


Functions with risks
3
process functions have risks
Number of risks
3
risks are related to functions of this process
Control coverage
100%
of risks have controls
Test coverage
100%
of risks have controls with tests
Risk details
List of risks
Risk
Function
Basis of valuation
Data source
Inaccurate prepa...
Calculate pretax i...
Incorrect journal ...
Run trial balance
Expert estimation
External
Inaccurate trial b...
Review trial bala...
Control test details
List of controls related to risks
Test definition
Control
Test type
Test plan "Review month...
Review monthly pre-tax i...
Effectiveness
ToE: Only authorized per...
Only authorized personn...
Effectiveness
ToD: Only authorized per...
Only authorized personn...
Design
ToD: Review and approv...
Review and approve all ...
Design
ToE: Review and approv...
Review and approve all ...
Effectiveness
ToE: System has accept...
System has acceptance ...
Effectiveness
ToD: System has accept...
System has acceptance ...
Design
Test plan "Check regulati...
Check regulations defini...
Effectiveness
Test plan "Review trial b...
Review trial balance (4-e...
Effectiveness

3.2.14.5.3.9.2 GRC management

The **GRC management** dashboard uses data from ARIS and ARIS Risk & Compliance Manager database filtered by the selected process. This dashboard gives an overview of different GRC indicators and objects regarding a process item. The default installation of the **GRC management** and the **GRC portfolio** dashboards uses static demo data stored in ARIS document storage. The runtime version of these dashboards uses real ARIS Risk & Compliance Manager data. To replace demo data by runtime data, refer to the **GRC dashboard - runtime installation** guide. For detailed information, refer to the ARIS Aware online help, or contact Software AG or the sales partner responsible.

AVAILABILITY

By default, it is available for two processes:

- **Sales order processing (as-is)**, (GUID: 0adfca71-2960-11dc-2729-000bcd0cce4e)
- **Generic monthly closing process** (GUID: a55af59c-19cb-4b78-bc41-07fae048a864)

CHARTS

ASSESSED RISKS

Displays the number of risks assigned to functions that are connected to risk assessments with reviewer status **Completed**.

Data source
ARIS and ARIS Risk & Compliance Manager

Calculation
Counts the number of risks in the selected process that are connected to a function that is at least connected to one completed risk assessment.

OPEN RISK ASSESSMENTS

Displays the number of risk assessments with the status **Open** (= owner status **New** or **In progress**, or owner status **Assessed** or **Assessment not possible** and reviewer status **Unspecified**).

Data source
ARIS and ARIS Risk & Compliance Manager

Calculation
Counts the number of risks in the selected process that are connected to functions that are connected to risk assessments with the status **Open**.

CONTROL TEST COVERAGE

Displays the percentage of controls that have at least one control test assigned.

Data source
ARIS and ARIS Risk & Compliance Manager

Calculation
Calculates the percentage of controls in the selected process that are connected to at least one control test, in relation to the total number of controls connected to risks that are connected to functions in the selected process.

OPEN TEST CASES

Displays the number of test cases with the status **Open** (**=** owner status **New** or **In progress**, or owner status **Control effective** and reviewer status **Unspecified**).

Data source
ARIS and ARIS Risk & Compliance Manager

Calculation
Counts the number of test cases in the selected process with the status **Open**.

DETAILS OPEN RISK ASSESSMENTS

Displays details of each risk assessment with the status **Open**:

- **Risk assessment ID** (to open the object in ARIS Risk & Compliance Manager, click the ID)
- **Risk** name (click the name)
- **Owner status**
- **Reviewer status**

Data source
ARIS and ARIS Risk & Compliance Manager

Calculation
Uses the risk assessments calculated in the **Open risk assessments** chart.

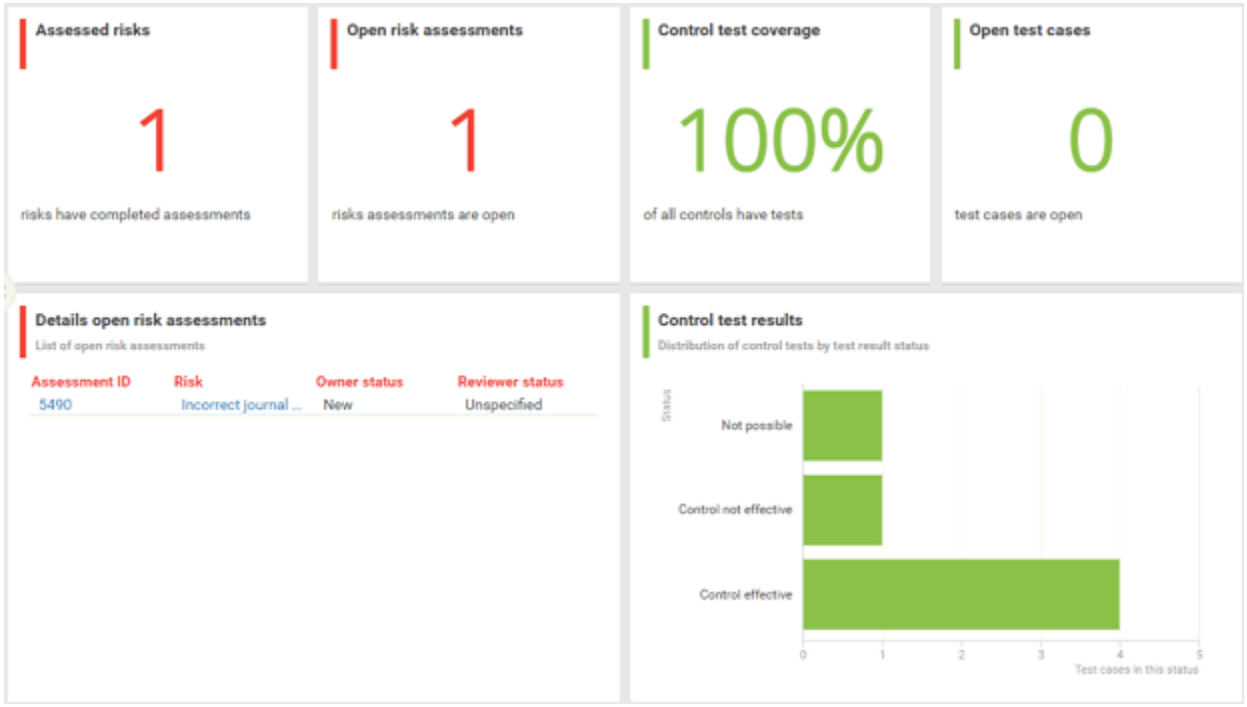
CONTROL TEST RESULT

Displays the owner status of completed test cases that have the reviewer status **Accepted**, or that have the owner status **Not possible** or **Control effective**, or that have the owner status **Not tested** (= closed by system because test was not performed within the testing period). Test cases with owner status **Not possible**, **Control effective**, and **Not tested** are not reviewed.

Data source
ARIS and ARIS Risk & Compliance Manager

Calculation
Counts the number of completed test cases in the different status in the selected process.

EXAMPLE


Assessed risks
1
risks have completed assessments
Open risk assessments
1
risks assessments are open
Control test coverage
100%
of all controls have tests
Open test cases
0
test cases are open
Details open risk assessments
List of open risk assessments
Assessment ID
Risk
Owner status
Reviewer status
5490
Incorrect journal ...
New
Unspecified
Control test results
Distribution of control tests by test result status
Status
Not possible
Control not effective
Control effective
0
1
2
3
4
5
Test cases in this status

3.2.14.5.3.9.3 GRC portfolio

The **GRC portfolio** dashboard uses data from ARIS and ARIS Risk & Compliance Manager database. This dashboard gives an overview of different GRC indicators and objects regarding a database. The default installation of the **GRC management** and the **GRC portfolio** dashboards uses static demo data stored in ARIS document storage. The runtime version of these dashboards uses real ARIS Risk & Compliance Manager data. To replace demo data by runtime data, refer to the **GRC dashboard - runtime installation** guide. For detailed information, refer to the ARIS Aware online help, or contact Software AG or the sales partner responsible.

AVAILABILITY

By default, it is available for the entire database (**Portal >** **Dashboards**).

CHARTS

TOTAL NUMBER OF RISKS

Displays the total number of risks relevant for risk management.

Data source
ARIS

Calculation
Counts the number of risk management-relevant risks in the ARIS database.

CONTROL COVERAGE

Displays the distribution of risks that have at least one control assigned as well as risks without control.

Data source
ARIS

Calculation
Calculates the percentage of risks in the ARIS database that are connected with at least one control in relation to the total number of risk management-relevant risks in the ARIS database.

TOTAL NUMBER OF OPEN GRC ISSUES

Displays the total number of issues with the status **Open** (= owner status **New**, **In progress** or **On hold**, or reviewer status **Unspecified**.)

Data source
ARIS Risk & Compliance Manager

Calculation
Counts the number of issues in the ARIS Risk & Compliance Manager database with the status **Open**.

GRC ISSUES PROPERTY

Displays the distribution of issues with the status **Open** according to their priority.

Data source
ARIS Risk & Compliance Manager

Calculation
Calculates the percentage of issues with the status **Open** according to the various priorities in the ARIS Risk & Compliance Manager database.

RISK HEAT MATRIX

Displays all risks with reviewed risk assessment in a matrix. To open a risk assessment, click a bubble.

Data source
ARIS Risk & Compliance Manager

Calculation
Positions all risks with reviewed risk assessment of the selected impact types according to the result of the most recent qualitative risk assessment.

RISK DETAILS

Displays details of each risk from the **Risk heat matrix** chart:

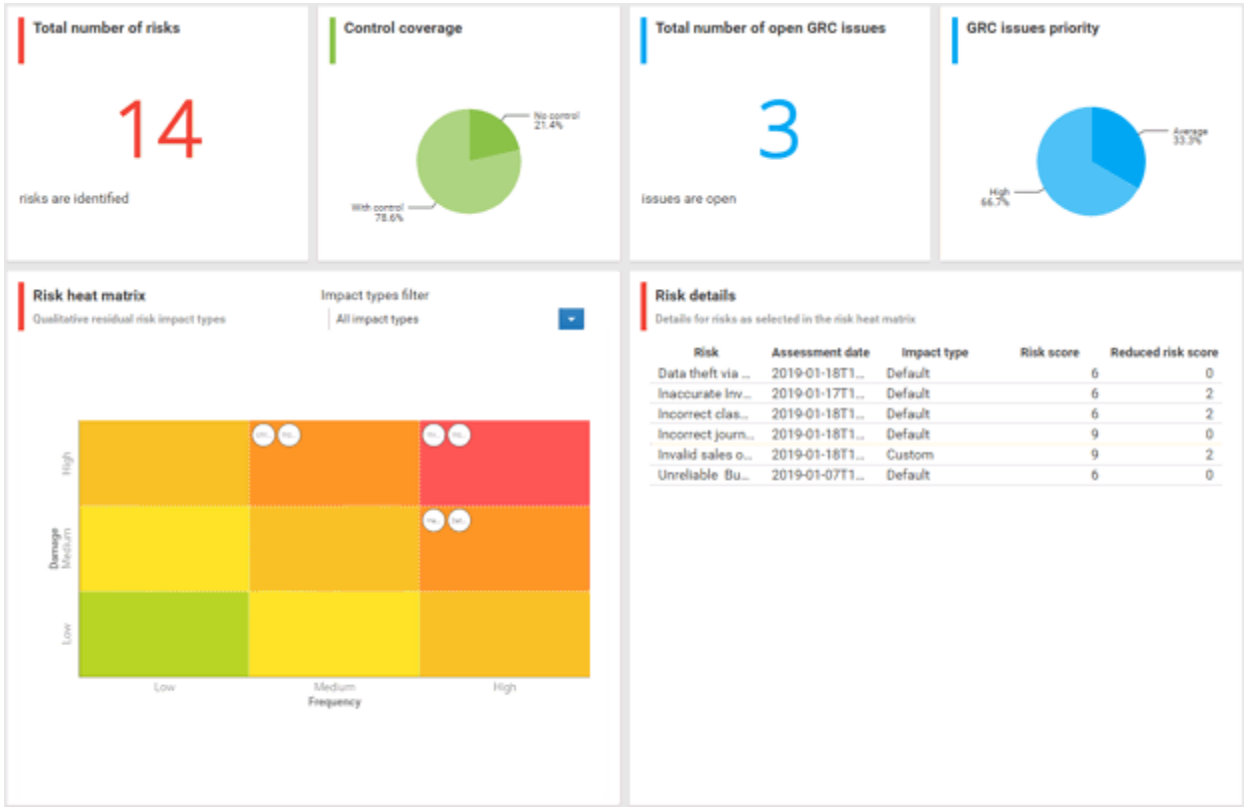
- **Risk** name
- **Assessment date**
- **Impact type**
- **Qualitative risk score**
- **Reduced qualitative risk score**

The list is filtered according to the selected element in the **Risk heat matrix** chart.

Data source
ARIS Risk & Compliance Manager

Calculation
Uses the risk assessments from the **Risk heat matrix** chart.

EXAMPLE


Total number of risks
14
risks are identified
Control coverage
No control
21.4%
With control
78.6%
Total number of open GRC issues
3
issues are open
GRC issues priority
Average
33.3%
High
66.7%
Risk heat matrix
Qualitative residual risk impact types
Impact types filter
All impact types
High
Medium
Low
Damage
Low
Medium
High
Frequency
Risk details
Details for risks as selected in the risk heat matrix
Risk
Assessment date
Impact type
Risk score
Reduced risk score
Data theft via ...
2019-01-18T1...
Default
6
0
Inaccurate Inv...
2019-01-17T1...
Default
6
2
Incorrect clas...
2019-01-18T1...
Default
6
2
Incorrect journ...
2019-01-18T1...
Default
9
0
Invalid sales o...
2019-01-18T1...
Custom
9
2
Unreliable Bu...
2019-01-07T1...
Default
6
0

3.2.14.5.3.10 GDPR Dashboards

You can find information about GDPR dashboards that are contained in ARIS Accelerators for GDPR in the **ARIS Accelerators for GDPR Installation Guide** and the **ARIS Accelerators for GDPR Use Case** manual.

3.2.15 Execute processes

The following describes the execution of processes.

3.2.15.1 Start governance process

You can start governance processes from the portal.

Prerequisite

The **Start governance process** function is provided only if an executable process is available, and if the item for which the governance process is to be started is defined as the execution context.

Procedure

1. Navigate to the process or object for which you want to start the governance process.
2. Click **Start governance process**. If multiple processes are available, they are displayed for selection.
3. Select the relevant executable process.

The executable process is started for the selected item.

3.2.16 Manage SAP Solutions

ARIS for SAP® Solutions is available, if your ARIS administrator has configured the system in ARIS Connect as well as in ARIS Architect. For details see **ARIS for SAP® Solutions** and **ARIS Requirements for SAP® Solutions** on DVD, ARIS Download Center (https://aris.softwareag.com/) or Empower (https://empower.softwareag.com/).

You can refine and evaluate your business processes in ARIS. This enables you to optimize your business processes.

ARIS video tutorial

Process-Driven SAP Management Explainer, 4 minutes (https://resources.softwareag.com/youtube-product-videos-for-uberflip/manage-your-digital-future-support-best-in-class-sap-solutions-with-aris)

3.2.16.1 Run SAP executable

Run executables in the connected SAP system.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using ARIS for SAP Solutions.
- Your administrator has configured the portal for the use of SAP content.
- Your administrator has register a SAP® Server for ARIS Connect

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate to the relevant model of the **EPC** type, where executables are available.
5. Click **Executables**. You can start the ▶ executable automatically via the default server in each row displaying the related **Transaction code** attribute value. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.
6. Run the executable. The **SAP logon** dialog opens.
7. Enter the number of the SAP client and the user name, and click **OK**. Depending on your browser settings, the **Run SAP executable** dialog opens.
8. Enter the password and click **Log on**.

The executable is run in the current language. The logon remains active until you log out of the portal, enter different logon data, or close the SAP system. To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you start an executable of the **Fiori application** type for the fist time or log out from SAP Fiori® launchpad before you start the executable, the **Start** page is displayed instead of the Fiori app. In this case, start the same executable again.

3.2.16.2 Download SAP documents

You can download SAP documents that are associated with SAP executables.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using **ARIS for SAP® Solutions**.
- Documents are available.
- This function has been configured in the portal.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Open the relevant model.
5. Click **Executables**.
6. Click the relevant executable. The fact sheet opens.
7. Next to the relevant document, click **Download document**.

The document is downloaded.

3.2.16.3 Start ARIS Online Guide

If your administrator has provided ARIS Online Guide via ARIS Connect, you can open the relevant portal pages from SAP screens using the **F1** key. All executables are shown there in relation to the process. Details are summarized in corresponding fact sheets.

Prerequisites

- This function has been configured in the portal.
- You have configured the help call.

Procedure

Press the **F1** key in the open screen. The corresponding portal page opens (link syntax: http://<server name:port>/?tcode=<transaction code>#<tenant>/onlineguide)

All information pertaining to this executable is available on the open page.

3.2.16.4 Reset SAP logon data

Change the logon information for running executables.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using **ARIS for SAP Solutions**.
- This function has been configured in the portal.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Open the model.
6. Click **Executables**.
7. In the last column of an executable, click the ▼ arrow head and then **Reset logon data**.

For the next executable start (page 340) you need to log on to the SAP system again.

3.2.17 SAP Enable Now

The native interface between **ARIS** and **SAP® Enable Now Producer** allows documentation and other knowledge objects, such as simulations and courses, to be quickly and easily added to ARIS process structures.

ARIS processes and substructures can be imported into the SAP® Enable Now Producer, to add learning content. Afterwards, the links to the published learning content can be exported and can be started directly in ARIS from the corresponding process node.

The import process supports common ARIS model types such as **BPMN** and **EPC**. Custom model types can be specified optionally. Process models can be imported as media objects additionally, to use them in learning content.

If you want to use the native interface between **ARIS** and **SAP® Enable Now**, the following prerequisites must be met in ARIS:

Prerequisites

- ARIS Connect Server installation, version **10.0.0.7** or higher.
- ARIS Connect Server extension pack for SAP Enable Now.
- ARIS users who transfer data between ARIS and SAP Enable Now must have:
  - **ARIS for SAP Enable Now** (YCSEN) license privilege,
  - **Read**, **Write**, and **Delete (rwd-)** access privilege in the ARIS database and target group that allow users to create models and objects.
  - A method filter that contains all required model, object, and connection types.

For detailed information about configuration and the use of **SAP® Enable Now**, such as **ARIS Import** and **ARIS Export**, refer to the related SAP online help.

Video tutorials are available for registered SAP customers

ARIS Integration with SAP Enable Now

3.2.18 Output information

The following describes different ways to get information.

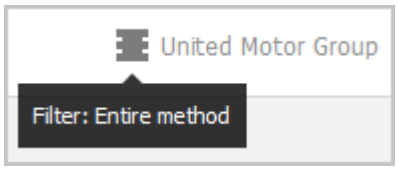
3.2.18.1 Display the current method filter

You can display the method filter that you use for the current database.

Procedure

1. Drag the mouse pointer to the database name with the database symbol at the top right of the screen.
2. Leave the mouse cursor above the database symbol for a short time.

The filter name is displayed:



3.2.18.2 Print the graphic of the current model

In the **Portal**, you can print the graphic of the current model as PDF.

Procedure

1. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 404) are shown.
4. In the button bar, click **Print graphic as PDF**. The **Select output options** dialog opens.
5. Specify your settings.
6. Click **OK**. After the report is generated, the **Print graphic as PDF** dialog opens.
7. Click **Download result**. Using the following dialog, open the file in a PDF viewer or save it.

In the **Portal**, you have printed the graphic of the current model as a PDF.

To the left of the user name, the **Reports notification** is inserted. Click the notification icon and **Export graphic as PDF** to download the result again. The result is also listed on the **Reports** bar. If you select the **Diagram** fact sheet, you can open the **Reports** bar and download the printed model graphic as a PDF.

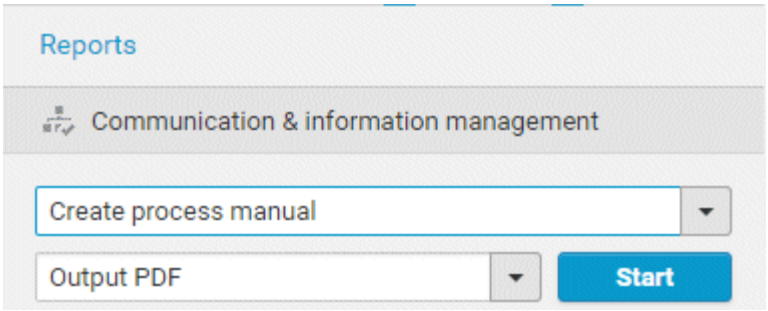
3.2.18.3 Generate report

You can start various reports (page 411) in the **Portal**.

Depending on the selected elements, reports are offered that provide a plausible evaluation for this context.

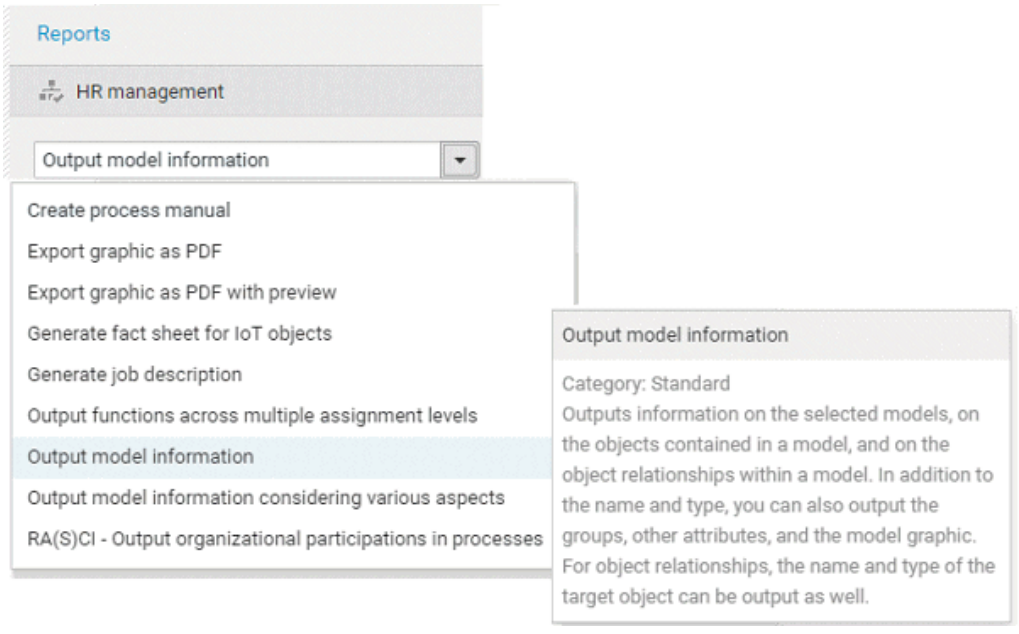
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
3. Navigate (page 67) to the relevant group.
4. Select the model for which you want to create a report.
5. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
6. Click **Reports**. The **Reports** bar opens showing the name of the item for which the report is to be generated.

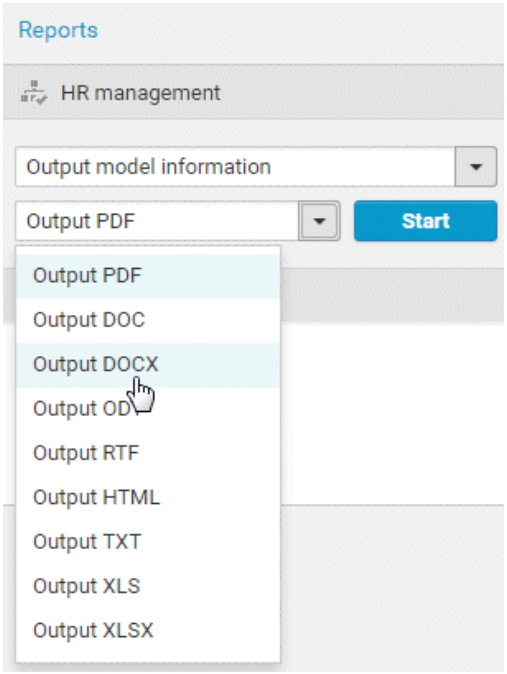


All reports you can generate for the selected model are displayed.

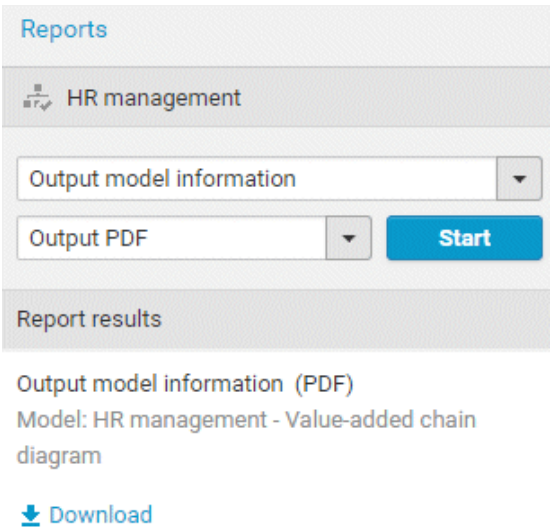
7. Click the ▼ down arrow next to the report name.
8. Select the relevant report. A report description is displayed.



9. Select the output format (page 156), for example, **Output DOCX**.



10. Click **Start**.
11. Depending on the report selected, a dialog with options is displayed. Specify your settings and click **OK**. The report is generated and a progress bar is displayed. After the report is complete, it is displayed in the **Report results** link list for downloading, and a dialog opens.
12. If you want to download the report immediately, click **Download result**.
13. If you want to download the report result later, click the **Download report** link in the **Report results** link list.



You have created a report. Only information you are authorized to view is included.

3.2.18.4 Create infographics

You can create infographics (page 406) for selected personas (page 410) (objects of the **Persona** type). You can select an object in a fact sheet (page 404) of the **Portal**, in the **Repository**, or in the open model. Objects of the **Persona** type can be used in models of **Customer segmentation map** and **Matrix model** type.

The following describes how to proceed in the **Portal**.

Prerequisite

The corresponding attributes of the persona objects must be specified (page 137).

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Groups** (page 33) in the **Classic** view (page 30) or **Processes** (page 50) in the **Default** view (page 47).
4. Navigate (page 67) to the relevant model.
5. Select the model that contains the persona.
6. If you have selected a model of the **Customer segmentation map** type, select the **Diagram** fact sheet. If you have selected a model of the **Matrix model** type, select the **Matrix** fact sheet.
7. Select the relevant **Persona** object in the fact sheet.
8. Click **Evaluation**. The **Evaluation** bar opens showing the name of the item for which the report is generated.
9. Click the ▼ down arrow next to the currently displayed report name.
10. Select the **Create infographic for persona (page** 137**)** report.
11. Select the output format (page 156), for example, **Output DOCX**.
12. Click **Start**. After the report is complete, the report is shown in the **Report results** link list for downloading.
13. In the **Report results** link list, click **Download**.

You have created an infographic for a persona. Depending on the attributes entered for the persona, the information graphic provides information about the personality, the goals, the frustrations, etc.

3.2.18.5 Show where object occurrences are used

You can display where occurrences of an object or a connection are used and select the required occurrence using the navigation controls.

Procedure

1. Click **Quick start** in **Home** (page 31).
2. Click **View models & documents**. Depending on the active configuration set, the navigation area opens, for example, **Groups** or **Processes**.
3. Navigate to the group containing the relevant model.
4. Click the name of the model. The fact sheets (page 404) of the model open.
5. Click **Diagram**. The **Diagram** fact sheet opens.
6. Select the required object in the **Diagram** fact sheet.
7. Click **Details**. The **Details** bar opens.
8. Click **More**.
9. Click the **Related models** tab. The occurrences of the selected object are listed. If more than one occurrence exists in the current model, the number of the selected occurrence and the total number of occurrences are displayed next to the object name.
10. Click the left or right arrow to navigate to the next occurrence in the model. The next occurrence is selected and its number updated.
11. To directly select an occurrence, expand the drop-down list and click the occurrence number.
12. To open a model that contains an occurrence of the selected object, click the name of the model in the **In other diagrams** area. The model opens and the first occurrence of the object is selected. If there is no **Diagram** fact sheet for the occurrence, the first fact sheet is shown, for example, **Overview**

In the **In other models** area, all models are displayed to which you have at least read access.

You have switched between the occurrences of an object using the navigation controls.

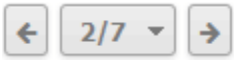
3.2.18.6 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.2.18.6.1 In which order are object occurrences displayed?

You can display where occurrences of an object or a connection are used and select the required occurrence using the navigation controls.

The navigation controls include arrows and a drop-down list:



If you click an arrow, the next occurrence is selected. The order of the occurrences depends on the vertical position of the objects in the model. The occurrence at the top most position is occurrence number 1.

The first number in the drop-down list refers to the occurrence currently selected, the second number represents the total amount of occurrences in a model.

Using the drop-down list, you can directly select a specific object occurrence:

3.2.18.6.2 What are time zone-dependent attributes?

Time zone-dependent attributes are attributes that take the current time zone into account when they are displayed. The values of the attributes are adjusted depending on the time zone in which they are displayed.

Time-zone dependent attributes are:

- Time of generation: AT_CREAT_TIME_STMP
- Last change: AT_LAST_CHNG_2
- Time of last semantic check: AT_TIME_OF_LAST_SEMANTIC_CHECK
- (Internal attribute: AT_TIME_STAMP)

STORING

In the database, these attributes are stored in Greenwich Mean Time (GMT + 0). When the attributes are displayed to users in the attribute editor, designer, model viewer, etc., they are first converted to the client's local time.

When the values are changed by a user in his local client time zone, the values are internally converted to GMT + 0 and stored in the database.

REPORTS

When a report is started from a client, the client's time zone is transferred to the server. The server converts the time zone-dependent attributes when creating the output.

When a report is run as a scheduled report, no client information is available and no conversion can be performed. Therefore, the time zone-dependent attribute is displayed as if the server were in the GMT + 0 time zone.

REPORT SCRIPT API

You should always use the methods accepting a string as parameter to change the value of time attributes. Example:

```
oDef.Attribute(Constants.AT_SAP_TIME_GEN, 0).setValue("07:12:45;11/19/2018");
```

RECOMMENDATION

We recommend not using **java.util.Date**, especially the **setValue()** methods, which accept a **Date** object as parameter: most of the various constructors of **Date** perform automatic conversion depending on the client's time zone. The conversion of a date into a character string, for example, via **toString()**, also performs a conversion into the client's time zone.

Example

This example assumes that both users are accessing the same server.

A user in Germany creates an object on **Nov. 19 2018 4:12PM**. (Based on his operating system local, the creation time is displayed as **19.11.2018 16:12**.) If another user located in San Francisco looks at the **Time of generation** attribute, the value is not **Nov. 19 2018 4:12PM**, but **Nov. 19 2018 7:12AM,** because San Francisco is 9 hours behind German time.

3.2.18.7 Where can you generate reports?

A report is a script that can be applied to database content.

A report can be used, for example, to collect database content and group it according to specific aspects, output the relationships (page 411) between database elements, generate comparison tables, or display multiple uses of database items.

It can also be used to change database content, such as entering attribute (page 399) values or correcting the layout of models (page 408).

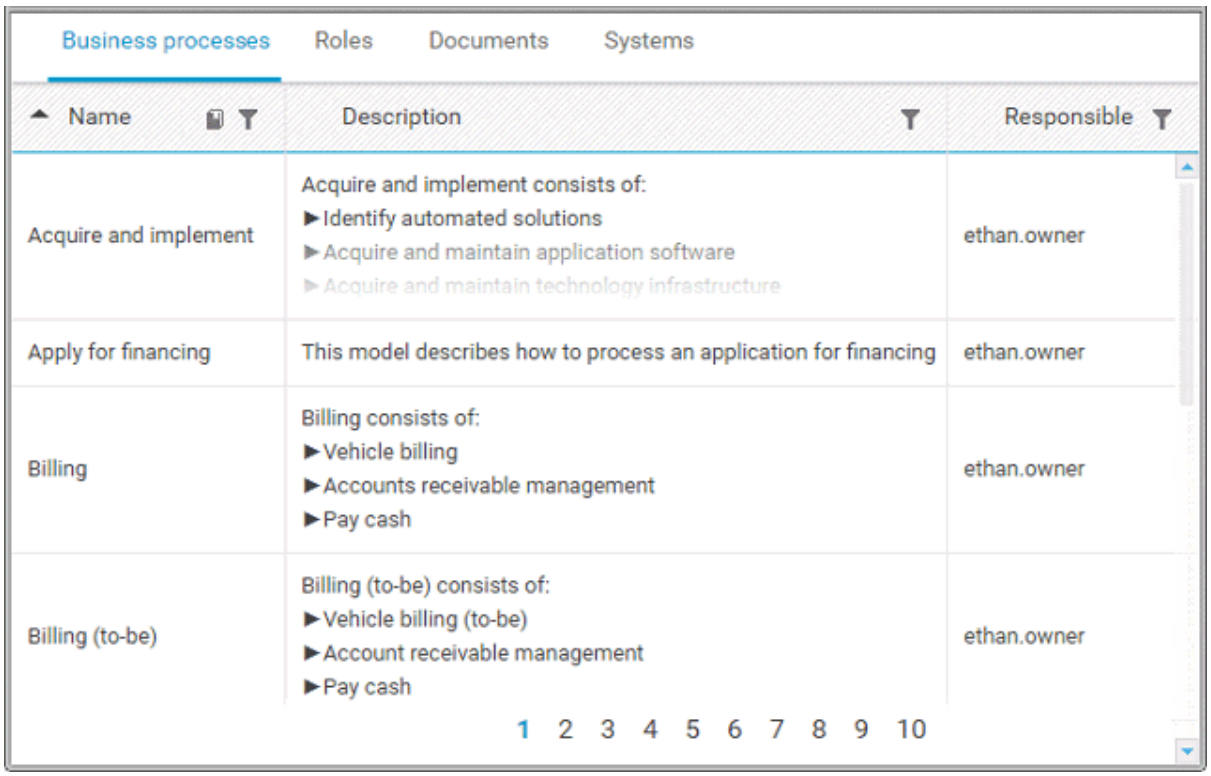
You can generate reports in the repository (page 132) or in ARIS Connect Designer for selected objects or the open model.

3.3 Use the Catalog

The **Catalog** provides structured data for published databases.

For the selected database, it shows the business processes, roles, documents, and systems in tables. Depending on the selected context such as **Business processes**, **Roles**, **Documents**, and **Systems**, you can list persons responsible, departments, linked business processes, and occurrences in business processes.

You can navigate to the table items (page 355), filter (page 354) the content, and export (page 356) each table completely or the filtered content to a Microsoft® Excel file. With the **ARIS Connect Designer** license or the **ARIS Connect Viewer** License combined with the **Contribution** license (page 20), you can edit attributes (page 355).



Click an entry to navigate. The corresponding fact sheet (page 404) opens.

3.3.1 Choose items starting with the same letter

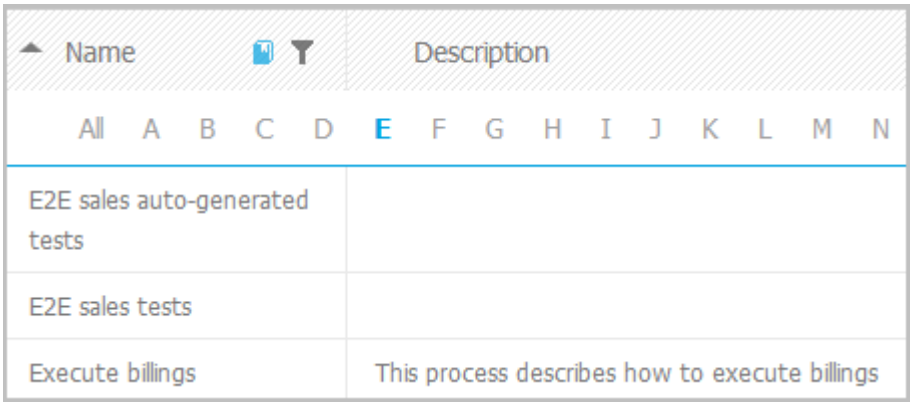
You can reduce the number of items shown in the catalog table. You can define a filter for each column of the table. This example describes how to filter columns of the **Business processes** table.

Prerequisite

Catalog letters can be displayed for the chosen language. If you, e. g., select Japanese it is not possible to display the large amount of letters available.

Procedure

1. Click **Catalog**.
2. Click **Catalog letters** in the **Name** cell of the table header. The **Catalog letters** bar opens.



3. Click the relevant letter.

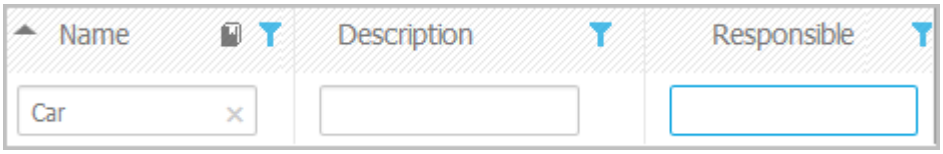
Only items starting with the letter chosen are shown.

3.3.2 Filter catalog items based on name, description, and responsibility

You can reduce the number of items shown in the catalog table. You can define a filter for each column of the table. This example describes how to filter columns of the **Business processes** table.

Procedure

1. Click **Catalog**.
2. Click **Filter** in the table header. A text box is available for each column to filter the table.



3. Enter the relevant terms. You can narrow down the search by entering terms in more than one text box.

All items are listed whose attribute content contains a word beginning with the term entered.

3.3.3 Remove catalog filter

You can easily remove the catalog filter.

Prerequisite

You have filtered the catalog content (page 354).

Procedure

Click **Filter** in the table header. The text boxes to filter the list are closed and all glossary items are shown.

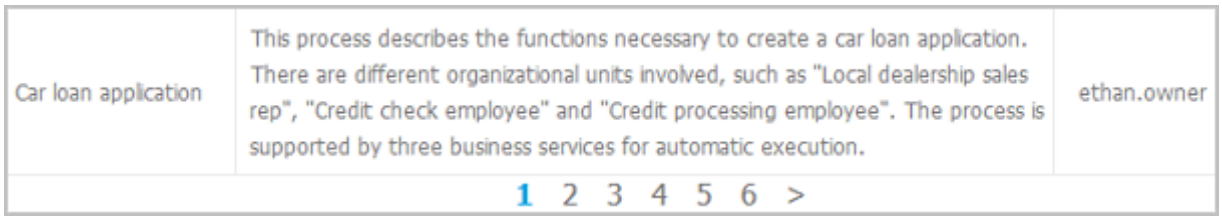
You have removed the catalog filter.

3.3.4 Choose a catalog page

If not all catalog entries fit on one page, you can switch to the page that contains the relevant catalog entry.

Procedure

1. Click **Catalog**.
2. Click the relevant page number at the bottom of the page.



All items of the selected page are listed.

3.3.5 Navigate to an item

You can navigate from the catalog items to the database group in which the item is stored.

Procedure

1. Click **Catalog**.
2. Click the relevant table.
3. In the **Name** column, click the name of the item to which you want to navigate. In the portal, the fact sheets (page 404) of the item are displayed. You can navigate to further details by clicking the various fact sheets or items.

To return to the catalog, use the **Back** fact sheet button **(page** 70**).**

3.3.6 Edit attributes

You can edit attributes of catalog items.

Prerequisite

You have the **ARIS Connect Viewer** and **Contribution** license privileges, or the **ARIS Connect Designer** license privilege.

Procedure

1. Click **Catalog**.
2. Click the table that contains the items for which you want to change attributes.
3. Click **Edit** to enable the edit mode (page 214).

The edit mode is enabled and the attributes can be edited. If no value has been entered for an attribute, the expression **Click here to edit** is displayed. When you select an attribute value, it is enclosed by a frame and you can change it.

3.3.7 Export catalog content to Excel

You can export the content of the selected catalog table to a Microsoft® Excel file.

Procedure

1. Click **Catalog**.
2. Click the table whose data you want to export. You can select **Business processes**, **Roles**, **Documents**, and **Systems**.
3. You can filter the content (page 354) to be exported or export all items starting with the same letter (page 353). If you do not filter the contents, the entire table is exported.
4. Click **Export to Excel**. The export is started and you get a corresponding message.
5. Click **Reports notification** to the left of the user name.
6. Click the result of the export, for example **Roles (XLSX)**. Depending on your browser settings, the export file is opened or saved.

You have exported content from the catalog into a Microsoft® Excel file (page 356).

3.3.8 What data does the catalog export provide?

The Microsoft® Excel file provides exported catalog content (page 356) on **Catalog** and **General** sheets.

Sheet **Catalog** contains the data you selected for export.

Sheet **General** provides the name of the database that contains the data, the time of generation, and the name of the user who initiated the export.

3.4 Collaborate with users

Collaboration is the platform for cooperation across teams. With Collaboration, information can be exchanged faster, knowledge can be shared, and cooperation across borders is improved.

3.4.1 Getting started

These five steps are an optimal start to Collaboration.

Prerequisites

- Collaboration is activated in ARIS Administration configuration.
- You have at least the **ARIS Connect Viewer** license privilege.
- You have the required access privilege (page 381) in ARIS Architect.

Procedure

1. Edit (page 358) your user profile.
2. Search (page 359) for groups and people who provide interesting content.
3. Create filters and check (page 366) for new information.
4. Comment on (page 364), share, flag posts, etc.
5. Invite (page 373) others to Collaboration.

You started using Collaboration to exchange information, share knowledge, etc.

3.4.2 Open Collaboration

Open Collaboration to exchange information, share knowledge, etc.

Prerequisites

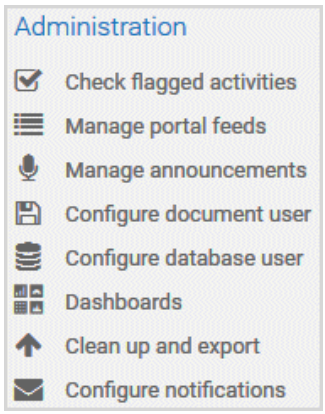
- Collaboration is activated in ARIS Administration configuration.
- You have at least the **ARIS Connect Viewer** license privilege.
- You have the required access privilege (page 381) in ARIS Architect.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Collaboration**.

Collaboration opens.

As an Collaboration administrator you have several options for managing Collaboration.



3.4.3 Edit your Collaboration user account

Specify your user profile to provide other users with information about your areas of activity and your interests.

Prerequisite

You have at least the **ARIS Connect Viewer** license privilege.

Procedure

1. Click **<user name>** on the left, then click **Edit profile** on the right. Your profile page for Collaboration is displayed.
2. Upload a picture in JPG, PNG, or GIF format, with the specified maximum size.

   If your user profile in ARIS Administration already includes a picture, it is also displayed in Collaboration. If a different picture is uploaded in ARIS Connect or in Collaboration, it is automatically transferred to the other application.
3. Click **Edit** to specify the trimming and size of the picture for Collaboration.
4. Select the preferred picture trimming by dragging the picture with the mouse.
5. Enlarge ( ) or reduce ( ) the picture.
6. Click **OK**.
7. Enter the title of your position in the company.
8. Describe your activities.
9. Specify keywords that will enable colleagues looking for particular information or expertise to find you. Use a comma as the separator.
10. Enter your telephone number.
11. Specify whether colleagues should be able to post information (**Allow others to post to my feed**) and submit comments (**Allow others to comment on activities in my feed**) in your feeds. To do this, enable the check box for the relevant option.
12. Click **OK**.

Your profile is changed. The information is now available to other users.

3.4.4 Find users and groups and follow their feeds

Look for colleagues or groups to find interesting contacts and information.

Procedure

1. Enter the name of the user or group in the global **Search** box at the top right. The search results are displayed during input.
2. Continue entering characters until the relevant user or group is displayed.
3. Click the name you are looking for. The profile of the user or the group is displayed with all posts.
4. For users and public groups, click **Follow**. For private groups, click **Send request**. (Private groups are identified as follows: .)

When you follow users, you have access to the posts that they publish in their feeds. In private groups, a coordinator must confirm your request before you are allowed access to this group's posts, comments, etc. In public groups you have immediate access to the group. The feeds you follow are displayed under **My feed** and the groups you follow under **Groups**. To stop following a user or group, click **Unfollow** in the user or group profile. Users who are following your feeds are displayed under **Followers** in your profile. Users and groups you are following are displayed under **Following** in your profile. Activities of deleted and anonymized users are shown with **Anonymized user**.

Tip

- To find groups, you can also use the group search function (**Groups > Find groups > All groups**).
- Alternatively, you can find out which groups and feeds another user follows from the user's profile (**Search > User XY > Following**).
- You can also use the global search to search for keywords, in order to find interesting feeds, users, and groups.

3.4.5 Follow and comment on content in the portal as a user

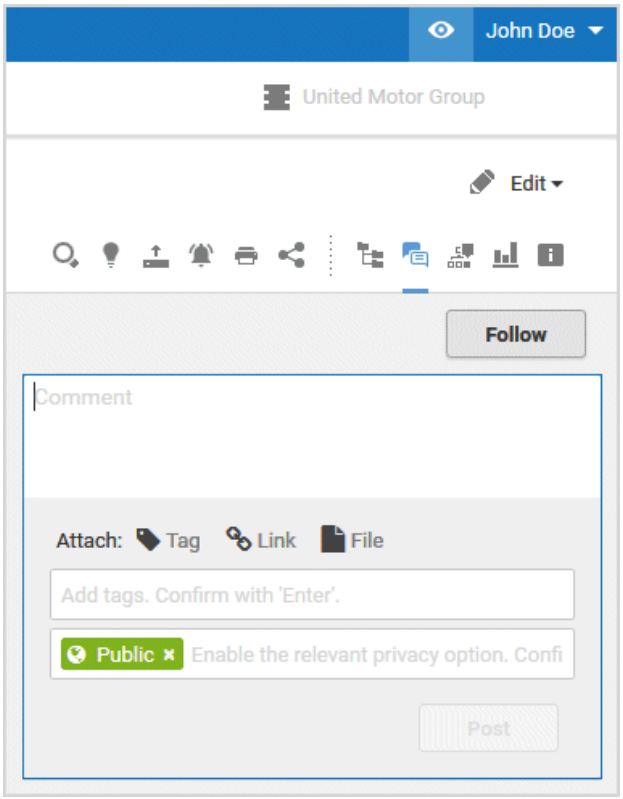
Follow interesting content in the portal to be informed about updates, etc., in Collaboration.

Prerequisite

You have the required access privilege (page 381) in ARIS Architect.

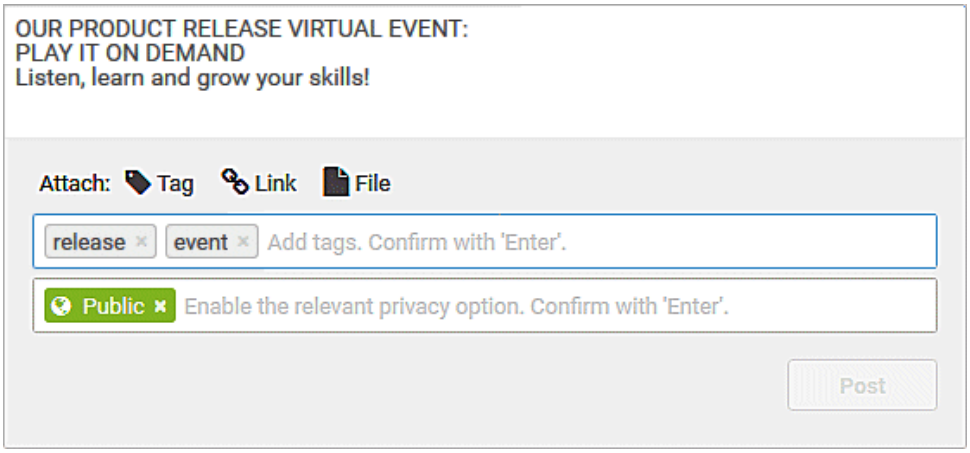
Procedure

1. Open the process you want to follow.
2. Click **Comment** in the bar panel if the bar is not activated yet.



3. Click **Follow**.
4. To comment, write or copy your text into the input box. Up to 2000 characters are available.
5. Click **Tag**.

6. Enter the words to be used as keywords (page 380) in the tag input box, for example, BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press **Enter** after each keyword.



7. Click **Link**.
8. Insert a link to a Web site that contains more detailed information.
9. Click **Add link**. The link is checked and added.
10. Click **File**. The **Select document** dialog is displayed.
11. Click **Upload new document** to upload one of your own documents. The corresponding dialog opens.
12. Select the file you want to upload and enter the relevant additional information.
13. Click **Upload**.
14. Enable the check box of the document you want to add to your post.
15. Click **OK**.
16. Click **Post**.

Your comment is posted, and the processes you follow are displayed under **My portal feeds** in Collaboration. To stop following content, click **Unfollow** in the row of the relevant content.

3.4.6 Publish posts

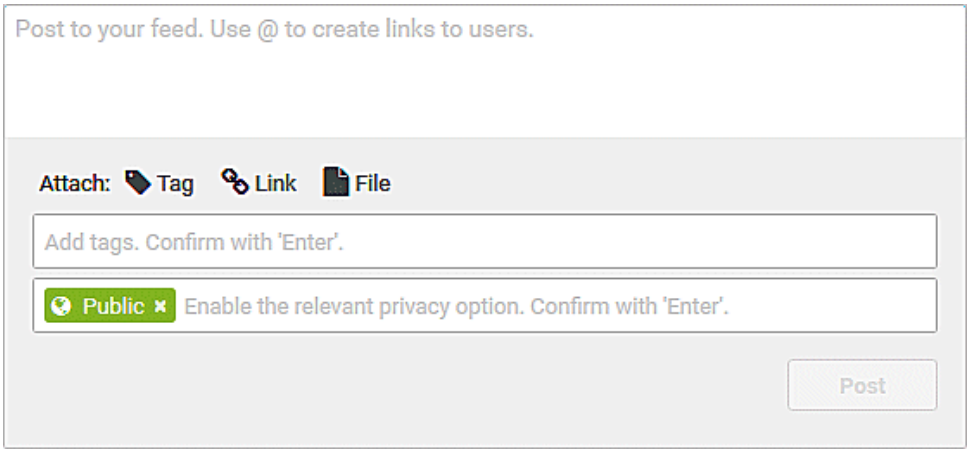
Post information that could be of interest to your colleagues, or start a discussion on a particular topic.

Prerequisite

You have the required access privilege (page 381) in ARIS Architect.

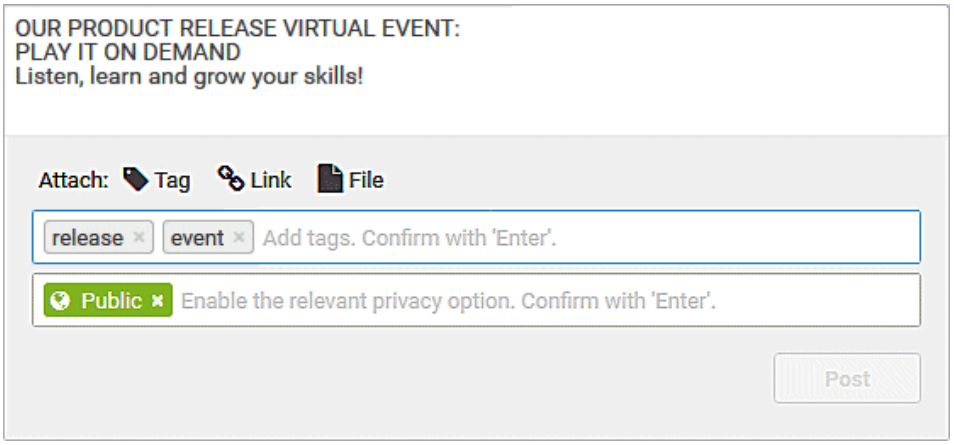
Procedure

1. Click **My feed**, the profile of the relevant user, the relevant group, or **All company feed**, depending on whether the information is to be displayed only to those users who follow your feeds, only to the members of a certain group, or to all users. If you post information to All company feed, it is possible that your information will not be seen by the relevant users, as some users do not use **All company feed** due to the large number of posts and the associated complexity.
2. Enter or copy your text into the text box. Up to 2000 characters are available.



3. To create a link to another user in the text, enter an '@' at the relevant point in the text, immediately followed by the name of the user. The search results are displayed during input.
4. Continue entering characters until the relevant user or group is displayed.
5. Click the name you are looking for.
6. Click **Tag**.

7. Enter the words to be used as keywords (page 380) in the tag input box, for example, BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press **Enter** after each keyword.



8. Click **Link**.
9. Insert a link to a Web site that contains more detailed information.
10. Click **Add link**. The link is checked and added.
11. Click **File**. The **Select document** dialog is displayed.
12. Click **Upload new document** to upload one of your own documents. The corresponding dialog opens.
13. Select the file you want to upload and enter the relevant additional information.
14. Click **Upload**.
15. Enable the check box of the document you want to add to your post.
16. Click **OK**.
17. Select the target group (page 379) by entering the first letters of the relevant group, then select one of the options displayed. By default, a new post is public.
18. Click **Post**.

Your post is published. If you published something in your feed, the text is also displayed in the company feeds. If you posted something to another user's feed, this post is also displayed in the company feed and if you are following the other user's feed, this post is displayed in your feed as well. If you published a post in a private group you are a member of, the post is shown only to group members.

To remove the post from your feeds, click **Delete**. Administrators can delete posts made by all users.

3.4.7 Comment on, share, flag posts, etc.

Depending on whether a post is your own or from another user, you can perform different actions.

Prerequisites

- The Like button, commenting on and sharing content, creating bookmarks, and flagging posts are enabled in ARIS Administration configuration.
- You have the required access privilege (page 381) in ARIS Architect.

Procedure

1. Open the page containing the relevant post.
2. Click **Like** to show other users what interests you. The user who wrote the post receives a notification, if they have the relevant notification setting. The post is also flagged accordingly and added to your filter. To cancel your Like, click **Unlike**.
3. Click **Comment** to enter a comment or further information for a post. You can also add a link to a Web site.
4. Click **Share** to comment on a post by another user and publish it in your own feed. To remove the post from your feeds, click **Delete**. Administrators can delete posts made by all users.
5. Click **More > Bookmark** to add a post to your filters, so that you can easily find it again (**Filters > My bookmarks**).
6. Click **Edit** or **More > Edit** to change or correct a post or comment you already published. Editing is possible as long as no other user has liked or commented on your post or comment yet.
7. Click **More > Flag** if you want the Collaboration administrator to review a post you think is inappropriate.

Depending on the selected action, the affected users receive a message by e-mail.

3.4.8 Add documents to posts

You can use documents from ARIS document storage in your posts. Use documents that have already been uploaded to ARIS document storage or upload new documents yourself.

Prerequisite

Using documents from ARIS document storage is enabled in ARIS Administration configuration.

Procedure

1. Add your post (page 362) or comment to the relevant feed (**My feed**, **All company feed**, or your group feeds).
2. Click **File**. The **Select document** dialog is displayed.
3. Click **Upload new document** to upload one of your own documents. The corresponding dialog opens.
4. Select the file you want to upload and enter the relevant additional information.
5. Click **Upload**.
6. Enable the check box of the document you want to add to your post.

You have added a document to your post.

3.4.9 View notifications and specify settings

Read your internal notifications and specify the situations in which you want to receive a notification about activities in Collaboration as well as the notification frequency.

Procedure

1. Click **View notifications**. Your notifications are displayed. Various filters provide you with a better overview, for example, **All**, **Unread**, **Read**.
2. Click **Change your notification settings**. Your notification settings are displayed.
3. Specify the situations in which you want to be informed about activities by other users, groups, or portal feeds. In each case, decide whether you want to receive the notification as an internal notification in Collaboration (**In-app**), or as an **E-mail**.
4. Specify the e-mail notification frequency, for example, **Daily digest**. If you do not want to receive e-mail notifications, select **Never** for the relevant situation.
5. Click **OK**.

Your settings are saved. From now on, you will be notified according to your specifications. The time for daily digest e-mail and the day for weekly digest e-mail are defined by the Collaboration administrator.

3.4.10 Define filters

Define custom filters to find interesting posts quickly and easily using keywords or to gain a better overview.

Prerequisite

Creating filters is enabled in ARIS Administration configuration.

Procedure

1. Click + **Create filter**. The form for creating a filter opens.
2. Select the relevant filter criteria, for example, whether you want all feeds or only feeds you follow to be included in the filter.
3. Enter a name for the filter.
4. Specify the keywords that can be used to find relevant posts. Use a space to separate the keywords.
5. Click **OK**.

The filter is saved and is displayed under **Filters**. Click the filter name to display the posts that contain the specified keywords.

To change a saved filter, click **Filter XY > Edit filter**. To delete filters that you no longer require, click **Delete filter**.

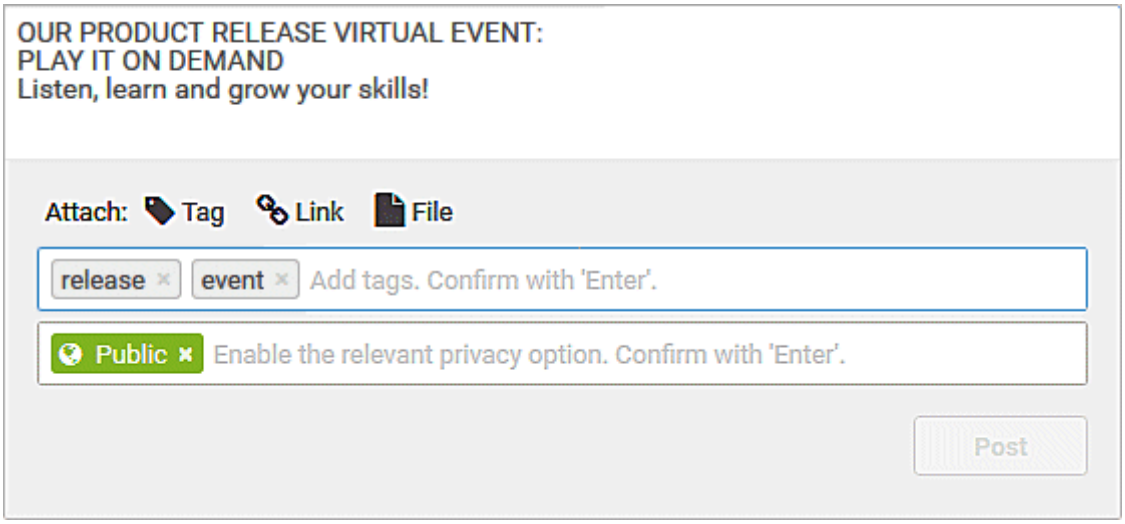
3.4.11 Use tags

Use tags to categorize posts using keywords. This enables other users to find posts on interesting topics more easily.

Prerequisite

Creating tags and filtering using tags are activated in the ARIS Administration configuration.

Procedure

1. Add your post (page 362) to the relevant feed (**My feed**, **All company feed**, or a group feed).
2. Click **Tag**.
3. Enter the words to be used as keywords (page 380) in the tag input box, for example, BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press **Enter** after each keyword.
4. 

5. Click **Post**.

Your post is published. The keywords entered as tags are shown below the post. You can add or delete tags at any time.

3.4.12 Filter feeds by means of tags

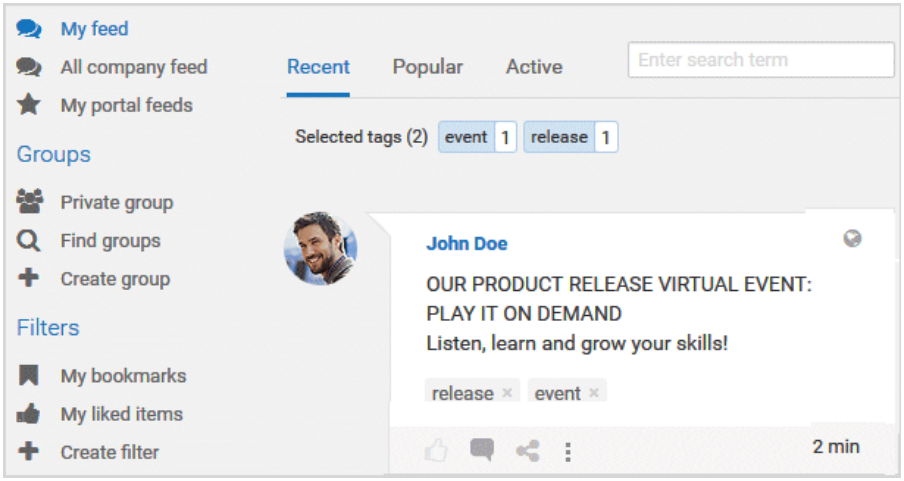
Use tags (page 380) to filter feeds using keywords.

Prerequisite

- Creating tags and filtering using tags are activated in the ARIS Administration configuration.
- There are tags for the feed.

Procedure

1. Open the relevant feed overview (**My feed**, **All company feed**). The tags are displayed above the feeds.
2. Click the tags for which you want to see posts. You can combine multiple tags. Activated tags are indicated in color.



You are shown the posts containing the tags selected.

To cancel the filter, click the selected keywords again.

3.4.13 Use hashtags

Use hashtags (page 380) to categorize posts using keywords or topics. This enables other users to find posts on interesting topics more easily.

Procedure

1. Add your post (page 362) or comment to the relevant feed (**My feed**, **All company feed**, or your group feeds).
2. Enter the word to be used as a keyword, preceded by a # symbol, for example, #BPM, or enter a sentence. Alternatively, select an existing hashtag from the list.
3. Publish (page 362) the post.

Your post is published and the keyword entered as a hashtag is highlighted in color as a link. Tags are automatically created for hashtags so that they can be used to filter feeds.

If a user clicks the hashtag, all post and comments subsequently entered are displayed on a separate page. A hashtag can be saved as a filter (page 366). You can then use the same hashtag in the filter definition, for example, #BPM.

3.4.14 Find help

In addition to this online help, there are various ways you can find support in Collaboration.

Procedure

Publish a post containing your question and use the hashtag (page 380) **#Help**.

This keyword enables other users to find and reply to your question. Alternatively, contact your system administrator.

3.4.15 Work with groups

3.4.15.1 Create a group

Create your own group if you cannot find any interesting groups or you need a group for your team. Groups enable users to collaborate in a team and to participate in a special interest group or a particular topic.

Prerequisite

Creating groups is enabled in ARIS Administration configuration.

Procedure

1. Click + **Create group**.
2. Enter the name of the group and the short name.
3. Describe the group's interests, so that your group can be found by other users. The best way to do this is to use keywords.
4. If necessary, specify an additional coordinator who will manage the group profile and privileges (+ **Add coordinator**).
5. Enable the relevant privacy option (**Public**/**Private**). After saving the group, you cannot change this option.
6. For private groups, you can follow portal feeds (page 374).
7. Click **OK**. The group is displayed in your groups list.
8. To remove the group from your groups list, click **Unpin** next to the group's name. This is useful to provide a better overview if you are following a lot of groups.

The group is created. Depending on your decision, the group is displayed or not under **Groups**.

Using tags, other users can find the group and follow its posts. In private groups, only members are able to read the posts. The group's name and description will, however, be visible in search results for non-members, as well.

3.4.15.2 Edit or delete a group

Change the details of a group, if the information is outdated. Delete an unused group, for example, to provide a better overview.

Prerequisite

You are the coordinator of the group.

Procedure

1. Under **Groups**, click the group that is to be edited.

   If the group is not displayed in your groups list because it is unpinned (page 372), click **Find groups** and then the relevant group.

   The **Edit group** form is displayed.
2. Change the relevant information, such as name, description, keywords, etc.
3. If necessary, specify an additional coordinator who will manage the group profile and privileges (+ **Add coordinator**).
4. For private groups, you can follow portal feeds (page 374).
5. Click **OK**.

Your changes are saved.

3.4.15.3 Unpin and pin your groups

Decide if groups you are following should be displayed or not in your groups list. This is useful to provide a better overview if you are following a lot of groups.

Procedure

1. To remove a group from your list, move the mouse pointer over the group name you want to unpin from the list.
2. Click **Unpin**.

   The group is removed from the list.
3. To display a group in your groups list, click **Find groups** and then the relevant group. The **group** is displayed.
4. Click **Pin** next to the group's name. The group is displayed in your groups list.

Depending on your decision, the group is displayed or not under **Groups**.

3.4.15.4 Invite other users to join a group

Invite other users to become a member in a specific group.

Procedure

1. Activate the group you want to issue an invitation for.
2. If you are a coordinator of the group, enter the name of the person you want to invite in the **Add colleagues** box.
3. Click **Add**. The user is added as a follower of this group.
4. If you are not a coordinator of the group, enter the name of the person you want to invite in the **Invite colleagues** box.
5. Click **Invite**.

The user receives a notification that they have been invited to join a private group. This user can then request membership of the group (**Find groups > Send request**). If the group coordinator approves (page 375) the request, the user can read the posts, comments, etc., by this group, and can himself post content in the group.

Group coordinators can add more users to a group directly (**Add colleagues**). That user immediately becomes a member of the group and receives the posts, comments, etc., by the group (**My feed**).

3.4.15.5 Follow portal contents as a group

Follow interesting content for private groups in ARIS Connect to be informed about updates, etc., in Collaboration. This enables a private group, for example, a project team, to jointly discuss and edit relevant processes.

Prerequisites

- The group is a private group.
- You are the coordinator of the group.
- The item from ARIS Connect must be followed as a portal feed in Collaboration.
- You have the required access privilege (page 381) in ARIS Architect.

Procedure

1. Under **Groups**, click the group that is to follow portal feeds.

   If the group is not displayed in your groups list because it is unpinned (page 372), click **Find groups** and then the relevant group.
2. Click **Edit group**.
3. Click **Follow portal feeds**. The **Find portal feed** dialog opens.
4. Enter a search term for finding the portal feed. Please ensure that the spelling is correct.
5. Click **Find** or press **Enter**.
6. Click the required portal feed in the search result.
7. Click **OK** in both the dialog and the group.

Using the **Following** button, the group can view the portal feed. Comments, etc., are shown directly in the group. To unsubscribe a group from a portal feed, the group coordinator removes the portal feed from the list of feeds followed by the group (**Group XY > Edit group > Followed portal feeds > Delete**).

Users of the group are notified when the portal feed has changed or comments have been added to it.

3.4.15.6 Edit requests to join private groups as a coordinator

Edit requests for group memberships.

Prerequisite

The group is a private group you are the coordinator of.

Procedure

1. Open the group.
2. Click **Requests**. The user requests are displayed.
3. For each request, click **Approve** or **Deny**.

If the user was accepted as a group member, the user will be notified accordingly and displayed in the list of followers. If the user was denied membership the user and all other group coordinators receive a corresponding notification.

3.4.15.7 Grant/revoke group users coordinator privileges

Grant additional group members coordinator privileges or revoke them from them.

Procedure

1. Open the private group.
2. Click **Followers**. The members of this group are displayed.
3. In the row for the group member you want to grant/revoke coordinator privileges to/from, click **Grant** or **Revoke**. The button always shows the command that can be executed next, that is, **Revoke** if the user has administrator privileges, and vice versa.

The user is granted coordinator privileges (page 381) or they are withdrawn. The user receives a notification. If a user is granted coordinator privileges all other coordinators of the group receive a notification, as well.

A coordinator can cancel group membership only if another coordinator withdraws the coordinator privileges from the user first.

Tip

The **Remove** button removes the user from the group. The **Revoke** button revokes the user's coordinator privileges.

3.4.16 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.4.16.1 Keyboard shortcuts for Collaboration

The following shortcuts are available in Collaboration.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 404) in the program.

Shortcut	Action
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
End	Moves to the lower entries if they cannot be displayed completely due to the window size or the screen resolution.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
Home	Moves to the upper entries if they cannot be displayed completely due to the window size or the screen resolution.
Tab	▪ Highlights the next control or input field. ▪ Jumps from the **Comment** box to the **Tag**, **Link**, and **File** symbols that you can use to attach tags, links, or files to your comment. It also jumps to the other input fields and to the **Post** button.
Shift + Tab	Highlights the previous control or input field.
Right arrow/ Left arrow	Moves the cursor through the text in input fields.
Up arrow/ Down arrow	Selects the previous/next item in lists.
Enter	Opens the attachment fields and places the cursor in the input field if the **Tag** or **Link** symbol is selected. Opens the **Select document** dialog when the **File** symbol is selected. ▪ Posts the comment when the **Post** button is selected. ▪ Executes the highlighted button. ▪ Opens the dialog/the selection list of the highlighted item.
Ctrl + Enter	Posts a comment when the **Post** button is active.

3.4.16.2 What is a feed?

Feeds contain the posts (page 362) in Collaboration, which for example, can be commented (page 364) on. The posts are categorized as follows:

- **My feed**

  Shows the posts and comments by the users from Collaboration whose feeds you follow.

- **All company feed**

  Shows all posts and comments by users and public groups from Collaboration.

- **My portal feeds**

  Displays a linked list of the portal feeds you follow. Portal feeds are only available if Collaboration is used within ARIS Connect.

3.4.16.3 How can users automatically follow content?

These options enable users to automatically become followers.

POSTING OR COMMENTING ON FEEDS

If **Automatically follow users**/**Automatically follow groups**/**Automatically follow models** is enabled in the configuration (**ARIS Administration > Collaboration > General settings**), you automatically become a follower of users, groups, or models, by posting or commenting on their feeds. To stop following this content, click **Unfollow**.

PERSON RESPONSIBLE

If a user name is set for the **Person responsible** model attribute of a model in an ARIS database, this user automatically becomes a follower of this model. Once automatic following is activated in Collaboration (**ARIS Administration > Collaboration > Configure database**), this user sees all model activities in **My feed**, and receives notifications about them. However, this only applies if this user has at least the **Read (r---)** access privilege in the corresponding ARIS database.

If a different user name is set for the **Person responsible** model attribute at a later point in time, the automatic following remains activated for the previous user until this user manually stops followinging this model (**Unfollow**).

3.4.16.4 What does following posts mean?

When you follow users, you have access to the posts that they publish in their feeds. In private groups, a coordinator must confirm your request before you are allowed access to this group's posts, comments, etc. In public groups you have immediate access to the group.

The feeds you follow are displayed under **My feed** and the groups you follow under **Groups**. To stop following a user or group, click **Unfollow** in the user or group profile. Users who are following your feeds are displayed under **Followers** in your profile. Users and groups you are following are displayed under **Following** in your profile.

3.4.16.5 Which target groups can be assigned to posts?

The following target groups can be selected for posts (page 362):

- **Private**

  Only the creator can see this group. You can use it to keep your own notes.

- **Public**

  All users can see this group.

- **Public Collaboration group**

  Only members of the selected public group(s) can see this group. Multiple selection is possible.

- **Private Collaboration group**

  Only members of the selected public group(s) can see this group. Multiple selection is possible, but you can assign only groups you are a member of.

- **ARIS user group (ARIS Administration)**

  Only members of the selected ARIS user group(s) can see this group. Multiple selection is possible, but you can assign only groups you are a member of.

By default, a new post is public. Any combination of ARIS user groups, public Collaboration groups, and private Collaboration groups is possible. It is not possible to assign users.

In a post, you can move the mouse pointer over the group symbol () to view the names of assigned groups.

The Collaboration administrator can view all posts, even the private ones.

3.4.16.6 What does Like mean?

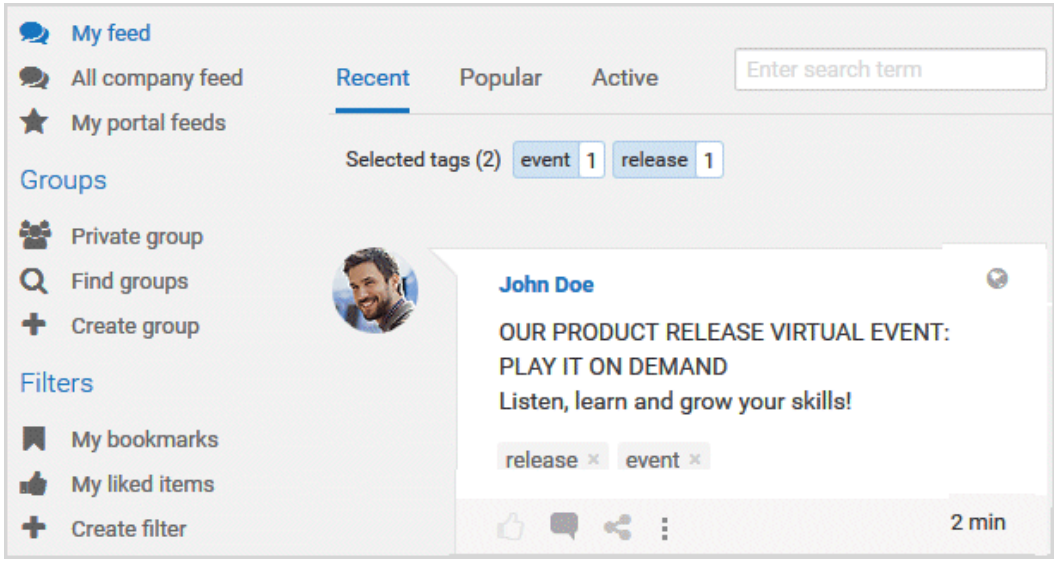
By clicking on **Like** under a post, you are telling other people that you are giving this post a positive rating, but without leaving a comment. Just like a comment, this is shown along with your user name below the post. To cancel your Like, click **Unlike**.

3.4.16.7 What is a timestamp?

A timestamp (page 364) indicates when a post was last updated in Collaboration. Example: Last update was 2 hours ago. Timestamp = **2 h**.

3.4.16.8 What is a tag?

Tags are used to categorize posts using keywords, making them easier to find (page 368). The keywords entered as tags are shown below the post. Tags are automatically created for hashtags so that they can be used to filter feeds.



3.4.16.9 What is a hashtag?

Hashtags are used to categorize posts and comments using keywords or topics, making them easier to find. The keyword entered as a hashtag is displayed as a link, highlighted in color. If a user clicks the hashtag, all post and comments subsequently entered are displayed on a separate page. A hashtag can be saved as a filter (page 366). You can then use the same hashtag in the filter definition, for example, #BPM.

A hashtag consists of the **#** character followed by a keyword or phrase. There is no space after the # and the phrase does not contain any punctuation marks.

Examples

#BPM

#Optimize your processes using social collaboration

3.4.16.10 What does flagging a post mean?

You can send (page 364) posts you deem inappropriate to the Collaboration administrator for review. The administrator decides whether the post will be deleted or not.

3.4.16.11 Which group types exist?

Groups can be created (page 371) for teams, departments, interest groups, topics, projects, etc. There are public and private groups. Public groups are open to all users. For private groups, a coordinator decides who is to be granted access (page 375) to the group.

3.4.16.12 Which database access privileges of ARIS Architect are relevant to Collaboration?

For some interactions in Collaboration, users need special access privileges, for example, to post on portal feeds. These access privileges are assigned in ARIS Architect. You can synchronize the privileges in Collaboration manually, after you edited them in ARIS Architect. The following database access privileges are relevant to Collaboration:

- **No access (----)**

  No portal content is displayed.

- **Read (r---)**

  Portal content is displayed. Users can read posts added to models, and they can like, share, bookmark, tag, and flag them. However, they cannot comment on models.

- **Read + Comment (rc--)**, **Read + Write (rw--)** (and all other types of rw access)

  Portal content is displayed. Users can use all functions of Collaboration.

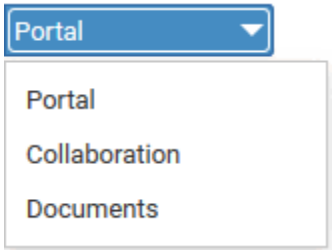
For detailed information about access privileges, refer to the help in ARIS Architect (ARIS Configuration and Administration).

3.5 Search content

Searching in ARIS Connect enables you to conveniently find items such as models, objects, documents, groups in Collaboration, etc., throughout the system.

You can use the quick search (page 15) on the start page to access items directly. Or you can use the Search area to define the search context beforehand and filter the search results (page 394).

The area to be searched and the search results depend on your license. If you use an **ARIS Connect Viewer** license, you can access the following search context:



Models found in the **Portal** search context can be opened read-only.

3.5.1 Open Search area

You can open the **Search** area (page 393) to search for items based on filter criteria.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.

You have opened the **Search** area and you can browse ARIS Connect for the relevant terms.

3.5.2 Open Search area with term

You can open the **Search** area using the term you want to find.

Procedure

1. If more than one database is provided, select the database (page 66) your search is to be based on.
2. Click in the **Search** box.
3. Enter the term you want to find.

A list with first results (page 392) is shown as you enter the term. As you complete the term, the list will be updated.

4. Click **Show all** at the end of the list.

The Search area opens with the results for the term you entered and you can restrict the result in the **Search** area to the items you want to find by using the search context and filters.

3.5.3 Start quick search

You can begin the search for items directly on the start page of ARIS Connect.

Procedure

1. If more than one database is provided, select the database (page 66) your search is to be based on.
2. Click in the **Search** box.
3. Enter the relevant term.

A list with first results (page 392) is shown as you enter the term. As you complete the term, the list will be updated.

4. In the list, click the entry of the category to which you want to navigate. The categories displayed depend on the license you are using.

The item opens. For example, if you click the name of a model, the model opens in ARIS Connect Designer. If you click a collaboration entry, it is output in Collaboration.

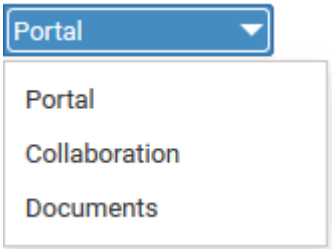
3.5.4 Find using the Search area

You can use the **Search** area (page 393) to find items. The Search area offers a wide range of filter options.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.
3. Enter the term you want to find in the **Search** field of the **Search** area. The items found will be presented in a list.
4. Click the down arrow that follows the term you entered and select the search context, for example, **Portal** or **Documents**.



   The search results are updated according to the search context. If filters are available for the selected context, they are listed in the **Filters** area.
5. In the **Filters** area, click the relevant filters and adjust the filter properties as necessary.

The result of the search will be updated to reflect the search context and filter criteria you specified.

3.5.5 Jump to an item found

You can use jump to items that are listed in the **Search** area (page 393).

Procedure

1. Perform a search and filter the search result if necessary.
2. Click the name of the relevant item, for example, the name of a model. If you performed the search in the **Model** context, the model is opened on a new tab for editing. If you performed the search in the **Portal** context, the fact sheets (page 404) of the model are opened.
3. When you reopen the **Search** area, the search result is still available and you can jump to another item.

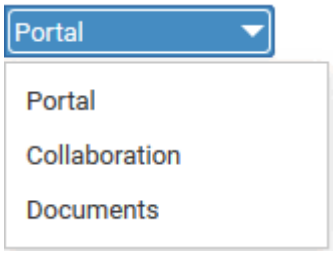
You navigated from the search result to a found item.

3.5.6 Use search context and filters

You can restrict the result in the **Search** area to the items you want to find by using the search context and filters.

Procedure

1. In the **Search** area, click the down arrow that follows the term you entered, and select, for example, **Portal**, or **Documents**.

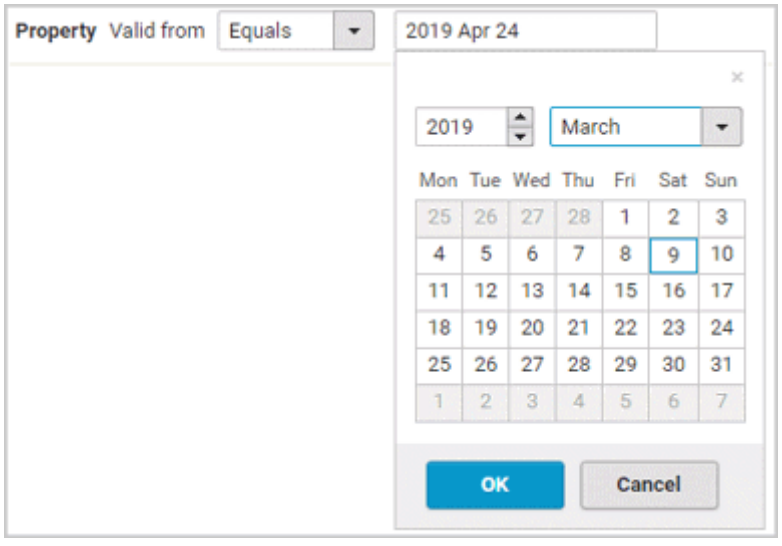


   The search result will be restricted to the range you selected. If the search result can be filtered, filter criteria will be listed in the **Filters** area.

2. Click one or more filter criteria. The selected filter criteria will be listed and the search result updated. If you have selected a filter criterion that you can define more precisely, another area with subordinate filter criteria will be added to the **Filters** area.
3. Click additional criteria. The selected criteria will be displayed in the Search area and restrict the search result.
   a. Selected filter criteria are listed:

   b. You can enter properties as the search criterion for certain filter criteria, for example, **Responsible**:

   You will be offered different input options depending on the property type. A calendar opens so you can select a date:



4. If necessary, specify the property of the search criterion.
5. To clear a selected filter criterion, click × **Clear**. The filter criterion will be cleared and the search result updated.
6. To see more search criteria, click **Show more** in the **Filters** area. The list will be extended.
7. To clear all filter criteria for an area, click **Clear subordinate filters**.
8. To clear all filters and base your search on other search criteria, click **Show all** in the **Filters** area. All previously selected search criteria will be cleared.

The list of results will be updated according to the search context and the selected criteria.

3.5.7 Save search settings as a favorite

In the **Search** area (page 393), you can save your search settings. Thus, you can search the content based on specific settings at any time.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.
3. Select the filter criteria to define your search.
4. Click ☆ **Save search query as a favorite**. The corresponding dialog opens.
5. Enter a name.
6. Click **OK**.

The search settings are saved in the ★ **My Favorites** area. You can filter the content based on these settings (page 86) at any time from various devices.

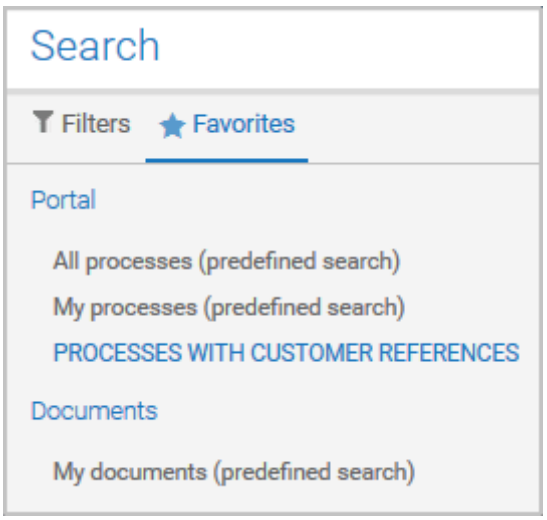
3.5.8 Use a favorite in the Search area

In the **Search** area (page 393), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. Click **Advanced** in the **Search** field.

2. If more than one database is provided, select the database (page 66) your search is to be based on.
3. Click **Favorites** in the **Filters** bar.



4. Click the favorite setting you want to use as the filter.

The filter criteria of the selected favorite setting are immediately applied and the list of filter results is updated.

3.5.9 Clear filters

You can clear filter criteria in more than one way.

Procedure

Clear a selected filter criterion

You can clear a single filter criterion.

Procedure

In the **Filters** bar, click a selected filter criterion again or click **Clear** for a filter criterion.

The filter criterion is cleared and the list of filter results updated.

Clear criteria from the main filter area

You can clear all filter criteria from the main filter area. The main filter area is the upper part of the filter bar located to the left of the list of results.

Procedure

Click **Show all** in the **Filter** bar.

All filter criteria are cleared and the list of filter results is updated.

Clear filter criteria from the subordinate filter area

You can clear the filter criteria from the subordinate filter area. If you have selected the **Models** context for filtering, the subordinate filter criteria for models are located in the **Filter** access bar below the main filter area.

Procedure

Click **Clear subordinate filters** in the **Filter** bar under **Attribute types**.

The filter criteria of the subordinate filter area are removed and the list of filter results is updated.

Clear all filter criteria

You can clear all filter criteria.

Procedure

Click **Clear all filters** at the top right.

All filter criteria are cleared and the list of filter results is updated.

You have cleared filter criteria.

3.5.10 Open search result on separate tab

You can open the items found on a separate tab. In this way, the search result remains available, and you can process the items found one after the other.

Procedure

1. Search for an item using the **Search** area (page 393).
2. Hold down the **Ctrl** key and click the name of the relevant item in the result list.

The item opens on a separate tab.

3.5.11 Filter using My Favorites

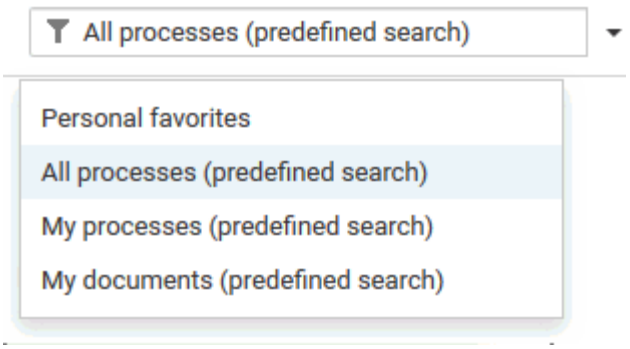
In the portal, you have direct access to all saved filter settings (page 84). The filters output the content of the selected database, while the personal favorites (page 83) of all published databases are listed and can be accessed.

Procedure

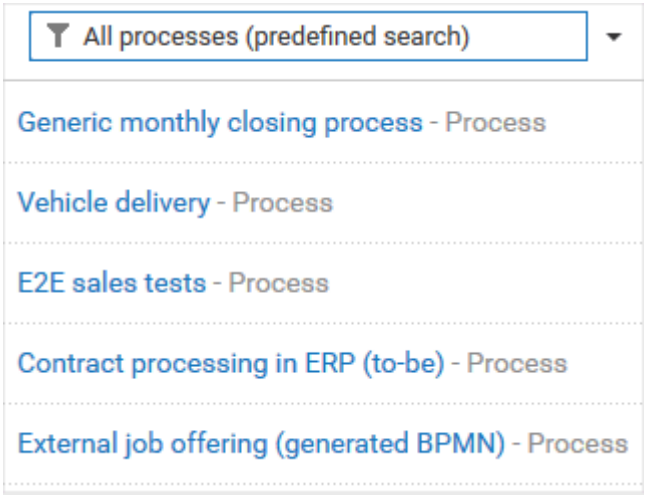
1. If you have access to more than one database, select the database (page 66) you want to work with.
2. Click ☆ **My favorites** in **Home** (page 31)

Provides direct access to saved filter criteria (Seite 71) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 83).

1. Click the ▼ **down arrow** of the **Filter selection** field.



2. Click the context caption to select the relevant filter settings, for example, **All processes (predefined search)**. The content of the selected database is filtered.



If the filter result does not fit on one page, page numbers are displayed behind the **Filter selection** field.

3. Click the page numbers to display the content of the corresponding pages.
4. Click the name of the item. The item opens.

You have filtered database content based on your filter setting and opened one of your favorites using the **Favorites** tab.

3.5.12 Delete a favorite setting

You can delete a Favorite setting when you no longer need it. The Favorite setting disappears from the **Favorites** area of the search and from the **My favorites** area.

Procedure

1. Click **Advanced** in the **Search** field.

2. Click **Favorites**.
3. Move the mouse pointer over the filter to be deleted. For user-defined filters, a **Delete** button is displayed to the right of the filter name.
4. Click **Delete**.

The filter setting is deleted.

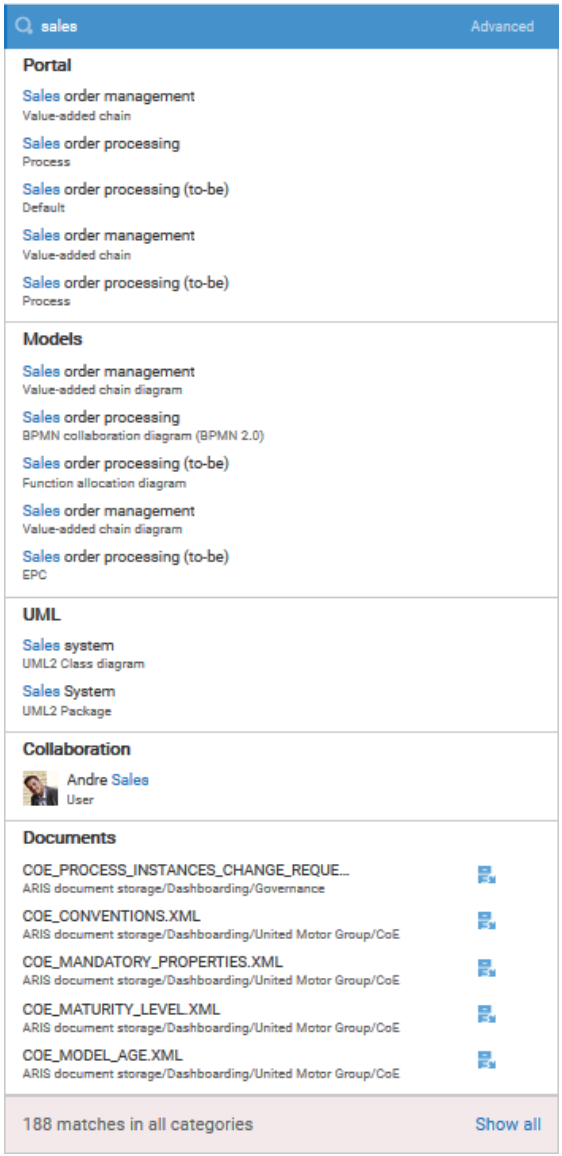
3.5.13 Valuable information

This section provides background information to assist you in carrying out the relevant procedures.

3.5.13.1 How is the quick search structured?

Quick search consists of a single input box:

A search list is compiled and displayed as soon as you have entered a search term. The first matches are output by category. The categories displayed depend on the license you are using. If you use a **Designer** license, the following categories are displayed.



The total number of matches is output at the end of the search list.

To access all matches, click **Show all**. The Search area opens (page 393).

3.5.13.2 How is the Search area structured?

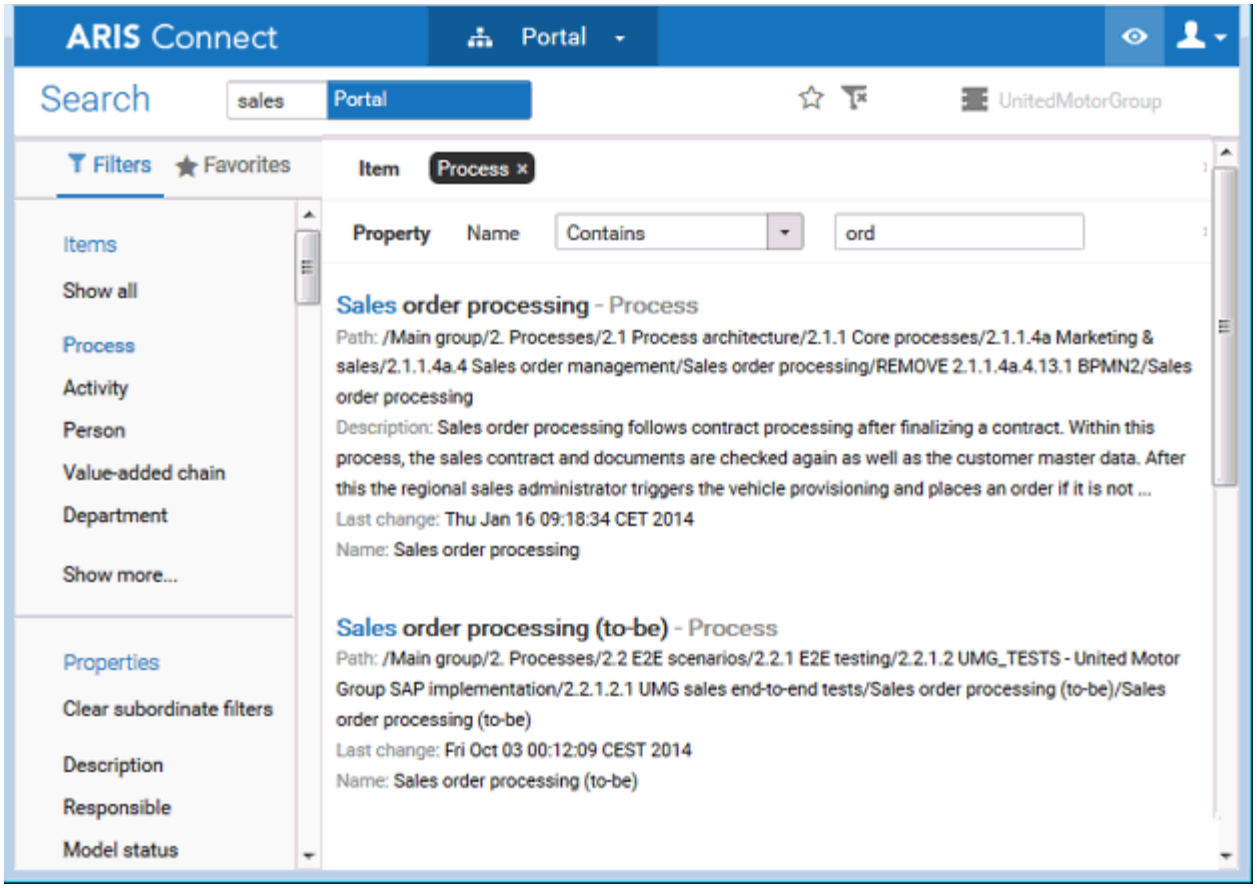
The **Search** area (page 382) includes a list of all matches.

To the right of the search term you entered, you can select the search context, for example, **Portal** or **Documents**.

To the left of the list, the filter criteria are offered under **Filters**. If you click the filter criteria, they are listed above the matches and restrict the list of results. Clicking a selected filter criterion again or clicking × **Remove** will clear the criterion. For certain filter criteria, such as the file name, you can enter properties as the search criterion, for example, a term that should be present in the name.

You can clear filter criteria (page 389) in several ways. You can save filter settings (page 84) and access saved filter settings (page 86) via the **Favorites** access bar.

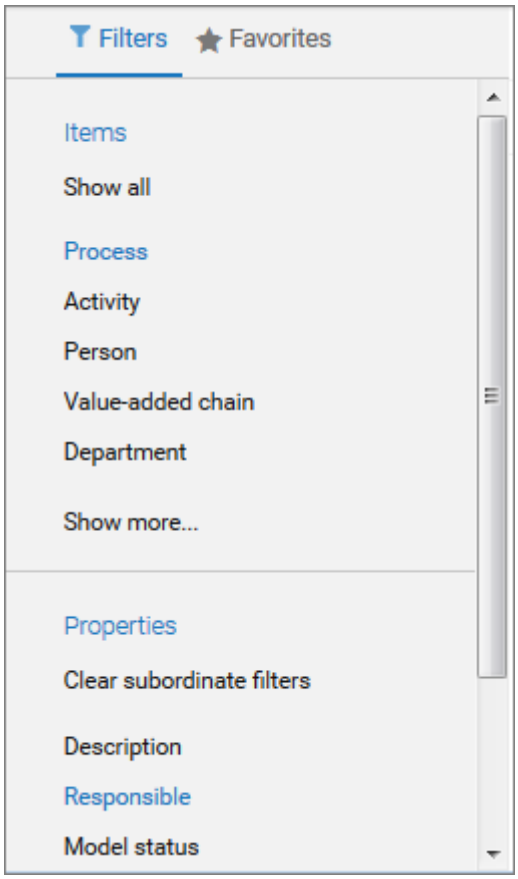
If there are too many matches to display all at once, page numbers appear at the end of the list of results. If you click one of these numbers, the matches on that page will be output.



3.5.13.3 Which filter criteria are available?

If you perform a search, the search result is displayed in a specific context. The following description is based on the **Portal** context.

You can filter search results with the filter pane in the **Search** area.



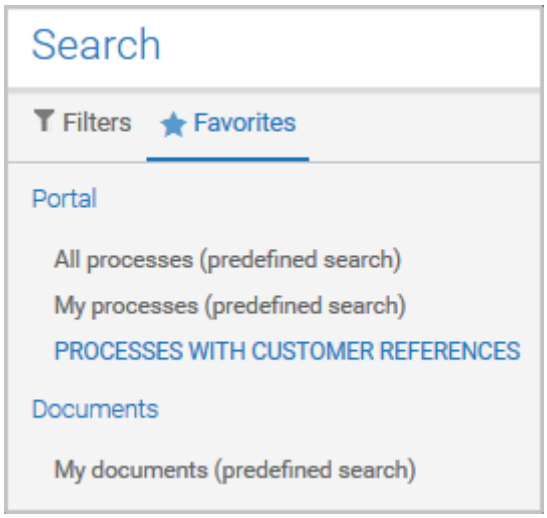
If you select a filter for an item, the filter criterion is shown above the search result and the filter is applied to the search result.

In the **Portal** context, you can further restrict the search by specifying properties.

You can remove filters by clicking the × **Clear** either behind the criterion or at the end of a property.

3.5.13.4 How are favorites structured in the search?

The **Filter** area reflects the saved search context. The search contexts are structured by captions, for example, **Portal** or **Documents**. The saved favorites are grouped under the captions. Thus, you are able to immediately recognize the search contexts of the favorites.



3.5.13.5 How can search results be influenced?

If you use quick search (page 15) or the Search area to find items, the list of results will be influenced by the selected database (page 66) and the license you are using.

For example, if you are using an **ARIS Connect Viewer** license, the **Models** area, from which you can open models for editing in ARIS Connect Designer, will not be displayed. This area is displayed to users with the **ARIS Connect Designer** license. These users are allowed to open models for editing.

3.5.13.6 What does the search find?

The search in ARIS Connect works according to the following rules.

- In general, the search can find words and numbers. Special characters, for example, **! ($ § % &) "** are not considered.
  For example, the result of the search term **ser** is **Hardware server** and **Customer service process**.
- Special characters, for example, **! ($ § % &) "** are not considered. Items named with special characters are found using the characters of the search terms.
  For example, the result of the search term **percent** is **%Percentage**.
- The search for more than one word links the words with AND. That means that every word must be present for an item to be listed.
  For example, the result of the search term **customer data** is **Customer data model**, **Input customer data**, **Create customer master data**, and **Data - customer model**.
- An exact search for several words is not possible.
- The wildcard * is ignored.
- The wildcard **question mark** (**?**) searches for any character except for special characters. For example, the result of the search term **a?a** is **a1a**, **a2a,** and **aba**. The result of the search term **?per** does not list any item whose name contains **%Percentage**.
- Untitled items cannot be found. If items are untitled in the current language, but are named in the alternative language, they are found and listed in the alternative language.

4 Glossary

A

ACCESS PRIVILEGE

With the access privileges you can control which content is accessible to specific users or user groups. Depending on their privilege, users can see, create/edit, delete or version models and objects. You assign access privileges to users, user groups, or database groups on the properties pages. Administrators manage users, user groups, cross-database and cross-product privileges and licenses for all ARIS products in ARIS Administration.

No access (----)

Users see the group structure of the database. Group contents are not displayed.

Read (r---)

The group content is displayed. Users can open models but neither change models and objects, nor add or delete new items.

Read + Comment (rc--)

The group content is displayed. Users can use all functions of Collaboration in ARIS Connect.

Read + Write (rw--)

The group content is displayed. Users can change models and objects, add new items, delete object occurrences from models, but not object definitions.

Read + Write + Delete (rwd-)

The group content is displayed. Users can modify models and objects and add and delete items.

Read + Version (r--v)

The group content is displayed. Users can open and version models but neither change models and objects, nor add or delete new items.

Read + Comment + Version (rc-v)

The group content is displayed. Users can use all functions of Collaboration in ARIS Connect and open and version models, but they can neither change models and objects, nor add or delete new items.

Read + Write + Version (rw-v)

The group content is displayed. Users can change models and objects, add new items, delete object occurrences from models, and version models. Object definitions cannot be deleted.

Read + Write + Delete + Version (rwdv)

The group content is displayed. Users can modify models and objects, add and delete items, and version models.

ALTERNATIVE LANGUAGE

Database language used to display database content if attribute values are not specified in the database language that is currently used. When you create a database, **English (United States)** is selected automatically. On the **Administration** tab, you can change the alternative language.

API NAME

The API name is a unique identifier for database items. You can use the API name to address database items with the ARIS API (page 398) programming interface.

Information about API names is available on the **Administration** tab below the **Method** folder structure. Specific information from the Method help is available by selecting an item, for example, an object, a connection, or a model, and pressing **Ctrl + F1**.

ARIS ADMINISTRATION

Manages users, user groups, privileges, licenses, documents, configurations, and processes for a tenant (page 414).

ARIS API

ARIS API is a programming interface with which you can access ARIS and its data from external applications.

ARIS CONNECT GOVERNANCE INBOX

As soon as the first change request is made, the **ARIS Connect Governance Inbox** database is automatically created in ARIS. It contains a Requirements inbox for each person responsible with a model of the **Requirements tree** type. An object of the **Requirement** type is created for each change request. As the process continues, the realization status of the object is automatically changed depending on which status the person responsible has selected (**Approve**, **Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

ASSIGNMENT

A model assigned to an object by an assignment relationship (page 399).

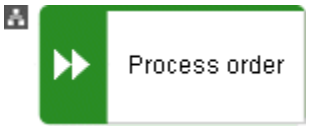
If a model is assigned to an object, this can be indicated by an assignment icon (page 399). An assignment enables you, for example, to use a model to describe objects in detail and thus get from a rough plan to a detailed plan.

ASSIGNMENT ICON

Icon that shows that one or more models are assigned to an object by an assignment relationship (page 399).

You can open assigned models by double-clicking the assignment icon. The assignment icon is displayed if you have disabled the **Hide assignment icons** option.

The assignment icon may look different and may be placed at different points in the object depending on the model template you are using.



You can also assign an assignment icon of your own to a database. It is displayed to the right of the icons.

ASSIGNMENT RELATIONSHIP

Relationship of an object to a model assigned (page 398) to it.

You can create an assignment relationship using drag and drop or using the object properties dialog. The assignment relationship is displayed at the object by an assignment icon (page 399).

MODEL TEMPLATE

Attributes are properties of items, such as models (page 408) and objects (page 409), that are used to describe the items in more detail. Typical attributes are **Name**, **Type**, **Description / Definition** and **Time of generation**. Certain attributes, such as **Name** and **Description / Definition** are set by the user, others, such as **Type** and **Time of generation**, are set by the system. Users cannot change attributes set by the system.

Attributes can be used in many ways. Depending on the value of the attributes, decisions can be made, for example, who is responsible for executing an activity, which follow-up activities are necessary, and in which context an element is relevant.

B

BEARER AUTHENTICATION

HTTP authentication scheme that involves security tokens. These tokens are called bearer tokens (page 400). This authentication can be understood as **give access to the bearer of this token**.

BEARER TOKEN

Bearer tokens are used in combination with bearer authentication (page 400).

The bearer token is a cryptic string, usually generated by the server in response to a login request. The client must send this token when request access to protected resources.

BPMN

Business **P**rocess **M**odel and **N**otation (**BPMN**) is a graphical notation used to describe business processes.

C

CHANGE LIST (VERSIONING)

Contains selected contents of a database that are versioned together and saved in a change list under a change list number (page 400). Change lists are sorted in ascending order.

Versioned database content can include individual models, multiple models without interdependencies, related models, group content, or the entire database contents.

A description of the change list characterizes the versioned contents. The change list description records who versioned which database content, when, and why. Opening a change list (page 416) displays the database content you selected for versioning. This can be a model, or the entire database content.

CHANGE LIST NUMBER (VERSIONING)

Number and description of a version of the database content. Change list numbers can be used to select particular versions for viewing (page 416). You have only read access for the content.

Change lists are sorted in ascending order.

COMPARISON MODEL

Model that is generated for comparison purposes from two models that exist in different versions (page 416) or are connected to each other by a variant relationship (page 416).

CONFIGURATION SET

A configuration set specifies the graphical user interface of ARIS Connect. Configuration sets are based on XML files and cannot be changed within ARIS Connect, but only in the relevant XML file. By default, ARIS Connect provides the classic configuration set and the default configuration set.

You can specify a modification set (page 408) based on a configuration set.

CONNECTION

Visible relationship (page 411) between objects (page 409) that shows how objects relate to each other. This graphical representation of a relationship is created during modeling.

A connection is usually represented by lines in the modeling area. If a direction is relevant, the line is added an arrow. One example is the connection of the **is predecessor of** type between functions in models of the **EPC** (event-driven process chain) type.

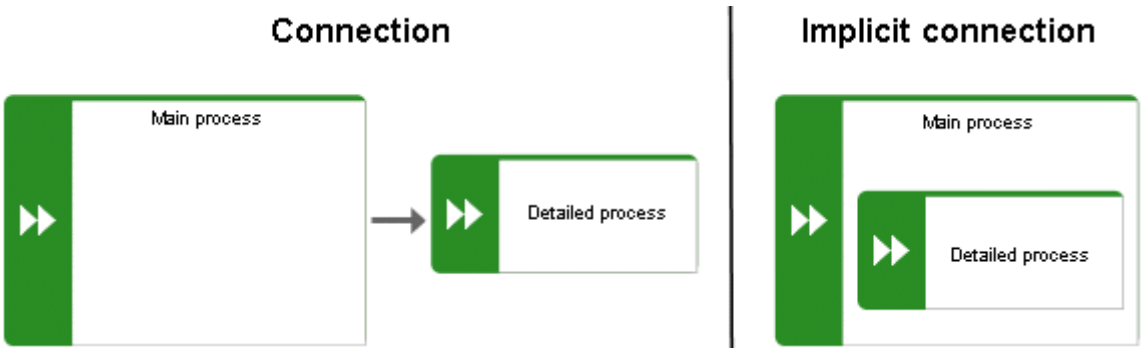
CONNECTION, IMPLICIT

Invisible connection.

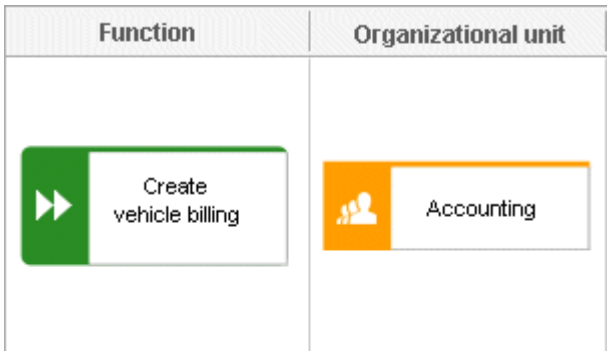
Implicit connections are created if the **Create implicit connections for overlapping objects** option is enabled and objects are placed within objects. In the displayed dialog, you can decide whether to hide any connections and, if so, which connections to hide for these objects. The difference between implicit connections and implicit relationships is that an implicit connection can be represented by a line in the modeling area. This line is displayed again, for example, if you drag an object from another object down into the free area of the modeling area.

Example of implicit connections:

Place a function on another function in a model of the **EPC** type.



In a model of the **PCD** type, place a function in the **Function** column and an organizational unit in the **Organizational unit** column. An implicit connection of the 'carries out' type is automatically created from the organizational unit to the function.



This needs to be differentiated from implicit relationships (page 411).

CRON EXPRESSION

String consisting of six to seven fields that is separated by a space and represents a time.

Normally, a CRON expression is used to define routine jobs that are executed automatically at certain times by the system.

Fields

- Seconds, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Minutes, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Hours, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Day in month, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Month, mandatory field, valid value: **0-12** or **JAN-DEC**, valid characters: *****, **/**, **,** **-**.
- Day of the week, mandatory field, valid value: **0-7** or **SUN-SAT**, valid characters: *****, **/**, **,** **-** **,** **?**, **L**, **C**, **#**.
- Year, not a mandatory field, valid value: **1970-2010**, valid characters: *****, **/**, **,** **-**.

CSS

Cascading **S**tyle **S**heets is a style sheet language used for describing the presentation HTML documents.

CURRENT VERSION (VERSIONING)

Corresponds to the last versioned database content. This version includes the entire versioned content of a database. You have only read access for the content.

In principle, this is the last change list (page 400) created for a database (versioning state (page 416)).

D

DASHBOARDS

Dashboards visualize database internal and database external information. Information can be runtime information, performance data, and analysis data, for example.

DEFINITION COPY

Copy of the object definition, that is of the entire object, rather than just the occurrence (page 409) as is the case with the occurrence copy (page 410).

The definition copy creates a new object. The occurrence, which is created when creating the definition copy, refers to the new object.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It makes sense to create a definition copy for an existing object if a new object is to have properties similar to those of the source object.

For example, you have modeled the object **Plant 1** and specified its properties. You now wish to create the object **Plant 2**, which has properties similar to Plant 1. In this case, it is advisable to create a definition copy of Plant 1. Object **Plant 2** is thus given all the properties of object Plant 1, but exists independently of it. You now simply need to change the properties that differ from those of object Plant 1, for example, by changing the name to **Plant 2**.

This involves significantly less work for you than creating the object from scratch and having to enter all the properties again.

Some attributes are not copied when the definition copy is created. For example, it does not make sense to copy the identifier of an object because the identifier represents a unique ID of an object.

E

ESCALATION MANAGER

The escalation manager is the user who is notified when a human task is not completed by any executor by the due date.

F

FACT SHEETS

Fact sheets show facts about an item in various views. Facts can be displayed in text form or graphically. Facts in text form are, for example, item descriptions or lists of elements that are structured in tables. In ARIS Connect, you can assign fact sheets to various items, such as processes, functions, events, and documents.

In the **Classic** and **Default** views delivered with ARIS Connect as standard the following fact sheets are assigned to a process:

Overview

Steps

Table

RACI

Diagram

Dashboards

Tasks

Documents

FOCUS

Selection marker that marks the item that is selected. There are certain occurrences of selection markers, such as text cursors.

The focus is usually surrounded by colored frames, which can be dashed or solid.

You can often start actions for the selected items using the **Enter** key or the space bar.

ARIS ADMINISTRATION

Set of text characters in a specific style and size. The type design of fonts is the typeface. For example, **ARIAL** is a typeface family, **ARIAL bold** is a typeface, and **ARIAL bold 12 point** is a font.

FULLY-QUALIFIED HOST NAME (FQHN)

The fully-qualified host name (FQHN) is the host name that is specified as the IP address of a computer or as a fully-qualified domain name (FQDN) in the following form: **my.department.example.com**.

FUNCTION PRIVILEGE

Controls tasks that users can perform.

You can assign function privileges to provide users and user groups with specific functionality and thus control their authorizations across a database. Function privileges for databases are assigned in ARIS Architect on the properties pages of users or user groups. In ARIS Administration, administrators manage users, user groups, cross-database and cross-product privileges and licenses for all ARIS products.

G

GDPR

The **G**eneral **D**ata **P**rotection **R**egulation (GDPR) protects the rights of individuals' personal data within the European Union. It also regulates the export of personal data outside the EU. GDPR is a regulation by the European Parliament, the Council of the European Union, and the European Commission.

GEOJSON

GeoJSON is an open format to represent geographic data. The JavaScript Object Notation is used for this.

GRAPHIC OBJECTS

Graphic elements without implicit semantic meaning. They can be used, for example, to indicate model areas, to specially highlight objects that are thematically linked, or to prepare models so that they are suitable for presentation.

Graphic objects include circles, ellipses, squares, rectangles, lines, and polygons.

GRID

Placement markings in the modeling area in the form of dots that you can show for modeling support.

These mark the minimum spacing between one model item and another. If you move an item, it is moved by increments of one gridline accordingly.

GROUPING

Grouped model items.

They can be moved, enlarged or reduced, and deleted as if they were one item.

GUID

Globally **U**nique **Id**entifier (GUID).

The GUID is a string that renders items unique anywhere in the world.

I

IMPERSONATION

Impersonation enables a user to perform actions on behalf of a different user account, for example, backup and restore tenants. This requires the creation of a user in the user management for the infrastructure tenant, for example, **master**. This user must be assigned all licenses and privileges that are needed for the action.

INFOGRAPHICS

Infographics (also **information graphics**) are visual representations of content. By combining images and text, it is easy for users to understand the information contained.

Infographics can simplify complicated topics. The data is displayed quickly and clearly.

INFRASTRUCTURE TENANT

Specifies the tenant with special privileges for managing other tenants, components, and the configuration in ARIS Administration.

By default, the **master** tenant is the infrastructure tenant. The system users **system** and **superuser** have administrative privileges, that is, they can access ARIS Administration and Tenant Management.

Users with the relevant privileges can specify other infrastructure tenants in ARIS Administration.

J

JAAS

Java **A**uthentication and **A**uthorization **S**ervice (**JAAS**).

A Java interface that enables you to provide services for authentication and access privileges in Java programs. JAAS supports user-based authentication.

JSON

Java**S**cript **O**bject **N**otation

Compact data format in an easy-to-read text form for data exchange between applications. Any valid JSON document must be a valid JavaScript and be interpretable.

L

LANE MODEL

Synonym for **Swimlane model**.

Model represented using columns/rows or a table.

Lanes are columns and/or rows. They include only specific object types and they structure the modeled information. An implicit relationship is often created between objects in a row.

A model of the **EPC (table display)** type is a lane model.

LDAP

Lightweight **D**irectory **A**ccess **P**rotocol (**LDAP**).

Application protocol from network technology. LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

LESS

Leaner **S**tyle **S**heets is a dynamic preprocessor style sheet language that can be compiled into Cascading Style Sheets (CSS) (page 402).

In addition to the normal CSS instructions, LESS offers nesting of rules, which can avoid code repetitions.

M

MASTER

Model/Object from which a model/object is derived.

A variant relationship (page 416) exists between the master and the derived model/object (variant (page 416)).

METHOD FILTER

Filter restricting the total number of ARIS Method items and thus offering only those items for modeling that are actually required.

By applying a specific method filter, only the model types included in this method filter will be offered for selection when creating new models. When modeling, all object, connection, and attribute types are available for the model type that are contained in the method filter. Thus, the content offered is exactly the content you need for performing your tasks. Method filters are an effective means of supporting uniform modeling and make it possible to provide users with only the information and methods relevant to them.

MINI TOOLBAR

Toolbar of objects that are used for placing and drawing connections.

It is shown if you select an object in the model.

MODEL

Models are a collection of objects (page 409) and connections (page 401). In this respect, models are graphic representatives of processes, structures, data, etc. of a company. Models, objects and connections are detailed by attributes (page 399). While objects represent activities, states, data, etc., connections represent how objects relate to each other.

Models are based on model types (page 408) that specify certain rules, such as which connections are allowed between objects and thus, how they relate to each other.

MODEL TEMPLATE

Basic settings that change the appearance and attribute placements of models all at once when being assigned. This enables you to apply settings defined once to all relevant models. Templates can be assigned additively. This means that all changes from templates assigned one after the other are valid. If, for example, you assign a template that removes the fill color of objects, and then assign a template that places the name attribute above the objects, both changes take effect.

MODEL TYPE

Template for models (page 408) that defines which objects a model can contain and how these objects relate to other objects. It defines the context in which the derived models are relevant.

The model type **EPC**, for example, defines the context **Process** because the objects it contains reflect the sequence of states, activities, and changed states, among other things. In contrast, models derived from the model type **Organizational chart** are located in the context **Organization**; they visualize the organizational structure of a company, for example, which organizational units exist, how organizational units are linked hierarchically, who manages the organizational units, and who is assigned to them.

MODIFICATION SET

A modification set is based on a configuration set (page 401) and specifies the graphical user interface of ARIS Connect.

Administrators create and enable custom modification sets for you based on the classic configuration set or default configuration set to change the appearance of the portal.

MY TASKS

My tasks is used for editing tasks that are provided by Process Governance during process execution. In addition, My tasks provides an overview of a user's active tasks.

O

OBJECT

An element, derived from an object type (page 409), consisting of a definition (page 409) and an occurrence (page 409), that is a graphical representative that is used in a model (page 408). Several objects based on one object type can be used in a model.

OBJECT DEFINITION

Object in the database for which you specify all relevant attributes.

Object definitions are displayed in models as an object occurrence (page 409) using the selected default symbols. All the object definitions in a database make up the object library. When modeling, object definitions are automatically created in the group in which the model is saved. Object definitions can also be created in Explorer.

OBJECT TYPE

Object types characterize the type of objects (page 409) that are permissible within a model type (page 408). Object types of the **EPC** (**Event-driven process chain**) include **Event**, **Function**, and **Rule**, for example.

Object types represent different procedures, activities, states, etc. For example, the **Function** object type can represent both the **Send delivery note** activity and the **Check parts availability** activity. Therefore, it represents a technical task or activity to support one or more business objectives. You define a function by placing it in the modeling area and assigning attributes to it, for example, name, costs, or times. The function then describes a specific task. A model type contains structurally non-relevant and structurally relevant object types.

An object type can occur in multiple model types. For example, the **Function** object type occurs in the **Function tree** model type which represents the hierarchical structure of functions. Functions are also used in the **EPC** model type which represents functions in their chronological-logical order.

OCCURRENCE

Graphical representation of objects, connections, and free-form texts.

It is used to represent items in a model.

With an occurrence copy (page 410) several occurrences of an object can be created. These can differ within a model and/or in different models, that is, object symbol, size, color, and attribute placements can be set individually and thus be different.

If the placed text attributes of an occurrence are changed, the changes are applied to all occurrences at which the text attribute has also been placed. For example , if the name an object is changed, the change is displayed for all occurrences.

OCCURRENCE COPY

Copy of the occurrence (page 409), that is, only the graphical representation of an object, rather than the entire object as with the definition copy (page 403).

All of the occurrence copies of an object represent the underlying object definition.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It is helpful to create a copy of the object symbol for an existing object - that is, only a copy of the occurrence of an object - if exactly the same object is used at various positions in the model or in different models.

For example, if, in the model you are creating, Plant 1 supplies goods at various points of the model, it is advisable to use occurrence copies at these points. These refer to the same object, and any changes to this object apply to all occurrence copies.

If you want to rename Plant 1 to **Plant A**, for example, you only need to do this for ONE of the occurrences: All other occurrences are changed to **Plant A** at the same time.

OLE OBJECT

OLE objects are objects from various external applications, which can be used in ARIS. When you start the objects from within ARIS, they are opened in the external application.

For them to open, specific requirements must be met. For example, the security policy of the Web browser must allow opening, and saved objects must be stored in a local drive.

OTP

One-**T**ime **P**ad (**OTP**).

This one-time pad is a symmetric encryption method for transferring secret messages. This encryption method is characterized by the fact that it uses a key of the same length as the message itself.

The OTP is information-theoretically secure and has proven to be impossible to crack – provided that it is used properly.

P

PERSONAS

Personas are fictional characters that characterize the features of people of a target group. Personas are used to illustrate the differences between user types.

In the customer experience (page 261) environment, a persona represents a customer segment and its main characteristics. Each persona provides a specific set of information describing that person representing a user type in more detail.

R

RELATIONSHIP

Connection that can exist between model elements and among models.

Relationships include connections (page 401), implicit connections, implicit relationships (page 411), assignment (page 399), and variant relationships. Therefore, the term **relationship** is a superordinate term for all links that can exist between objects and models.

RELATIONSHIP, IMPLICIT

Assignment relationship, that is, a relationship between objects for which no visible connection is drawn.

You create this relationship by assigning a model to an object.

This needs to be differentiated from implicit connections.

REPORT

A report is a script that can be applied to database content.

A report can be used, for example, to collect database content and group it according to specific aspects, output the relationships (page 411) between database elements, generate comparison tables, or display multiple uses of database items.

It can also be used to change database content, such as entering attribute (page 399) values or correcting the layout of models (page 408).

ROOT ELEMENT

odel or object that is used as the top element in a hierarchy in the portal. This element is displayed when you open the hierarchy in the portal.

S

SAML

Security **A**ssertion **M**arkup **L**anguage (**SAML**).

XML framework for exchanging authentication and authorization information. SAML provides functions to describe and transfer security-related information.

SATELLITE

A satellite is an object that can be inserted in a model or diagram but is not a structurally relevant object (page 412) in the model or diagram.

For example, an object of the **Organizational unit** type is a satellite in an event-driven process chain (EPC). In a model of the **Organizational chart** type, on the other hand, an object of the **Organizational unit** type is a structurally relevant object.

SEMANTIC CHECK

A semantic check is a script that contains modeling conventions. It can be applied to models (page 408) and indicates whether modeling conventions have been followed. If rules are not adhered to, detailed error descriptions, warnings, and/or notes are displayed.

SINGLE LOG-OUT (SLO)

The advantage of using SLO is that users need log out only once from the network.

SINGLE SIGN-ON (SSO)

With **SSO** or **single sign-on** the user only needs to authenticate himself once with his user name and password to access all services, programs and computers without logging in again.

If services, programs, and computers request a new authentication when accessed by the user the authentication is carried out by the underlying SSO mechanism.

SSL

Secure **S**ocket **L**ayer (**SSL**).

Security software for encrypting data that is exchanged between programs.

STRUCTURALLY RELEVANT OBJECTS

Basic model objects.

These are objects that indicate the distinctive feature of a model. For a model of the **Organizational chart** type, the objects **Organizational unit**, **Role**, and **Person** are structurally relevant objects, for example. Using these items, you can build the typical hierarchy of an organizational chart.

The **Event** and **Function** objects are typical for the **EPC** model type and are thus structurally relevant to a business process. You can use these to establish the typical control flow. The **Organizational unit**, **Role**, and **Person** objects can also be inserted into an **EPC**. However, these objects do not constitute the distinctive feature of a business process. As structurally irrelevant objects, they act as satellites, and add more detailed information to the process model. For example, you can insert **organizational units** and link them to functions to illustrate who carries out those functions.

An object that can be inserted in a model or diagram but is not a structurally relevant object is known as a satellite (page 411).

SUPERUSER

The user **superuser** is created automatically. By default, this user is assigned the **User management**, **License management**, and **Configuration administrator** function privileges. This user can also enable this function privilege for other users. Users of the **superuser** type do not use up a license. They manage the system administration, but cannot use ARIS products due to license restrictions. The default password is **superuser**. You should change the default password to prevent unauthorized access. The password of the superuser is very important, as it is the only user who cannot be deleted. You can change all user data except for the user name.

SYSTEM DATABASE

This database manages the content of a tenant locatedin the **Configuration** and **Evaluations** folders, which is displayed on the **Administration** tab in ARIS Architect. This content includes filters, templates, fonts and font formats, but also ARIS Method and all common files, report scripts, scheduled reports, semantic checks and macros.

The system database is created automatically while the first user is logging in to ARIS. The content is available to all databases of this tenant. The ARIS Service Administrator commands **backupsystemdb**, **restoresystemdb**, and **updatesystemdb** can be used to save and restore this data centrally.

SYSTEM USERS

System users are users who have all function and access privileges in a database and who have the required privileges in the ARIS Administration. System users can be created by the system administrator (user **system**) or by another system user.

The system user **system** is created automatically. This user has full access to all databases of a tenant. The name **system** cannot be changed. A system user should immediately change the password **manager** in ARIS Administration to prevent unauthorized access. The function and access privileges of system users cannot be changed at database level. To withdraw privileges from a system user, another system user must disable the **System user** check box on the user's **Function privileges** properties page in ARIS Architect. As a result, the user's privileges can be changed. After this, the user has no access privileges.

The system user **system** assumes the administrator role of the system administrator and has all function and access privileges in all databases of a tenant. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP (page 407), for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page in ARIS Architect) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. Having more than one system user can avoid problems, for example, if one system user has forgotten his password. If you forgot the passwords of all your system users, the full range of functions is no longer available and full data access is no longer possible.

T

TAG

Keyword or term assigned to an information, such as an Internet bookmark, a digital image, a database record, or a computer file. This kind of metadata helps describe an item and allows it to be found again by browsing or searching

TENANT

A tenant is a container providing its own ARIS Administration (page 398) and ARIS data set, such as configuration, ARIS method, databases, scripts, etc.

Each tenant provides users with a particular set of functionalities and specific data depending on their licenses and privileges.

TILE SERVERS

This is a list of online raster tile servers based on OpenStreetMap data.

TLS

Transport **L**ayer **S**ecurity (**TLS**).

TLS is known under the name of its predecessor **S**ecure **S**ockets **L**ayer (**SSL**) and is an encryption protocol for the secure transfer of data on the Internet.

U

UML (UNIFIED MODELING LANGUAGE)

UML is a graphical modeling language for specifying, constructing, and documenting software, parts of software, and other systems. This "unified" modeling language specifies the notations of the modeling terms and their relationships. It also defines the graphical notation, the static structures, and the dynamic processes.

URI

Uniform **R**esource **I**dentifier. String that is used to uniquely identify an abstract or physical resource.

URIs are used to describe resources (such as Web sites, other files, calls for Web services) on the Internet.

URIs can be incorporated as a string (encoded with a character set) into digital documents, particularly those in HTML format, or written by hand. A link from one Web site to another is called a hyperlink.

URL

Uniform **R**esource **L**ocator, a particular type of URI (page 414) (**U**niform **R**esource **I**dentifier).

URLs identify a resource via the network protocol used (for example, http or ftp) and the **location** of the resource (for example, of a service) in a network.

The term URL is often used synonymously with URI because URLs were the first and are still the most frequently used type of URI.

USER NAME

Name of a user (for example, **system**) for access to a database. The user name does not necessarily have to correspond to a person's real name.

Access to a database is possible if a user logs in to it with the combination of user name and password that has previously been stored for the database. This is the case when the system administrator or a user with the **User management** function privilege creates the new user.

USER 'SYSTEM'

The system user **system** assumes the administrator role of the system administrator and has all function and access privileges in all databases of a tenant. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP (page 407), for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page in ARIS Architect) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. Having more than one system user can avoid problems, for example, if one system user has forgotten his password. If you forgot the passwords of all your system users, the full range of functions is no longer available and full data access is no longer possible.

V

VARIANT

Model/Object "derived" from another model/object, known as the master (page 407).

The derived model/object has a reference to the GUID (page 405) of its master, known as the variant relation (page 416).

VARIANT RELATIONSHIP

Reference in a variant to the GUID of its master (page 407).

When you create variants of objects or models, they receive a reference to the GUID (page 405) of their master. The model or object created as a variant can be changed as required, irrespective of the master item. However, the master model/object and the model/object variant "know" each other. With variant relationships, scripts can be used, for example, to evaluate differences between items.

VERSION

A version is an image of a model that represents the unique state of the model at the time it was versioned in a change list (page 400).

A version represents a modification of a model and, for example, in Release Cycle Management, you can determine which version is valid from which point in time. Therefore, versions cannot be modified.

The editable state of a model is workspace (page 417), the last version created is the current version (page 402), and the other versions are associated with the Change list numbers (page 400) (Versioning state (page 417)).

VERSION NUMBER

Number assigned to a model during versioning.

The number relates to the model whose versions are numbered in ascending order.

VERSIONING STATE

Image of database content recorded at a certain point in time. Individual models, several models, or all models of a database that are available at the time of versioning can be versioned. The versioned content of a database is summarized in a change list (page 400). A versioning state can include models of different versions with different or identical version numbers (page 416) that represent a specific state.

While Workspace (page 417) represents a state that is editable but has not yet been versioned, the versions are included in the Current version (page 402) state and in the revisions associated with the Change list numbers (page 400).

W

WORKSPACE (VERSIONING)

Indicates the database content that has not yet been versioned. It can be edited. (Versioning state (page 416))

5 Legal information

5.1 Documentation scope

The information provided describes the settings and features as they were at the time of publishing. Since documentation and software are subject to different production cycles, the description of settings and features may differ from actual settings and features. Information about discrepancies is provided in the Release Notes that accompany the product. Please read the Release Notes and take the information into account when installing, setting up, and using the product.

If you want to install technical and/or business system functions without using the consulting services provided by Software AG, you require extensive knowledge of the system to be installed, its intended purpose, the target systems, and their various dependencies. Due to the number of platforms and interdependent hardware and software configurations, we can describe only specific installations. It is not possible to document all settings and dependencies.

When you combine various technologies, please observe the manufacturers' instructions, particularly announcements concerning releases on their Internet pages. We cannot guarantee proper functioning and installation of approved third-party systems and do not support them. Always follow the instructions provided in the installation manuals of the relevant manufacturers. If you experience difficulties, please contact the relevant manufacturer.

If you need help installing third-party systems, contact your local Software AG sales organization. Please note that this type of manufacturer-specific or customer-specific customization is not covered by the standard Software AG software maintenance agreement and can be performed only on special request and agreement.

If a description refers to a specific ARIS product, the product is named. If this is not the case, names for ARIS products are used as follows:

Name	Includes
ARIS products	Refers to all products to which the license regulations of Software AG standard software apply.
ARIS Client	Refers to all programs that access shared databases by using ARIS Server.
ARIS Download Client	Refers to an ARIS Client that can be accessed using a browser.

5.2 Data protection

Software AG products provide functionality with respect to processing of personal data according to the EU General Data Protection Regulation (GDPR).

Where applicable, appropriate steps are documented in the respective administration documentation.

5.3 Disclaimer

ARIS products are intended and developed for use by persons. Automated processes, such as the generation of content and the import of objects/artifacts via interfaces, can lead to an outsized amount of data, and their execution may exceed processing capacities and physical limits. For example, processing capacities are exceeded if models and diagrams transcend the size of the modeling area or an extremely high number of processing operations is started simultaneously. Physical limits may be exceeded if the memory available is not sufficient for the execution of operations or the storage of data.

Proper operation of ARIS products requires the availability of a reliable and fast network connection. Networks with insufficient response time will reduce system performance and may cause timeouts.

If your product contains ARIS document storage, the following applies:

ARIS document storage was tested with 40.000 document items. This includes documents, document versions or folders. We recommend monitoring the number and overall size of stored document items and archiving some document items if needed.

If ARIS products are used in a virtual environment, sufficient resources must be available there in order to avoid the risk of overbooking.

The system was tested using scenarios that included 100,000 groups (folders), 100,000 users, and 1,000,000 modeling artifacts. It supports a modeling area of 25 square meters.

If projects or repositories are larger than the maximum size allowed, a powerful functionality is available to break them down into smaller, more manageable parts.

Some restrictions may apply regarding the use of process administration, ARIS Administration, ARIS document storage, and My tasks, and the generation of executable processes. Process Governance has been tested and approved for 1000 parallel process instances. However, the number may vary depending on process complexity, for example, if custom reports are integrated.

ARIS document storage was tested with 40.000 document items. This includes documents, document versions or folders. We recommend monitoring the number and overall size of stored document items and archiving some document items if needed.

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