



ARIS Connect **DESIGNER USER MANUAL**

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

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

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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1 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.

As a process expert, you receive access to the corresponding views and options for analyzing and improving processes.

In ARIS Connect projects participants can directly enter comments pertaining to modeled processes and discuss improvement potential with others. With dashboards 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.

News on ARIS is available in ARIS Community:

http://www.ariscommunity.com/system/files/files/ARIS_10_SR4_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 Basics

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

2.1 Help system

This chapter obtains information on how to use the help system.

2.1.1 Open Help

You can open Help to find out 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>**. The menu opens.
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.

2.1.2 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 **<in bold and in angle brackets>**.
- Single-line example texts (for example, a long directory path that covers several lines due to a lack of space) are separated by ↵ 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.

2.1.3 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, 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, 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.
-

2.1.4 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.

2.1.5 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.

2.2 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>**. The menu opens.
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.

2.3 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. Click **Select file** to navigate to the picture file you want to upload.
6. In the **File Upload** dialog, select the picture file and click **Open**. The picture is displayed in the preview of the **Change picture** dialog.
7. 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.

2.4 Change password

Change your password in the user profile after your first login or after the password was reset by the administrator.

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.

2.5 Switch your profile

You can switch between profiles (page 23) 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.

2.6 Start search

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

Procedure

1. Enter a term in the **Quick search** area.
2. The search list (page 258) lists the items found.
3. Click the item you want to access.

The item opens in the appropriate context. For example, if you select a model name in the **Portal** context, the fact sheet of the model is displayed.

2.7 Show tasks in My tasks

In ARIS Connect you can show new tasks in My tasks without logging in again.

Prerequisite

Tasks have been assigned to you.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Click  **Edit tasks**.

My tasks opens. You can open My tasks at any time by clicking  **My tasks** in Home (page 26).

2.8 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>**. The menu opens.
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.

2.9 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>**. The menu opens.
2. Click **Administration**.

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

2.10 Open information window

You can view information about ARIS Connect.

Procedure

1. Click **<user name>**. The menu opens.
2. Click **About**.

Information about ARIS Connect will be displayed.

2.11 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.

PERFORMANCE

The system has been tested using 30,000 documents with an average size of 5 MB. Depending on the use cases, these numbers may vary.

MICROSOFT® INTERNET EXPLORER® AND MICROSOFT® EDGE®

When you open many dashboards, switch back to the Portal and back to the dashboards again, the browser may freeze and no content is displayed. You must close and restart the browser again.

2.12 Log out of ARIS Connect

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

Procedure

1. Click **<user name>**. The menu opens.
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.

2.13 Valuable information

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

2.13.1 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 (page **Error! Bookmark not defined.**) and license (page **Error! Bookmark not defined.**) 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 (page **Error! Bookmark not defined.**) 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	<ul style="list-style-type: none"> ▪ 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)	<ul style="list-style-type: none"> ▪ 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.

2.13.2 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 for which they have view rights (page **Error! Bookmark not defined.**). 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 for which they have view rights (page **Error! Bookmark not defined.**). 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 items (page 186), create new or reuse existing items (page 177), as well as delete items (page 180) in the portal.

ARIS API

ARIS API is a programming interface with which you can access ARIS and its data from external applications.

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 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 (page **Error! Bookmark not defined.**), and the published databases (page **Error! Bookmark not defined.**) your administrator selected, the function and content of the portal may vary. In the following, the functions of the classic view (page 55) and the default view (page 56) are described.

3.1.1 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 (page 55) and the default view (page 56). These views are defined in configuration sets (page **Error! Bookmark not defined.**) that cannot be changed. However, administrators can define multiple modification sets based on these templates.

3.1.1.1 Classic view

If the administrator provides at least one database (page **Error! Bookmark not defined.**) you have access to, this view shows all content relevant to you in a clear structure.

- Home (page 26)
- Groups (page 27)

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 125) 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 123) and activate them as content filters (page 126) to further restrict this content.

3.1.1.1.1 Home

Depending on your license, not all described quick access buttons may be available.

There are several editing areas available:

 **Quick start (page 57)**

 **My content**

Opens the **My content** area (page 70) 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 106) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 172).

 **My activities**

Shows the current activities you are following in Collaboration or in the portal (page 235).

 **Dashboards**

Opens the **Dashboards** area where you can access various dashboards sorted in categories such as **Business usage monitoring**.

 **My tasks**

Opens My tasks where you can edit your tasks (page 204).

 **My GRC tasks**

Shows an overview of your current tasks from ARIS Risk & Compliance Manager (page 74) in ARIS Connect.

 **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** privileges. If you have any requests regarding the privileges of your user account, you can get in touch with these ARIS Connect users.

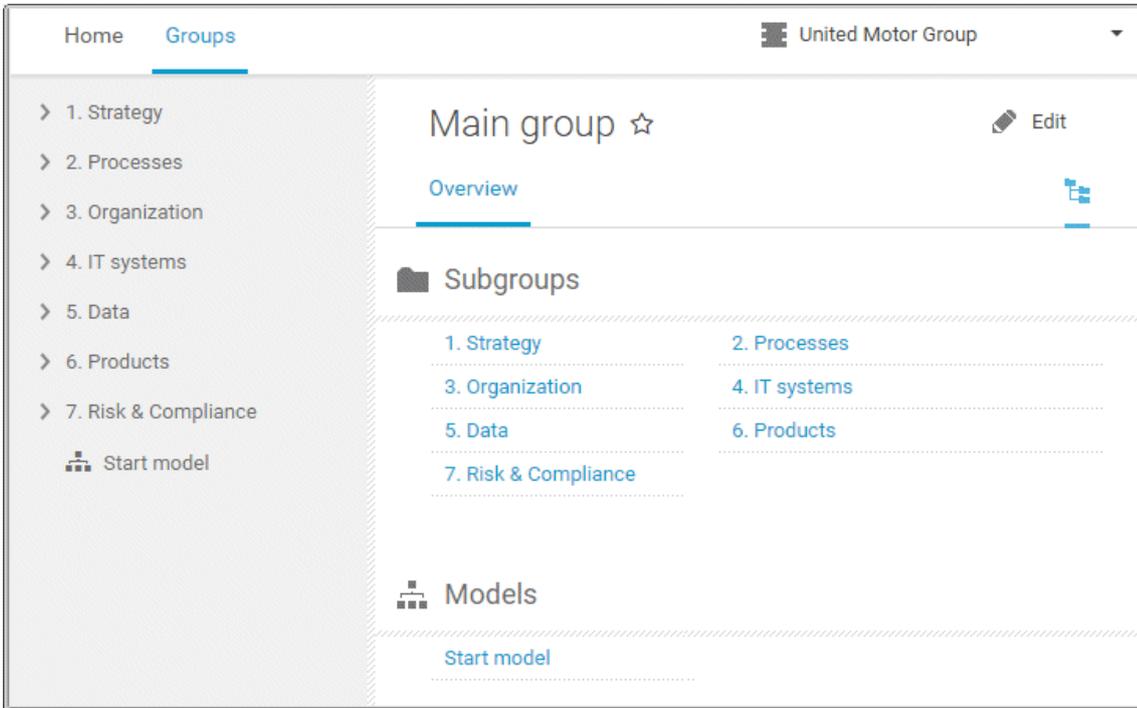
3.1.1.1.2 Groups

Use the Explorer tree to navigate to the entire contents of the portal you selected. Depending on the contents selected and the model type, different functions are available.

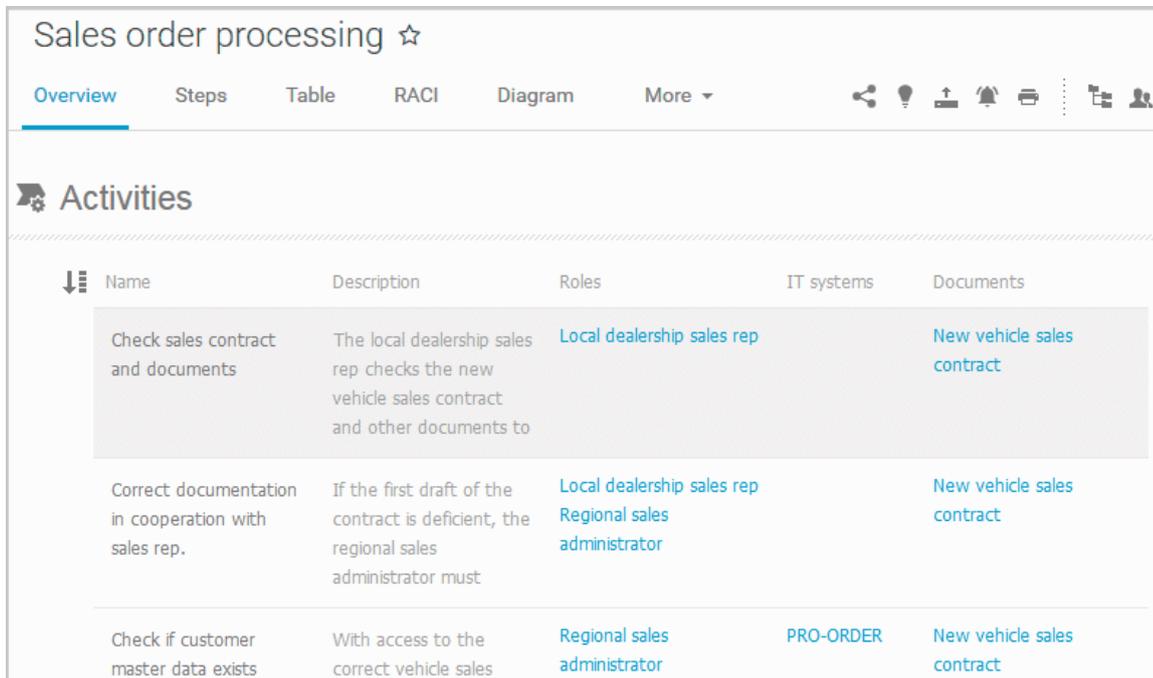
Fact sheets of ARIS models

Overview

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



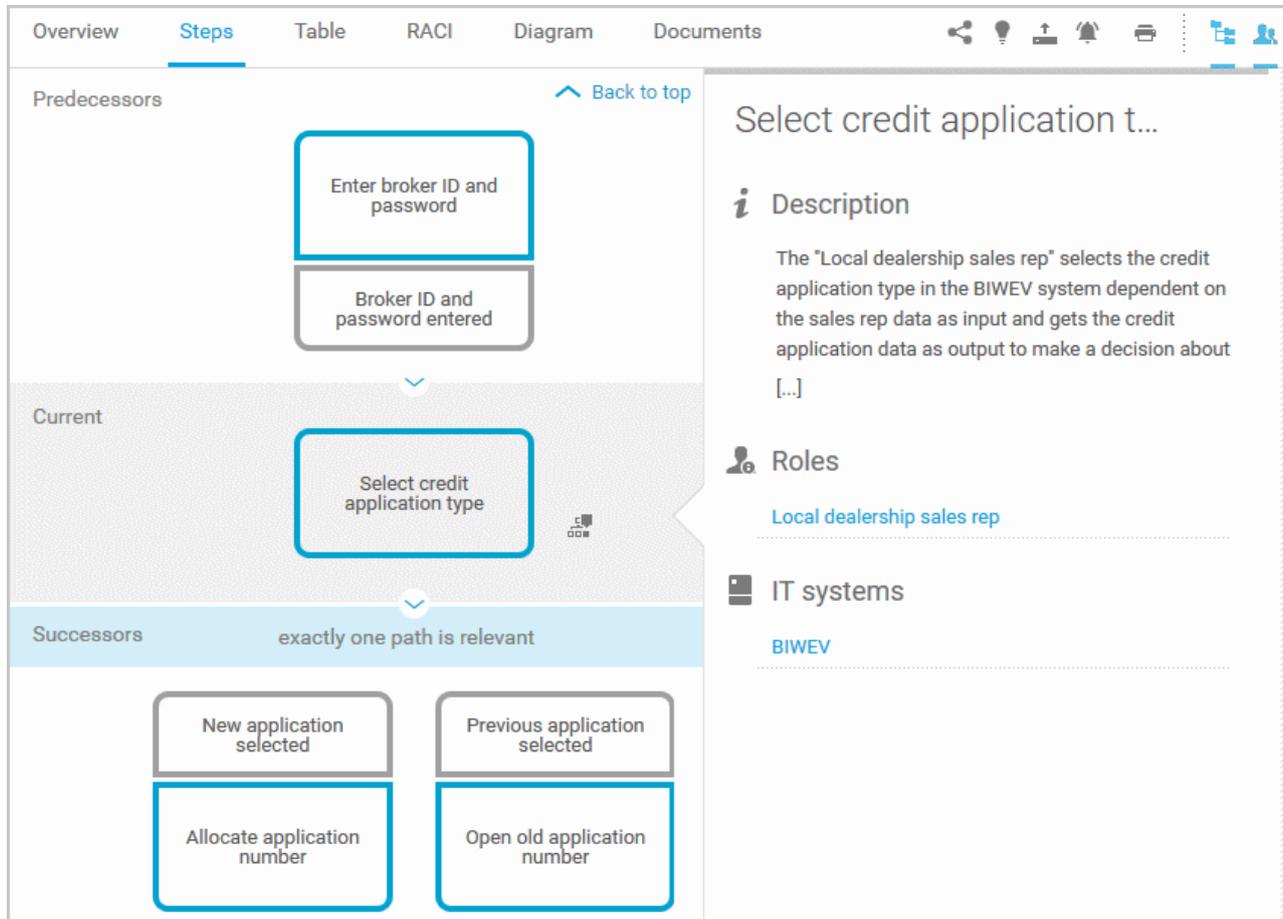
If you have selected a model, additional headings are shown depending on the context.



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

Steps

Transparently displays all steps of a process (EPC) (page 104). 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 108) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 107).

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	OR	
	AND/OR	
	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 117) and remove added columns (page 117) again.

Overview Steps Table RACI More ▾	
↓ Functions	Roles
Check sales contract and documents	Local dealership sales rep
Correct documentation in cooperation with sal	Local dealership sales rep Regional sales administrator
Check if customer master data exists	Regional sales administrator
Create customer master data	Regional sales administrator
Enter vehicle data and details	Regional sales administrator
Check if vehicle is in stock	
Allocate vehicle	Regional sales administrator
Create sales order	Regional sales administrator

You can sort the functions (page 119) in different ways by clicking the column title.

You can open a matrix (page 118) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Overview Steps Table RACI More ▾		
↓ Functions	Roles	
	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	<input checked="" type="checkbox"/>	
Correct documentation in cooperation with sales rep.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check if customer master data exists		<input checked="" type="checkbox"/>
Create customer master data		<input checked="" type="checkbox"/>
Enter vehicle data and details		<input checked="" type="checkbox"/>

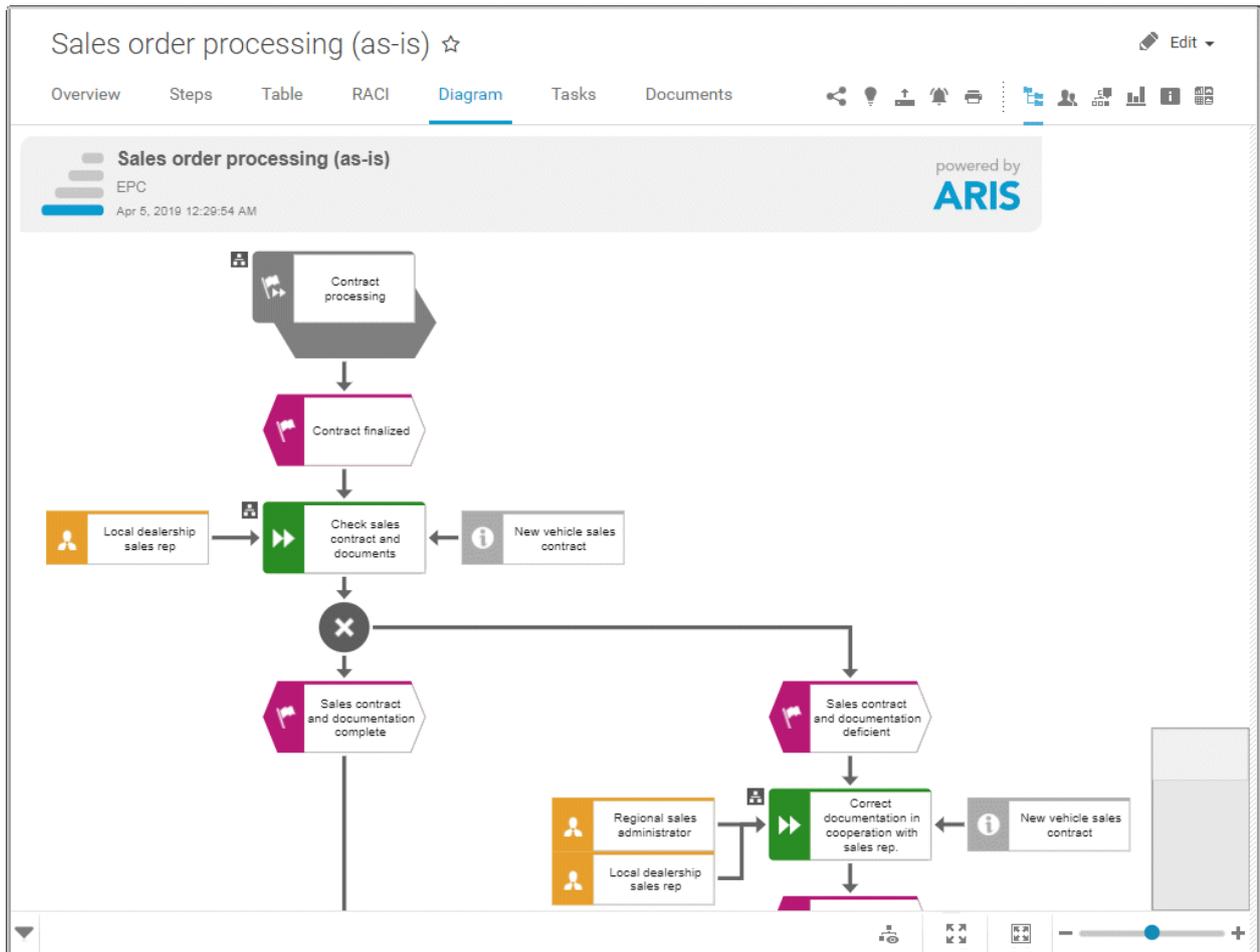
RACI

RACI matrices display the activity processes and the associated organizational responsibilities. RACI matrices are displayed only if RACI information is available for this process (page 194). You can sort the functions (page 119) of matrices.

Overview Steps Table RACI More ▾				
↓ Functions	Local dealership sales rep		Regional sales administrator	
	R	A	R	A
Check sales contract and documents	C	I	C	I
Correct documentation in cooperation with sales rep.	R	A	R	A
	C	I	C	I
Check if customer master data exists	R	A	R	A
	C	I	C	I
Create customer master data	R	A	R	A
	C	I	C	I

Diagram

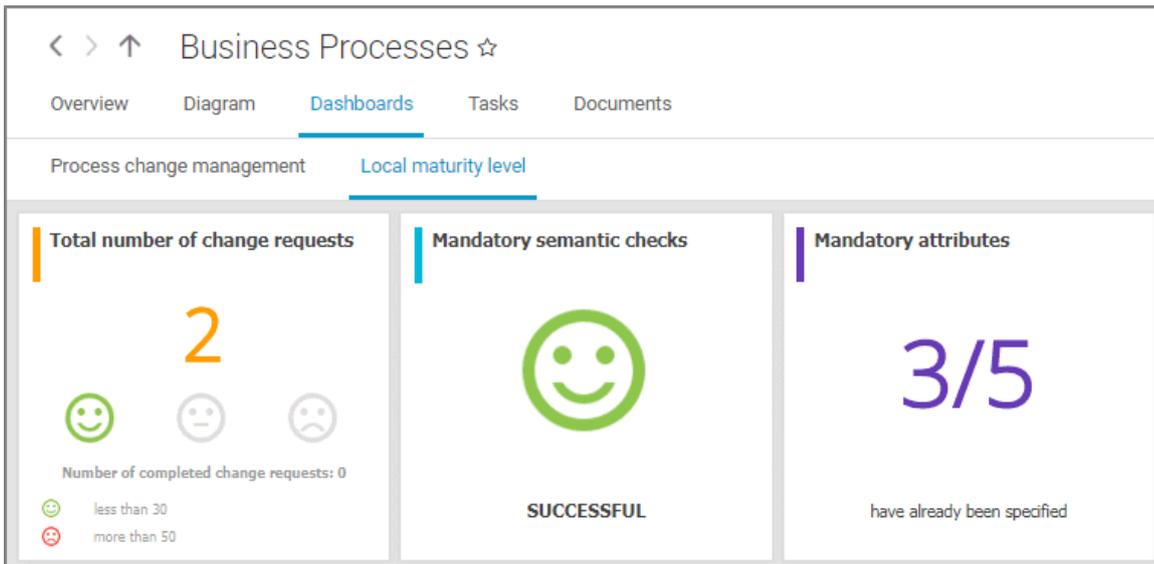
Graphically displays the diagram in Model Viewer. Depending on the diagram type, different functions are available.



You can change the view of the diagram (page 91) () to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 89). Click  **Properties** to view the properties of a model or a model item. (page 92) You can highlight objects in the diagram (page 93) () that meet a defined condition. In addition, you can open assigned models (page 94) ()

Dashboards

Shows the dashboards available for the selected diagram.



The **Dashboard** fact sheet is shown to users who have the **ARIS Aware** license (page 24).

Tasks

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks (page 20).

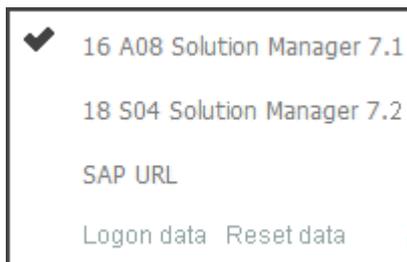
Task	Priority	Status
 New document submitted: Assigned Nov 26, 2018		New

Transactions

Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page **Error! Bookmark not defined.**) in the portal.

Transaction code	Name	Supports	Type	
	Create contract	Contract negotiation and completion in ERP Create contract	SAP transaction	
	Periodic billing	Contract negotiation and completion in ERP	SAP transaction	
	Display contract	Contract negotiation and completion in ERP Inform sales office about contract	SAP transaction	
	Change contract	Contract negotiation and completion in ERP	SAP transaction	
	Create quotation	Quotation processing in ERP (to-be)	SAP transaction	
SDQ1	Expired quotations	Quotation processing in ERP (to-be)	SAP transaction	▶ ▼
SDQ2	Expired quotations	Quotation processing in ERP (to-be)	SAP transaction	
SDQ3	Complete quotatio	Quotation processing in ERP (to-be)	SAP transaction	

You can start (page 120) the ▶ transaction 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 transaction, click an SAP Server or a URL. The Login dialog opens.

SAP logon

Client:

User:

Password:

Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 122). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next transaction start you need to log on to the SAP system again.

If you click a transaction on the **Transactions** page, such as **SDQ1**, its fact sheet including detailed information is displayed. If documents are available, you will be able to download (page 121) them.

Documents

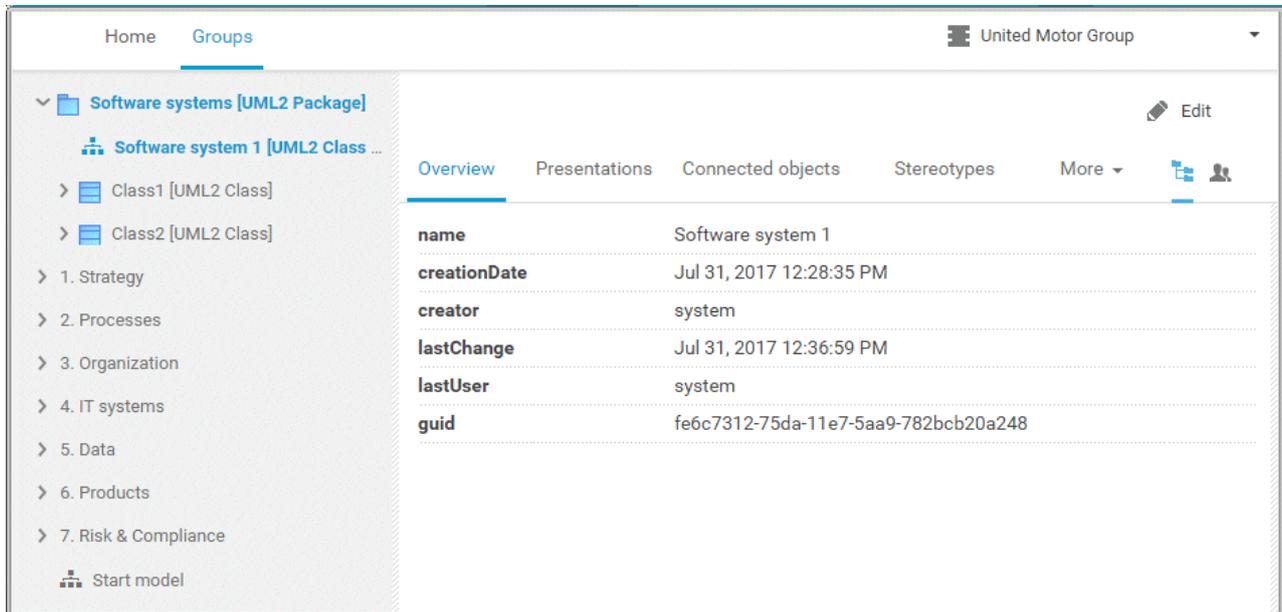
Lists documents assigned to models or objects, for example, by the **Link 1 - Link 4** attributes. The list displays the latest approved version of each document. These documents are stored in ARIS document storage.

Overview Steps Table RACI Diagram Tasks Documents      			
   1-1 of 1   			
Name	Owner	Last update	Related to
Modeling conventions	stem14	2018.11.26, 10:25:38	 Sales order processing

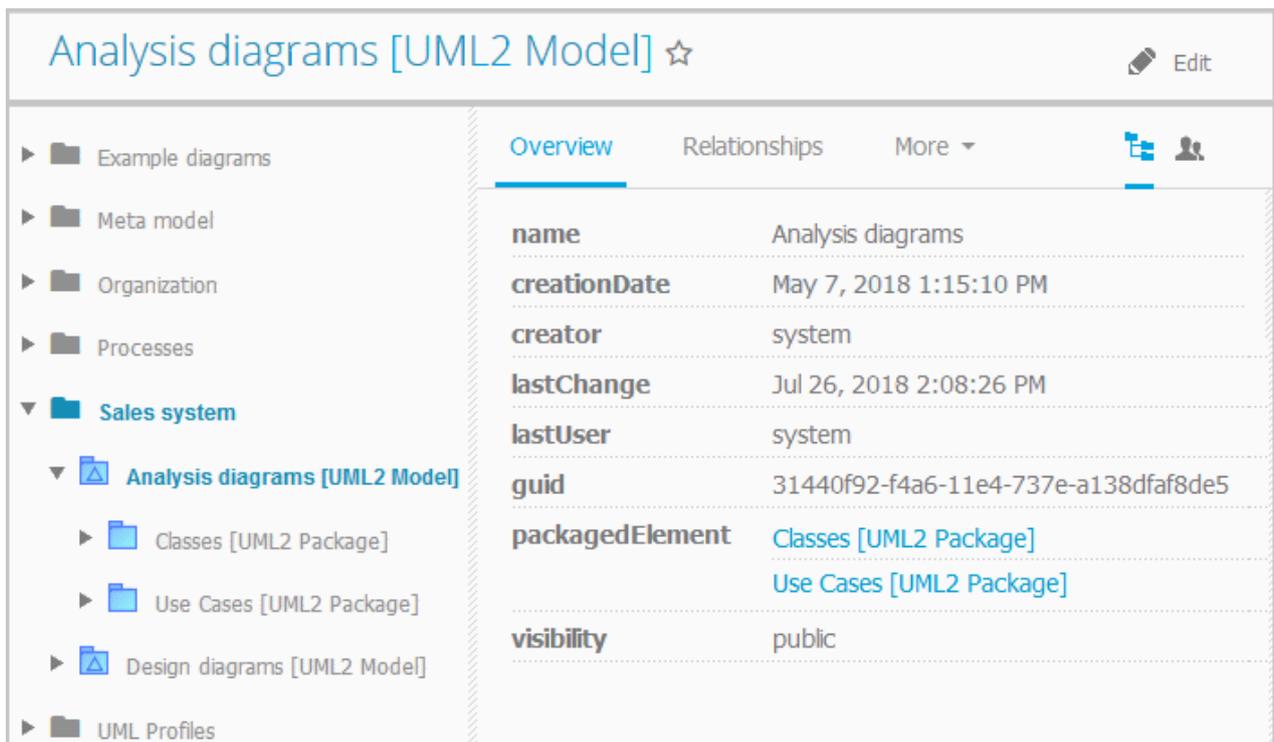
Fact sheets of UML elements

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.

3.1.1.2 Default view

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

If the administrator provides at least one database (page **Error! Bookmark not defined.**), you have access to, this view shows all content relevant to you in a clear structure:

- Home (page 26)
- Processes (page 40)
- Organization (page 51)
- IT systems (page 52)

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 125) 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 123) and activate them as content filters (page 126) to further restrict this content.

3.1.1.2.1 Home

Depending on your license, not all described quick access buttons may be available.

There are several editing areas available:



Quick start (page 57)



My content

Opens the **My content** area (page 70) 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 106) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 172).



My activities

Shows the current activities you are following in Collaboration or in the portal (page 235).



Dashboards

Opens the **Dashboards** area where you can access various dashboards sorted in categories such as **Business usage monitoring**.



My tasks

Opens My tasks where you can edit your tasks (page 204).



My GRC tasks

Shows an overview of your current tasks from ARIS Risk & Compliance Manager (page 74) in ARIS Connect.



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.

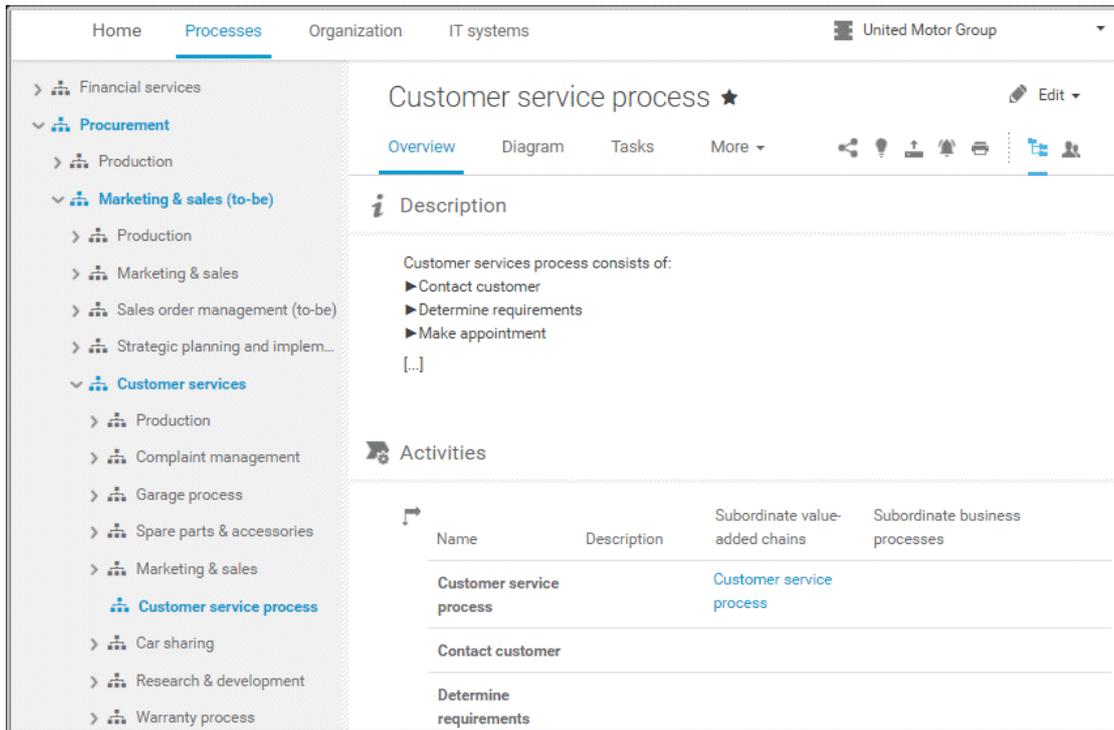


Contacts

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

3.1.1.2.2 Processes

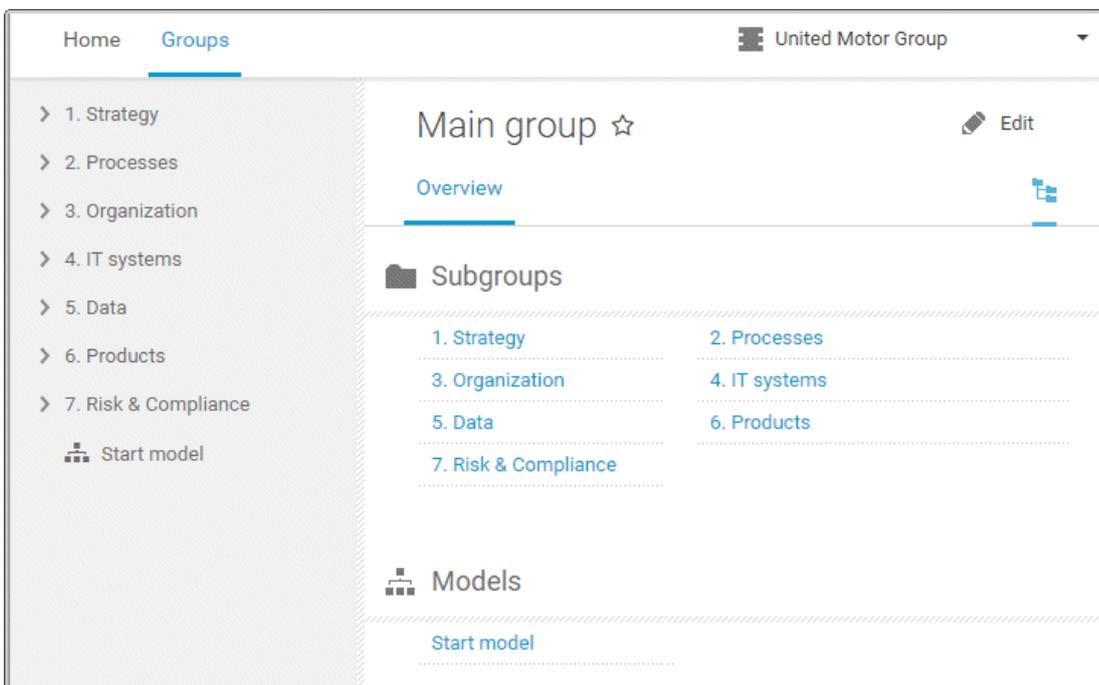
Quickly gain an overview of all processes that are relevant to you. Navigate via value-added chains to the process chains of the portal selected.



Depending on the contents selected and the type of a diagram, different fact sheets 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.

Sales order processing ☆

Overview Steps Table RACI Diagram More ▾

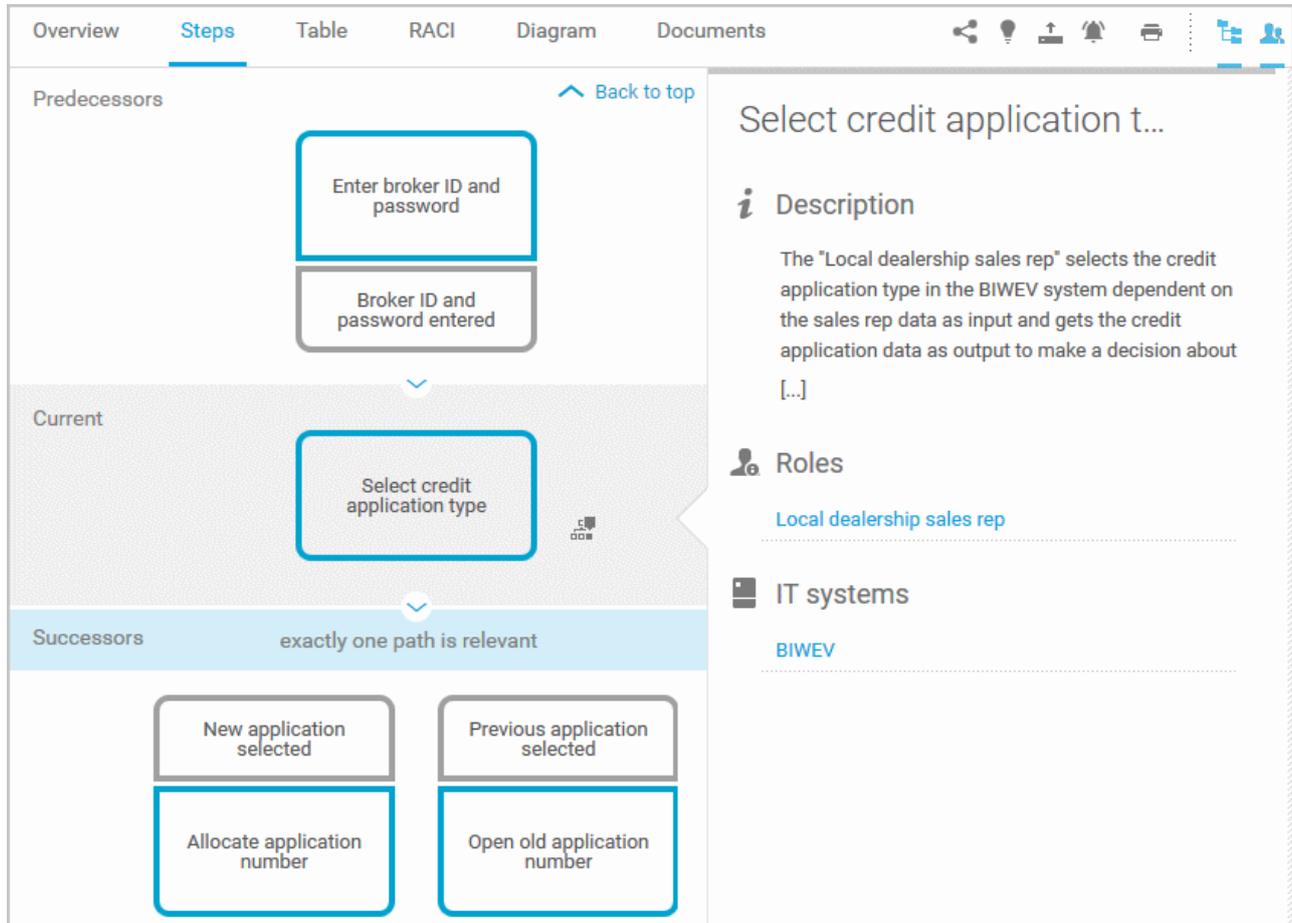
Activities

Name	Description	Roles	IT systems	Documents
Check sales contract and documents	The local dealership sales rep checks the new vehicle sales contract and other documents to	Local dealership sales rep		New vehicle sales contract
Correct documentation in cooperation with sales rep.	If the first draft of the contract is deficient, the regional sales administrator must	Local dealership sales rep Regional sales administrator		New vehicle sales contract
Check if customer master data exists	With access to the correct vehicle sales	Regional sales administrator	PRO-ORDER	New vehicle sales contract

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

Steps

Transparently displays all steps of a process (EPC) (page 104). 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 108) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 107).

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	OR	
	AND/OR	
	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 117) and remove added columns (page 117) again.

Overview Steps Table RACI More ▾	
↓ Functions	Roles
Check sales contract and documents	Local dealership sales rep
Correct documentation in cooperation with sal	Local dealership sales rep Regional sales administrator
Check if customer master data exists	Regional sales administrator
Create customer master data	Regional sales administrator
Enter vehicle data and details	Regional sales administrator
Check if vehicle is in stock	
Allocate vehicle	Regional sales administrator
Create sales order	Regional sales administrator

You can sort the functions (page 119) in different ways by clicking the column title.

You can open a matrix (page 118) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Overview Steps Table RACI More ▾		
↓ Functions	Roles	
	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	<input checked="" type="checkbox"/>	
Correct documentation in cooperation with sales rep.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check if customer master data exists		<input checked="" type="checkbox"/>
Create customer master data		<input checked="" type="checkbox"/>
Enter vehicle data and details		<input checked="" type="checkbox"/>

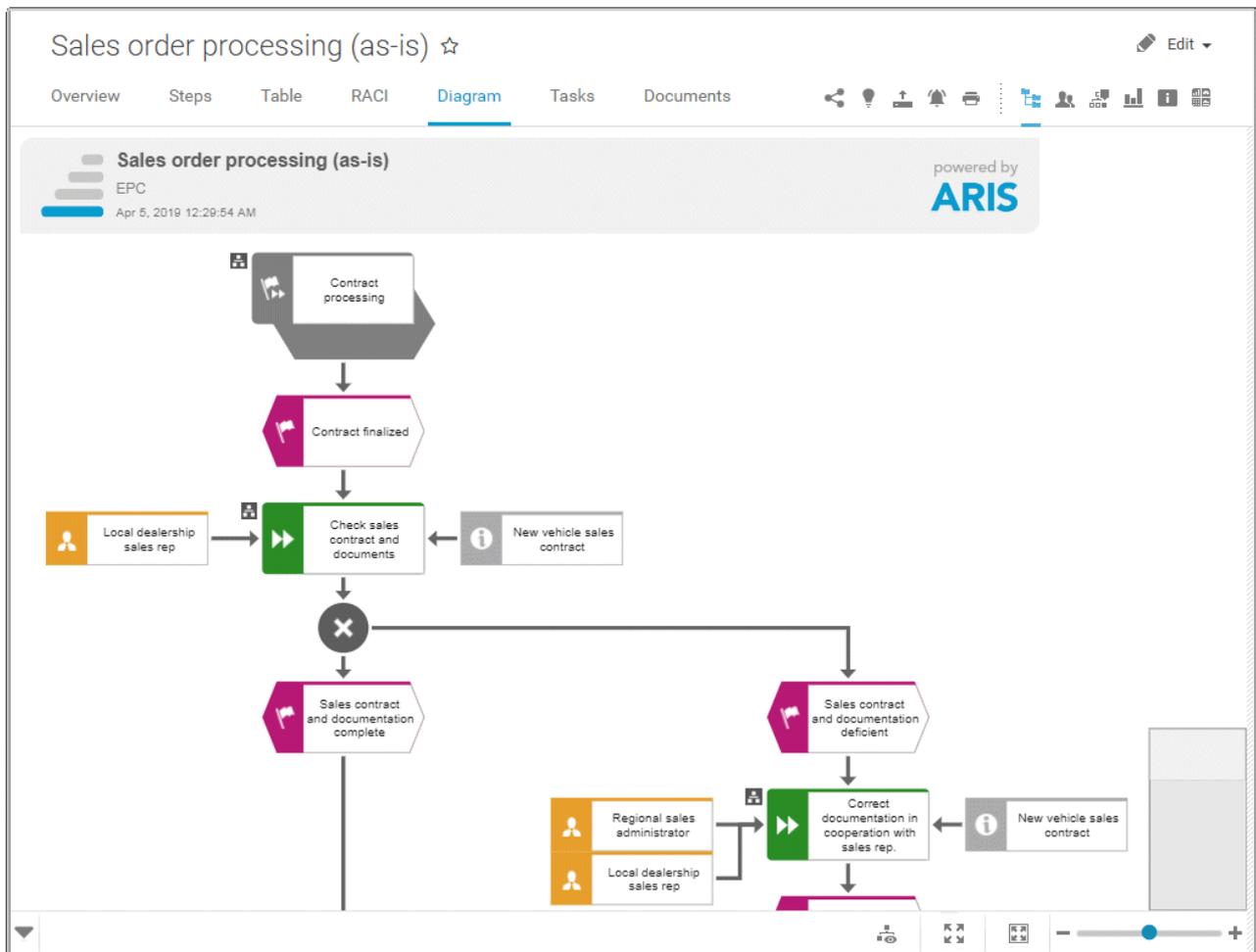
RACI

RACI matrices display the activity processes and the associated organizational responsibilities. RACI matrices are displayed only if RACI information is available for this process (page 194). You can sort the functions (page 119) of matrices.

Overview Steps Table RACI More ▾			
	Local dealership sales rep	Regional sales administrator	
⌵ Functions ▾			
Check sales contract and documents	R A C I	R A C I	
Correct documentation in cooperation with sales rep.	R A C I	R A C I	
Check if customer master data exists	R A C I	R A C I	
Create customer master data	R A C I	R A C I	

Diagram

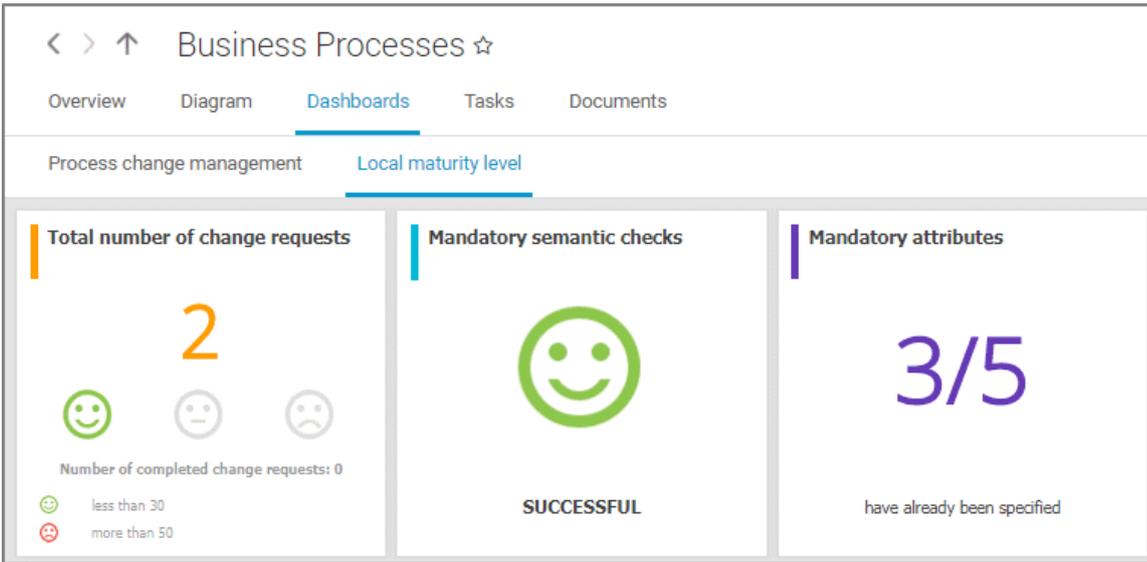
Graphically displays the diagram in Model Viewer. Depending on the diagram type, different functions are available.



You can change the view of the diagram (page 91) () to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 89). Click  **Properties** to view the properties of a model or a model item. (page 92) You can highlight objects in the diagram (page 93) () that meet a defined condition. In addition, you can open assigned models (page 94) ()

Dashboards

Shows the dashboards available for the selected diagram.



The **Dashboard** fact sheet is shown to users who have the **ARIS Aware** license (page 24).

Tasks

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks (page 20).

Overview			Steps			Table			RACI			Diagram			Tasks			Documents					
Task	Priority											Status											
New document submitted: Assigned Nov 26, 2018												New											

Transactions

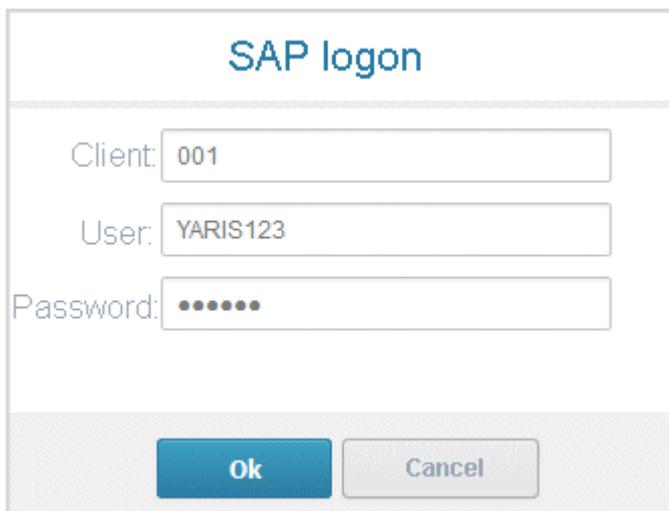
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page **Error! Bookmark not defined.**) in the portal.

Transaction code	Name	Supports	Type	
	Create contract	Contract negotiation and completion in ERP Create contract	SAP transaction	
	Periodic billing	Contract negotiation and completion in ERP	SAP transaction	
	Display contract	Contract negotiation and completion in ERP Inform sales office about contract	SAP transaction	
	Change contract	Contract negotiation and completion in ERP	SAP transaction	
	Create quotation	Quotation processing in ERP (to-be)	SAP transaction	
SDQ1	Expired quotations	Quotation processing in ERP (to-be)	SAP transaction	▶ ▼
SDQ2	Expired quotations	Quotation processing in ERP (to-be)	SAP transaction	
SDQ3	Complete quotatio	Quotation processing in ERP (to-be)	SAP transaction	

You can start (page 120) the ▶ transaction 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 transaction, click an SAP Server or a URL. The Login dialog opens.



Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 122). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next transaction start you need to log on to the SAP system again.

If you click a transaction on the **Transactions** page, such as **SDQ1**, its fact sheet including detailed information is displayed. If documents are available, you will be able to download (page 121) them.

Overview ▶	
Transaction code	 Supported processes
SDQ1 (Expiring Quotations)	Customer qualification (to-be) Sales process (to-be) Contract negotiation and completion in ERP (to-be)
Type	Activities
SAP transaction	Quotation processing in ERP (to-be)
Logical component	 Documents
ZSAP ECC 50	Quotation processing in ERP
	 Roles
	Head of regional sales Regional sales
	Transaction siblings
	Display quotation Change quotation Create quotation List of incomplete quotations Batch processing of quotations

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.

Overview	Steps	Table	RACI	Diagram	Tasks	Documents						
⏪ ⏩ 1-1 of 1 ⏪ ⏩												
Name	Owner	Last update	Related to									
Modeling conventions	stem14	2018.11.26, 10:25:38	 Sales order processing									

ARIS video tutorial

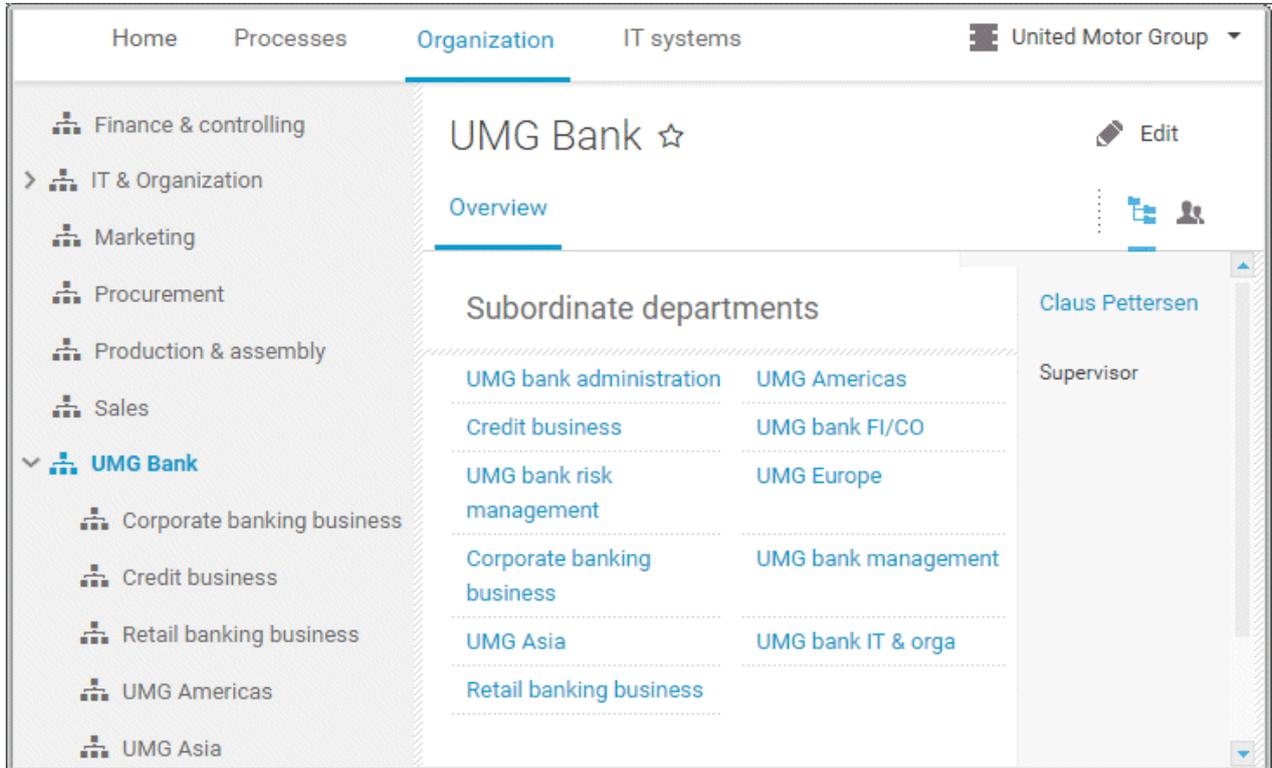
ARIS Connect - Process improvement

(<http://www.ariscommunity.com/videos/aris-connect-process-improvement-everyone>)

3.1.1.2.3 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 40) is displayed. IT information (page 52) is available when clicking a system in use.



3.1.1.2.4 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.

The screenshot displays the 'IT systems' overview page. At the top, there is a navigation bar with 'Home', 'Processes', 'Organization', and 'IT systems' (which is underlined). The 'United Motor Group' logo is on the right. On the left, an Explorer tree lists IT systems: ERX-00, HEBA-2, TBA-TT, EPLU, BIWEV, ETR, OVIT-BSE, COT, JONKUSS-00, PRO-DISPO, ADC, and CEDAT. The main content area shows a star icon, followed by tabs for 'Overview', 'Diagram', 'Tasks', and 'Documents'. The 'Overview' tab is active, displaying details for a system: 'amy.architecture', 'Responsible', 'Feb 16, 2016', and 'Last change'. Below this is a section titled 'Subordinate IT systems' with a grid of system IDs: ERX-00, HEBA-2, TBA-TT, EPLU, BIWEV, ETR, OVIT-BSE, COT, JONKUSS-00, and PRO-DISPO.

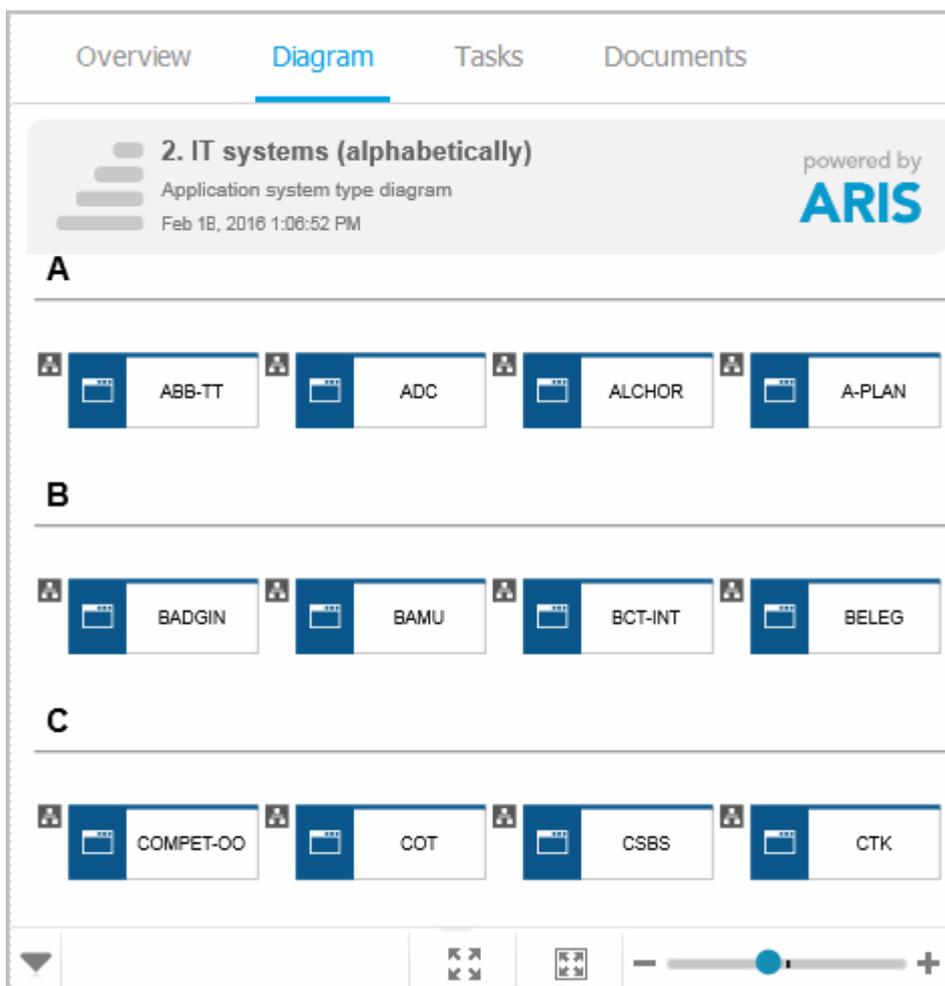
Diagram

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 **i 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 (page 20).

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 like **Process architecture**, **Information architecture**, or **IT infrastructure**.

The screenshot displays the IT system fact sheet for 'A-PLAN' within the 'United Motor Group' environment. The interface includes a navigation bar with 'Home', 'Processes', 'Organization', and 'IT systems' (selected). Below the navigation, the system name 'A-PLAN' is shown with a star icon and an 'Edit' button. A breadcrumb trail indicates '2. IT systems (alphabetically)'. The main content area is divided into several sections:

- Overview:** Contains key metrics: 'Up to 10000' (Number of users), 'Non-standard' (Standardization status), and 'Between 4 hours and 24 hours' (Maximum downtime). A contact card for Peter Brown (555-32547) is also visible.
- Supported roles:** Lists roles such as Logistics administrator, Regional sales administrator, Local dealership sales rep, and Warehouse coordinator.
- Business processes (context information):** Lists processes like Billing, Order processing (as-is), Process system map, Contract negotiation and conclusion (as-is), Quotation processing (as-is), Receive and condition vehicle, Inspection of delivered goods, and Goods receipt/service receipt.
- Responsible:** Identifies 'Sales support EMEA' as the unit responsible and 'APL' as the responsible party.

A left-hand navigation pane shows a tree structure of IT systems, including A-PLAN and various sub-systems like ABB-TT, ADC, and APT-5.

3.1.1.3 Valuable information

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

3.1.1.3.1 What is the portal view?

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 (page 55) and the default view (page 56). These views are defined in configuration sets (page **Error! Bookmark not defined.**) that cannot be changed. However, administrators can define multiple modification sets based on these templates.

3.1.1.3.2 What is the structure of the classic view?

If the administrator provides at least one database (page **Error! Bookmark not defined.**) you have access to, this view shows all content relevant to you in a clear structure.

- Home (page 26)
- Groups (page 27)

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 125) 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 123) and activate them as content filters (page 126) to further restrict this content.

3.1.1.3.3 What is the structure of the default view?

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

If the administrator provides at least one database (page **Error! Bookmark not defined.**), you have access to, this view shows all content relevant to you in a clear structure:

- Home (page 26)
- Processes (page 40)
- Organization (page 51)
- IT systems (page 52)

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 125) 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 123) and activate them as content filters (page 126) to further restrict this content.

3.1.1.3.4 What is the bar panel for?

The bar panel offers you buttons to open or close bars like the **Groups** or **Processes** bars as well as, for example, the **Reports** and **Comment** bars.



The bar buttons, that means buttons that directly trigger functionality such as  **Print graphic as PDF** are separated by a separator.

Among others the following possibilities are available:

You can use the bar panel buttons  **Collaboration** and  **Navigation** to show or hide the Collaboration functions **Follow** (page 72) and **Comment** (page 71), as well as the Explorer tree. The buttons of visible bars are indicated in color.

Click  **Share model** to share models with other users (page 134). Click  **Submit change request** to send change requests to the process manager (page 200).

3.1.1.3.5 Which quick access buttons are available?

Depending on your license, not all described quick access buttons may be available.



View models & documents

Opens the **Groups** (page 27) structure in the **Classic** (page 55) view or **Processes** (page 40) structure in the **Default** (page 56) view, where you can browse the ARIS Connect content of the selected database.



Tasks

Opens My tasks, where you can edit tasks that are assigned to you.



Search

Opens the **Search** area (page 258), where you can find items, objects, documents, groups in Collaboration, etc.



Create new model

Opens the **Create model** dialog for you to create a model in one of the databases you have access to.



Download clients

Opens the **Download client** page for you to download a java client of the products the administrator made available.



My feed

Opens the **Recent** area of the  **Collaboration** (page 232) where you have access to your own feed.



All company feed

Opens the **All company feed** area (page 234) of the  **Collaboration** (page 232).



All collaboration groups

Activates the  **Find groups** area of the  **Collaboration** (page 232) where you can find new groups (page 234).



Manage models & objects

Opens the **Models & Objects** area of the  **Repository** and enables you to manage models and objects of the databases of the current ARIS server.



Manage documents

Opens the **Documents** area of the  **Repository** and enables you to manage the content of ARIS document storage of the current ARIS server.



Manage dashboards & data feeds

Opens the **Dashboards & Data feeds** area of the  **Repository** where you can manage dashboards and data feeds (page **Error! Bookmark not defined.**).



User settings

Opens your user setting page where you can edit your data or add an image.



Administration

Opens the **Configuration** area where you can manage the current ARIS Connect system (page 24).



User administration

Opens the **Users (page Error! Bookmark not defined.)** area of the  **User Management** in ARIS Administration where you can administrate the users for the current server.



License administration

Opens the  **Licenses (page Error! Bookmark not defined.)** area in ARIS Administration where you can administrate the licenses for the current server.



Process administration

Opens the  **Process administration (page Error! Bookmark not defined.)** area in ARIS Administration where you can administrate automated processes.

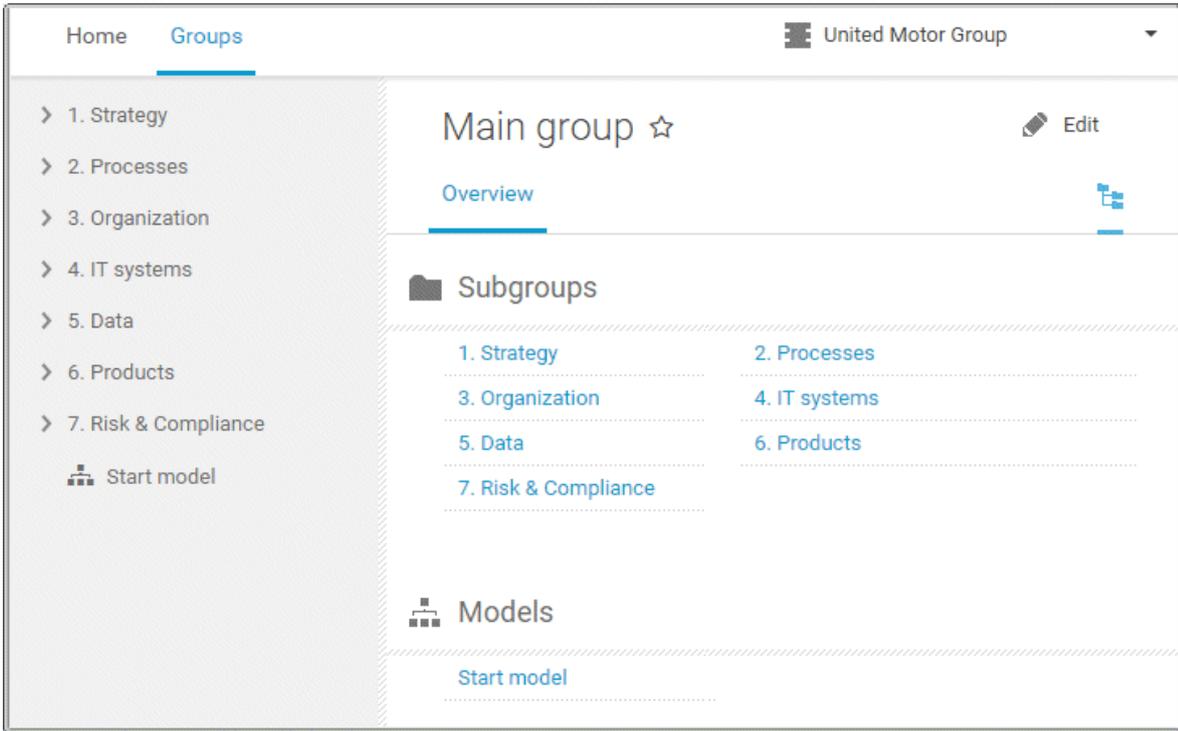


Collaboration administration

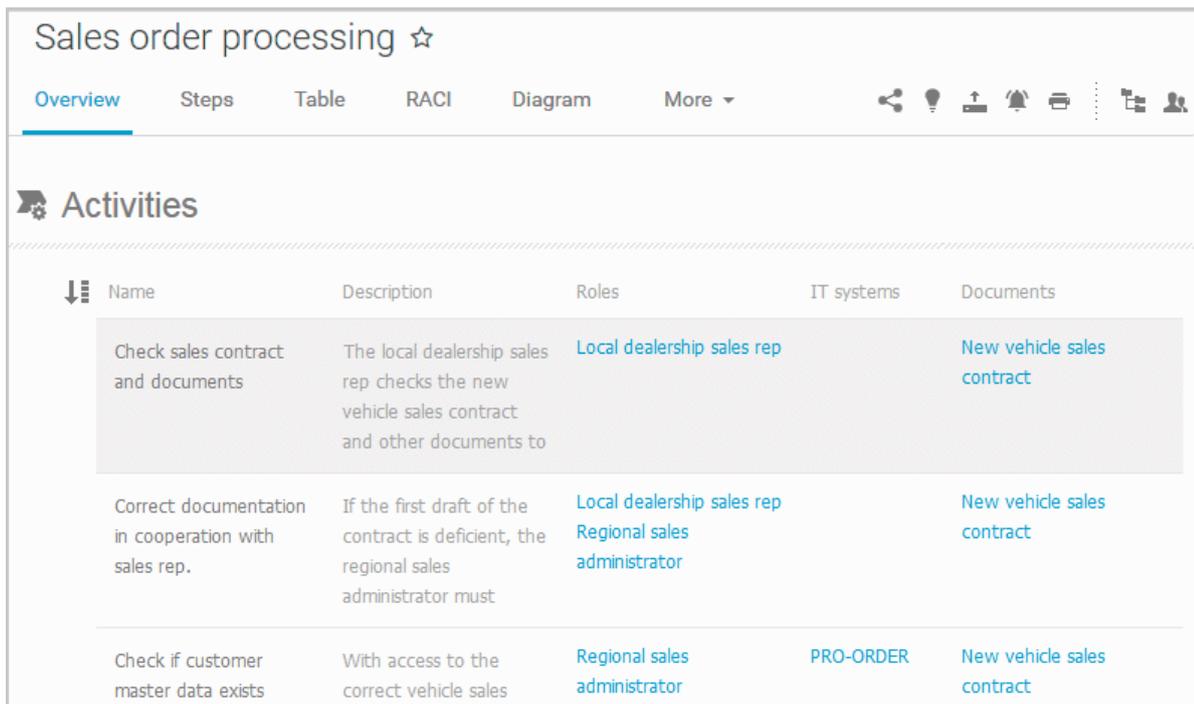
Opens the **Check flagged activities** page of the **Administration** area (page **Error! Bookmark not defined.**) of the  **Collaboration** (page 232) where you can decide whether content is appropriate or not.

3.1.1.3.6 What is the Overview fact sheet for?

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.

3.1.1.3.7 When can UML content be displayed?

You can display UML content in ARIS Connect under the following conditions:

- You use the classic configuration set (page 55).
- The database with UML content you are using has been assigned a filter (page 286) that allows UML content. This may be the **Entire method** filter or a filter you have defined in which all UML elements are available.
- The database has been published (page **Error! Bookmark not defined.**) by an administrator. It is therefore available in the portal.
- You have logged in as a user with the **UML Viewer** function privilege.

3.1.1.3.8 Where is UML content displayed?

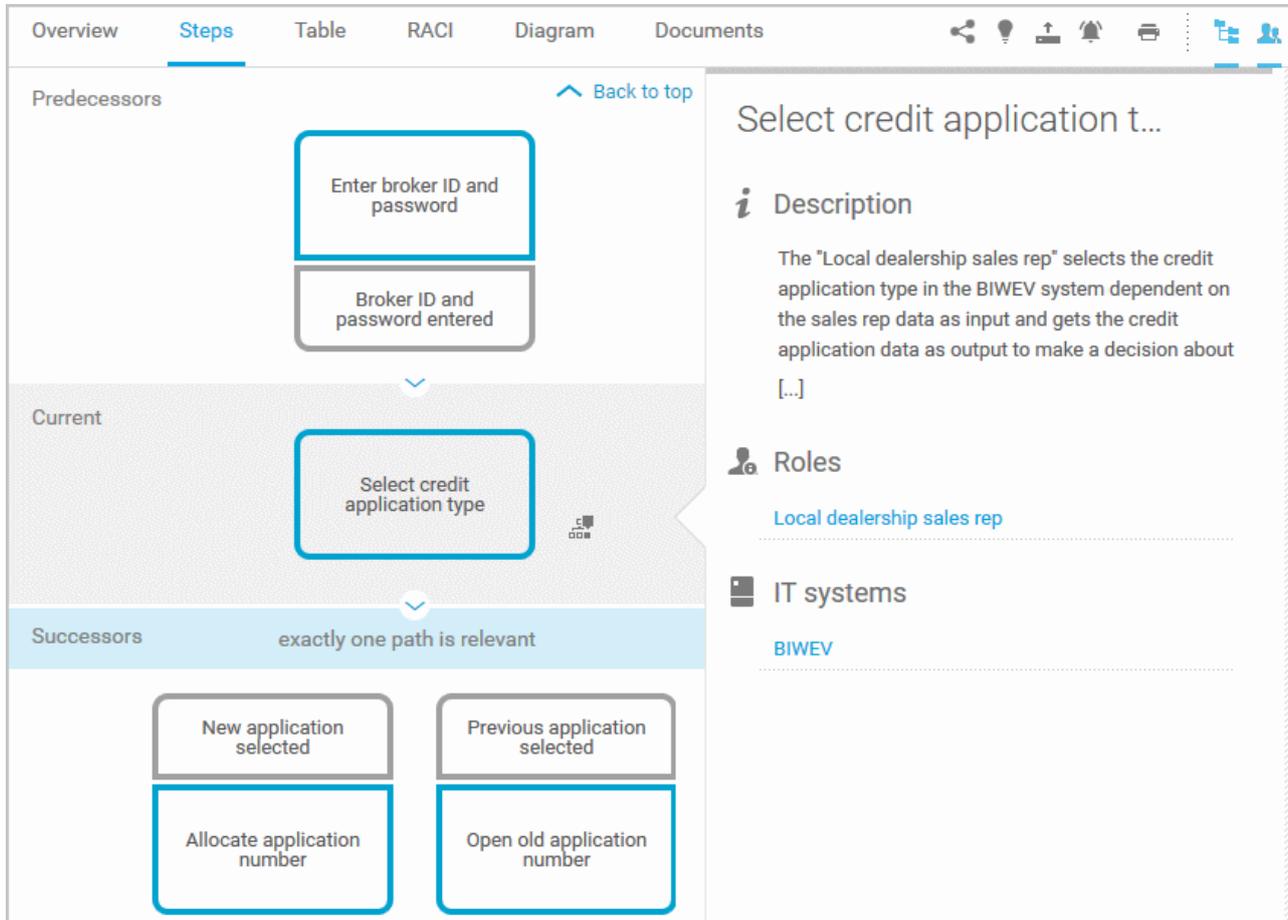
UML content is displayed in the same way as other ARIS content. You can use the groups (page 27) to navigate in the database.

As soon as you select UML content to be displayed, specific UML characteristics are taken into account.

- Thus, UML namespace hierarchies are also displayed together with the group path.
- If you select a UML element, you can display its typical UML-specific properties such as stereotypes and tagged values.
- If you select a diagram, you can of course display it graphically.
- The search also finds UML content.

3.1.1.3.9 What is the Steps fact sheet for?

Transparently displays all steps of a process (EPC) (page 104). 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 108) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 107).

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	OR	
	AND/OR	
	XOR/OR	
exactly one path is relevant	XOR	
	AND/XOR	
	OR/XOR	
	Gateway	
complex decision	Rule	

3.1.1.3.10 What is the Table fact sheet for?

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 117) and remove added columns (page 117) again.

Overview Steps Table RACI More ▾	
↓ Functions	Roles
Check sales contract and documents	Local dealership sales rep
Correct documentation in cooperation with sal	Local dealership sales rep Regional sales administrator
Check if customer master data exists	Regional sales administrator
Create customer master data	Regional sales administrator
Enter vehicle data and details	Regional sales administrator
Check if vehicle is in stock	
Allocate vehicle	Regional sales administrator
Create sales order	Regional sales administrator

You can sort the functions (page 119) in different ways by clicking the column title.

You can open a matrix (page 118) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Overview Steps Table RACI More ▾		
↓ Functions	Roles	
	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	<input checked="" type="checkbox"/>	
Correct documentation in cooperation with sales rep.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check if customer master data exists		<input checked="" type="checkbox"/>
Create customer master data		<input checked="" type="checkbox"/>
Enter vehicle data and details		<input checked="" type="checkbox"/>

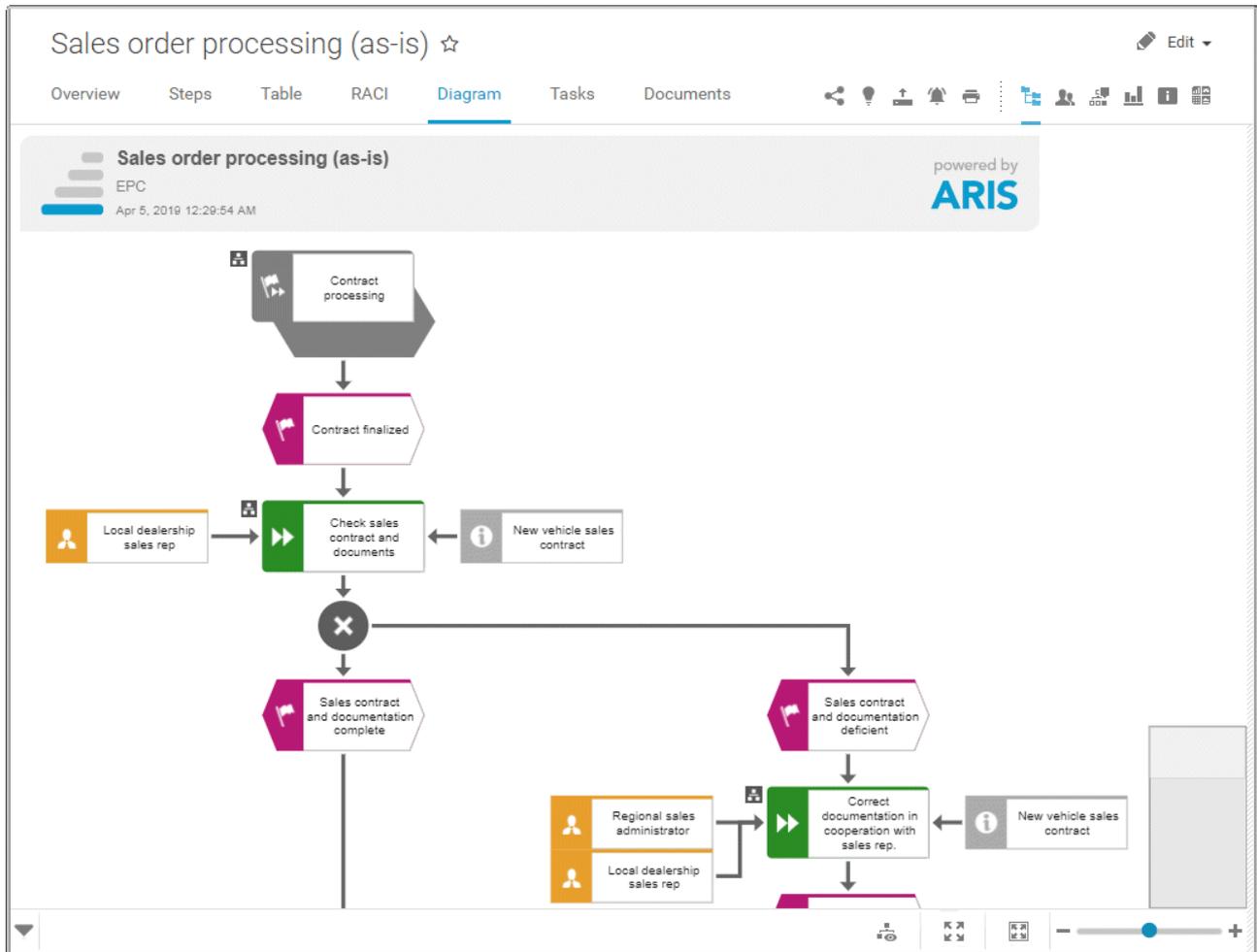
3.1.1.3.11 What is the RACI fact sheet for?

RACI matrices display the activity processes and the associated organizational responsibilities. RACI matrices are displayed only if RACI information is available for this process (page 194). You can sort the functions (page 119) of matrices.

Overview		Steps	Table	RACI	More ▾	...		
↓ Functions		Local dealership sales rep		Regional sales administrator				
Check sales contract and documents	R	A	R	A	C	I	R	A
Correct documentation in cooperation with sales rep.	R	A	C	I	R	A	R	A
Check if customer master data exists	R	A	R	A	C	I	R	A
Create customer master data	R	A	R	A	C	I	R	A

3.1.1.3.12 What is the Diagram fact sheet for?

Graphically displays the diagram in Model Viewer. Depending on the diagram type, different functions are available.



You can change the view of the diagram (page 91) (🔍) to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 89). Click **i Properties** to view the properties of a model or a model item. (page 92) You can highlight objects in the diagram (page 93) (🔍) that meet a defined condition. In addition, you can open assigned models (page 94) (📁).

3.1.1.3.13 What is the Task fact sheet for?

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks (page 20).

Task	Priority	Status
New document submitted: Assigned Nov 26, 2018		New

3.1.1.3.14 What is the Transactions fact sheet for?

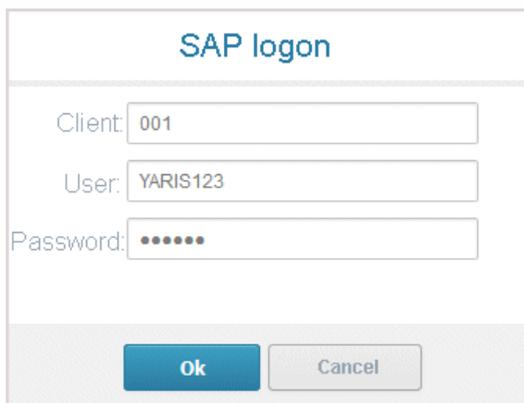
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page **Error! Bookmark not defined.**) in the portal.

Transaction code	Name	Supports	Type	
	Create contract	Contract negotiation and completion in ERP Create contract	SAP transaction	
	Periodic billing	Contract negotiation and completion in ERP	SAP transaction	
	Display contract	Contract negotiation and completion in ERP Inform sales office about contract	SAP transaction	
	Change contract	Contract negotiation and completion in ERP	SAP transaction	
	Create quotation	Quotation processing in ERP (to-be)	SAP transaction	
SDQ1	Expired quotations	Quotation processing in ERP (to-be)	SAP transaction	▶ ▼
SDQ2	Expired quotations	Quotation processing in ERP (to-be)	SAP transaction	
SDQ3	Complete quotatio	Quotation processing in ERP (to-be)	SAP transaction	

You can start (page 120) the ▶ transaction 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 transaction, click an SAP Server or a URL. The Login dialog opens.



Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 122). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next transaction start you need to log on to the SAP system again.

If you click a transaction on the **Transactions** page, such as **SDQ1**, its fact sheet including detailed information is displayed. If documents are available, you will be able to download (page 121) them.

Overview
▶
⋮
🔍

Transaction code	<div style="display: flex; align-items: center;"> Supported processes </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Customer qualification (to-be) </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Sales process (to-be) </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Contract negotiation and completion in ERP (to-be) </div>
Type	<div style="display: flex; align-items: center;"> Activities </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Quotation processing in ERP (to-be) </div>
Logical component	<div style="display: flex; align-items: center;"> Documents </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Quotation processing in ERP </div>
ZSAP ECC 50	<div style="display: flex; align-items: center;"> Roles </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Head of regional sales </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Regional sales </div>
	<div style="display: flex; align-items: center;"> Transaction siblings </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Display quotation </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Change quotation </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Create quotation </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> List of incomplete quotations </div> <hr style="border-top: 1px dashed #ccc;"/> <div style="margin-left: 20px;"> Batch processing of quotations </div>

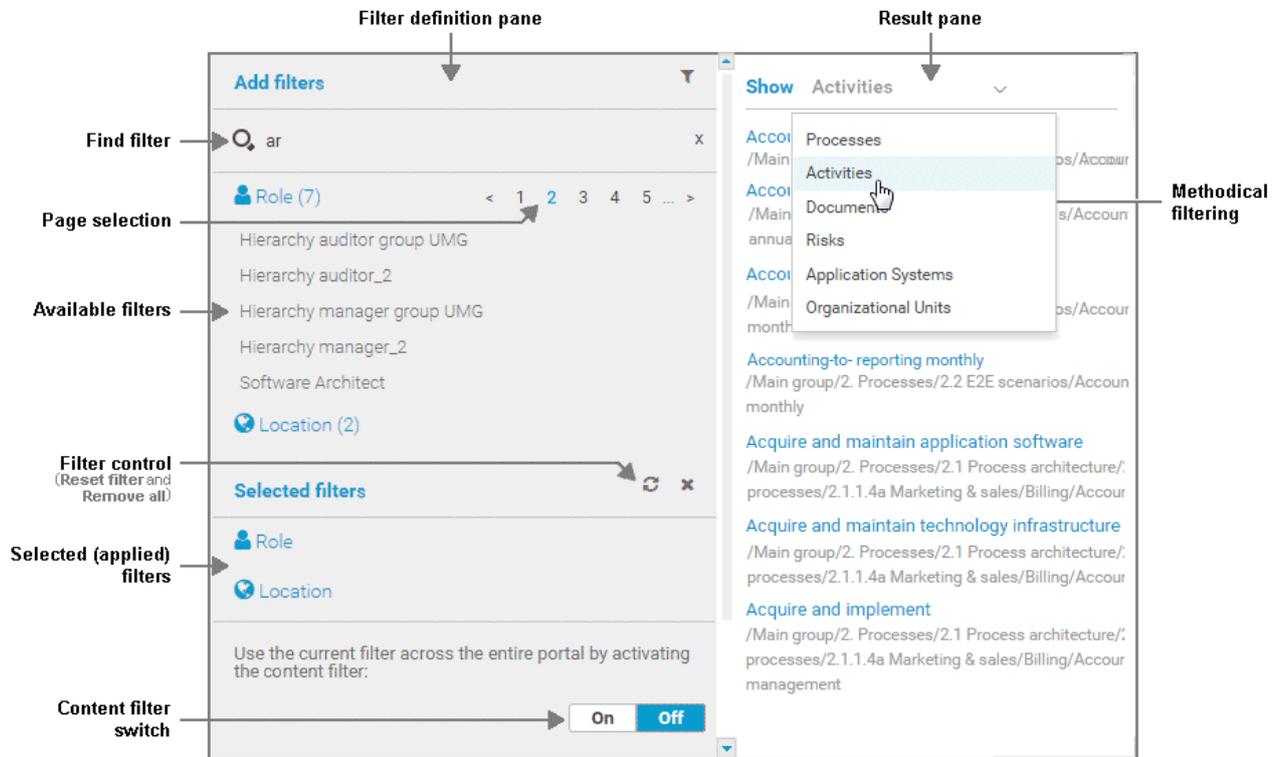
3.1.1.3.15 What is the Documents fact sheet for?

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.

Overview	Steps	Table	RACI	Diagram	Tasks	Documents						
⏪ ⏩ 1-1 of 1 ⏪ ⏩												
Name	Owner	Last update	Related to									
Modeling conventions	stem14	2018.11.26, 10:25:38	 Sales order processing									

3.1.1.3.16 What is the structure of the My content area?

If the administrator provides at least one database (page **Error! Bookmark not defined.**) 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. Therefore 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 123) or a number of filters (page 124) 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 127) and selected filters can be reset (page 127), 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 125).

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 127) by role assignment.

3.1.2 Use 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 (page **Error! Bookmark not defined.**), and the published databases (page **Error! Bookmark not defined.**) your administrator selected, the function and content of the portal may vary. In the following, the functions of the classic view (page 55) and the default view (page 56) are described.

3.1.2.1 Collaborate

The following describes the collaboration features.

3.1.2.1.1 Comment on portal content

Add comments to models and post information that could be of interest to your colleagues.

Prerequisite

You have the required access privilege (page **Error! Bookmark not defined.**) in ARIS Architect.

1. Navigate to a process.
2. Click  **Collaboration** in the bar panel 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 247) 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**.

Your comment is posted.

3.1.2.1.2 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  **Collaboration** in the bar panel 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**.

3.1.2.1.3 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want feedback.
6. Click  **Collaboration** if the **Collaboration** bar is not open yet.
7. Enter your comment in the box provided.
8. Click  **Tag**.
9. Enter the words to be used as keywords (page 247) 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 below the process 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**.

3.1.2.2 Compliance

The following describes the compliance features.

3.1.2.2.1 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.

3.1.2.2.2 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.

3.1.2.2.3 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 74) the risk assessment in ARIS Risk & Compliance Manager, click  **Open in ARIS Risk & Compliance Manager**.

3.1.2.2.4 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 opened 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.

3.1.2.3 Documents

The following describes the use of documents.

3.1.2.3.1 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 the approval request by e-mail. They can approve the proposal to link the document. It is then linked to the model or object. If they do not approve it, no link is created. The applicant receives a corresponding 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**.

3.1.2.3.2 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. Click  **Propose document**. The **Submit new document** dialog opens.
3. Select the documents you want to submit.
4. Click **Send**.

The person responsible for the contents receives the approval request by e-mail. They can approve the document. It is then linked to the model or object. If they do not approve it, no link is created. The applicant receives a corresponding 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**.

3.1.2.3.3 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 (page 88) 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**.

3.1.2.3.4 Link new documents to a model or object

You can link new documents with a model or object. We strongly recommend that you check documents for malicious software before uploading.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Click the name of the model you want to edit.
3. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
4. Click  **Properties**. The **Properties** bar opens.
5. Activate the **Documents** tab.
6. Click in the model background to add a document to the model or the relevant object to add a document to the object.
7. Click  **Add document**. The corresponding dialog opens.
8. Navigate to the target folder.
9. Click  **Upload new document**. The **Select new document** dialog opens.
10. Click **Select file** and select a document.
11. Enter a title and, if required, specify further document properties.
12. Click **Upload**.
13. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

3.1.2.3.5 Add existing documents to a model or object

You can link documents from ARIS document storage or a document management system with a model or object.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Navigate to a group and click a model.
3. Click **Diagram** if not enabled yet.
4. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
5. Click  **Properties**.
6. Activate the **Documents** tab.
7. Click in the model background or an object.
8. Click  **Add document**.
9. Click the folder containing the relevant documents.
10. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

3.1.2.3.6 Have document approved

Ask the person in charge to approve the documents you changed so that the changed document can be made available to all users.

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 (page 88) the model that contains the document that you want to have approved.
4. Click  **Properties**.
5. Activate the **Documents** tab.
6. Select the relevant document.
7. Click  **Request approval**. The corresponding dialog opens.
8. Click **Send**.

The person responsible receives an e-mail with the relevant information and a link to the associated task in My tasks. If the person responsible approves the changes, the current version of the document is made available in ARIS Connect (status APPROVED). The document is visible in the portal on the **Documents** tab. If rejected, the document receives the status 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**.

3.1.2.3.7 Share document

You can share documents with other users.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Open (page 88) the model that contains the document you want to submit a change request for.
3. Click **Diagram** if not enabled yet.
4. Click  **Edit** >  **Edit model**.
5. Click  **Properties**.
6. Activate the **Documents** tab.
7. Select the document you want to share with another user.
8. Click  **Share document**. The corresponding dialog opens.
9. Select the user you want to share the document with.
10. Enable **Send copy to me** to receive a copy of the message, if required.
11. You can also enter a subject and a comment.
12. Click **Send**.

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

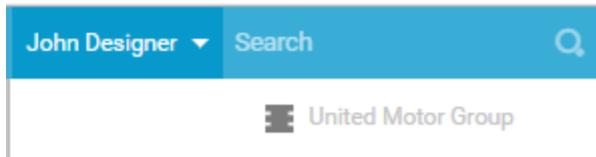
This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect**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

3.1.2.3.8 Find a document

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

Procedure

1. Select **Documents** from the list.
2. Click in the **Search** box.



3. Enter the relevant term.
A list with the first results (page 258) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

The document will open.

3.1.2.3.9 Remove document from a model or object

You can remove a document from a model or object.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Open (page 88) the model you want to remove the document from.
3. Click **Diagram** if not enabled yet.
4. Click  **Edit** >  **Edit model**.
5. Click  **Properties**.
6. Activate the **Documents** tab.
7. Click  **Remove selected document**.

The document is removed from the model or object and no longer has any relationship to the model or object.

3.1.2.4 Execute processes

The following describes the execution of processes.

3.1.2.4.1 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 (page **Error! Bookmark not defined.**).

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 will be displayed for selection.
3. Click the executable process.

The executable process will start.

3.1.2.5 Model

The following describes the use of models.

3.1.2.5.1 Create model

You can quickly and easily create new models.

Prerequisites

- You have the **ARIS Connect Designer** license privilege.
- The classic configuration set or modification set (page **Error! Bookmark not defined.**) based on it is selected for 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  **Create new model** on the **Quick start (page 57)** area. The corresponding dialog opens.
4. Enter a name for the new model in the **Model name** box.
5. Click the **Model type** box and enter part of the model type name. All model types (page 282) are displayed whose names contain the term you entered.
6. Select the required model type. The **Target** area displays the database and group names. This is where the new model will be stored.
7. Click **Change** if you want to store the model in a different database and/or group. The **Select target group** dialog opens.
8. Select the required database in the **Database** box.
9. Select the required group.
10. Click **OK**. The **Select target group** dialog closes.
11. Check your input.
12. Click **OK**. The **Create model** dialog closes.

The model is created based on the preset template (page 286) and opens in a new tab (page 288).

3.1.2.5.2 Edit models

You can edit models in ARIS Connect.

Prerequisite

- You have the **ARIS Connect Designer** 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the 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**.

3.1.2.6 Model Viewer

The following describes the use of the Model Viewer.

3.1.2.6.1 Use the view bar

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

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets 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 91) of the model.
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.

3.1.2.6.2 Navigate using the Model Viewer

You can navigate to different areas of a model.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets 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 89), 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 area you want to bring into the visible area.
7. Release the mouse button when the relevant model area is visible.

You have navigated to the relevant model area.

3.1.2.6.3 Change view

In the Model Viewer, you can change the view of 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 model window.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click  **Change view**. The view options (page 96) 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 96) 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 model window.

As long as the view options are active, the  **Change view** icon is colored in red and the selected view is output, for example, **Lean**.

3.1.2.6.4 Reset a changed view

In the Model Viewer, you can determine that models are displayed according to criteria you have selected (page 91). 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 96) are collapsed.
2. Click  **Reset to default** to the right of the title **Views**.
3. To close the **Change view** bar, click in the model window.

The model is shown without restrictions and the  **Change view** icon is not colored anymore.

3.1.2.6.5 Show properties

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

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click **i Properties**. The **Property** bar opens and the **Attributes** tab is activated.

Attributes More ▾	
Attribute	Attribute value
Name	Organizational chart
Remark/Example	Organization
Type	Structural element
Time of generation	Apr 18, 2017 11:20:25 AM
Creator	w.becker
Last change	Aug 18, 2019 11:25:00 AM
Last user	system

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.



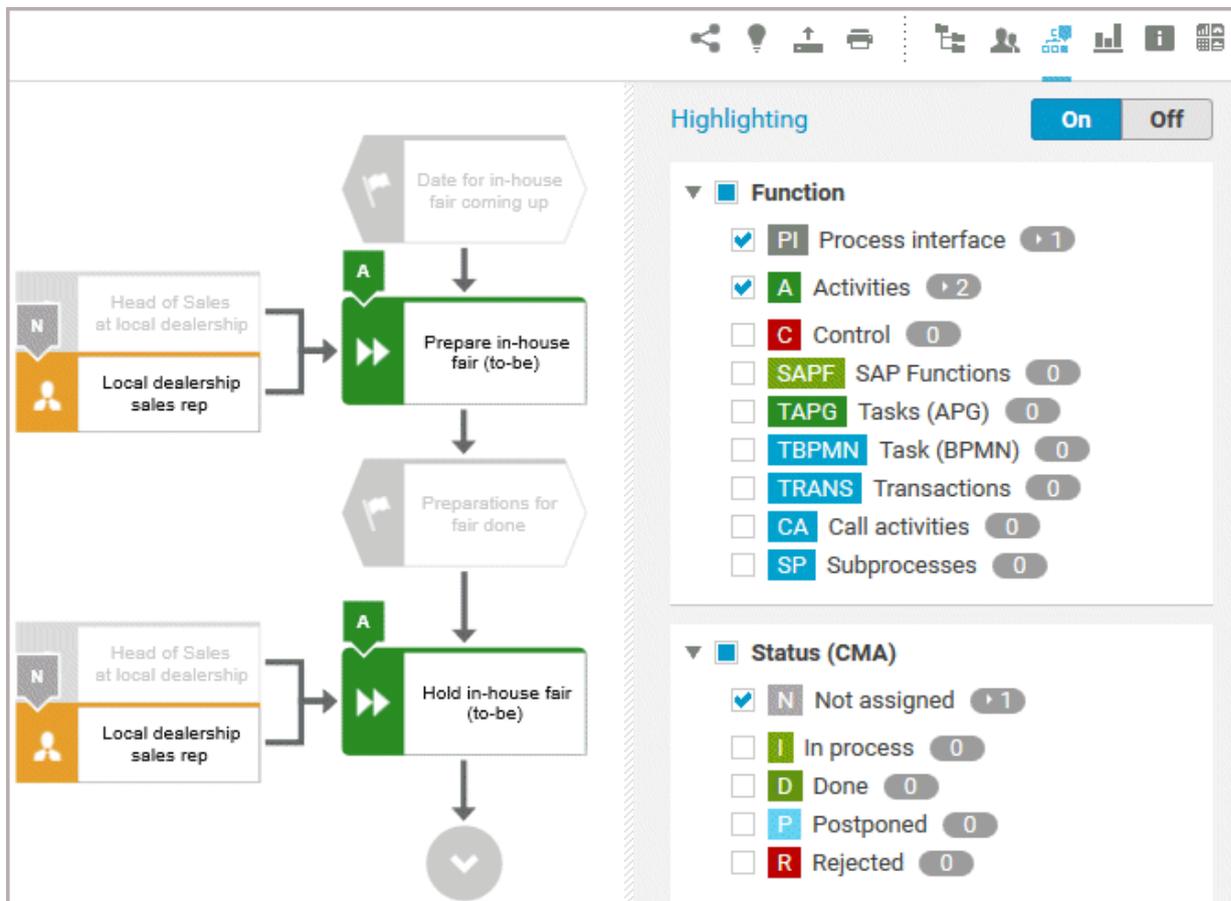
You have used the **Property** bar.

3.1.2.6.6 Highlight objects

In the Model Viewer, you can highlight objects that meet a defined condition. The highlighting remains active as long as you stay in the view or until you switch highlighting off (page 162).

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Click  **Highlighting > On**.
6. Enable the criteria to be met. The objects are then highlighted in the diagram. In this example, the activities are highlighted and the role that is not assigned because their check boxes are activated.



You have highlighted objects.

3.1.2.6.7 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets 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.

3.1.2.6.8 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Click **Diagram** if you have not already selected this fact sheet before. The diagram is displayed in the Model Viewer together with all placed link attributes.



5. Click the relevant link attribute.

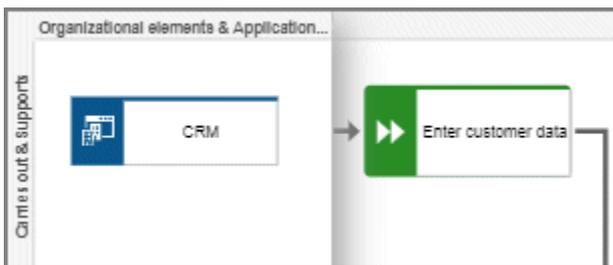
The link opens. This is how you can easily open a text document or a new e-mail with the e-mail recipient entered, for example.

3.1.2.6.9 Valuable information

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

3.1.2.6.9.1 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 90). 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.



3.1.2.6.9.2 Which view options are available?

You can change the view (page 91) 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 model window.

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 elements, structurally relevant objects (page 543) and satellites (page 543), are shown.

Lean

Displays only the structurally relevant objects (page 543) of a model. Satellites (page 543) 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 543), all objects of the following types are displayed.

- Internal person
- External person
- Position
- Role

IT system view

Besides the structurally relevant objects (page 543), 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 100) across model boundaries by arranging the structurally relevant objects (page 543) of the process from left to right and the satellites (page 543) 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 objects 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 objects 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 objects 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 objects 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 objects 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 objects 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 objects 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 objects 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 elements by roles according to the connection you have selected. The previously selected grouping is deactivated. The model elements are grouped in a swimlane model (page 540).

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 elements by positions according to the connection you have selected. The previously selected grouping is deactivated. The model elements are grouped in a swimlane model (page 540).

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 elements 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 540). The previously selected grouping is deactivated. The model elements are grouped in a swimlane model (page 540).

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**.



3.1.2.6.9.3 How can comprehensive processes be modeled?

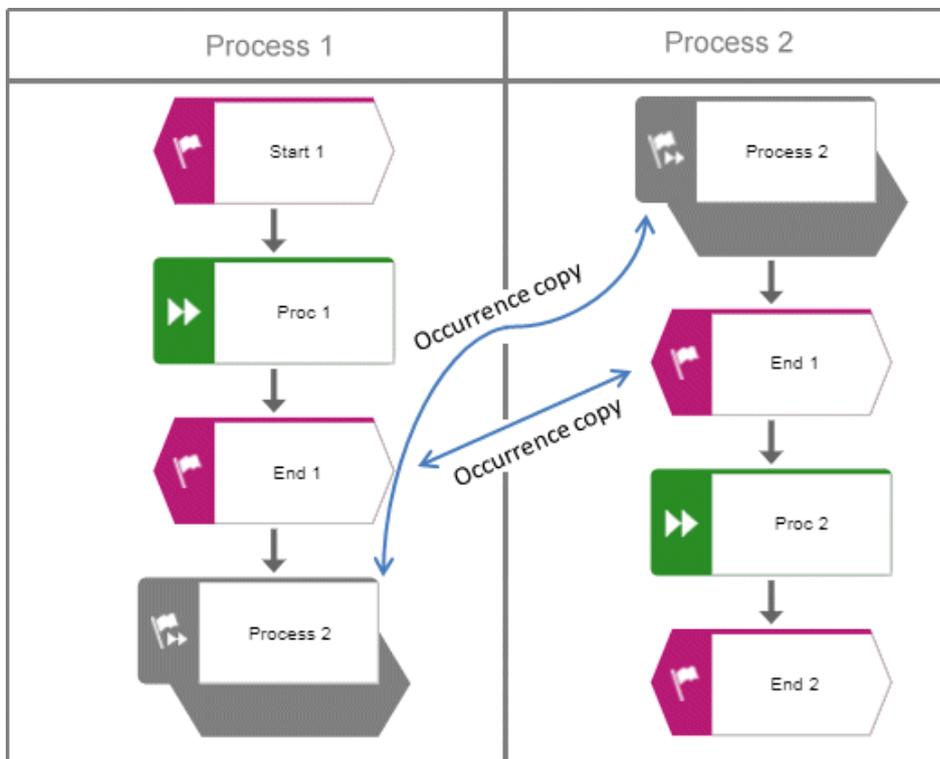
You can use the **Change view** functionality (page 91) in the **Diagram** fact sheet to show different views (page 96) on diagrams. This also allows you to choose the model-spanning Extended process view, which displays models that are connected by process interfaces.

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 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.

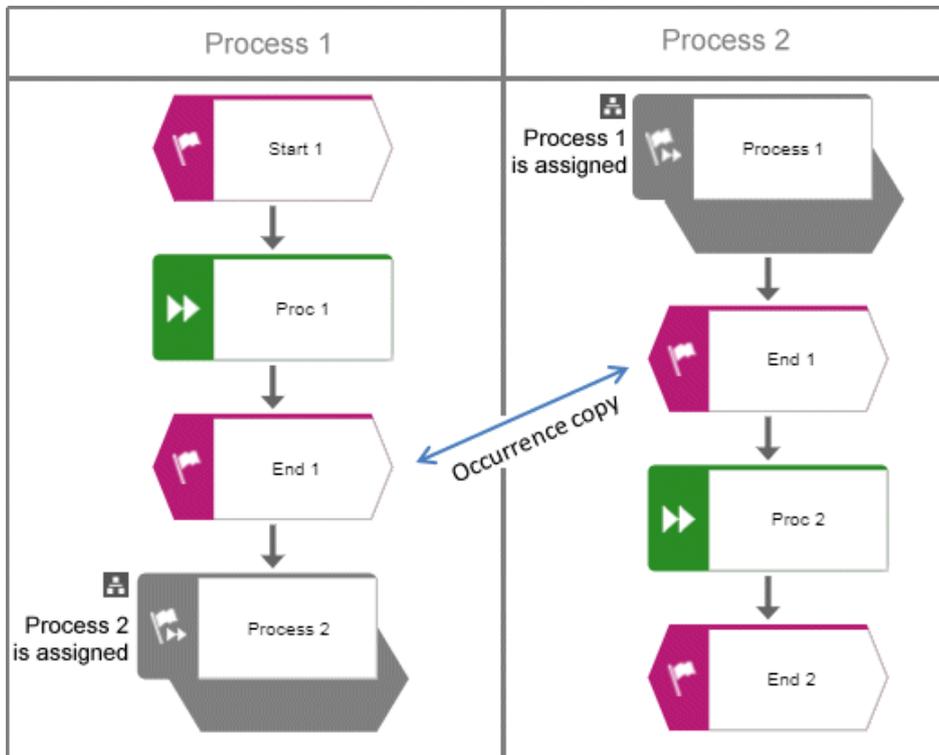
The following graphic shows the connection scheme of the models.



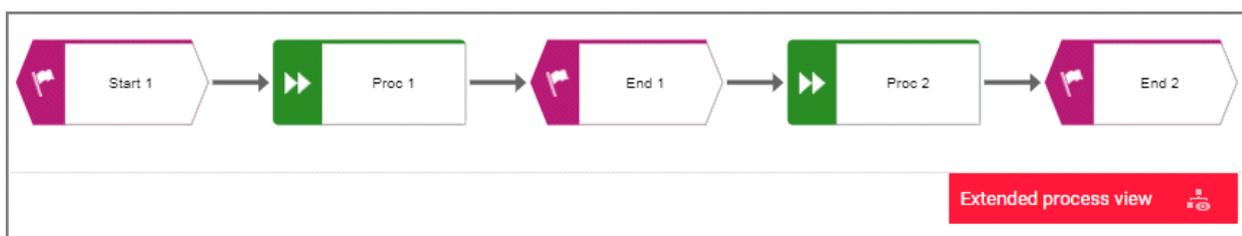
PROCESS INTERFACES WITH ASSIGNED MODELS

- Use an occurrence copy 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 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.



3.1.2.7 Navigate

The following describes the navigation features.

3.1.2.7.1 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.

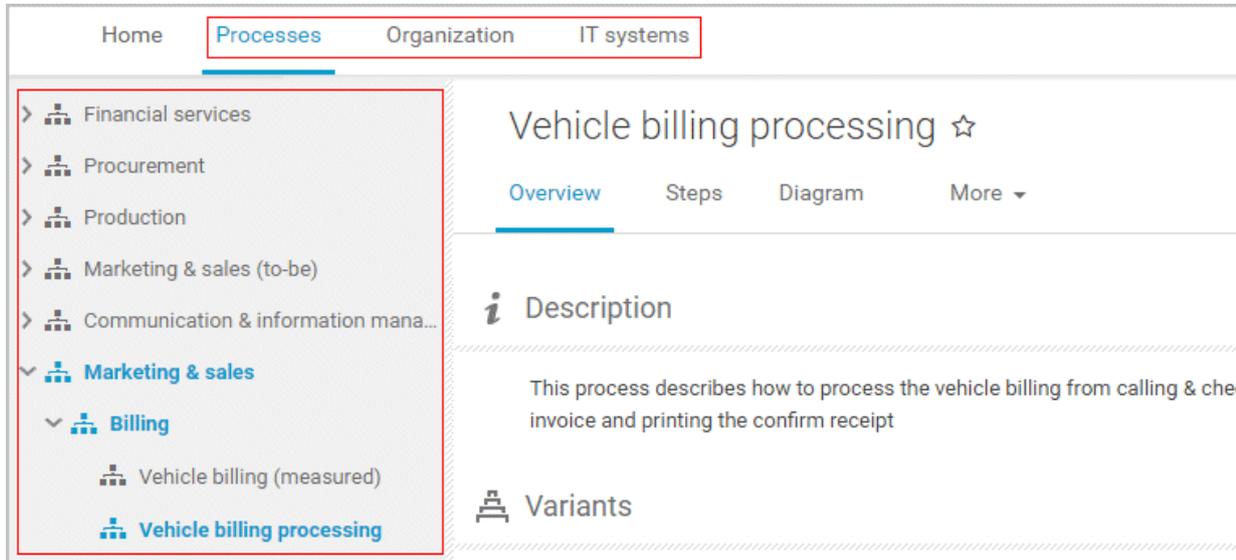
The name of the selected database is displayed. The **Recent changes** area is updated according to the selected database. If you start a search (page 248), it is performed based on the current database.

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.

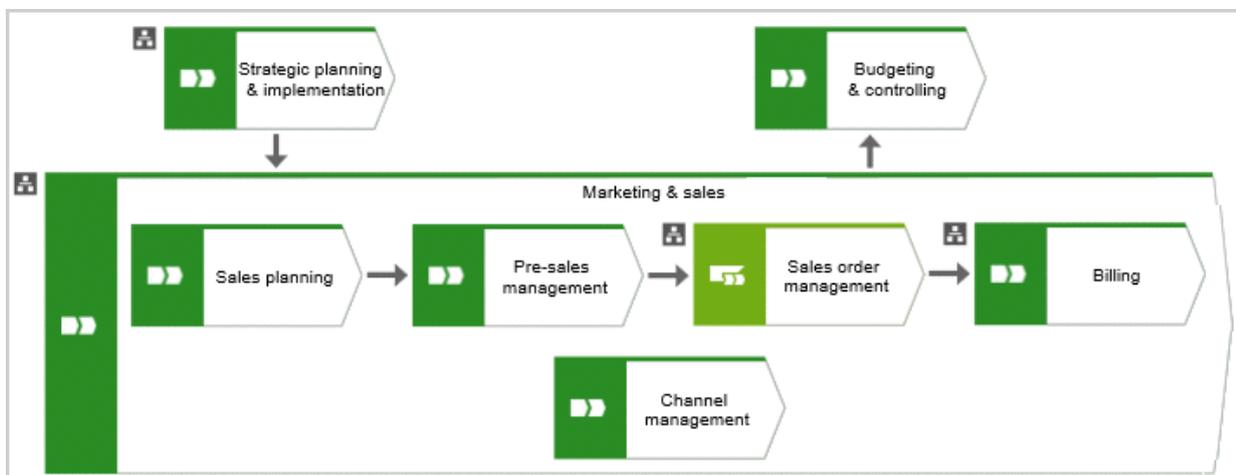
3.1.2.7.2 Navigate in the portal

With the help of hierarchies, administrators control (page **Error! Bookmark not defined.**) how portal users can quickly navigate to relevant information. These hierarchies map the relationships between superior and subordinate items.

In the 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 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 94) by clicking an object's  assignment icon, or by double-clicking an object with the  assignment icon.



3.1.2.7.3 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Select a process model. You are offered the fact sheets of the process model.
3. Click the **Steps** (page 62) fact sheet. The first event of the process is shown at the top. It does not have a 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.

3.1.2.7.4 Navigate using a Process interface

Using process interfaces in models of the **EPC** type, you can easily follow the process flow from one process model to another.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Select the process model that contains an object of **Process interface** type the other process model is assigned to (page 355).
3. Click the **Steps** (page 62) fact sheet.
4. Navigate to the process interface.
5. Click the process interface.

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

3.1.2.7.5 **Navigate using fact sheet buttons**

In the fact sheets, you can scroll back and forth between the views and hierarchy levels you have visited.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Select groups and models. You are offered the fact sheets of the item.
3. Click on the relevant fact sheets one after the other and complete your tasks.
4. Click **< Back** to display the previously visited view. If you click on **< Back** several times, the fact sheets are displayed in the reverse order in which you have visited them before.
5. Click **> Forward** to display the fact sheets in the visited 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.

3.1.2.7.6 Use the Favorites tab in the portal

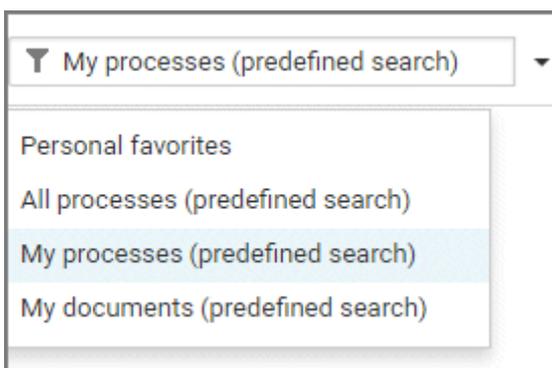
In the portal, you have direct access to all saved filter settings (page 173). The filters output the content of the selected database, while the personal favorites (page 172) of all published databases are listed and can be accessed.

Procedure

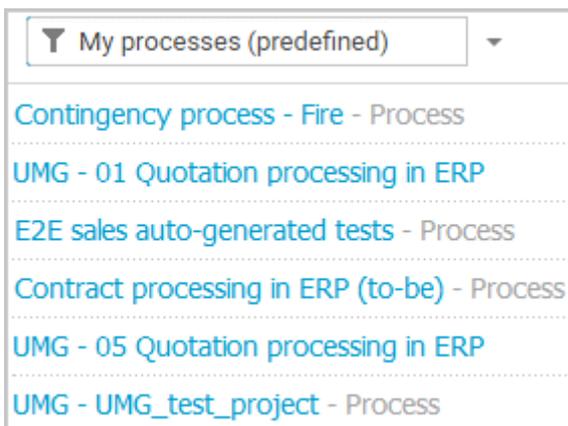
1. If you have access to more than one database, select the database you want to work with.
2. Click  **My favorites** in **Home** (page 26)

Provides direct access to saved filter criteria (Seite 106) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 172).

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



2. Click the context caption to select the relevant filter settings, for example, **My 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.

3.1.2.7.7 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Steps (page 62)** 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.

3.1.2.7.8 Switch from Diagram to Steps

For models of type **EPC**, you can switch from the **Diagram** fact sheet to the **Steps** (page 62) fact sheet where the current object symbol is selected.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Select the relevant object symbol.
6. Activate the **Steps** fact sheet.

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

3.1.2.7.9 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Steps (page 62)** 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.

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

You can use process interfaces to navigate (page 104) from one process model of the **EPC** type to another. Therefore you only have to create an assignment from the process interface to the corresponding process (page 355).

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**.



3.1.2.8 Output information

The following describes different ways to get information.

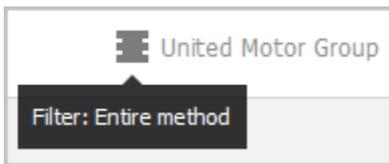
3.1.2.8.1 Display the current method filter

You can display the method filter (page 286) that you use for the current database.

Procedure

1. Drag the mouse cursor over the database name located 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:



3.1.2.8.2 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. 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.

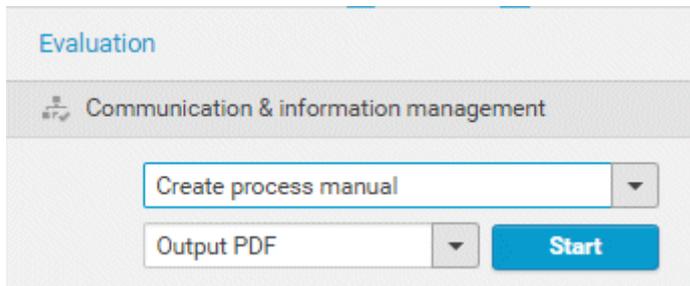
To the left of the user name, a  notification is inserted. Click the notification icon and  **Export graphic as PDF** to download the result again. The result is also listed on the **Reports** bar. If you select the **Diagram** fact sheet, you can open the **Reports** bar and download the printed model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

3.1.2.8.3 Generate report

The package includes various reports that you can start in the portal. Depending on the selected elements, reports are offered that provide a plausible evaluation for this context.

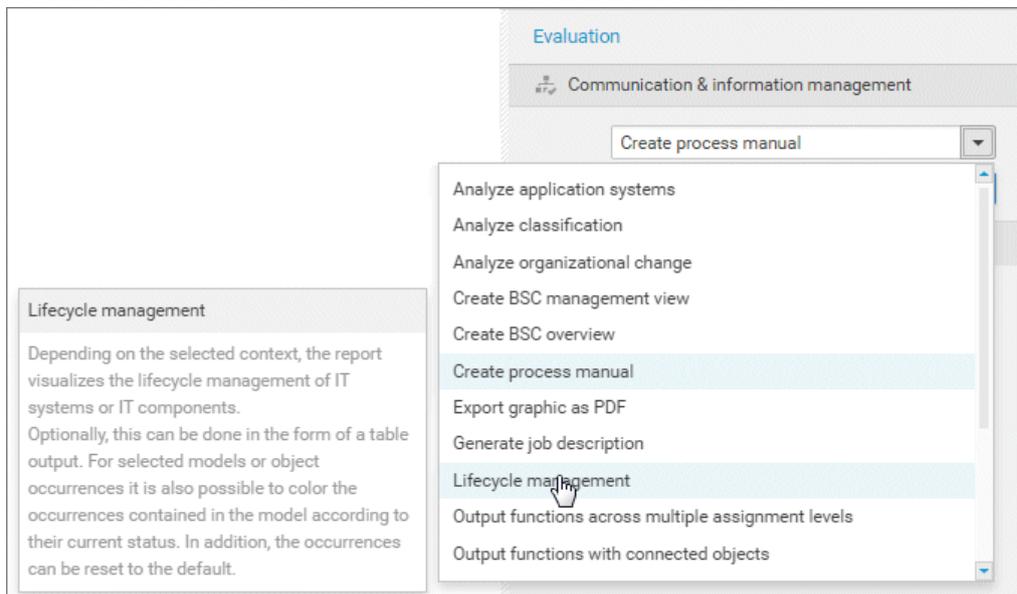
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want to create a report.
6. Click **Diagram** if not enabled yet. The model is displayed.
7. Click  **Evaluation**. The **Evaluation** bar opens showing the name of the item for which the report is generated.

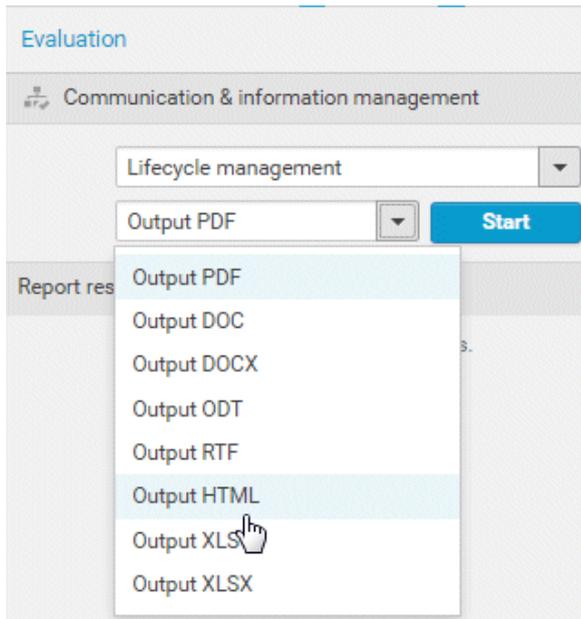


All reports you can start for this diagram are displayed.

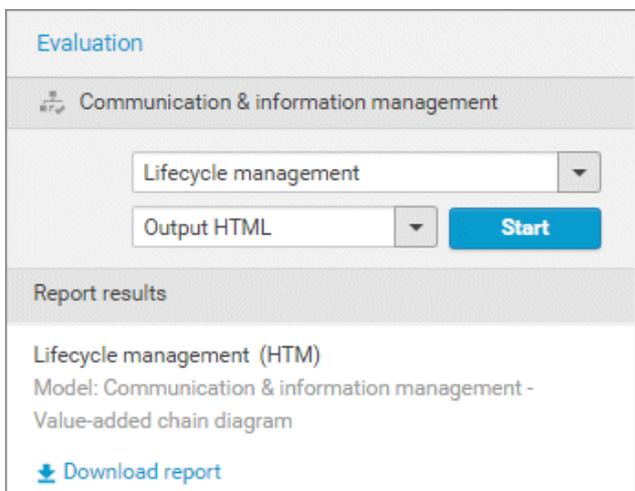
8. Click the ▼ down arrow next to the report name.
9. Select the relevant report.



10. Select the output format (page 157), for example, **Output HTML**.



11. Click **Start**.
12. Depending on the report chosen, a dialog with options is displayed. Specify your settings and click **OK**. The report is started and a progress bar is displayed.
13. After the report is complete, the report is shown in the **Report results** link list for downloading, and a dialog opens.
14. Click **Download result** if you want to download the report immediately. You can choose whether to open or to save the report.
15. 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.

3.1.2.8.4 Create infographic

You can create an infographic for selected personas (objects of the **Persona** type). You can select an object in a fact sheet 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 you proceed 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
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 141)** report.
11. Select the output format (page 157), 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.

3.1.2.8.5 Show where object occurrences are used

You can display where occurrences of an object are used and select the required occurrence using the navigation controls.

Procedure

1. Click  **Quick start (page 57) in Home (page 26)**.

2. Click  **View models & documents**. Depending on the active configuration set, the navigation area opens, e. g. **Groups** or **Processes**.

Opens the **Groups** (page 27) structure in the **Classic** (page 55) view or **Processes** (page 40) structure in the **Default** (page 56) view, where you can browse the ARIS Connect content of the selected database.

1. Click the name of the model. The fact sheet of the model opens.
2. Click **Diagram**. The **Diagram** fact sheet opens.
3. Select the required object in the **Diagram** fact sheet.
4. Click  **Properties**. The Properties bar opens.
5. Click **More**.
6. 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.
7. Click the left or right arrow to navigate to the next occurrence in the model. The next occurrence is selected and its number updated.
8. To directly select an occurrence, expand the drop-down list and click the occurrence number.
9. 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 tab 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.

3.1.2.8.6 In which order are object occurrences displayed?

You can display where occurrences of an object are used and select the required occurrence using the navigation controls.

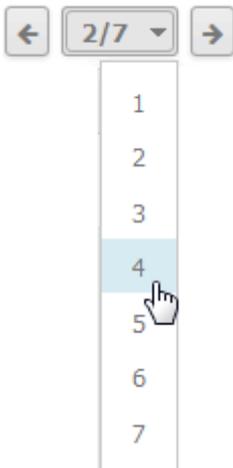
The navigation controls include arrows and a drop-down list:



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:



3.1.2.8.7 Show dashboards

You can show dashboards for various items. The following example is based on predefined dashboards by default that are contained in the supplied **United Motor Group** database and the Classic view (page 25).

Prerequisite

Dashboards are configured for the items selected.

Procedure

1. In the Portal, select (page 102) 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 and shows the CoE - Local Maturity (page 459) dashboard.
4. Click **2.1.1 Core processes > 2.1.1.1 Customer services > 2.1.1.1.1 Customer services process >  Customer services process**. The **Overview** fact sheet of the **Enterprise process map** model opens and shows the CoE - Local Maturity (page 459) dashboard.
5. Click the **Dashboards** fact sheet. The model's dashboards are shown. You can switch between the Process Change Management (page 464) and the Local Maturity (page 459) dashboards.

You have shown different dashboards by default.

3.1.2.8.8 Show dashboard in a sidebar

You can show the **EA dashboard for objectives** dashboard in a sidebar. The following example is based on predefined dashboards by default that are contained in the supplied **United Motor Group** database and the Classic view (page 25).

Prerequisite

Dashboards are configured for the items selected.

Procedure

1. In the Portal, select (page 102) the **United Motor Group** database.
2. Click **Groups**. The Group tree opens.
3. Click **1 Strategy > 1.1 Business strategy > 1.1.1 Strategies & Tactics >  01 Business strategies (all UMG segments)**. The **Diagram** fact sheet of the model opens.
4. Click  **Dashboards**.

The Dashboard sidebar opens and shows the EA dashboard for objectives (page 504) dashboards.

3.1.2.8.9 Generate report for multiple elements

You can generate a report for multiple elements. Depending on the selected elements, reports are offered that provide a plausible evaluation for this context.

Procedure

1. Click  **Repository**.
2. Navigate to the group where the content you want to select is stored.
3. Activate the check boxes of the relevant elements.
4. Click  **Reports**. The **Reports** bar opens. The number of item for which the report is generated is shown.
5. Click the drop-down list box to display the list of available reports.
6. Leave the mouse pointer on the name of a report if you want to display its description.
7. Click the name of the relevant report.
8. Click the **Start** button if you want to output the report in the displayed format (page 157). To select a different output format, click the **Output format** field and select the format you want to use, e. g. **Output PDF**.
9. Click the **Start** button. The report is created.
10. When the report is created, the result is listed in the **Reports** bar, and a dialog to download the result opens.
11. Click  **Download result**. Depending on your browser settings, you can specify the download folder or the result is downloaded in the default download folder.
12. To download the result later, click  **Download report** in the **Reports** bar.

You have created a report for multiple elements.

3.1.2.9 Table

The following describes the use of tables.

3.1.2.9.1 Add a column to a table

You can add columns to a table. As long as you navigate in the fact sheet 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. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Table** fact sheet.
5. Click  **Add column**. The available columns are shown.
6. Click the column name of the column you want to add.

You added a column.

3.1.2.9.2 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 sheet 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.
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.

3.1.2.9.3 Open the matrix of a table

You can open a matrix based on the **Table (page 64)** fact sheet to clearly display the interrelations between the individual roles and functions.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Table** fact sheet.
5. Click  **Matrix**. The interrelations between the individual roles and functions are transparently displayed.
6. 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.

3.1.2.9.4 Add a column to a matrix

You can add columns to a matrix. As long as you navigate in the fact sheet 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. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Table** fact sheet.
5. Click  **Matrix**.
6. Click  **Add column**. The available columns are shown.
7. Click the column name of the column you want to add.

You added a column.

3.1.2.9.5 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 sheet 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.
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.

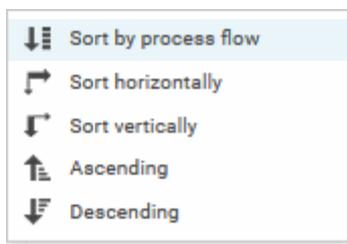
The column is removed without confirmation prompt.

3.1.2.9.6 Sort functions of fact sheets

You can sort the functions of fact sheets, for example, of the Table (page 64) or RACI (page 65) fact sheet.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the relevant fact sheet.
5. Click the column title  **Functions**. The sort options are displayed.



6. Click the relevant sort option. The functions are resorted.

You have resorted the functions.

3.1.2.10 Manage SAP Solutions

Process-Driven Management for SAP® Solutions is available, if your ARIS administrator has configured the system in ARIS Connect as well as in ARIS Architect (see **ARIS - Process-driven Management for SAP.pdf**).

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>)

3.1.2.10.1 Run SAP® transaction

Run transactions in the connected SAP system.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using Process-driven Management for SAP.
- Your administrator has configured the portal for the use of SAP content (page **Error! Bookmark not defined.**).

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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Navigate to the relevant model of the **EPC** type, where transactions are available.
6. Click **Transactions**. You can start the  transaction 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.
7. Run the transaction. The **SAP logon** dialog opens.
8. Enter the number of the SAP client and the user name, and click **OK**. Depending on your browser settings, the **Run SAP transaction** dialog opens.
9. Enter the password and click **Log on**.

The transaction 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 transaction start you need to log on to the SAP system again.

3.1.2.10.2 Download SAP® documents

You can download SAP documents that are associated with SAP transactions.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using Process-driven Management for SAP.
- Documents are available.
- This function has been configured in the portal (page **Error! Bookmark not defined.**).

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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Open the relevant model.
6. Click **Transactions**.
7. Click the relevant transaction code. The fact sheet opens.
8. Next to the relevant document, click  **Download document**.

The document is downloaded.

3.1.2.10.3 Start ARIS Online Guide

If your administrator has provided (page **Error! Bookmark not defined.**) ARIS Online Guide via ARIS Connect, you can open the relevant portal pages from SAP screens using the F1 key. All transactions are shown there in relation to the process. Details are summarized in corresponding fact sheets.

Prerequisites

- This function has been configured in the portal (page **Error! Bookmark not defined.**).
- You have configured the help call (page **Error! Bookmark not defined.**).

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 transaction is available on the open page.

3.1.2.10.4 Reset SAP® logon data

Change the logon information for running transactions.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using Process-driven Management for SAP.
- 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Open the relevant model.
6. Click **Transactions**.
7. In the last column of a transaction code, click the ▼ arrow head and then **Reset logon data**.

For the next transaction start (page 120) you need to log on to the SAP system again.

3.1.3 Use filters

You can define content filters (page 123) 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 125) to your user in models and the portal has been configured for the use of role filters.

3.1.3.1 Open My content to manage filters

You can manage your filters in the **My content** (page 70) area.

Procedure

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

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

3.1.3.2 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.

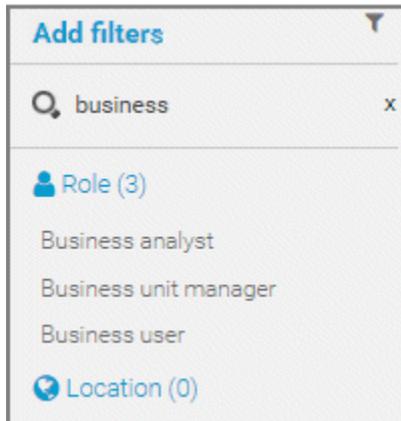
The filter is moved from the category of the **Add filters** section to the appropriate category of the **Selected filters** section and the content of the result pane is adjusted.

3.1.3.3 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 **Find filter** field.
2. Enter a part of the name of the filters you want to add, e. g. **Business**. The found filters 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.

3.1.3.4 Assign roles for the use of content filters

You can define content filters (page 129) using role assignment. In this case, these filters are added to the role filters under **Selected filters** of the **My content** (page 70) 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
3. In the navigation, select a diagram containing an occurrence of the relevant role, for example, **Regional sales department specialist**. The fact sheets 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  **Properties**. The Properties bar opens.
7. Click the **Attributes** tab if it is not activated yet.
8. Add (page 300) 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 126) the content filters, information is restricted (page 129) according to the role.

3.1.3.5 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 123), add a number of filters (page 124), remove filters (page 127), or reset filter (page 127).
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.



3.1.3.6 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.

3.1.3.7 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.

3.1.3.8 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 125).

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.

3.1.3.9 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.

3.1.3.10 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 125).

Procedure

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

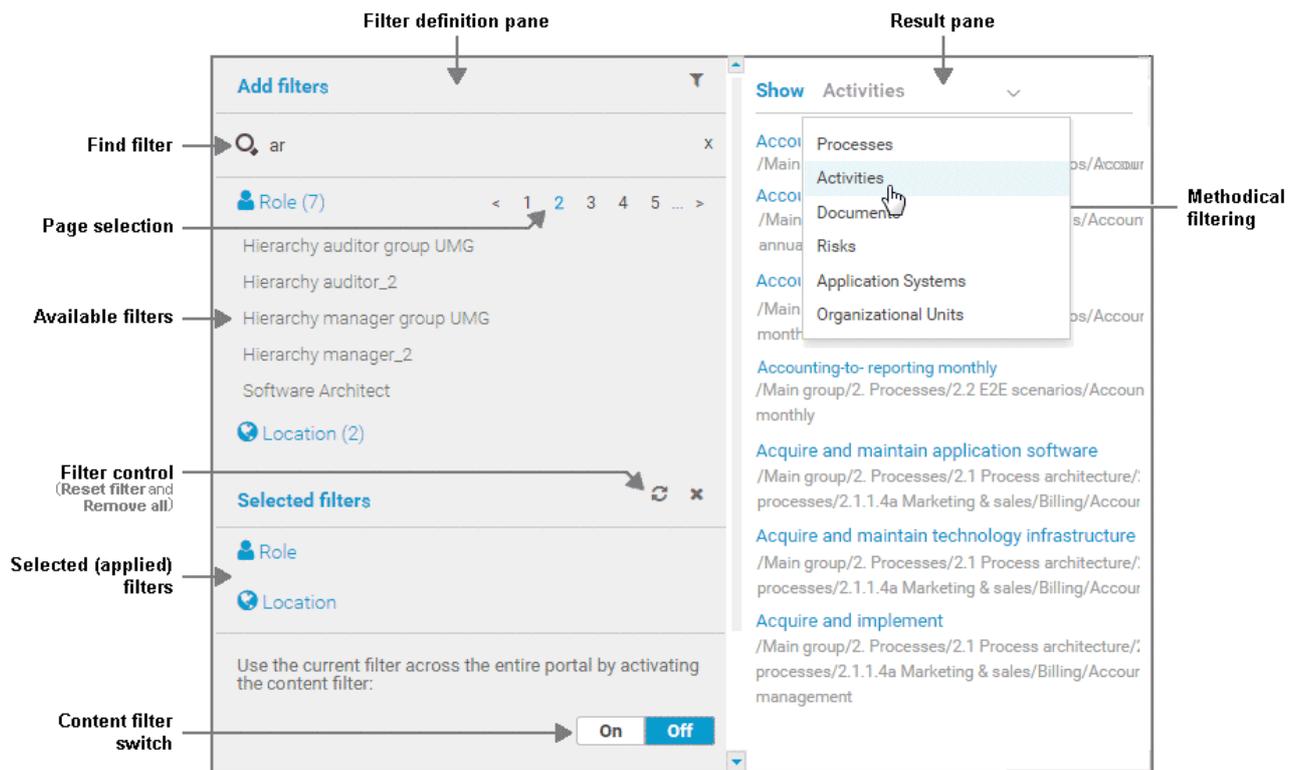
All filters including the filters assigned by role assignment are removed and the content of the result pane is adjusted.

3.1.3.11 Valuable information

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

3.1.3.11.1 What is the structure of the My content area?

If the administrator provides at least one database (page **Error! Bookmark not defined.**) 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. Therefore 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 123) or a number of filters (page 124) 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 127) and selected filters can be reset (page 127), 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 125).

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 127) by role assignment.

3.1.3.11.2 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 123) and activate them as content filters (page 126) to further restrict this content. Content filters are available only if roles are assigned (page 125) 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 104), but the detailed information about the satellites is filtered.
- Tables
- Fact sheets
- RACI matrices
- Search
- Navigation

3.1.4 Use models

3.1.4.1 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets 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.

3.1.4.2 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Click **Diagram** if you have not already selected this fact sheet before. 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.

3.1.4.3 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Steps (page 62)** 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.

3.1.4.4 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Steps (page 62)** 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.

3.1.4.5 Switch from Diagram to Steps

For models of type **EPC**, you can switch from the **Diagram** fact sheet to the **Steps** (page 62) fact sheet where the current object symbol is selected.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer.
5. Select the relevant object symbol.
6. Activate the **Steps** fact sheet.

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

3.1.4.6 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets are shown.
4. 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, a  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.

3.1.4.7 Ask for model approval

Ask the person in charge to approve the models you changed so that the changed models can be made available to all 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
7. Make the required changes.
8. Click  **Save**.
9. Click  **Collaboration** if it is not activated yet.
10. Click  **Request approval**. The **Confirmation** dialog opens for you to confirm that the model changes are to be saved and the model is to be reopened read-only.
11. Click **OK**. The model reopens read-only and the **Request approval** dialog is displayed.
12. If required, select a person in charge to approve the model if the **Person responsible** attribute has not been specified at the model.
13. Enter a comment to explain the approval request.
14. Click **Send**. A completion message is displayed.
15. Click **OK**.

The person responsible receives an e-mail with the relevant information and a link to the associated task in My tasks. If the person responsible approves the changes, the model is automatically published and the current version is provided.

Until then, only you and other modelers can view your changes.

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**.

3.1.4.8 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model you want to send to another user.
6. Click  **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**.

3.1.4.9 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 176). 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Navigate to the items and change the relevant attributes (page 176). Depending on the attributes, various editing options (page 188) are available.
6. Click  **Inform owner of change**. The **Inform of change** dialog opens.
7. Insert a change description
8. Click **Submit**. The **Information** dialog opens.
9. 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.
10. 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.

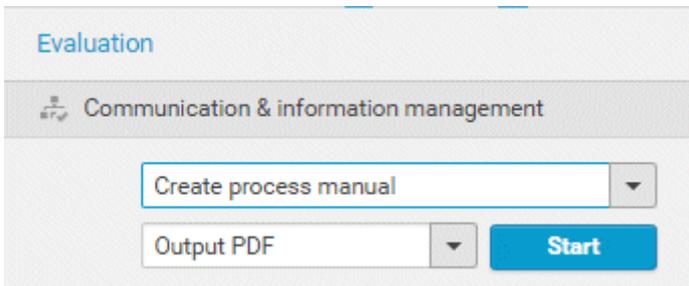
This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect**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

3.1.4.10 Generate report

The package includes various reports that you can start in the portal. Depending on the selected elements, reports are offered that provide a plausible evaluation for this context.

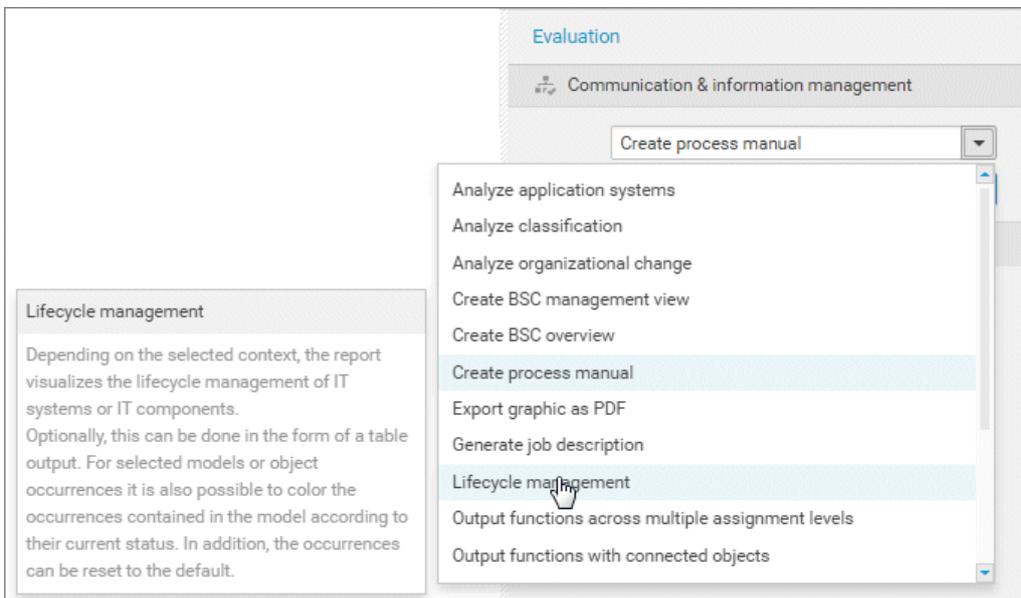
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want to create a report.
6. Click **Diagram** if not enabled yet. The model is displayed.
7. Click  **Evaluation**. The **Evaluation** bar opens showing the name of the item for which the report is generated.

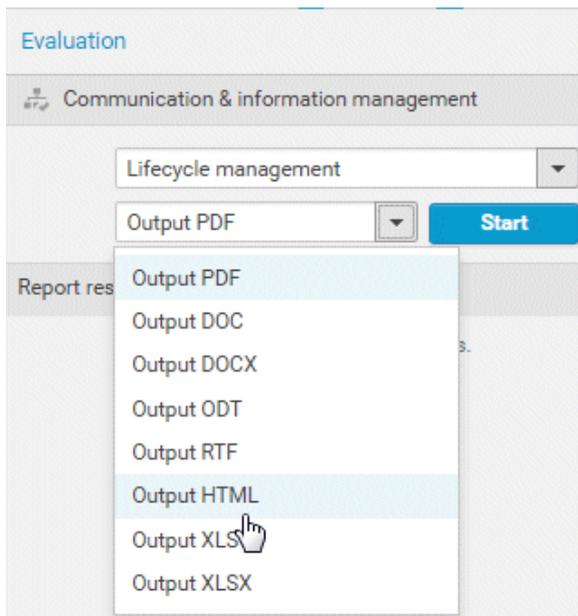


All reports you can start for this diagram are displayed.

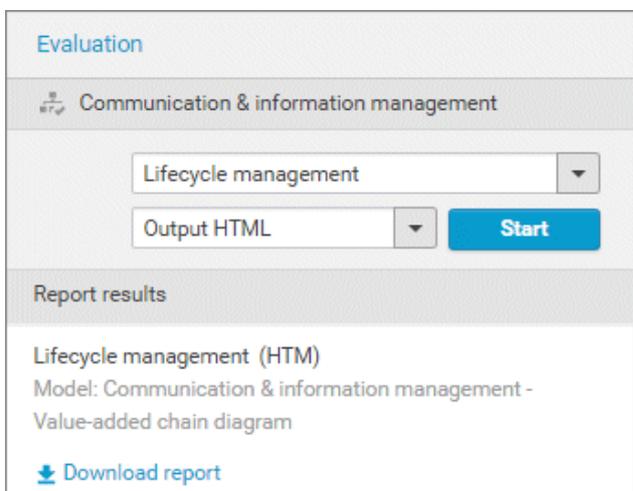
8. Click the ▼ down arrow next to the report name.
9. Select the relevant report.



10. Select the output format (page 157), for example, **Output HTML**.



11. Click **Start**.
12. Depending on the report chosen, a dialog with options is displayed. Specify your settings and click **OK**. The report is started and a progress bar is displayed.
13. After the report is complete, the report is shown in the **Report results** link list for downloading, and a dialog opens.
14. Click **Download result** if you want to download the report immediately. You can choose whether to open or to save the report.
15. 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.

3.1.4.10.1 Valuable information

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

3.1.4.10.1.1 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.

3.1.4.10.1.1.1 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.

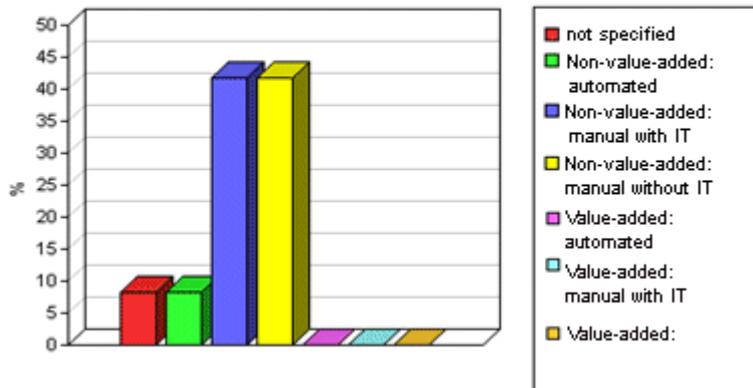
The following example is based on an analysis of the **Purchase order processing (actual)** and **Purchase order processing (target)** models. The **Assessment of value added** attribute is evaluated separately for each model. In this case, one worksheet is output with a table and one with charts.

TABLE

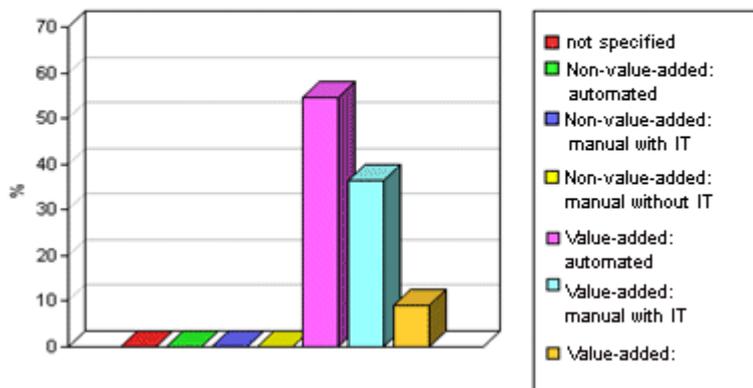
Analysis: Evaluate assessment of value added				
Created: 5/25/09 11:21 AM				
Server: horus.me.corp.ids-scheer.com				
Database: DemoDB-United Motors Group				
User: system				
File: Report0.xls				
Analyze classification				
Models:				
1.) United Motors Group\2. Processes\Process Architecture\Core 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 not specified	12	100	11	100
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

3.1.4.10.1.1.2 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:

Lukas Andrews



Age 32

Job title Software Engineer

Family status married

Location Saarbruecken

Customer segment Family

"The Best Things in Life Are Free"

About

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 has enough space that the entire family can drive into holidays.

Personally, he owns many electronic gadgets. Generally, he is sensitive to cost but can get carried away if he sees an innovative solution.

Personality

- conscientious
- detail oriented
- humorous
- playful

Goals

- save money for buying a house
- get promoted in his company
- exercise his favorite sport more often: Climbing

Frustrations

- reading manuals
- services that are overly time consuming
- sharing his personal data to unknown entities





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	<p>This text is shown beneath the About topic.</p> <p>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 has enough space that the entire family can drive into holidays.</p> <p>Personally, he owns many electronic gadgets. Generally, he is sensitive to cost but can get carried away if he sees an innovative solution.</p>

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

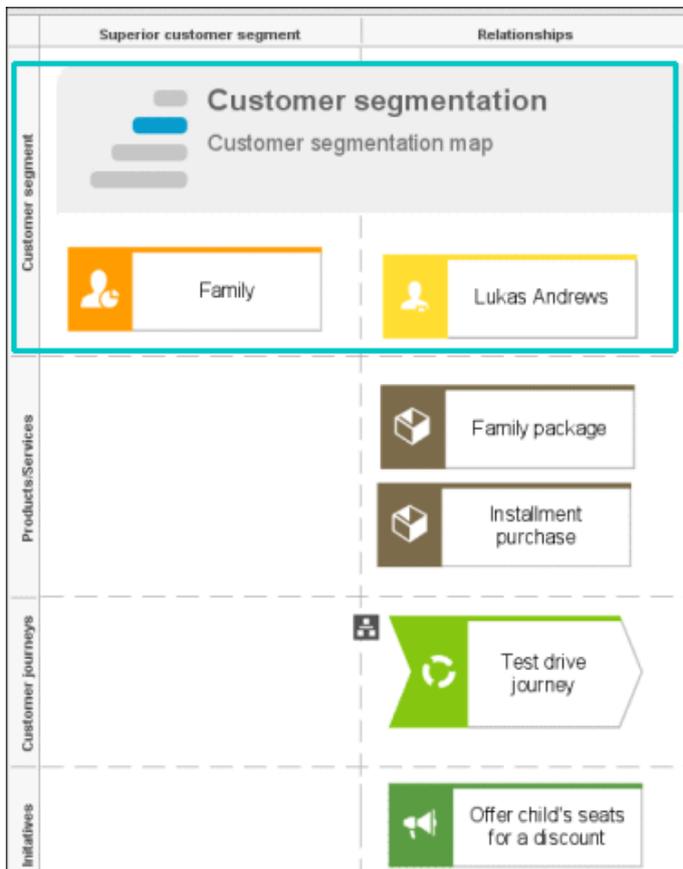
Attribute	Example
Age	32
Family status	married
Location	Saarbruecken
Job title	Software Engineer
Personality	<ul style="list-style-type: none"> ▪ conscientious ▪ detail oriented ▪ humorous ▪ playful
Frustration	<ul style="list-style-type: none"> ▪ reading manuals ▪ services that are overly time consuming ▪ sharing his personal data to unknown entities
Goals	<ul style="list-style-type: none"> ▪ 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 **Customer segment Family** 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

3.1.4.10.1.1.3 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

3.1.4.10.1.1.4 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

3.1.4.10.1.1.5 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

3.1.4.10.1.1.6 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

3.1.4.10.1.1.7 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

3.1.4.10.1.1.8 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

3.1.4.10.1.1.9 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

3.1.4.10.1.1.10 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

3.1.4.10.1.1.11 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

3.1.4.10.1.1.12 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

3.1.4.10.1.1.13 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:

- **Responsible** 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. Execution responsibility must be assigned to at least one role, although others (see **Supportive**) can be delegated to assist in the work required.
- **Accountable** 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.
- **Supportive** relates to the person supporting the person responsible (see 'Responsible') in performing the activity.
- **Consulted** 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.
- **Informed** 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

3.1.4.10.1.2 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

3.1.4.11 Create model

You can quickly and easily create new models.

Prerequisites

- You have the **ARIS Connect Designer** license privilege.
- The classic configuration set or modification set (page **Error! Bookmark not defined.**) based on it is selected for 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  **Create new model** on the **Quick start (page 57)** area. The corresponding dialog opens.
4. Enter a name for the new model in the **Model name** box.
5. Click the **Model type** box and enter part of the model type name. All model types (page 282) are displayed whose names contain the term you entered.
6. Select the required model type. The **Target** area displays the database and group names. This is where the new model will be stored.
7. Click **Change** if you want to store the model in a different database and/or group. The **Select target group** dialog opens.
8. Select the required database in the **Database** box.
9. Select the required group.
10. Click **OK**. The **Select target group** dialog closes.
11. Check your input.
12. Click **OK**. The **Create model** dialog closes.

The model is created based on the preset template (page 286) and opens in a new tab (page 288).

3.1.4.12 Edit models

You can edit models in ARIS Connect.

Prerequisite

- You have the **ARIS Connect Designer** 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the 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**.

3.1.4.13 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

3.1.4.13.1 Open a matrix model in ARIS Connect

You can display a matrix model in ARIS Connect.

Prerequisite

- You have a valid license for either Designer or ARIS Architect.
- You have at least the **ARIS Connect Viewer** license privilege.

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**.
4. Navigate to the group containing the relevant model.
5. Click the matrix model.
6. Click **Matrix** to display the matrix model.

The matrix model is displayed.

3.1.4.13.2 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 160)
2. Place the mouse cursor over a connection cell.

The list of connections used in the matrix model is displayed as a tooltip.

3.1.4.13.3 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 160)
2. Click the little arrow to expand or collapse the hierarchy. The hierarchy is shown or hidden accordingly.

The hierarchy is shown/hidden.

<div style="text-align: right;">Location</div> <div style="text-align: left;">Organization</div>	Europe 	Frankfurt 	Bratislava 	St. Petersburg 	America 	Asia
UMG America						
UMG Asia						
UMG Europe	✓	✓	✓			

3.1.4.13.4 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.

<input checked="" type="checkbox"/>	Indicates the direction from an icon placed in the column header to an icon placed in the row header.
<input checked="" type="checkbox"/>	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.

3.1.5 Highlight model elements

You can highlight model elements to focus on aspects to be monitored.

3.1.5.1 Switch highlighting on

You can highlight model elements to focus on aspects to be monitored. This example illustrates highlighting of a process model in the default view (page 38).

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets 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 elements 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 162).

3.1.5.2 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.

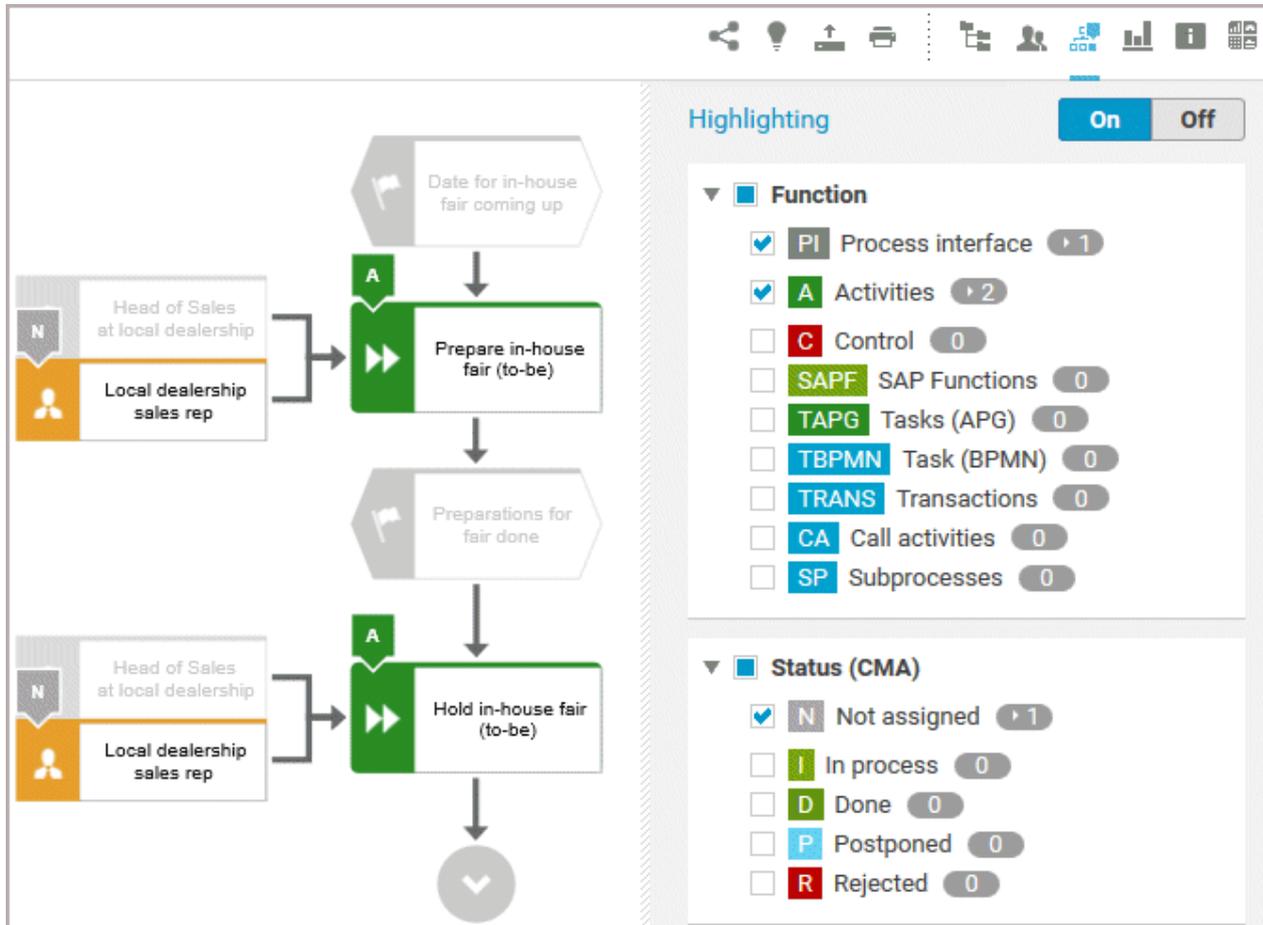
Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets 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.

3.1.5.3 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.



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. To activate all criteria of a category, activate the check box of the category.

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.

If you have switched highlighting on, for example, for processes, the highlighting remains active until you switch it off or you leave the view.

3.1.6 Handle documents

ARIS document storage enables you to manage and temporarily or permanently save documents. Access restriction on folder level is possible in ARIS document storage.

3.1.6.1 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 the approval request by e-mail. They can approve the proposal to link the document. It is then linked to the model or object. If they do not approve it, no link is created. The applicant receives a corresponding 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**.

3.1.6.2 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. Click  **Propose document**. The **Submit new document** dialog opens.
3. Select the documents you want to submit.
4. Click **Send**.

The person responsible for the contents receives the approval request by e-mail. They can approve the document. It is then linked to the model or object. If they do not approve it, no link is created. The applicant receives a corresponding 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**.

3.1.6.3 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 (page 88) 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**.

3.1.6.4 Link new documents to a model or object

You can link new documents with a model or object. We strongly recommend that you check documents for malicious software before uploading.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
2. Click the name of the model you want to edit.
3. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
4. Click  **Properties**. The **Properties** bar opens.
5. Activate the **Documents** tab.
6. Click in the model background to add a document to the model or the relevant object to add a document to the object.
7. Click  **Add document**. The corresponding dialog opens.
8. Navigate to the target folder.
9. Click  **Upload new document**. The **Select new document** dialog opens.
10. Click **Select file** and select a document.
11. Enter a title and, if required, specify further document properties.
12. Click **Upload**.
13. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

3.1.6.5 Add existing documents to a model or object

You can link documents from ARIS document storage or a document management system with a model or object.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Navigate to a group and click a model.
3. Click **Diagram** if not enabled yet.
4. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
5. Click  **Properties**.
6. Activate the **Documents** tab.
7. Click in the model background or an object.
8. Click  **Add document**.
9. Click the folder containing the relevant documents.
10. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

3.1.6.6 Have document approved

Ask the person in charge to approve the documents you changed so that the changed document can be made available to all users.

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 (page 88) the model that contains the document that you want to have approved.
4. Click  **Properties**.
5. Activate the **Documents** tab.
6. Select the relevant document.
7. Click  **Request approval**. The corresponding dialog opens.
8. Click **Send**.

The person responsible receives an e-mail with the relevant information and a link to the associated task in My tasks. If the person responsible approves the changes, the current version of the document is made available in ARIS Connect (status APPROVED). The document is visible in the portal on the **Documents** tab. If rejected, the document receives the status 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**.

3.1.6.7 Share document

You can share documents with other users.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Open (page 88) the model that contains the document you want to submit a change request for.
3. Click **Diagram** if not enabled yet.
4. Click  **Edit** >  **Edit model**.
5. Click  **Properties**.
6. Activate the **Documents** tab.
7. Select the document you want to share with another user.
8. Click  **Share document**. The corresponding dialog opens.
9. Select the user you want to share the document with.
10. Enable **Send copy to me** to receive a copy of the message, if required.
11. You can also enter a subject and a comment.
12. Click **Send**.

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

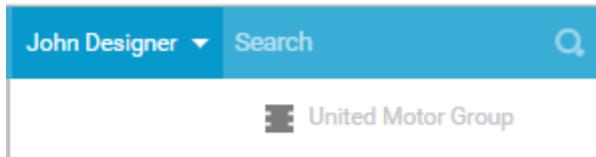
This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect**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

3.1.6.8 Find a document

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

Procedure

1. Select **Documents** from the list.
2. Click in the **Search** box.



3. Enter the relevant term.
A list with the first results (page 258) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

The document will open.

3.1.6.9 Remove document from a model or object

You can remove a document from a model or object.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Click  **Portal** if it is not activated yet.
2. Open (page 88) the model you want to remove the document from.
3. Click **Diagram** if not enabled yet.
4. Click  **Edit** >  **Edit model**.
5. Click  **Properties**.
6. Activate the **Documents** tab.
7. Click  **Remove selected document**.

The document is removed from the model or object and no longer has any relationship to the model or object.

3.1.7 Use favorites

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

You can save filter settings (page 173) and single database items as favorites (page 172). While you can define (page 173) and access the filter settings (page 173) in the Search area (page 250), you can access personal favorites and favorites based on filter settings in the Favorites area (page 174) of the portal.

3.1.7.1 Save a model or group as a personal favorite

You can save a model as a favorite to access it quickly from the **Favorites** tab 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 172).

3.1.7.2 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.

3.1.7.3 Save search settings as a favorite

In the Search area (page 259), you can save your search settings. Thus, you can search the content based on specific settings at any time.

Procedure

1. Select the filter criteria (page 252) to define your search.
2. Click ☆ **Save search query as a favorite**. The corresponding dialog opens.
3. Enter a name.
4. Click **OK**.

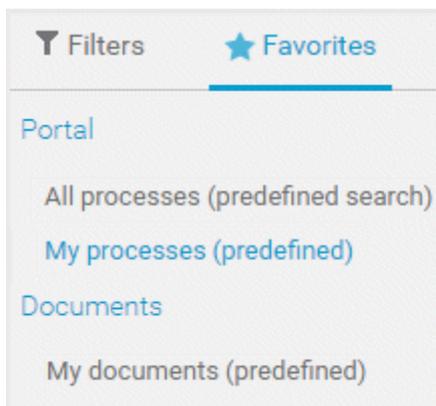
The search settings are saved in the ☆ **Favorites** area. You can filter the content based on these settings (page 173) at any time from various devices.

3.1.7.4 Use a favorite in the Search area

In the Search area (page 259), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. Click ☆ **Favorites** in the **Filters** bar.



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

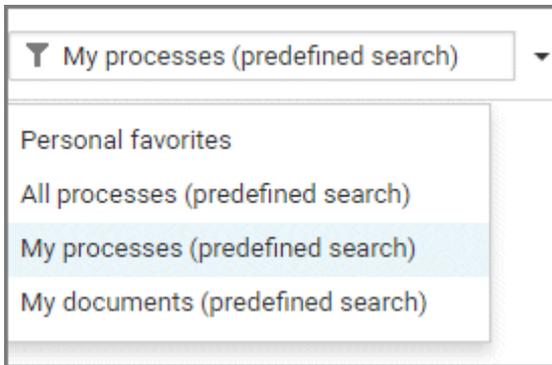
The filter criteria of the selected favorite setting are immediately applied and the list of filter results is updated.

3.1.7.5 Use a favorite in the Favorites area

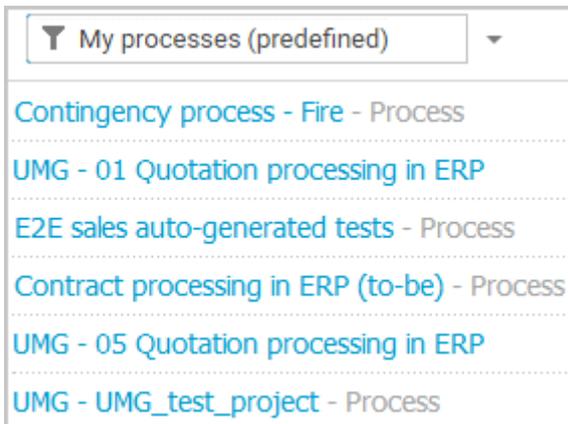
In the Favorites area (page 175), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. In the **Home** area, click  **My favorites**.
2. Click the ▼ **down arrow** of the **Filter selection** field.



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



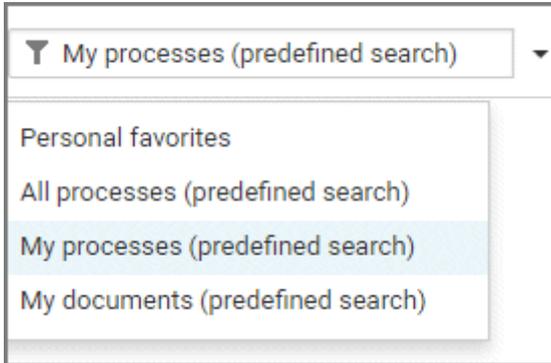
If the filter result does not fit on one page, page numbers are displayed behind the **Filter selection** field.

4. Click the page numbers to display the content of the corresponding pages.
5. 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.

3.1.7.6 How is the Favorites area structured?

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.



3.1.8 Contribute as a viewer

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you can change values of specific items (page 186), create new or reuse existing items (page 177), as well as delete items (page 180) 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.

3.1.8.1 Change values of items

You can change values of items (page 186) 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. Edit mode (page 185) is enabled.
6. Navigate to the group containing the relevant item.
7. Select the item you want to edit.
8. Activate the **Overview** fact sheet if it is not activated yet.
9. Change the relevant attribute. Depending on the attribute, various editing options (page 188) are available.
10. 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 188) if you do not enter a numerical value.

3.1.8.2 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 188). 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. Edit mode (page 185) is enabled.
6. Navigate to the required diagram and select it.
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 193) 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.

3.1.8.3 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 188). 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 (page 262).

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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. Edit mode (page 185) is enabled.
6. Navigate 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.
7. Activate the **Overview** fact sheet if it is not activated yet.
8. Click the **Subordinate IT systems** edit box. Existing objects are displayed one next to the other and the option **Insert item** is shown.
9. 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.
10. 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.
11. Enter other names for additional application system types.
12. Click  **Change**. A confirmation prompt is shown listing all new application system types for confirmation.
13. Click **OK**.

New application system types (page 193) 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.

3.1.8.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 188). 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. Edit mode (page 185) is enabled.
6. Navigate to the required diagram and select it.
7. 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.
8. In the **Groups** area, click  **Delete** for the role from which you want to remove the risk assignment. A confirmation prompt is shown.
9. 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.

3.1.8.5 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 188). 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 (page 262).

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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. Edit mode (page 185) is enabled.
6. Navigate 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.
7. Activate the **Overview** fact sheet if it is not activated yet.
8. 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.
9. Click the delete sign for the application system types you want to delete from the diagram.
10. Click  **Change**. A confirmation prompt is displayed listing all application system types to be deleted.
11. 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.

3.1.8.6 Valuable information

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

3.1.8.6.1 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 188) 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 188) if you do not enter a numerical value.

Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

3.1.8.6.2 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 (page 55), default view (page 56), or a view derived from these views.

3.1.8.6.3 How to identify whether the edit mode is active

The edit mode is displayed in the header. If it is not active, only the symbol and **Edit** are displayed:

 Edit

Clicking **Edit** >  **Contribute** enables the edit mode.

If the edit mode is active, this is shown in the header:

 Edit mode  Exit edit mode

Clicking  **Exit edit mode** disables the edit mode.

The availability of various edit boxes (page 188) is another clear indication that the edit mode is active.

3.1.8.6.4 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

3.1.8.6.5 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 188) 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 188) if you do not enter a numerical value.

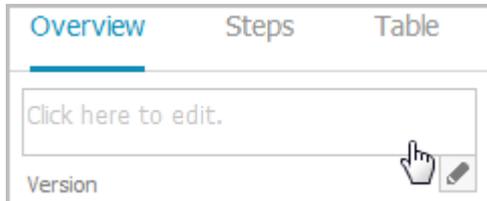
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

3.1.8.6.6 Which editing options are available?

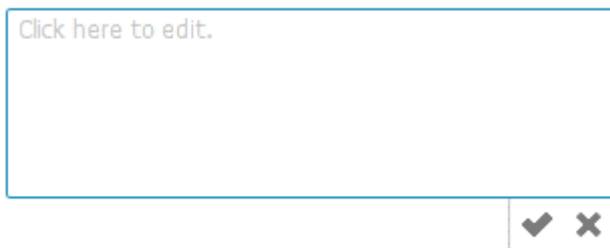
Depending on the attribute (page 187), various editing options are available.

Edit box

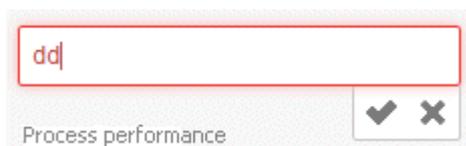
If the edit mode is active (page 185), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 176), the hint **Click here to edit.** is displayed:



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:

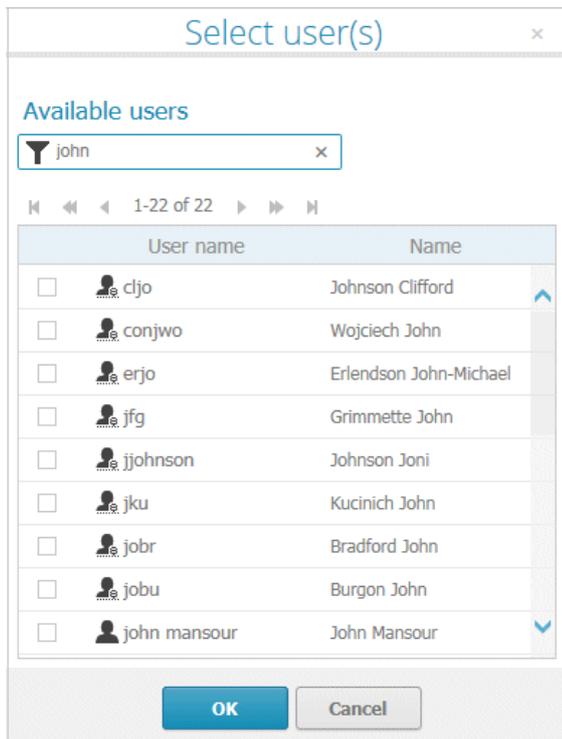


If the entry is correct, the field is displayed without a special characteristic:



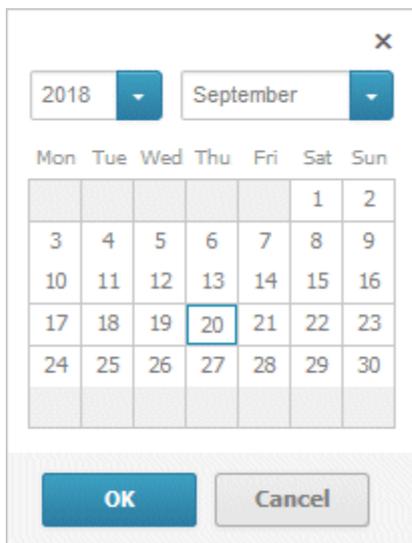
Select user(s)

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:

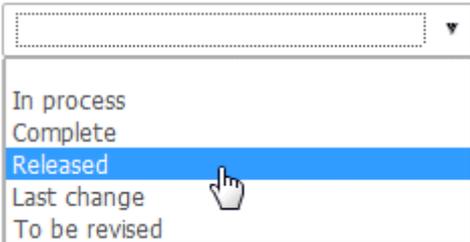


Drop-down list box

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:

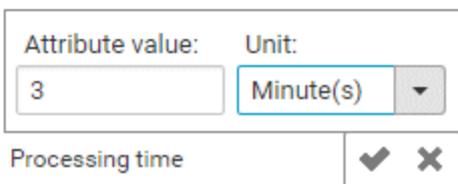
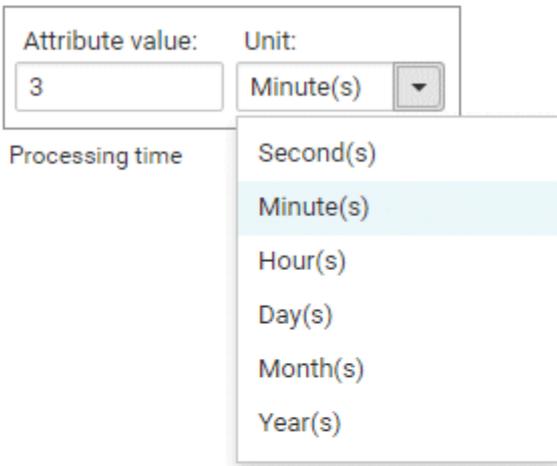


Clicking in the field will offer possible values for selection:



Combo box

You can use a combo box to edit composite attributes. This makes it possible, for example, to assign values to a unit.

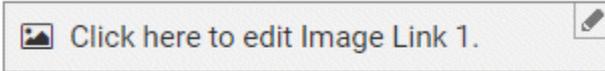


Link attribute boxes

You can use link attribute boxes to link images, videos, documents, and external pages to the current item.

Click here to edit Image Title 1.

Click here to edit Image Description 1.



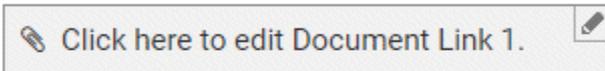
Click here to edit Video Title 1.

Click here to edit Video Description 1.



Click here to edit Document Title 1.

Click here to edit Document Description 1.



Click here to edit External page Title 1.

Click here to edit External page Description 1.



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:

Name	Role
Risk manager group Finance	Risk manager_3
Risk owner group Finance	Risk owner_3
Risk reviewer group Finance	Risk reviewer_3

You can add individual objects to the table (page 177) or remove objects from the table (page 180).

List

Existing objects are displayed in a list:

Collaboration system	Loan processing system
Reporting system	Revision data information system

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:

Subordinate IT systems

Revision data information system x Loan

- Loan (new item) ✓
- Loan processing system x

DELETE OBJECTS

You can delete objects from tables (page 180) and lists (page 181):

Table

▲ Name	Role	
Risk manager group Finance	Risk manager_3	✕

List



3.1.8.6.7 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.

3.1.9 Use RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process (page 196). RACI is short for **R**esponsible, **A**ccountable, **S**upportive, **C**onsulted, and **I**nformed. The matrix shows which organizational unit participates in activities of a process and in what manner:

- **Responsible** 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. Execution responsibility must be assigned to at least one role, although others (see **Supportive**) can be delegated to assist in the work required.
- **Accountable** 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.
- **Supportive** relates to the person supporting the person responsible (see 'Responsible') in performing the activity.
- **Consulted** 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.

Informed specifies who must be informed. It indicates who is kept up to date on the progress or completion of a task.

3.1.9.1 Create process model for RACI matrix

You can model processes that can be evaluated as a RACI matrix.

Prerequisite

You have the **ARIS Connect Designer** privilege.

Procedure

1. Create a process model (page 196).
2. Use objects (page 196) and connections that can be evaluated by the RACI matrix.
3. Save the process.

You have modeled a process for which the relevant responsibilities can be represented using a RACI matrix (page 195).

3.1.9.2 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 (page **Error! Bookmark not defined.**), 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Show the  **Navigation** bar if it is not visible yet.
5. In the  **Navigation**, open the group in which the required process (page 196) is stored.
6. Click the name of the process for which you want to display the RACI matrix. The entry **RACI** 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 27) and default view (page 40). You can configure the representation as RASCI matrix. Please contact your local Software AG sales organization (<http://softwareag.com>).

You can use the RA(S)CI - Output organizational participations in processes (page 155) report to output the RACI matrix in Microsoft® Excel format from an open process model (page 288). 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**.

3.1.9.3 Valuable information

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

3.1.9.3.1 Which diagrams can be used for a RACI matrix?

A RACI matrix can be based on the following diagrams:

- EPC (API name **MT_EEPC**)
- EPC (column display) (API name **MT_EEPC_COLUMN**)
- EPC (material flow) (API name **MT_EEPC_MAT**)
- EPC (row display) (API name **MT_EEPC_ROW**)
- EPC (table display) (API name **MT_EEPC_TAB**)
- EPC (horizontal table display) (API name **MT_EEPC_TAB_HORIZONTAL**)
- BPMN collaboration diagram (BPMN 2.0) - (API name **MT_BPMN_COLLABORATION_DIAGRAM**)
- BPMN process diagram (BPMN 2.0) (API name **MT_BPMN_PROCESS_DIAGRAM**)
- Enterprise BPMN collaboration diagram (API name **MT_ENTERPRISE_BPMN_COLLABORATION**)
- Enterprise BPMN process diagram (API name **MT_ENTERPRISE_BPMN_PROCESS**)
- Function allocation diagram (API name **MT_FUNC_ALLOC_DGM**). This model must be assigned to a function.
- Value-added chain diagram (API name **MT_VAL_ADD_CHN_DGM**)

3.1.9.3.2 Which objects can be used for a RACI matrix?

The following objects are evaluated by a RACI matrix:

- Function (API name OT_FUNC)
- Group (API name OT_GRP)
- Organizational unit (API name OT_ORG_UNIT)
- Organizational unit type (API name OT_ORG_UNIT_TYPE)
- Person (API name OT_PERS)
- Role (API name OT_PERS_TYPE)
- Position (API name OT_POS)

3.1.9.3.3 Which connections can be used for a RACI matrix?

The following connections between organizational elements and functions are evaluated by the RACI matrix:

RESPONSIBLE (R)

- carries out (API name: CT_EXEC_1)
- carries out (API name: CT_EXEC_2)

ACCOUNTABLE (A)

- decides on (API name: CT_DECD_ON)
- decides on (API name: CT_DECID_ON)
- accepts (API name: CT_AGREES)

CONSULTED (C)

- is technically responsible for (API name CT_IS_TECH_RESP_1)
- is technically responsible for (API name CT_IS_TECH_RESP_3)
- has consulting role in (API name CT_HAS_CONSLT_ROLE_IN_1)
- has consulting role in (API name CT_HAS_CONSLT_ROLE_IN_2)

INFORMED (I)

- must be informed about (API name: CT_MUST_BE_INFO_ABT_1)
- must be informed about (API name: CT_MUST_BE_INFO_ABT_2)
- must be informed on cancellation (API name: CT_MUST_BE_INFO_ON_CNC_1)
- must be informed on cancellation (API name: CT_MUST_BE_INFO_ON_CNC_2)

If RA(S)CI was set, the following connections are additionally available:

SUPPORTIVE (S)

- contributes to (API name CT_CONTR_TO_1)
- contributes to (API name CT_CONTR_TO_2)

3.1.10 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.

3.1.10.1 Edit models

You can edit models in ARIS Connect.

Prerequisite

- You have the **ARIS Connect Designer** 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the 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**.

3.1.10.2 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model you want to send to another user.
6. Click  **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**.

3.1.10.3 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want to submit a change request.
6. 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**.

3.1.10.4 Ask for model approval

Ask the person in charge to approve the models you changed so that the changed models can be made available to all 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in ARIS Connect Designer on an individual tab.
7. Make the required changes.
8. Click  **Save**.
9. Click  **Collaboration** if it is not activated yet.
10. Click  **Request approval**. The **Confirmation** dialog opens for you to confirm that the model changes are to be saved and the model is to be reopened read-only.
11. Click **OK**. The model reopens read-only and the **Request approval** dialog is displayed.
12. If required, select a person in charge to approve the model if the **Person responsible** attribute has not been specified at the model.
13. Enter a comment to explain the approval request.
14. Click **Send**. A completion message is displayed.
15. Click **OK**.

The person responsible receives an e-mail with the relevant information and a link to the associated task in My tasks. If the person responsible approves the changes, the model is automatically published and the current version is provided.

Until then, only you and other modelers can view your changes.

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**.

3.1.10.5 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want feedback.
6. Click  **Collaboration** if the **Collaboration** bar is not open yet.
7. Enter your comment in the box provided.
8. Click  **Tag**.
9. Enter the words to be used as keywords (page 247) 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 below the process 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**.

3.1.10.6 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 176). 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
5. Navigate to the items and change the relevant attributes (page 176). Depending on the attributes, various editing options (page 188) are available.
6. Click  **Inform owner of change**. The **Inform of change** dialog opens.
7. Insert a change description
8. Click **Submit**. The **Information** dialog opens.
9. 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.
10. 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**.

3.1.11 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 210) 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 (page **Error! Bookmark not defined.**) 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>).

ARIS video tutorial

Manage tasks using My tasks (without ARIS Connect)

(<http://www.ariscommunity.com/videos/learn-how-manage-tasks-process-board>) (approx. 6 minutes)

This tutorial is based on ARIS 7.2. The functionality shown is also available to you in the current version.

3.1.11.1 Open My tasks (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.

ARIS video tutorial

Manage tasks using My tasks (without ARIS Connect

(<http://www.ariscommunity.com/videos/learn-how-manage-tasks-process-board>) (approx. 6 minutes)

This tutorial is based on ARIS 7.2. The functionality shown is also available to you in the current version.

3.1.11.2 Tasks

3.1.11.2.1 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 210) the **Current editor** column in your list ( **Select columns**).

Procedure

1. Click 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, if you are requested to do so when finishing the task. The double authentication can be specified in the ARIS Administration configuration (**ARIS Administration > Configuration > Process Governance > Workflow policies > E-signature (double authentication)**) so that you have to reenter the password when you complete tasks.

The task was edited and has a status (page **Error! Bookmark not defined.**) that corresponds to how it was completed.

Tip

Alternatively, you can double-click a task to open it for editing.

3.1.11.2.2 Interrupt editing

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

Procedure

1. Click 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.

3.1.11.2.3 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.

3.1.11.2.4 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 210) 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**.

3.1.11.2.5 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**.

Procedure

1. Click the relevant task in the task list. The buttons of the available functions are displayed.
2. Click  **Display**.

The task opens in read-only mode.

3.1.11.2.6 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.

3.1.11.2.7 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 **Error! Bookmark not defined.**) of the task is **New**. To find out if another user is already editing a task, display (page 210) 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 ID, 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 **Error! Bookmark not defined.**) 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.

3.1.11.2.8 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 210) 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. Click 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 ID, 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. You can also 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 **Error! Bookmark not defined.**) **Delegated**.

Click a task in the task list to display detailed information. 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.

3.1.11.2.9 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.

3.1.11.2.10 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.

3.1.11.2.11 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 210) the **Current editor** column in your list (⚙️ **Select columns**).

Prerequisite

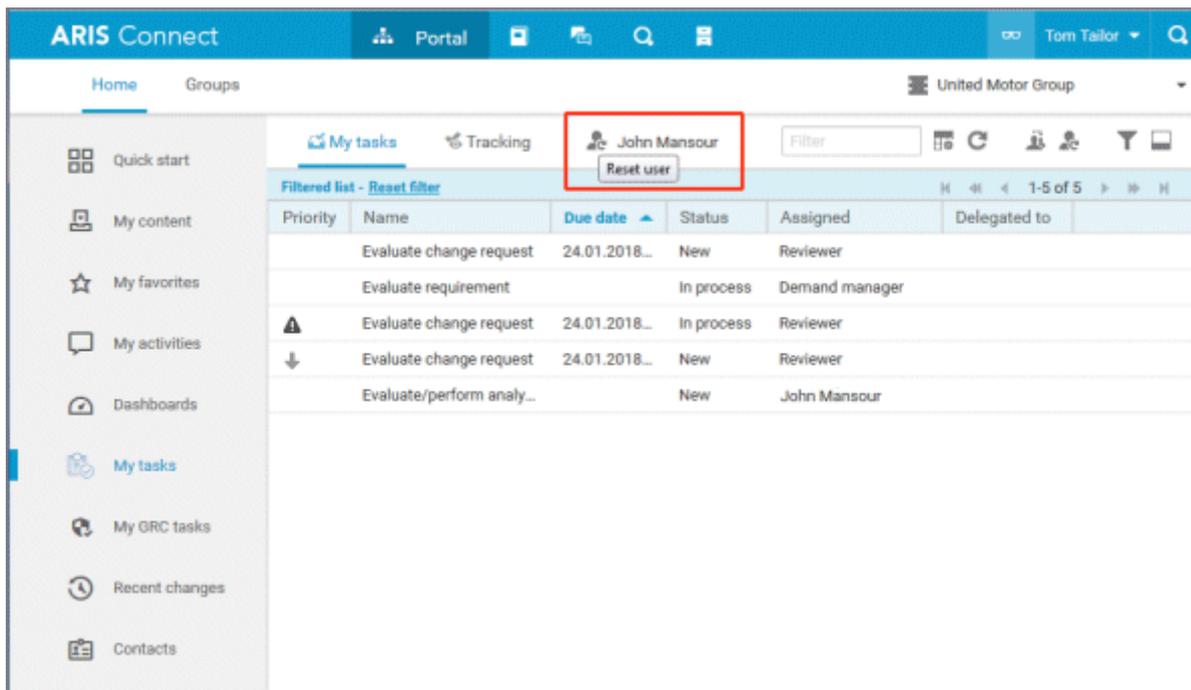
You have the Process Governance administrator (page **Error! Bookmark not defined.**) function privilege.

Procedure

1. Click  **Change user**. The corresponding dialog opens.
2. Enter the first characters of the group, user ID, 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 206), delegate (page 209) (**Delegate to me** button), or pass on tasks. To return to your user, click **Reset user**. Statistics data in the form of charts (page **Error! Bookmark not defined.**) for human tasks are available in ARIS Connect under **ARIS Administration > Charts > Governance > Human tasks**.

Click  **Reset user** to return to your own task list.



The screenshot shows the ARIS Connect interface. The top navigation bar includes 'ARIS Connect', 'Portal', and a search bar. The main content area is titled 'United Motor Group' and shows a 'Filtered list - Reset filter' for 'John Mansour'. A red box highlights the 'Reset user' button. Below the button is a table with the following data:

Priority	Name	Due date	Status	Assigned	Delegated to
	Evaluate change request	24.01.2018...	New	Reviewer	
	Evaluate requirement		In process	Demand manager	
⚠️	Evaluate change request	24.01.2018...	In process	Reviewer	
↓	Evaluate change request	24.01.2018...	New	Reviewer	
	Evaluate/perform analy...		New	John Mansour	

3.1.11.2.12 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.

3.1.11.2.13 Valuable information

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

3.1.11.2.13.1 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 **Error! Bookmark not defined.**). The status filter is always applied to all tasks.

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

3.1.11.2.13.2 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 207).
- **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 206).
- **Delegated**

Editing of the task was passed on permanently (page 209) 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.

3.1.11.2.13.3 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.

3.1.11.2.13.4 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.

3.1.11.2.13.5 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 210) 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 **Error! Bookmark not defined.**) 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 209) these tasks. Tasks can only be delegated if their status (page **Error! Bookmark not defined.**) is **New** or **In process**. These tasks are then displayed in your task list with the status **Delegated**.

3.1.11.2.13.6 How can user accounts be deleted and anonymized?

Users can only be deleted (page **Error! Bookmark not defined.**) in ARIS Administration. To anonymize Process Governance users according to GDPR 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 with the user name.

3.1.11.3 Documents

3.1.11.3.1 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 217) the modified document and move it to ARIS document storage.

3.1.11.3.2 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 (page **Error! Bookmark not defined.**) 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.

3.1.11.3.3 Check out document

You can download (page 221) 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.

3.1.11.3.4 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.

3.1.11.3.5 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.

3.1.11.3.6 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.

3.1.11.3.7 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.

3.1.11.3.8 Edit document properties

You can edit the properties of a document.

Prerequisite

You have the **Document management** 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.

3.1.11.3.9 Select documentowner or responsible

You can edit the properties of a document.

Prerequisite

You have the **Document management** 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.

3.1.11.3.10 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.

3.1.11.3.11 Valuable information

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

3.1.11.3.11.1 Tags

Option for supplementing data with additional information in data processing and IT.

The word tag is used in the sense of a label, marker or identifier. Tags can be used in search queries, for example.

3.1.11.3.11.2 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 217) to ARIS document storage to become permanent documents.

3.1.11.3.11.3 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.

3.1.11.3.11.4 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.
-

3.1.11.4 Select executor dialog

Specifies the user for whom you want to perform the action.

Find

For finding a specific item. Enter the first characters of the group, user ID, first name, or last name, and click **Find**.

Search result

Indicates the number and names of the items found by the current search. To select a group or user, double-click the relevant element. If you select a group, you also need to select a user.

3.1.11.5 Change user dialog

Changes the user so that actions can be performed for that user.

Find

For finding a specific item. Enter the first characters of the group, user ID, first name, or last name, and click **Find**.

Search result

Indicates the number and names of the items found by the current search. To select a group or user, double-click the relevant element. If you select a group, you also need to select a user.

3.1.11.6 Delegate dialog

Defines the user to whom the task is to be delegated.

Find

For finding a specific item. Enter the first characters of the group, user ID, first name, or last name, and click **Find**.

Search result

Indicates the number and names of the items found by the current search. To select a group or user, double-click the relevant element. If you select a group, you also need to select a user.

Comment

Adds a comment to the delegated task, such as a reason or notes for the new executor.

3.1.11.7 Add document dialog - Find

You can search for a document.

Search filter

Used for entering a search term.

Find

Starts the search. You can also start searching by pressing **Enter**.

Documents found

Displays the documents that match the search criteria.

Selected documents

Displays the list of documents already included in the selection.

3.1.11.8 'Upload document' dialog

Enables the upload of the required document.

File

Enter the name of the file. To search your file system, click  **Browse**.

Location

Enables you to select the location where files are to be saved in ARIS document storage. Click the small right arrow in order to navigate to further subfolders. To browse, click  **Browse** next to the box.

Comment

Enables you to enter a comment that will be displayed in the **Document versions** dialog.

Title

Used to enter the title of the document to be uploaded.

Description

Used to enter the description of the document to be uploaded.

Tags

Displays tags, if they exist. You can add new tags and edit or delete existing ones.

Enter suggestions here

Used to enter new tags. Press Enter to transfer the new tag.

Delete individual tag

Click  **Delete** to delete an individual tag or selected tags for this document. Multiple selections are allowed.

Delete all tags

Click  **Delete all tags** to delete all tags for this document.

Find

Click  **Find** to search for corresponding tags for this document in your ARIS document storage.

3.1.11.9 Select document dialog - Explorer

Enables selection of the documents you want to add. Multiple selection is possible. Double-click to add a single document to the selection.

Properties (📄)

Opens the **Document properties** dialog. This dialog displays document properties, such as file name, version, and file type.

Versions (📅)

Displays the current version of the document. During a new upload of the document the last number is increased. When the document status is changed, the number in the middle is increased. The states **Approved**, **Rejected**, **In process**, and **To be approved** exist.

Add to selection (📄)

Adds the selected document to the document selection.

Open (📄)

The document opens if the software required for opening the document is available on your local system.

Upload document (📄)

Opens the **Upload document** dialog.

Add folder (📁)

Adds a new folder below the selected one.

Clear selection (🗑️)

Clears the selection. All documents are removed from the selection.

Remove document (🗑️)

Removes the selected document from the selection. Multiple selection is possible. Select adjacent documents by holding down the Shift key and clicking the first and last document. Select individual objects by holding down the Shift key and clicking the relevant documents.

Selected documents

Displays the list of documents already included in the selection.

EXPLORER TAB

Click the small right arrow in order to navigate to further subfolders.

Selected documents

Displays the list of documents already included in the selection.

FIND TAB

Find what

Enables you to enter a term that occurs in the title, file name, description, or tags (page 221) of the document.

Area

Enables you to restrict the search. For example, you can search only the metadata of the documents or just their contents.

Search result

Displays the documents that match the search criteria.

3.1.11.10 Document versions dialog

Displays the list of document versions.

Properties

Opens the **Document properties** dialog. This dialog displays document properties, such as file name, version, and file type.

Add to selection

Adds the selected document to the document selection.

Open

The document opens if the software required for opening the document is available on your local system.

Remove revision

Removes a specific revision of a document.

Version

Displays the current version of the document. During a new upload of the document the last number is increased. When the document status is changed, the number in the middle is increased. The states **Approved**, **Rejected**, **In process**, and **To be approved** exist.

Revision number

Shows the number of the revision for the selected document. Each time a document is checked out and changed, a new revision number is assigned.

Size

Displays the size of the file.

Changed on

Displays the change date of the respective document version.

Changed by

Displays who edited this version of the document.

Change description

Used for changing the descriptive text of the selected document version.

Selected documents

Displays all documents already selected.

3.1.11.11 Select person responsible dialog

Displays all ARIS Server users.

Enter term

Serves to enter the initial letters of a user name. Only those users whose user name starts with the letters you entered are displayed in the list.

User name

Displays the user names.

Full name

Displays the full name of the user.

3.1.11.12 Upload location dialog

Specify the folder in ARIS document storage in which you want to save the document.

Properties

Displays the folder's properties, for example, access privileges.

New folder

Creates a new folder.

Rename folder

Enables you to rename a folder. To rename a folder, you can also select a folder and press the F2 key.

3.1.11.13 'Select folder' dialog

Enables you to enter search criteria for the document. You can only search for or navigate in the permanent documents for which you have read privileges. Click the small right arrow in order to navigate to further subfolders.

New folder

Creates a new folder.

Rename folder

Enables you to rename a folder. To rename a folder, you can also select a folder and press the F2 key.

3.1.11.14 Browse tags dialog

From the available tags, select those you want to use for marking the document.

Browse tags

Used for entering a search term to restrict the number of the tags (page 221) displayed existing in the system. When you enter the first letters the display is restricted to the tags that fit your input.

Tags found

The tags that the search criteria apply to are displayed. Double-click a tag to add it to the selection.

Selected tags

Displays the tags the document is marked with. Double-click to add more tags to the selection.

3.1.11.15 Specify substitution dialog

Specifies the options for selecting a substitute for the current user.

Active

Activates the substitute with the options defined.

Start date

Defines the date from which the substitution is active.

End date

Defines the date on which the substitution will cease to be active.

User group

Displays the user group of the user selected as substitute.

Executor

Specifies the executor who is to assume the duties of substitution.

Delete

Deletes the substitute in the selected row from the table.

3.2 Use the Catalog

The  **Catalog** shows descriptions of business processes, roles, documents, and IT systems in tables. Depending on the selected context, you can list persons responsible, departments, business processes, and occurrences in business processes.

Business processes				Roles	Documents	Systems
▲ Name	 ▼	Description	▼	Responsible	▼	
Acquire and implement		Acquire and implement consists of: ▶ Identify automated solutions ▶ Acquire and maintain application software ▶ Acquire and maintain technology infrastructure		ethan.owner		
Apply for financing		This model describes how to process an application for financing		ethan.owner		
Billing		Billing consists of: ▶ Vehicle billing ▶ Accounts receivable management ▶ Pay cash		ethan.owner		
Billing (to-be)		Billing (to-be) consists of: ▶ Vehicle billing (to-be) ▶ Account receivable management ▶ Pay cash		ethan.owner		

1 2 3 4 5 6 7 8 9 10

Click an entry to navigate. The corresponding fact sheet opens.

3.2.1 Choose items starting with the same letter

You can reduce the number of items shown in the catalog 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.

Name	Description
<div style="display: flex; justify-content: space-between; padding: 5px;"> All A B C D E F G H I J K L M N </div>	
E2E sales auto-generated tests	
E2E sales tests	
Execute billings	This process describes how to execute billings

3. Click the relevant letter.

Only items starting with the letter chosen are shown.

3.2.2 Filter catalog items based on name, description, and responsibility

You can reduce the number of items shown in the catalog table.

Procedure

1. Click  **Catalog**.
2. Click  **Filter** in the table header. The text boxes to filter the list are opened.

Name	Description	Responsible
<input type="text" value="Car"/>	<input type="text"/>	<input type="text"/>

3. Enter the relevant terms in one or more fields.

All items are listed whose attribute content contains a word beginning with the term entered. You can narrow down the search by entering terms in more than one text box.

3.2.3 Remove catalog filter

You can easily remove the catalog filter.

Prerequisite

You have filtered the catalog content (page 230).

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.

3.2.4 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.

Car loan application	This process describes the functions necessary to create a car loan application. There are different organizational units involved, such as "Local dealership sales rep", "Credit check employee" and "Credit processing employee". The process is supported by three business services for automatic execution.	ethan.owner
1 2 3 4 5 6 >		

All items of the selected page are listed.

3.3 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.

3.3.1 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 **Error! Bookmark not defined.**) in ARIS Architect.

Procedure

1. Edit (page 233) your user profile.
2. Search (page 234) for groups and people who provide interesting content.
3. Create filters and check (page 239) for new information.
4. Comment on (page 237), share, flag posts, etc.
5. Invite (page 242) others to Collaboration.

You started using Collaboration to exchange information, share knowledge, etc.

3.3.2 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 **Error! Bookmark not defined.**) in ARIS Architect.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Collaboration**.

Collaboration opens.

3.3.3 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.

3.3.4 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 (page **Error! Bookmark not defined.**) 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.

3.3.5 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 **Error! Bookmark not defined.**) in ARIS Architect.

Procedure

1. Open the process you want to follow.
2. Click  **Collaboration** 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 247) 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.

3.3.6 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 **Error! Bookmark not defined.**) 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 247) 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 246) 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.

3.3.7 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 activated in ARIS Administration configuration.
- You have the required access privilege (page **Error! Bookmark not defined.**) 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.

3.3.8 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 activated in the ARIS Administration configuration.

Procedure

1. Add your post (page 236) 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.

3.3.9 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  **1 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.

3.3.10 Define filters

Define custom filters to find interesting posts quickly and easily using keywords or to gain a better overview.

Prerequisite

Creating filters is activated 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**.

3.3.11 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 236) 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 247) 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. 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.

3.3.12 Filter feeds by means of tags

Use tags (page 247) 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.

3.3.13 Use hashtags

Use hashtags (page 247) 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 236) 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 236) 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 239). You can then use the same hashtag in the filter definition, for example, #BPM.

3.3.14 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 247) **#Help**.

This keyword enables other users to find and reply to your question. Alternatively, contact your system administrator.

3.3.15 Work with groups

3.3.15.1 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 activated 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 243).
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.

3.3.15.2 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 242), 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 243).
5. Click **OK**.

Your changes are saved.

3.3.15.3 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**.

3.3.15.4 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. In the **Add colleagues** box, enter the name of the person you want to invite.
3. Click **Add**.

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 244) 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**).

3.3.15.5 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 **Error! Bookmark not defined.**) 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 242), 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.

3.3.15.6 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.

3.3.15.7 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 247) 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.

3.3.16 Valuable information

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

3.3.16.1 What is a feed?

Feeds contain the posts (page 236) in Collaboration, which for example, can be commented (page 237) 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.

3.3.16.2 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 (page **Error! Bookmark not defined.**) (**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 to follow this model (**Unfollow**).

3.3.16.3 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.

3.3.16.4 Which target groups can be assigned to posts?

The following target groups can be selected for posts (page 236):

-  **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.

3.3.16.5 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**.

3.3.16.6 What is a timestamp?

A timestamp (page 237) indicates when a post was last updated in Collaboration. Example: Last update was 2 hours ago. Timestamp = **2 h**.

3.3.16.7 What is a tag?

Tags are used to categorize posts using keywords, making them easier to find (page 240). 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.

3.3.16.8 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 239). 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

3.3.16.9 What does flagging a post mean?

You can send (page 237) posts you deem inappropriate to the Collaboration administrator for review. The administrator decides (page **Error! Bookmark not defined.**) whether the post will be deleted or not.

3.3.16.10 Which group types exist?

Groups can be created (page 241) 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 244) to the group.

3.3.16.11 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 (page **Error! Bookmark not defined.**) the privileges in Collaboration manually, after you edited them in ARIS Architect. The following database access rights 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.

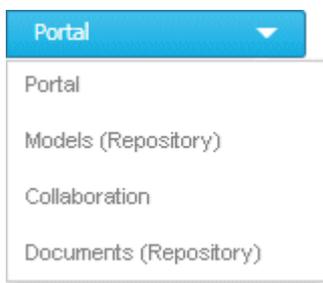
For detailed information about access rights, refer to the help in ARIS Architect (ARIS Configuration and Administration).

3.4 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 250) on the start page to access items directly. Or you can use the Search area (page 250) to define the search context beforehand and filter the search results.

The area to be searched and the search results depend on your license. If you use an **ARIS Connect Designer** license, you can access the following search context:



If you use an **ARIS Connect Viewer** license, the **Models** search context is not available. Models found can be opened for editing, but users with an **ARIS Connect Viewer** license have read-only access to models.

3.4.1 Open Search area directly

You can open the Search area directly.

Procedure

Open Search area

1. If necessary, select the database (page 102) your search is to be based on.
2. Click  **Search**.

Open Search area using the menu

1. If necessary, select the database (page 102) your search is to be based on.
2. Top right, click <user name>. The menu opens.
3. Click **Search**.

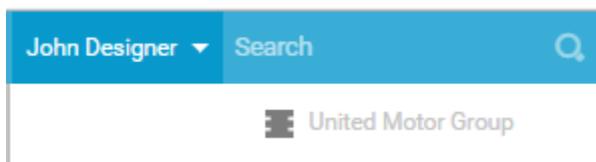
The Search area opens and you can browse ARIS Connect for the relevant terms.

3.4.2 Open Search area with term to be searched for

You can open the **Search** area using the term you want to find.

Procedure

1. If necessary, select the database (page 102) your search is to be based on.
2. Click in the **Search** box.



3. Enter the term you want to find. The search list is shown.
4. Click **Show all** at the end of the list.

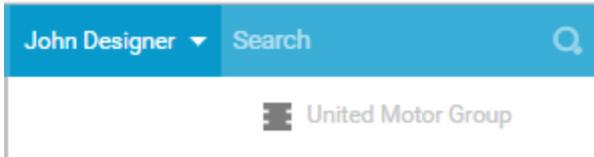
The Search area opens with the results for the term you entered.

3.4.3 Start quick search

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

Procedure

1. If necessary, select the database (page 102) your search is to be based on.
2. Click in the **Search** box.



3. Enter the relevant term.
A list with the first results (page 258) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

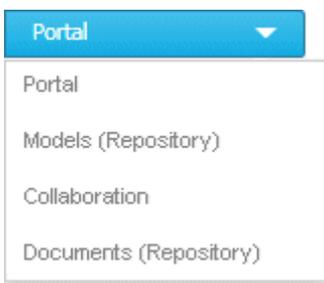
The item opens. For example, if you click the name of a model, the model opens in ARIS Connect Designer. If you click a collaboration entry, it is output in Collaboration.

3.4.4 Find using the Search area

You can use the **Search** area to find items. The Search area offers a wide range of filter options.

Procedure

1. If necessary, select the database (page 102) your search is to be based on.
2. Click  **Search**.
3. Enter the term you want to find. 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 (Repository)**.



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 (page 252).

The result of the search will be updated to reflect the search context and filter criteria you specified.

3.4.5 Jump to an item found

You can use jump to items that are listed in the **Search** area.

Procedure

1. Perform a search (page 250) and filter the search result (page 252) 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 (Repository)** context (page 252), the model is opened on a new tab for editing (page 288). If you performed the search in the **Portal** context (page 252), the fact sheets of the model is opened.
3. When you reopen the Search area, the search result is still available and you can jump to another item.

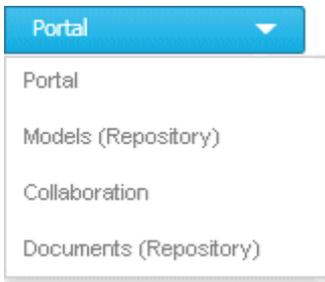
You navigated from the search result to a found item.

3.4.6 Use search context and filters

You can restrict the result in the Search area (page 250) 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**, **Models (Repository)**, **Collaboration**, or **Documents (Repository)**.



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.

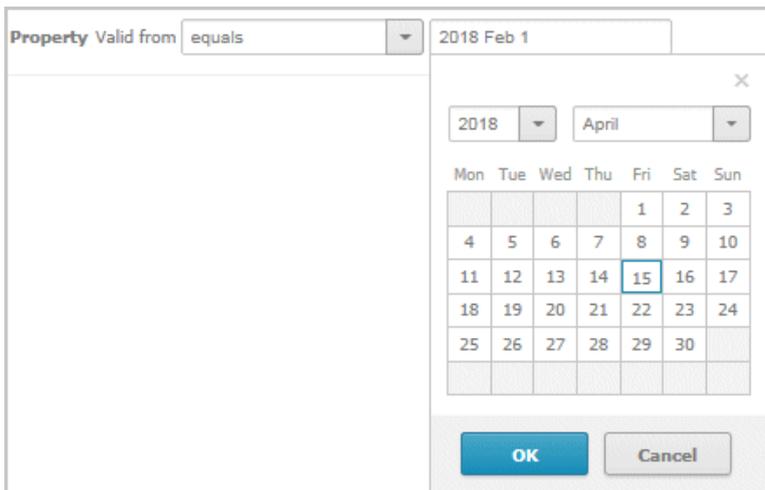
2. Click one or more filter criteria. The selected filter criteria will be listed and the search result updated. If you have selected a filter criterion that you can define more precisely, another area with subordinate filter criteria will be added to the **Filters** area.
3. Click additional criteria. 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, the file name:



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.

3.4.7 Save search settings as a favorite

In the Search area (page 259), you can save your search settings. Thus, you can search the content based on specific settings at any time.

Procedure

1. Select the filter criteria (page 252) to define your search.
2. Click **☆ Save search query as a favorite**. The corresponding dialog opens.
3. Enter a name.
4. Click **OK**.

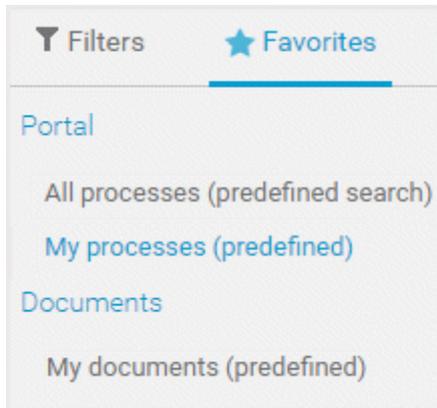
The search settings are saved in the **★ Favorites** area. You can filter the content based on these settings (page 173) at any time from various devices.

3.4.8 Use a favorite in the Search area

In the Search area (page 259), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. Click ★ **Favorites** in the **Filters** bar.



2. 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.

3.4.9 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 **Filter** bar, click a selected filter criterion again or click **Clear** for a filter criterion.

A screenshot of a filter bar. It shows a dark grey rounded rectangle containing the text 'EPC (column display)' in white, followed by a small white 'x' icon on a dark grey background, which is the clear button.

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 **Properties**.

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.

3.4.10 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 250).
2. Hold down the **Ctrl** key, and click the name of the relevant item.

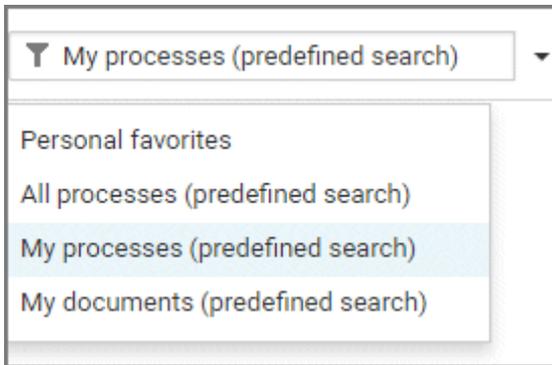
The item will open on a separate tab.

3.4.11 Use a favorite in the Favorites area

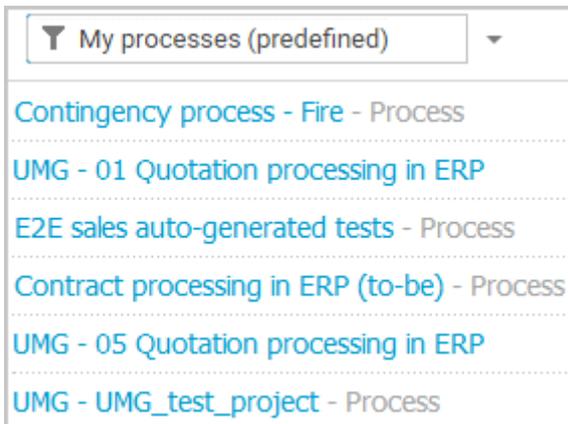
In the Favorites area (page 175), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. In the **Home** area, click  **My favorites**.
2. Click the ▼ **down arrow** of the **Filter selection** field.



3. Click the context caption to select the relevant filter settings, for example, **My 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.

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

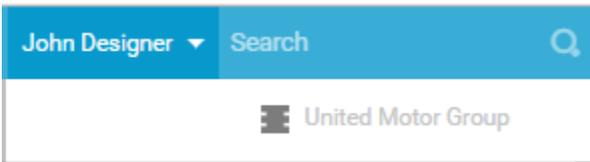
You have filtered database content based on your filter setting and opened one of your favorites using the **Favorites** tab.

3.4.12 Valuable information

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

3.4.12.1 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:

John Designer mod	
Portal	Apply for financing Process Receipt of goods (with risks and contr... Process Receipt of goods Process Start model Default Hardware platform for firewall Default
Models (Repository)	Start model Structuring model Demo_bow_tie_model Bow tie diagram Demo_bow_tie_model_3 Bow tie diagram Demo_bow_tie_model_2 Bow tie diagram Hardware platform for firewall IT architecture matrix
UML	No results found
Collaboration	No results found
Documents (Repository)	AGE_UC_Configure_tool.doc ARIS Document Storage_SharePoint.p... ARIS Server Installation and Administr...
80 matches in this category Show all	

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 259).

3.4.12.2 How is the Favorites area structured?

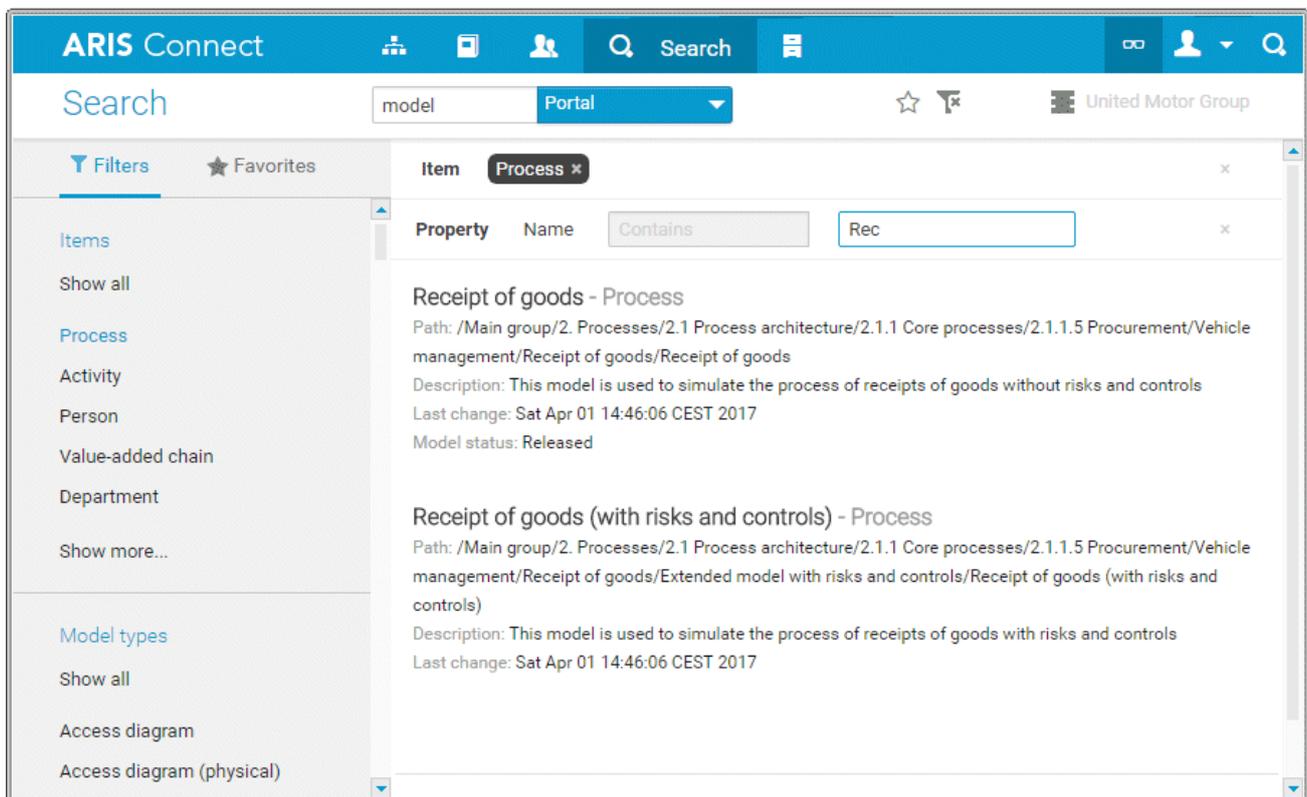
The Search area (page 249) includes a list of all matches.

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.

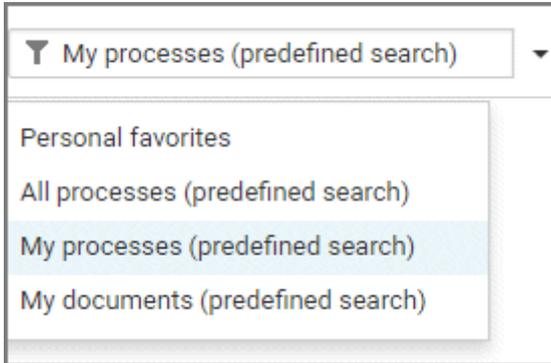
You can clear filter criteria (page 255) in several ways. You can save filter settings (page 173) and access saved filter settings (page 173) via the Favorites access bar.

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.



3.4.12.3 How is the Favorites area structured?

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.



3.4.12.4 How can search results be influenced?

If you use quick search (page 250) or the Search area (page 250) to find items, the list of results will be influenced by the selected database (page 102) 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.

3.4.12.5 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.

3.5 Use the repository

The repository contains, for example, databases and documents of the selected server. In the database, you can navigate to a database group and edit its content, for example, rename models and objects.

3.5.1 Create and edit models

ARIS Connect Designer allows you to edit existing and new models (page 277) in ARIS Connect. Using the **ARIS Connect Designer** license privilege you can create new models (page 277) directly in the portal, as well as edit (page 288) or create models (page 277) in the repository. You can access the entire modeling functionality of ARIS Connect Designer using buttons and bars (page 270) that you can use to efficiently edit your models.

If you have created or opened a model, you can set up the perspective (page 262) and adjust it to your own needs. Modeling (page 288) your organization, processes, data, etc., is just as simple as extended model editing (page 324). In addition to the graphic information, you can add further information to your models using attributes (page 301) that can be placed in the model as a symbol (page 382) or a text (page 378), if necessary.

In combination with ARIS Architect, automated processing steps can be inserted via macros (page 323). In addition, semantic checks (page 431) can be used to execute exactly specified model and object checks.

Of course, you can also add comments to models (page 347) and discuss models with other users.

To use ARIS Connect Designer, you must have the **ARIS Connect Designer** license.

3.5.1.1 Customize ARIS Connect Designer

If you create a new model in ARIS Connect or open an existing model for editing, the model is displayed on a separate tab and ARIS Connect Designer is activated. You can set up the ARIS Connect Designer user interface according to your requirements. In addition, you can apply templates to specify the appearance of model items. ARIS Connect Designer provides you with the following functionality:

- edit models.
- create new models.
- assign models.
- generate reports.
- run semantic checks.
- comment on models and model items.

3.5.1.1.1 Show and hide bars

You can use the bar buttons to show or hide bars as required.

What is said in the following for the **Symbols** bar applies to all bars.

Procedure

Click  **Symbols**. If the **Symbols** bar is shown, it will be hidden. If it is hidden, it will be shown.

Depending on your selection you either have more room to edit the model items or direct access to the relevant functionality.

3.5.1.1.2 Show/Hide header

You can hide or show the header. This means you either have more space for modeling, or are able to view the information displayed in the header.

Procedure

1. Click  **Show/Hide header**. The header is hidden so that more space is available for modeling.
2. Click  **Show/Hide header**. The header is shown and the header information is available to you.

You have adapted the display area according to your requirements.

3.5.1.1.3 Customize Symbols bar

You can change the content of the **Symbols** bar so that you are offered only the symbols you need for modeling.

Procedure

Remove individual symbols from the Symbols bar

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Move the mouse pointer over the symbol you want to remove. Behind the symbol the icon  **Remove** is displayed.
3. Click  **Remove**.

The symbol is removed from the **Symbols** bar.

Add a specific symbol

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. In the **Symbols** bar, click  **Add/Remove symbols**. The dialog opens. Objects displayed in the **Symbols** bar are followed by a  check mark.
3. Click the **Enter symbol name** box and enter the name of the required symbol partly or entirely. All object symbols are displayed whose names contain the term you entered.
4. Click the symbol not yet displayed in the **Symbols** bar that you want to include. A  check mark is added to the symbol.
5. Click **Close**.

The selected symbol is added to the **Symbols** bar.

Overall setup of the Symbols bar

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. In the **Symbols** bar, click  **Add/Remove symbols**. The dialog opens. Objects displayed in the **Symbols** bar are followed by a  check mark.
3. Click the symbols that are displayed in the **Symbols** bar, but that you no longer want to display. Their  check marks are removed.
4. Click the symbols not yet displayed in the **Symbols** bar that you want to include. A  check mark is added to these symbols.
5. Click **Close**.

The **Symbols** bar now provides you with the object symbols required for modeling your model. If you placed an object symbol using the **Symbols** bar, you can then use the mini toolbar (page 318) to create further objects.

Restore defaults

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. In the **Symbols** bar, click  **Add/Remove symbols**. The dialog opens. Objects displayed in the **Symbols** bar are followed by a  check mark.
3. Click **Restore defaults**. A  check mark is added to the object symbols that the system provides in the **Symbols** bar by default.
4. Click **Close**.

All symbols that are part of the system default are visible in the **Symbols** bar.

The **Symbols** bar provides the object symbols that you want to use.

3.5.1.1.4 Customize Attributes tab

You can show additional attributes or specify whether and when attributes are to be shown.

Procedure

1. Click **i Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Edit language** if you want to show (page 376) an additional language column for language-specific attributes. You can select an additional database language and view and edit it next to the language currently used.
4. Click **Add** on the **Attributes** tab. The **Select attribute** dialog opens.
5. Enter a search term for the attribute you want to display. A list of all attributes whose names contain the term you entered is displayed.
6. Click the relevant attribute.
7. Click **OK**. The selected attribute is added to the **Attributes** tab.
8. Click **⋮ More** next to the attribute whose visibility you want to specify.
9. Click **Hide always** if you want to hide the attribute from the **Attributes** tab even if a value has been specified. For the attribute to be displayed at a later time you need to select it explicitly by clicking **Add**.
10. Click **Hide, if not specified** if you want the attribute to be displayed in the **Attributes** tab only if a value has been specified.
11. Click **Place attribute** and the relevant position in the model window if you want the attribute value to be displayed in the model.
12. Click **Delete attribute**, if you want to delete the attribute value. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

The attributes will be displayed in line with your settings.

3.5.1.1.5 Show and hide mini toolbar

You can show and hide the mini toolbar for an object.

Procedure

1. Select an object in the model. The mini toolbar (page 318) is shown as transparent. When you move the mouse pointer over the mini toolbar it becomes opaque. Now you can configure the mini toolbar (page 267), or click the  **Connection** symbol or object symbols.
2. If you want the mini toolbar to be hidden only temporarily while the mouse pointer is not over the object, move the mouse pointer away from the object until the mini toolbar is hidden. As soon as you move the mouse pointer back towards the object, the mini toolbar is shown again.
3. If you do not want the mini toolbar to be shown for a selected object anymore, move the mouse pointer several centimeters away from this object. The mini toolbar is hidden and is then no longer shown when you position the mouse pointer over the object.
It will be visible for the object again only if you cancel the selection and select the object again.

Depending on your action, the mini toolbar is either shown or hidden for an object.

3.5.1.1.6 Configure mini toolbar

You can define which object symbols the mini toolbar (page 318) should offer for the relevant object type. You are offered only the object symbols for which the creation of a connection to the selected object type is allowed by the method.

Procedure

1. Select the object symbol whose object type you want to configure the mini toolbar for. The mini toolbar is shown.
2. Move the mouse pointer to the mini toolbar and click  **Add/Remove symbols**. The dialog opens.
3. Click the symbols that are displayed in the mini toolbar, but that you no longer want to display. Their  check marks are removed.
4. Click the symbols that are not displayed in the mini toolbar, but that you do want to include. A  check mark is added to these symbols.
5. Click **Close**.

Now, when you open the mini toolbar (page 267) the selected object symbols are available.

3.5.1.1.7 Change grid width

You can show a grid in the model window (page 270). Model items are aligned to the grid and inserted or moved according to the grid width. In the grid, you can specify how far apart the grid points will be.

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Grid > Change grid width**. The dialog is displayed.
3. Enter the required grid width or click the up or down arrow to change the grid width.
4. Click **OK**.

The grid is displayed with the new grid width, and model items are aligned and moved within this grid.

3.5.1.1.8 Show formatting toolbar

The formatting toolbar is enabled for selected texts, for example, for the text of placed attributes (page 302). The formatting bar is not available for attributes that the system changes, for example, for the attribute **Creator**.

Procedure

1. Select the placed attribute in the model window.
2. Click the attribute again.

The text of the attribute is selected for you to overwrite it, and the formatting toolbar is shown. If you deselect the placed attribute, the formatting toolbar is hidden.

3.5.1.1.9 Assign model template

You can assign a template (page 541) to a model and thus, change its appearance as well as its attribute placements in the model window (page 270) at once automatically.

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click the required template.

The content of the model window is adjusted immediately in line with the model template settings.

3.5.1.1.10 Reset model template

You can reset the appearance of a model that was assigned templates (page 541) to the ARIS default appearance. Color and size changes and attribute placements assigned by templates are removed.

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click **Reset**.

The content of the model window (page 270) is adjusted immediately.

3.5.1.1.11 Valuable information

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

3.5.1.1.11.1 How is ARIS Connect Designer structured?

ARIS Connect Designer from ARIS Connect has the following areas.

Header

The header outputs the name and type of the opened model. It also displays the current language.

If you change the language (page 289), the text attributes are output in the selected language as long as the text attributes are specified in the target language. If this is not the case, the text attributes are displayed in the alternative language and identified by the language code added to the alternative language.



Logistics - Value-Added Chain Diagram (US ▾)

Bar buttons

You can use the bar buttons to show or hide the **Search** and the **Collaboration, Reports, Properties, Modeling table** (page 387), **Semantic checks** (page 431), and **Symbols** bars.

You can also hide or show the header by clicking **Hide/Show header**, depending on whether you need more space for the model window or want to be able to see the information provided in the header.



Tab bars

Tab bars enable you to access the relevant buttons within a specific context.

All tab bars contain frequently used buttons (page 276). This means that you do not need to switch between tab bars to access these buttons.

START TAB BAR

The **Start** tab bar groups the functions related to the representation and placement of model items (page 312).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 314).

FORMAT TAB BAR

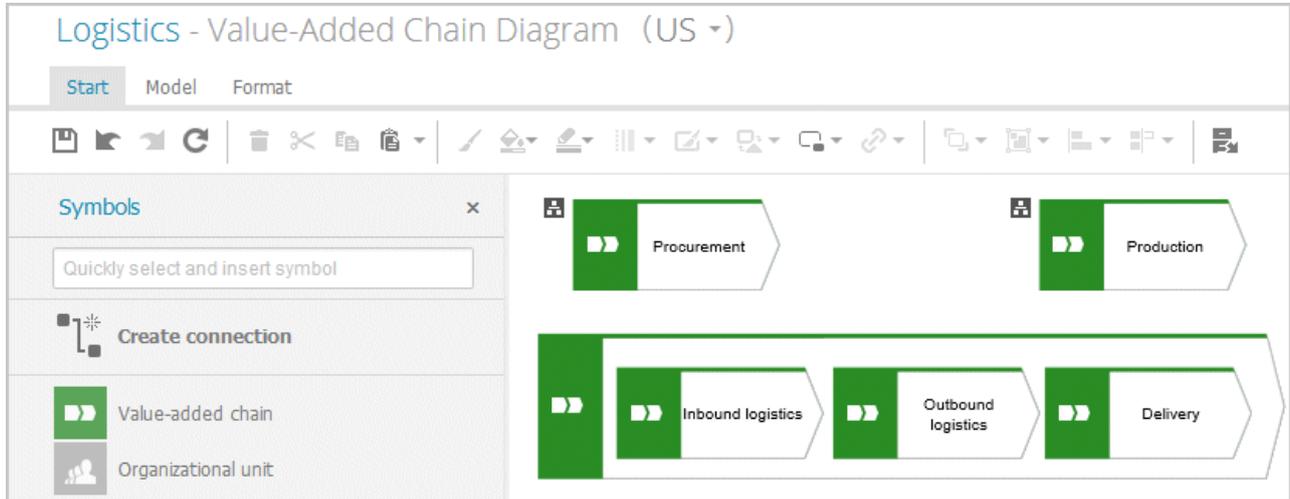
The **Format** tab bar groups the functions related to the presentation of written data in models (page 315).

BPMN TAB BAR

The BPMN tab bar is displayed if you have opened a BPMN diagram. It groups the functions that are used for the convenient editing of BPMN diagrams (page 317).

Model window

The model items are arranged in the model window. You can see the changes made with the different bars immediately. Thus, color changes made to objects or changes in the size of appearance are displayed at once. In addition, you can quickly bring relevant objects into the visible model area, even in large models, using the **Find** button in the bar buttons.



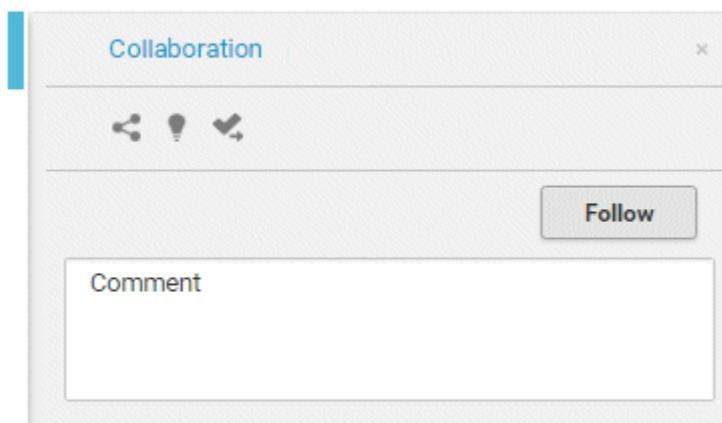
Search bar

Click  **Search** in the bar buttons to show the **Search** bar that you can use to have objects selected in the model (page 324).



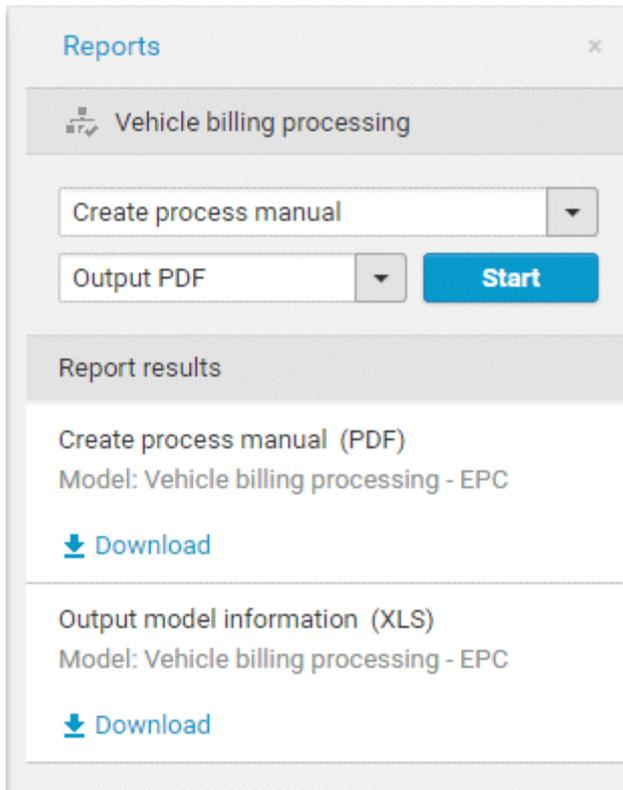
Collaboration bar

Click **Collaboration** in the bar buttons to show the **Collaboration** bar that you can use to enter notes, improvement proposals, questions, etc., pertaining to the model (page 347).



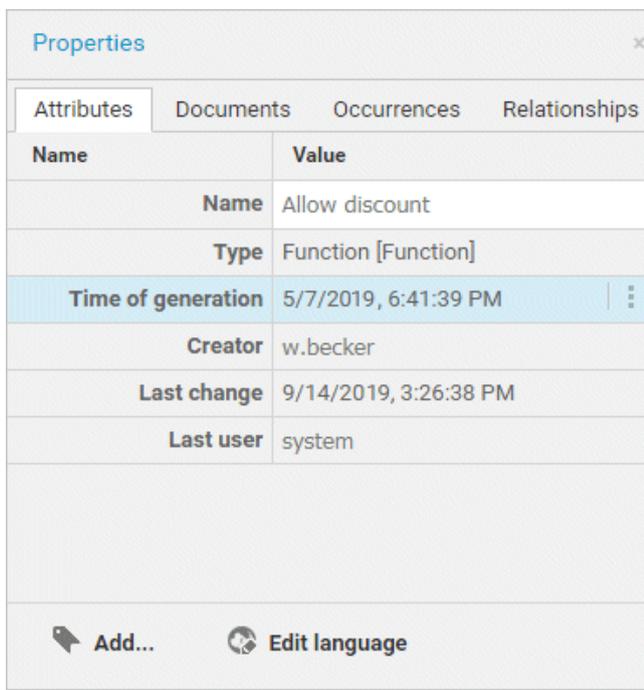
Reports bar

Click  **Reports** in the bar buttons to show the **Reports** tabs and generate reports (page 348).



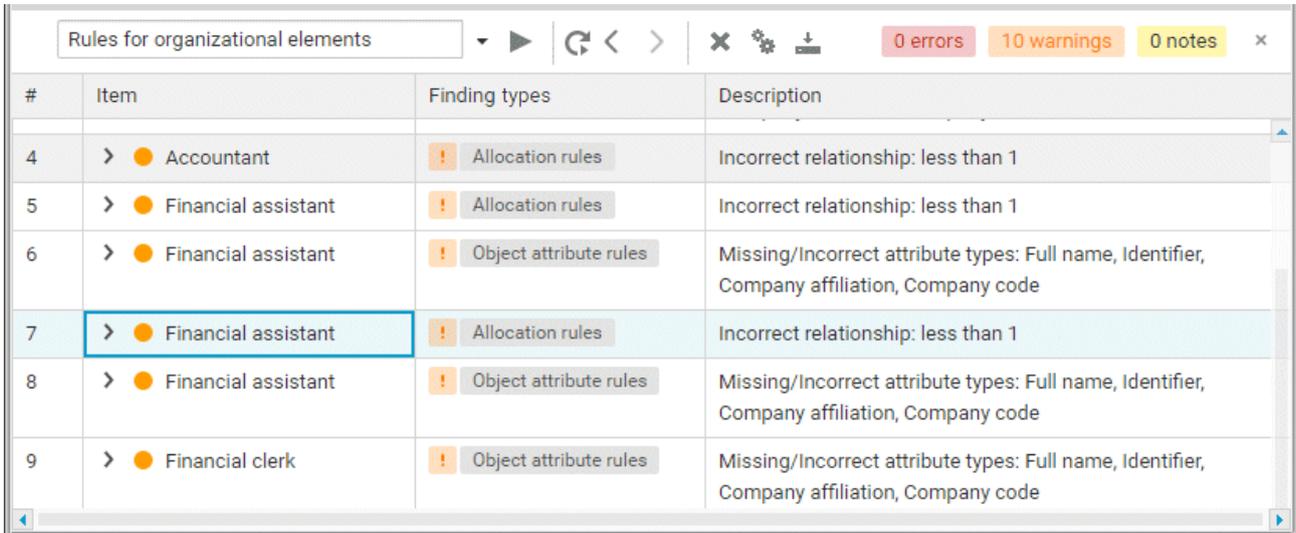
Properties bar

Click  **Properties** in the bar buttons to show the **Properties** bar where you can edit attributes (page 301), or view occurrences (page 306) and relationships of objects (page 307), for example.



Semantic checks bar

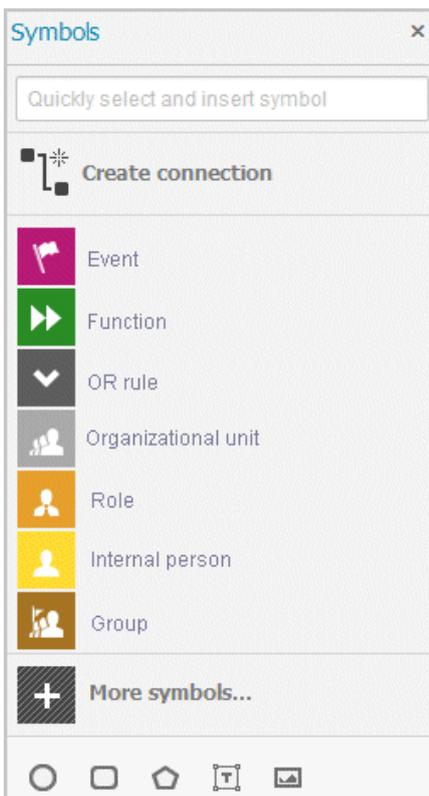
Click  **Semantic checks** in the bar buttons to show the **Semantic checks** bar where you can run semantic checks for a model or for one or more objects. Among other things, the toolbar allows you to restrict the view to errors, warnings, or notes.



#	Item	Finding types	Description
4	Accountant	Allocation rules	Incorrect relationship: less than 1
5	Financial assistant	Allocation rules	Incorrect relationship: less than 1
6	Financial assistant	Object attribute rules	Missing/Incorrect attribute types: Full name, Identifier, Company affiliation, Company code
7	Financial assistant	Allocation rules	Incorrect relationship: less than 1
8	Financial assistant	Object attribute rules	Missing/Incorrect attribute types: Full name, Identifier, Company affiliation, Company code
9	Financial clerk	Object attribute rules	Missing/Incorrect attribute types: Full name, Identifier, Company affiliation, Company code

Symbols bar

The **Symbols** bar provides object symbols (page 291), graphic objects (page 297), and text (page 303) for insertion into the model window. It also allows you to filter the available object symbols by entering names and create connections between (page 302) objects.



Display bar

The Display bar is located at the bottom of the model window. You can use this bar to quickly define which model areas are to be displayed in the visible window pane (page 304).

If for example, you want to display the entire model in the visible window pane, click  **Fit to window** (without any model item being selected).



3.5.1.1.11.2 What are tab bars for?

Tab bars enable you to access the relevant buttons within a specific context.

All tab bars contain frequently used buttons (page 276). This means that you do not need to switch between tab bars to access these buttons.

START TAB BAR

The **Start** tab bar groups the functions related to the representation and placement of model items (page 312).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 314).

FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 315).

BPMN TAB BAR

The BPMN tab bar is displayed if you have opened a BPMN diagram. It groups the functions that are used for the convenient editing of BPMN diagrams (page 317).

3.5.1.1.11.3 What general buttons are available?

The following general buttons are available for each tab bar.



Save: Saves your changes in the database.



Undo: Undoes editing steps.



Redo: Redoes editing steps that were undone.



Refresh: Refreshes the display. Reloads the data from the database and thereby also shows any changes made by a different editor in the meantime.



Delete: Deletes selected model items.



Cut: Cuts selected items and saves them to the clipboard.



Copy: Copies selected items to the clipboard.



Paste: Pastes the content of the clipboard into the model. If an object is on the clipboard, an occurrence copy (page 350) is inserted. Click the arrow next to the **Paste** icon if you want to paste a definition copy.

3.5.1.2 Create/Import a model

You can use ARIS Connect Designer to create new models and to import models from ARIS Express (<http://www.ariscommunity.com/aris-express>).

3.5.1.2.1 Create new models

You can create new models in order to for example, model procedures as a control flow or model the data generation and usage.

Prerequisite

You have the **ARIS Connect Designer** license privilege.

Procedure

In the portal (quick video)

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click  **Create new model** on the **Quick start (page 57)** area. The corresponding dialog opens.
4. Enter a name for the new model in the **Model name** box.
5. Click the **Model type** box and enter part of the model type name. All model types (page 282) are displayed whose names contain the term you entered.
6. Select the required model type. The **Target** area displays the database and group names. This is where the new model will be stored.
7. Click **Change** if you want to store the model in a different database and/or group. The **Select target group** dialog opens.
8. Select the required database in the **Database** box.
9. Select the required group.
10. Click **OK**. The **Select target group** dialog closes.
11. Check your input.
12. Click **OK**. The **Create model** dialog closes.

In the repository

1. Click  **Repository**.
2. Select the database and the database group in which you want to create a new model. When you select a group, its content is displayed.
3. In the upper right, click  **Create model**. The corresponding dialog opens.
4. In the **Model name** box specify the name that the new model is to be created with in the selected group.
5. Click the **Model type** box and enter part of the model type name. All model types (page 282) are displayed whose names contain the term you entered.
6. Select the required model type.

7. Click **OK**.

The new model is created and opened in a new tab. You can set up ARIS Connect Designer (page 262) and model the model.

3.5.1.2.2 Create a new model using an assignment

You can assign models to objects. The assignment enables you to describe objects in independent models in more detail, for example. Assigned models are displayed by way of an  assignment icon at the object and can be opened by double-clicking the assignment icon.

Procedure

1. In the open model, click the object to which you want to assign a new model.
2. Activate the Start (page 312) tab bar.
3. Click  **Assignment** >  **Create assignment**. The dialog opens.
4. Select the required model type. The model types that are allowed for the selected object by the method and by the method filter (page 286) in use are available for selection.
5. Enter the relevant model name. The name of the selected object is suggested as a model name.
6. Click **OK**.

The new model is assigned to the selected object and opens on a separate tab. You can model the required content.

3.5.1.2.3 Create group

You can create a new group in which you can store models and objects.

Procedure

1. Click  **Repository**.
2. Select the database group in which you want to create a new group. When you select the group, its content is displayed.
3. In the upper right, click  **Create group**. The dialog opens.
4. Enter the required name in the **Name** box.
5. Click **OK**.

The new group is created as a subgroup of the selected one and you can store models and objects in it.

3.5.1.2.4 Import ARIS Express model

You can import a model from ARIS Express and use it in ARIS Connect. ARIS Express saves models in files of the **ARIS Document Format** format (adf).

Prerequisite

- The model is of a model type allowed by ARIS Connect and by the method filter (page 286) you are using.
- You have a **Designer** license.

Procedure

1. Click  **Repository**.
2. Select the database group into which you want to import the ARIS Express model. When you select the group its content is displayed and a down arrow ▼ is shown next to the name.
3. Click the ▼ down arrow and select  **Import ARIS Express model**. The dialog opens.
4. Click **Select file** and use the **File Upload** dialog to navigate to the group in which the model is stored in **ADF** format.
5. Select the relevant ADF file and click **Open**.
 - a. The selected model is imported if an ARIS Express filter or an ARIS Express template is available.
 - b. If no ARIS Express filter or ARIS Express template is available, you are asked whether you still want to import the model. If you do import the model, it will not look the same as in ARIS Express. Click **OK**.
6. Then import the ARIS Express filter and/or the ARIS Express template if you want the imported model to appear exactly as it does in ARIS Express.

The imported model is stored in the selected group and you can open it for editing.

3.5.1.2.5 Import BPMN file

You can import (page 408) data from a BPMN file and use the BPMN diagram that was generated by the import in ARIS Connect.

Prerequisites

- The method filter (page 286) you are using allows BPMN diagrams.
- You have a **Designer** license.

Procedure

1. Click  **Repository**.
2. Select the database group into which you want to import the BPMN diagram. When you select the group its content is displayed and a ▼ **down arrow** is shown next to the name.
3. Click the ▼ **down arrow** and select  **Import BPMN diagram**. The dialog opens.
4. Click **Select file** and navigate to the relevant BPMN file.
5. Select the BPMN file and click **Open**.

The BPMN diagram is stored in the selected group, and you can open it for editing on a tab.

3.5.1.2.6 Create matrix model

You can create a model of the **Matrix model** type. A matrix model is used to represent connections between objects.

Prerequisite

- You have the **ARIS Connect Designer** license privilege.
- The classic configuration set or modification set (page **Error! Bookmark not defined.**) based on it is selected for 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  **Create new model** on the **Quick start (page 57)** area. The corresponding dialog opens.
4. Click the **Model type** box and enter part of the model type name. All model types (page 282) are displayed whose names contain the term you entered.
5. Select **Matrix model**. The **Target** area displays the database and group names. This is where the new model will be stored.
6. Click **Change** if you want to store the model in a different database and/or group. The **Select target group** dialog opens.
7. Select the required database in the **Database** box.
8. Select the required group.
9. Click **OK**. The **Select target group** dialog closes.
10. Check your input.
11. Click **OK**. The **Create model** dialog closes.

The matrix model is newly created in the selected group and opened for editing on a tab.

3.5.1.2.7 Valuable information

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

3.5.1.2.7.1 What model types are available in ARIS Connect?

The following model types are available.

The number of model types may differ from the model types listed here. Additional model types can be enabled by the license key used. On the other hand, the number of model types can be limited by the filter used (page 286).

Access diagram
Access diagram (physical)
Application collaboration diagram
Application collaboration diagram (physical)
Application system diagram
Application system type diagram
ArchiMate model (2.1)
ArchiMate model (3.0)
Attribute allocation diagram (Solution Design)
Bow tie diagram
BPMN allocation diagram (BPMN 2.0)
BPMN collaboration diagram (BPMN 2.0)
BPMN conversation diagram (BPMN 2.0)
BPMN process diagram (BPMN 2.0)
BSC Cause-and-effect diagram
Business controls diagram
Business footprint diagram
Business Model Canvas
Business rule allocation diagram
Business rule architecture diagram
Business segment matrix
Class diagram

CtX-tree
Customer journey landscape
Customer journey map
Customer segmentation map
Customer touchpoint allocation diagram
Customer touchpoint map
Data type diagram (Solution Design)
Data Warehouse model
DMN boxed function
DMN context diagram
DMN decision requirements diagram
DMN decision table model
DMN invocation diagram
Document structure (Solution Design)
DW structure
E-Business scenario diagram
eERM
eERM attribute allocation diagram
Enterprise BPMN collaboration diagram
Enterprise BPMN process diagram
EPC
EPC (column display)
EPC (horizontal table display)
EPC (instance)
EPC (material flow)
EPC (row display)
EPC (table display)
Event diagram
Fishbone diagram
Function allocation diagram
Function mapping

Function tree
Functions mapping (SAP Solution Manager)
IE Data model
Information carrier diagram
IoT object context
IoT object definition
IT architecture mapping
IT architecture matrix
Knowledge map
Knowledge structure diagram
KPI allocation diagram
KPI tree
Network diagram
Network topology
Objective diagram
Organizational chart
Process selection diagram
Process selection matrix
Product allocation diagram
Product selection matrix
Product/Service exchange diagram
Product/Service tree
Product tree
Program flow chart (PF)
Questionnaire template allocations
Quick model
RAD
Requirement allocation diagram
Requirements tree
Risk diagram
Role diagram

SAP functions mapping (SAP Solution Manager)
SAP NetWeaver Business Warehouse data flow model
SAP NetWeaver Business Warehouse mapping multi provider
SAP NetWeaver Business Warehouse structure
SAP NetWeaver Business Warehouse transformation
SAP Solutions allocation diagram
SAP Solutions organizational elements mapping
Screen design
Screen design (Solution Design)
Screen diagram
Screen navigation
Service allocation diagram
Service architecture diagram
Service collaboration diagram
SIPOC
Strategy allocation diagram
Strategy diagram
Structuring model
Survey management
SWOT diagram
System environment
Table diagram
Task allocation diagram
Technical resources
Technical terms model
TOGAF diagram
Value-added chain diagram
Value stream map
Work breakdown structure
XML model

3.5.1.2.7.2 Which template is used for new models?

When you create, import, or generate a new model, it is created on the basis of a template. In ARIS Architect, users with the **Configuration administrator** function privileges create templates and assign them to model types.

If a template is assigned to the model type you use, this template is used. If there is no assignment to a template, your model is created on the basis of the **Default** template.

3.5.1.2.7.3 Which method filter is used?

When you open and edit models, your work is based on one of the method filters (page 540) assigned to you ARIS Architect. Database administrators specify which method filter a user may use in ARIS Connect. To do this, a database administrator assigns the relevant method filter to the database and user in ARIS Architect.

The method filter applied depends on the method filter(s) assigned to you.

- If you were assigned only one filter, that filter is applied.
- If you were assigned multiple filters:
 - The method filter assigned to the database is used (default filter of the database).
 - If the default filter of the database does not exist, the filter named **Demo** is used.
 - If the **Demo** filter does not exist either, the **Entire method** filter is applied.
 - If the **Entire method** filter also does not exist, the first method filter of the alphabetically sorted list is used.

3.5.1.2.7.4 How to proceed if the model type is missing for models

Model types and method filters are configured in ARIS Architect. Therefore, the description of the **Solutions** section explains how the system administrator proceeds in ARIS Architect.

CAUSE

There is a model in the database that is based on a user-defined model type that no longer exists in the ARIS method configuration. In this case, the user-defined model type can no longer be used to find the model. There are two possible reasons why the model type is no longer available:

- The method filter used does not contain the user-defined model type.
- The model type has been intentionally deleted from the ARIS method configuration.

SOLUTIONS

- If a method filter exists on the server or tenant that contains the user-defined model type, the user can log in to the database again with this method filter. The model is based on the user-defined model type again.
- If there is no method filter on the server or tenant that contains the user-defined model type, the system administrator can use ARIS Architect to import the method filter into the server/tenant and the user can log in to the database again with this method filter. The model is based on the user-defined model type again.
- If the user-defined method filter has been intentionally deleted, the system administrator can reorganize the database on the **Administration** tab of ARIS Architect with the **Automatically replace missing item types** option. This resets the model type to the standard ARIS model type. After re-logging in to the database, the model is found again by the search if the search is performed using the standard ARIS model type.

3.5.1.3 Model

ARIS Connect Designer assists you in editing models, for example, by providing a grid (page 290), a mini toolbar (page 299), graphic objects (page 297), or in-place formatting options (page 302).

3.5.1.3.1 Basic modeling

This section describes the basic procedures for editing models.

3.5.1.3.1.1 Open model for editing

You can open models in different ways.

Prerequisite

- You have a **Designer** license.
- The model type of the model is allowed (page 287) by the method filter (page 286) in use.

Procedure

From Groups or the Processes area

1. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the  **Portal** at the top right below the search.
2. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
3. Select the group or process area containing the required model. The content of the selected group or process area is listed.
4. Click the name of the relevant model.
5. Click **Diagram** if you want to display the model graphically.
6. Click  **Edit** >  **Edit model**.

From the repository

1. Click  **Repository**.
2. In the database, select the group containing the relevant model. The content of the selected group is listed.
3. Click the name of the model you want to open.

Using the search

1. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the  **Portal** at the top right below the search.
2. At the top right, click the **Search** box and enter a term that is included in the model name. All models and objects containing this term are listed immediately.
3. In the **Models (Repository)** category, click the name of the model you want to open.

From the 'Recent changes' area

1. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the  **Portal** at the top right below the search.
2. Click  **Recent changes** in the **Home** area. All models are listed that have recently been changed or created.
3. Click the name of the model you want to open. Depending on active configuration set, the **Groups** or **Process** area opens and the model is activated.
4. Click **Diagram** if you want to display the model graphically.
5. Click  **Edit** >  **Edit model**.

The model opens in a separate tab.

3.5.1.3.1.2 Change database language of a model

You can select a database language other than the one currently in use for a model. This enables you to specify all language-dependent attributes for the model in a language of your choice.

If you change the language (page 289), the text attributes are output in the selected language as long as the text attributes are specified in the target language. If this is not the case, the text attributes are displayed in the alternative language and identified by the language code added to the alternative language.

Prerequisite

The header is shown (page 263).

Procedure

1. In the header, click the language code next to the model name. A list of available languages is displayed.
2. Click the language you want to use for entering the language-dependent contents.

The model window and the bars will directly display the language-dependent contents in the selected language, for example, on the **Attributes** tab of the **Properties** bar. You can change language-dependent contents specified in this language or enter new contents.

3.5.1.3.1.3 Show and hide grid

If a grid is hidden, you can show it in the model window (page 270). When you place or move model items, they are inserted or moved according to the grid width (page 268). This facilitates the orderly placement of model items.

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Grid** >  **Toggle grid**.

A dot grid is displayed in the model window. Model items are placed and moved according to the grid width.

To hide the grid, click  **Grid** >  **Toggle grid** again. The dot grid is hidden and model items are placed or moved pixel by pixel.

3.5.1.3.1.4 Set grid width

You can set the grid width. Based on the grid width, model elements are inserted or moved in the model window (page 270).

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Grid** > **Change grid width**. The corresponding dialog opens.
3. Enter the required grid width in the spin box or click the up or down arrow to increase or reduce the grid width.
4. Click **OK**.

Grid settings have been changed.

3.5.1.3.1.5 Place object symbols

You can place object symbols in the model window (page 270) in different ways.

Procedure

Using the Symbols bar (quick video)

Procedure

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the object symbol you want to place in the model window.
3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. If necessary, overwrite the previous name with the name of your choice and press Enter. The object symbol has been inserted in the model window.

Using the selection box in the Symbols bar (quick video)

Procedure

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. In the **Quickly select and insert symbol** box enter a few characters of the object symbol name. All object symbols whose names contain these characters are listed, regardless of whether they are hidden or shown in the **Symbols** bar. The list is continuously updated while you are entering your input.
3. In the list, click the object symbol you want to place.
4. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
5. If necessary, overwrite the previous name with the name of your choice and press Enter. The object symbol has been inserted in the model window.

Using the mini toolbar (quick video)

Prerequisite

An object symbol has already been placed in the model window.

Procedure

1. Click the placed object symbol. The mini toolbar (page 318) is shown.
2. In the mini toolbar, click the symbol you want to place in the model window. A frame is displayed for the new object.
3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. If necessary, overwrite the previous name with the name of your choice and press Enter. The object symbol is placed in the model window and linked to the previously selected object symbol using a connection.

As an occurrence copy (quick video)

Create a new occurrence for an existing object. This enables you, e. g., to insert the same organizational unit at all positions in a process where it actually participates in the process.

Prerequisite

An object symbol has already been placed in the model window.

Procedure

1. Click the placed object symbol and then  **Copy**.
2. Click  **Paste**. Alternatively, press **Ctrl + V**. A preview frame is displayed for the new item.
3. Click the position in the model window where you want to insert the object symbol.

The object symbol is placed in the model window. It represents the object whose object symbol you copied as an occurrence copy. This means, for example, that the name of both object symbols is changed, that is, the name of the copied object symbol and the name of the object symbol copy, if you change it for ONE of the two.

As a definition copy (quick video)

Use an existing object as the basis for a new object. Thus, you only need to change the attributes by which the new object differs from the source object.

Prerequisite

An object symbol has already been placed in the model window.

Procedure

1. Click the placed object symbol and then  **Copy**.
2. Click **▼ down arrow > Definition copy** next to  **Paste**. Alternatively, press **Ctrl + Shift + V**. A preview frame is displayed for the new item.
3. Click the position in the model window where you want to insert the object symbol.

The object symbol is placed in the model window. As a definition copy it represents a new object using the attributes of the object whose object symbol you have copied. The new object is autonomous even though it has the same attributes as the source object. This means, for example, that the name of the copied object does not change if you change the name of the source object.

You have placed object symbols in the model window.

3.5.1.3.1.6 Place occurrence copy

You can place occurrence copies in the model window (page 270) in different ways.

Procedure

By placing an object symbol

Procedure

1. Click the relevant object symbol in the toolbar or the mini toolbar.
2. In the model window, click the position where you want to place the object symbol.
3. Enter at least two letters. A list of existing objects is displayed that have the same type as the placed object and whose names begin with the letters entered.
4. Click the name of the object you want to create as an occurrence copy. The name is entered in the object.

The occurrence copy is placed in the model window.

By copying and pasting

Procedure

1. In the model window, click the object of which you want to create an occurrence copy.
2. Click  **Copy** in the toolbar.
3. Click  **Paste** in the toolbar. A frame for the occurrence copy is displayed in the model window.
4. Drag the frame to the required position and press the mouse button.

You have placed the occurrence copy.

You have placed an occurrence copy.

3.5.1.3.1.7 Paste copied object as an occurrence copy

You can paste a copied object into a model as an occurrence copy. Thus, a new occurrence is created, that is, a new graphical representation of the object. This means, for example, that changing the name of this occurrence will change the name in all occurrences of the copied object.

Prerequisite

The object is allowed to exist in the target model according to the method.

Procedure

1. Select the relevant object.
2. Click  **Copy**. Now you can insert the copy into the current or another model.
3. Click  **Paste > Occurrence copy**. Alternatively, press **Ctrl + V**. A preview frame is displayed for the new item.
4. Click the position in the model window where you want to insert the object symbol.

Copying and pasting the occurrence of an object is now complete.

Occurrence copies enable you to quickly reuse the same object at different positions in the same model, or to reuse it in various other models.

3.5.1.3.1.8 Paste copied object as a definition copy

You can paste a copied object into a model as a definition copy. Thus, a new object is created whose attributes are identical with those of the copied object. Changing the attributes of the pasted object will not affect the copied object.

Prerequisite

The object is allowed to exist in the target model according to the method.

Procedure

1. Select the relevant object.
2. Click  **Copy**. Now you can insert the copy into the current or another model.
3. Click  **Paste > Definition copy**. A preview frame is displayed for the new item.
4. Click the position in the model window where you want to insert the object symbol.

Copying an object and pasting it as a definition copy is now complete.

Using definition copies reduces the effort of creating multiple objects that differ only in a few attributes.

3.5.1.3.1.9 Change object symbol

You can change the symbol for selected objects if various symbols are available for them.

Prerequisite

The method filter in use (page 286) includes different symbols of the objects you selected.

Procedure

1. Click an object, or hold the **Ctrl** key pressed to select multiple objects of the same type.
2. Activate the Start (page 312) tab bar.
3. Click  **Change symbol**. The list of object symbols available for the selected object(s) is shown.
4. Click the symbol you want to use from now on for the selected object/s in this model.
The symbol for the selected object is or the symbols of the selected objects are changed.

3.5.1.3.1.10 Determine the appearance of connections

You can determine the color, the line style and weight, the bridge height, and rounding intensity of connections.

Procedure

Determine the connection color

1. Select the connections you want to adjust.
2. Activate the Start (page 312) tab bar.
3. Click  **Line color**. The color palette opens.
4. Click the color you want to apply.

The connection color is adjusted.

Tip

Using the color palette, you can define another color or reset the color to the default color.

Determine the line style and weight

1. Select the connections you want to adjust.
2. Activate the Start (page 312) tab bar.
3. Click  **Line style and weight**.
4. Click **Dotted**, **Dashed**, or **Solid**. The connection style is adjusted.
5. Click  **Line style and weight** again.
6. Click the weight in points you want to display the connections. The connection weight is adjusted.

The line style of the connections is adjusted.

Determine the bridge height and rounding intensity

1. Open the model you want to adjust.
2. Activate the Model (page 314) tab bar.
3. Click  **Connection properties**. The **Edit connections** dialog opens.
4. Click the **Bridge height** field and specify the height of the bridge. The higher the value, the higher the bridge. A preview of the specified bridge height is displayed.
5. Click the **Rounding intensity** field and specify the degree of edge rounding for connections with directional changes. The higher the value, the stronger the rounding. A preview of the specified edge rounding is displayed.
6. Click **OK**.

The bridge height and rounding intensity of the current model's connections are adjusted.

You have adjusted the connections.

3.5.1.3.1.11 Place graphic objects

You can place graphic objects in the model window (page 270) in order to, for example, structure model content.

Procedure

Place circle

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Circle/Ellipse**.
3. Click the position in the model window where you want to insert the graphic object.

The circle is inserted in the model window. Now you can color the line (page 333) and inside (page 331), and, for example, place the graphic object behind a model area (page 338) to highlight this area.

Place square

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Square**.
3. Click the position in the model window where you want to insert the graphic object.

The square is inserted in the model window. Now you can color the line (page 333) and inside (page 331), and, for example, place the graphic object behind a model area (page 338) to highlight this area.

Place rectangle

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Square**.
3. Click the position in the model window where you would like to place the graphic symbol, and hold down the mouse button.
4. Drag the mouse pointer in the desired direction so that the placed item receives the required form of a rectangle.
5. Release the mouse button.

The rectangle is inserted in the model window. Now you can color the line (page 333) and inside (page 331), and, for example, place the graphic object behind a model area (page 338) to highlight this area.

Place ellipse

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Circle/Ellipse**.
3. Click the position in the model window where you would like to place the graphic symbol, and hold down the mouse button.
4. Drag the mouse pointer in the desired direction so that the placed item receives the required form of an ellipse.
5. Release the mouse button.

The ellipse is inserted in the model window. Now you can color the line (page 333) and inside (page 331), and, for example, place the graphic object behind a model area (page 338) to highlight this area.

Place polygon

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Polygon/Line**.
3. In the model window, click the position where you want the polygon to begin.
4. Click the positions where the lines of the polygon are to change direction.
5. Double-click the position where you would like the polygon to end.

The polygon is inserted in the model window. Now you can color the line (page 333) and inside (page 331), and, for example, place the graphic object behind a model area (page 338) to highlight this area.

Place line

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Polygon/Line**.
3. In the model window, click the position where you want the line to begin.
4. Double-click the position where you would like the line to end.

The line is inserted in the model window. Now you can color the line (page 333).

Specify size when placing objects

You can directly resize circles/ellipses and squares when placing them.

Procedure

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Circle/Ellipse** or  **Square**.
3. In the model window, click the position where you would like the graphic object to begin, and hold down the mouse button.

4. Drag the mouse pointer in the required direction until the graphic object has taken the shape that you want to place.
5. Release the mouse button.

The graphic object is placed with the required size.

You have placed graphic objects.

3.5.1.3.1.12 Paste copied graphic objects

You can paste copied graphic objects, such as circles or squares, regardless of whether you have copied them from the same or another model.

Procedure

1. Select the required graphic objects.
2. Click  **Copy**.
3. Open the target model, if required.
4. Click  **Paste**. Preview frames are displayed for the items you are pasting.
5. Click the position in the model window where you want to insert the graphic objects.

Copying and pasting graphic objects is now complete.

3.5.1.3.1.13 Modeling using the mini toolbar

You can model very effectively using the mini toolbar (page 318). By configuring (page 267) it you are quickly offered the object symbols (page 267) required for your model.

Procedure

1. Click a placed object symbol (page 291). The mini toolbar is shown.
2. In the mini toolbar, click the object symbol you want to place. A frame is displayed for the new object.
3. In the model window, click the position where you want to place the object symbol. The object symbol is placed together with a connection to the source object and the name field for overwriting.
4. Enter the relevant name.
5. Press **Enter**.

The new object symbol is placed and the connection to the source object is created automatically.

3.5.1.3.1.14 Add attributes in the Attributes tab

You can edit model attributes and the attributes of objects or connections.

Prerequisite

The attribute you selected can be edited. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. If you want to edit model attributes, ensure that no model item is selected.
If you want to edit object or connection attributes, select the corresponding object or connection.
4. Click  **Add** in the **Attributes** tab. The **Select attribute** dialog opens.
5. If you only want to see attributes with assigned value, activate the **Show specified attributes only** check box.
6. Click the **Attribute** field and select the attribute you want to show.
7. Click **OK**.

The attribute is displayed in the **Attributes** tab.

3.5.1.3.1.15 Edit attributes

You can edit model attributes and the attributes of objects or connections.

Prerequisite

The attribute you selected can be edited. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Click **I Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. If you want to edit model attributes, ensure that no model item is selected.
If you want to edit object or connection attributes, select the corresponding object or connection.
4. Display the relevant attribute (page 300) if it is not listed.
5. Click the cell that comes after the name of the attribute. A dialog is displayed. If you can enter any text for an attribute, a dialog including the formatting toolbar is displayed. If required, you can enlarge (page 378) this dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times.
7. Click **OK**.

You have changed the attribute value.

3.5.1.3.1.16 Directly format placed attributes

You can format model, object, and connection attributes when editing in the model window.

Prerequisite

The attribute you selected can be edited. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Double-click the placed attribute of a model, object, or connection so that the text is selected. The formatting toolbar is shown.
2. In the formatting toolbar, click the button for the formatting you want to assign to the selected attribute, for example,  **Increase indent**. The formatting information is directly applied to the selected attribute.
3. Click an empty area in the model window. The attribute selection is undone.

You have formatted the placed attribute.

3.5.1.3.1.17 Create connections

You can link objects using connections in different ways in the model window (page 270).

Procedure

When placing objects using the mini toolbar

Prerequisite

An object symbol has already been placed in the model window.

Procedure

1. Click the placed object symbol. The mini toolbar (page 318) is shown.
2. In the mini toolbar, click the symbol you want to place in the model window. A frame is displayed for the new object.
3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. If necessary, overwrite the previous name with the name of your choice and press Enter.

The object symbol is placed in the model window and linked to the previously selected object symbol using a connection.

Subsequently using the Symbols bar

1. In the **Symbols** bar click  **Create connection**.
2. Click the object in the model window you want to connect with another object.
3. Click a target object that can be connected to the source object. If the method does not allow objects to be connected to one another, a prohibitory sign is displayed on the target object; the connection cannot be attached to this object.

Both objects are linked by a connection.

Subsequently using the mini toolbar

1. Click the object in the model window you want to connect with another object. The mini toolbar is shown.
2. In the mini toolbar, click  **Create connection**.
3. Click a target object that can be connected to the source object. If the method does not allow objects to be connected to one another, a prohibitory sign is displayed on the target object; the connection cannot be attached to this object.

Both objects are linked by a connection.

You have linked objects in the model window.

3.5.1.3.1.18 Place text

You can place text in the model window (page 270) irrespective of other model items. This way you can add additional information to your model.

Procedure

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click  **Text**.
3. Click the position in the model window where you want to place the text. A text box is inserted.
4. Enter your text in the text box and press the **Ctrl + Enter** keys for line breaks.
5. Press **Enter**.

The text is inserted into the model window. You can format (page 302) the text in just the same way as placed text attributes.

3.5.1.3.1.19 Insert graphic

You can place images and graphics in the model window (page 270) in order to add further information to the model or to optimize the design. For example, you can optimize a model for representation purposes.

Procedure

1. Open the relevant model.
2. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
3. Click  **Graphic**. The **Select graphic** dialog opens.
4. Click **Select file** and use the **Open** dialog to navigate to the directory in which the required graphic or image is stored.
5. Select the graphic or image and click **Open**.

The image or graphic is placed in the model window. You can change its size, drag it to another position, and place it behind model items (page 338), for example.

3.5.1.3.1.20 Adjust size of appearance

You can change the size that models and model items are displayed in.

Procedure

1. Click  **Fit to window** in the Display bar.
If you have not selected a model item, the entire model content is placed in the visible area.
If you have selected one or more model items, their size of appearance is adjusted so that the selected model items are optimally placed in the visible area.
2. In the Display bar, click  **Original size**. The model content is output in the size 100 %.
3. In the Display bar, click  **Zoom in**. The model content is enlarged by 10 %.
4. In the Display bar, click  **Zoom out**. The model content is reduced in size by 10 %.

You have resized the model according to your requirements.

3.5.1.3.1.21 Select connected object

You can select the object that is linked to the selected object by a connection.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet. The relationships of the selected object are listed.
4. Next to the name of the occurrence of a relationship  (connection), click  **More > Go to object**.

The connected object is selected in the model window.

3.5.1.3.1.22 Display and select connection

You can view and select the connection between a source and target object.

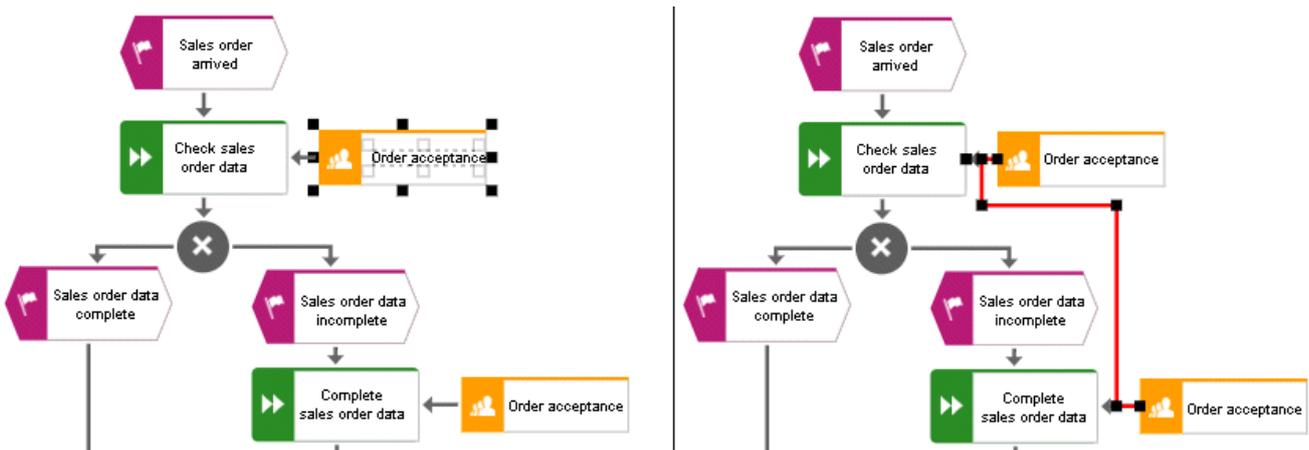
Procedure

1. Click **i Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet. The relationships of the selected object are listed.
4. Next to the name of the occurrence of a relationship  (connection), click **More >**
Display connection.

The connection between source and target object is selected. If multiple occurrences of a source object are used in a model, any connections that do not yet exist between the occurrences and the target object are created and selected.

Example

The following graphic shows two occurrences of the **Order acceptance** object. If you select one of the two occurrences and enable the **Display connection** function for the **carries out** connection linking the selected occurrence to the **Check sales order data** object, a **carries out** connection is also created to the target object from the other object occurrence that had a connection only to the **Complete sales order data** object before.



3.5.1.3.1.23 Delete connection

You can delete connections that do not have any occurrences in models for specific objects.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet. The relationships of the selected object are listed.
4. Next to the name of a relationship that has no occurrences in a model  (connection), click  **More >**  **Delete**.

If the connection no longer has any occurrences in any model, it is deleted. If it still has an occurrence in a model, a message is displayed and the connection is not deleted.

3.5.1.3.1.24 Display occurrences in an open model

You can display the usage of the selected object and connection occurrences in the open model.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Select the relevant occurrence in the model window.
3. Click the **Occurrences** tab if it is not activated yet. The usage of the selected occurrence is displayed in the areas **In this model** and **In other models**.
4. Navigate to the individual occurrences in the model, if multiple occurrences exist. To do this, use the navigation buttons in the **In this model** area.
 - a. From top to bottom or left to right: Click the  right arrow.
 - b. From bottom to top or right to left: Click the  left arrow.
 - c. Select occurrence directly: Click  direct selection and then the number of the relevant occurrence.

The occurrence selected is highlighted. If it is placed outside the visible area, the model display is moved automatically so that the selected occurrence is placed in the visible area.

3.5.1.3.1.25 Display occurrences in other models

You can display the usage of the selected object and connection occurrences in other models than the open model.

Procedure

1. Click **i Properties**. The Properties bar opens.
2. Select the relevant occurrence in the model window.
3. Click the **Occurrences** tab if it is not activated yet. The usage of the selected occurrence is displayed in the areas **In this model** and **In other models**.
4. In the **In other models** area, click the name of the model in which the occurrence is to be selected.

The selected model opens in a new tab and the occurrence is highlighted. If multiple occurrences of the object exist in this model, the top one is highlighted.

3.5.1.3.1.26 Display relationships of selected objects

You can display the relationships of selected objects (page 319).

Procedure

1. Click **i Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet.

The relationships of the selected object are listed. If a relationship has an occurrence as a connection, you can select the object (page 304) that is linked to the selected object by the connection. You can also delete connections that do not have any occurrences in models.

3.5.1.3.1.27 Delete model items

You can delete model items from the model window (page 270).

Procedure

Using the tab bar

1. Select the model items you want to delete.
2. Click  **Delete** in the tab bar.

The selected elements are deleted without prompting. As long as you have not saved the model you can undo the deletion by clicking  **Undo**.

Using the Delete key

1. Select the model items you want to delete.
2. Press the **Del** key.

The selected elements are deleted without prompting. As long as you have not saved the model you can undo the deletion by clicking  **Undo**.

You have deleted model items from the model window.

3.5.1.3.1.28 Refresh model appearance

You can refresh the model appearance in order to display current content from the database. This is useful if several people work with the model items. For example, names of objects that have an occurrence in the model you have opened may have been changed.

Procedure

1. Make the relevant changes in your model.
2. Click  **Refresh** if you want to compare the most current state of your model with the changes from other users.

The current data is read from the database and the appearance of your model is refreshed. If for example, the names of the objects used in the model were changed the new names are displayed.

3.5.1.3.1.29 Save model

Save your model.

Procedure

1. Make the required changes.
2. Click  **Save** in the tab bar.

Your changes are saved. You or others can access this model status at a later time.

3.5.1.3.1.30 Valuable information

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

3.5.1.3.1.30.1 Bars and buttons

3.5.1.3.1.30.1.1 What are tab bars for?

Tab bars enable you to access the relevant buttons within a specific context.

All tab bars contain frequently used buttons (page 276). This means that you do not need to switch between tab bars to access these buttons.

START TAB BAR

The **Start** tab bar groups the functions related to the representation and placement of model items (page 312).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 314).

FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 315).

BPMN TAB BAR

The BPMN tab bar is displayed if you have opened a BPMN diagram. It groups the functions that are used for the convenient editing of BPMN diagrams (page 317).

3.5.1.3.1.30.1.2 What general buttons are available?

The following general buttons are available for each tab bar.



Save: Saves your changes in the database.



Undo: Undoes editing steps.



Redo: Redoes editing steps that were undone.



Refresh: Refreshes the display. Reloads the data from the database and thereby also shows any changes made by a different editor in the meantime.



Delete: Deletes selected model items.



Cut: Cuts selected items and saves them to the clipboard.



Copy: Copies selected items to the clipboard.



Paste: Pastes the content of the clipboard into the model. If an object is on the clipboard, an occurrence copy (page 350) is inserted. Click the arrow next to the **Paste** icon if you want to paste a definition copy.

3.5.1.3.1.30.1.3 What buttons does the Start tab bar have?

Beside the general buttons (page 276), the **Start** tab bar provides the following buttons.



Format painter: Transfers the format (page 331) from one item to another.



Fill color: Colors the item in the selected color (page 331).



Line color: Colors the line of the item in the selected color (page 333).



Equation 1: Edit

Line style and weight: Assigns selected items a different style (page 334) (**Dotted**, **Dashed**, or **Solid**) and defines the weight (page 334).



Appearance: Assigns other properties to or removes properties from selected items (page 335), such as **Shaded**, **3-D effect**, and in addition, **Active** for objects.



Change symbol: Changes the symbol (page 295) of a selected object or the symbols of all selected objects of a type.



Attribute placement: Places attributes at the preset positions.



Assignments: Assigns a new model to the selected object (page 336). The type and name of the new model can be selected.



Arrange: Positions selected items (page 338) behind or in front of other items.



Group/Ungroup: Groups selected items (page 338), so that they can be treated like a single item or ungroups them (page 338).



Align: Aligns selected items in the model area with regard to each other (page 339).



Match size of items: Matches the size of selected model items with each other (page 339).



Go to occurrence in Repository: Opens a new tab showing the repository for the selected object or model and enables the relevant check box.



Alfabet: Provides functionality for establishing connections (page 345) with Alfabet.

3.5.1.3.1.30.1.4 What buttons does the Model tab bar have?

Beside the general buttons (page 276), the **Model** tab bar provides the following buttons.



Check diagram: Starts the selected semantic check (page 432) for the current model or the selected objects.



Optimize layout: Automatically creates a new layout for the model (page 343).



Horizontal space: Inserts space in your model (page 343) from left to right.



Vertical space: Inserts space in your model (page 343) from top to bottom.



Export graphic: Exports the graphic of the model (page 341) to your download area.



Connection properties: Determines the bridge height and rounding intensity of connections (page 295).



Grid: Shows and hides (page 290) the grid in the model windows and sets the grid width (page 290).



Template: Provides the available model templates for selection (page 268).

3.5.1.3.1.30.1.5 What buttons does the Format tab bar have?

Beside the general buttons (page 276), the **Format** tab bar provides the following buttons.



Format painter: Transfers the format (page 331) from one item to another.



Font format: Provides the available font formats for selection.



Bold: Applies bold formatting to a text.



Italic: Applies italic formatting to a text.



Underline: Applies underline formatting to a text.



Strikethrough: Applies strikethrough formatting to a text.



Font color: Opens the color palette for you to change the color of the selected text.



Font: Provides all fonts available for the selected text.



Font size: Enables you to change the font size for the selected text.



Reset character formatting: Undoes all formatting changes.



Increase indent: Increases the text indent from the left margin.



Decrease indent: Decreases the text indent from the left margin.



Bullets: Applies a bullet to each paragraph of the selected text.



Numbering: Turns the paragraphs of the selected text into a numbered list, starting at 1.



Align left: Aligns selected text to the left.



Centered: Aligns selected text to the center.



Align right: Aligns selected text to the right.

3.5.1.3.1.30.1.6 What buttons does the BPMN tab bar have?

Beside the general buttons (page 276), the **BPMN** tab bar provides the following buttons.



Change symbol: Changes the symbol (page 295) of a selected object or the symbols of all selected objects of a type.



Add lane: Adds a new lane (page 405) to a pool or lane.



Insert lane: Inserts a selected lane in the selected pool or lane (page 405).



Delete pool or lane: Deletes the selected pool or lane (page 406).



Move lane: Moves the selected lane (page 405) in the required direction.



Transform into call conversation: Transforms communication elements into call conversations (page 406).



Change type of sequence flow: Specifies the type of a sequence flow (page 406).



Collapse subprocess: Collapses a subprocess object (page 407).



Expand subprocess: Expands a subprocess object (page 407).



Figure 1: Edit

Edit: Opens the assigned model contained in the subprocess (page 407) on a separate tab for editing.



Select global reference: Opens the dialog **Select global process or task** to assign it to a Call activity (page 408).

3.5.1.3.1.30.1.7 What is the mini toolbar for?

The mini toolbar provides you with exactly the object symbols that can be linked to the selected object using a connection.



When you place an object symbol from the mini toolbar in the model window a connection between the selected object and the new object symbol is created at the same time. In addition, you can use the mini toolbar to create connections to existing objects.

The mini toolbar is configured for each object type. When you click an object, the mini toolbar provides the object symbols you selected for the underlying object type.

3.5.1.3.1.30.2 Model display

3.5.1.3.1.30.2.1 How are object relationships displayed by symbols?

The relationships are identified by the following symbols:



Symbol for relationships for which an occurrence or an implicit connection exists in the current model.



Symbol for assignment relationships (implicit relationships).



Symbol for relationships for which no occurrences exist in the current model and that are not implicit either.

For example, if a connection was created between objects **A** and **B** and object **B** has been deleted, the relationship is displayed when object **A** is selected.

3.5.1.3.1.30.2.2 What to consider when placing objects in/on objects

You can place objects on other objects (page 325) or in other objects (page 325). The difference between these two procedures is as follows: When placing an object **on** another object you specify that no implicit connection will be created between the objects. In contrast, when placing an object **in** another object you specify that an implicit connection is to be created between the objects.

You can place multiple objects of one type in an object at once. If you want to embed two objects at once and object 1 already has a connection to the enclosing object while object 2 has none, proceed as follows when creating connections:

- Select the connection that exists between object 1 and the enclosing object: This connection now links both objects to the enclosing object.
- Select a connection other than the one that exists between object 1 and the enclosing object: Object 1 is now linked to the enclosing object via two connections - the existing connection and the one you have selected. Object 2 uses the new connection.

Objects that were placed in other objects are also moved when the enclosing object is moved. If an enclosing object is selected, the embedded object is selected as well. This indicates clearly that an object is embedded in another object. In contrast, a non-embedded object is neither selected nor moved when the object on which it was placed is selected or moved.

You can drag an embedded object from an enclosing object to the model background. The connections linking the objects are then displayed.

3.5.1.3.1.30.2.3 Which items can be copied from one model to another?

You can copy graphic objects, such as circles, free-form texts, graphics, and objects, from one model to another.

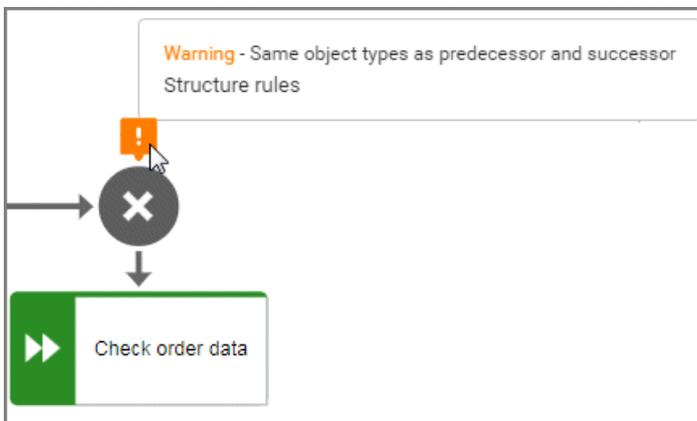
However, for an object to be pasted in the target model it has to be allowed there by the method. For example, if you copy functions and organizational units in the source model, only the organizational units will be pasted into a model of the **Organizational chart** type because functions are not allowed in this model type. The corresponding information is provided by the preview frames of the copied functions, showing as crossed out with an X when they are pasted into the organizational chart.

3.5.1.3.1.30.2.4 How are errors, warnings, and notes marked in the model?

If a semantic check finds errors, warnings, or notes, the corresponding object is marked in the model.

Information type	Marker
Error	
Warning	
Note	

If, for example, a warning is found, the warning marker is placed above the corresponding object. When you position the mouse pointer over the warning marker, additional information on the warning is displayed.



You can show detailed information in the **Semantic checks** bar by expanding an entry.

#	Item	Finding	Description
1	> ● AND rule	! Structure rules	Same object types as predecessor and successor
2	▼ ● XOR rule	! Structure rules Warning	Rule: Order at the rule must be observed At occurrence level, this rule checks whether or not at objects of type "Rule" redundancies exist for the set of preceding object types and the set of subsequent object types. When all incoming connections come from events, then all outgoing connections may only lead to functions, and vice versa.

3.5.1.3.1.30.3 ARIS and Alfabet

3.5.1.3.1.30.3.1 What is Alfabet?

Alfabet is an IT planning and portfolio management system. Based on answering the questions, when, where, how and why to make changes in the IT portfolio, it is used to increase IT investment returns and reduce transformation risks.

3.5.1.3.1.30.3.2 How do ARIS and Alfabet interact?

You can use the **ARIS - Alfabet Interoperability Interface** to reuse objects from ARIS and Alfabet databases in the respective other system. This is done interactively and for one object at a time or as a batch job and for multiple objects. By default, data from applications can be transferred from Alfabet to the ARIS database, while processes and functions can be transferred from ARIS to the Alfabet database.

It is easy to navigate between the systems. For example, from a business process in Alfabet, you can jump to the corresponding function or to a model in ARIS Connect that contains the function.

3.5.1.3.1.30.3.3 When is the Alfabet button shown?

When Alfabet is configured with ARIS Architect, the Alfabet button is available in the Start (page 312) tab bar. You can find the complete configuration description in the ARIS Architect online help.

3.5.1.3.1.30.4 **Macros**

3.5.1.3.1.30.4.1 **What are macros?**

Macros are command sequences with which recurring actions can be automated.

Macros can be started manually in ARIS Architect or automatically in ARIS Architect and ARIS Connect. To start macros automatically, you can define that a macro is started when a certain event occurs (page 323).

For example, you can specify that the **Output model information** report is generated whenever a model of a specific type is saved (event **Model saved**). Or you can specify that whenever a new object occurrence of a specific object type is placed in a model of a specific model type the object symbol is always colored blue (event **Object occurrence created**).

3.5.1.3.1.30.4.2 **Where to choose macro events for ARIS Connect Designer?**

On the **Administration** tab in ARIS Architect, you can choose the macro events to start macros (page 323) in ARIS Connect Designer.

Click **ARIS > Administration** to open the tab. Click **Evaluations > Macros** to open the macro categories. In the appropriate category, right-click the relevant macro and click **Properties**. In the **Property** dialog, click **Context** and enable the option button **Event**. Click **Select event**. In the dialog, the **Available in ARIS Connect** column in the dialog box indicates the events that can be used in ARIS Connect start a macro.

3.5.1.3.1.30.4.3 **What does the addition vetoable in macro names mean?**

Some macro names have the addition **vetoable**. This indicates the ability of a macro developer to suppress standard functionality.

You can define a macro that starts, for example, a semantic check automatically when a user saves a model. The semantic check is triggered by the **Model is to be saved (vetoable)** event. To suppress the save operation for non-compliant models, you must include the line **Context.setProperty("event.veto", "1")** into the corresponding statement block. The model is saved only if the semantic check rules are met.

3.5.1.3.2 Extended editing

Besides the basic editing options, Model Editor provides you with additional functionality, such as copying formatting (page 331), creating groupings (page 338), applying various colors (page 332), inserting user-defined descriptions (page 329), or automatic resizing of objects (page 339).

3.5.1.3.2.1 Use objects

3.5.1.3.2.1.1 Find objects in an open model

You can have objects selected in the model window. If the object is not located in the visible area of the model window the visible area is moved and the object is displayed as selected in the visible area.

Procedure

1. Click the  **Find** bar button. The Find bar opens.
2. Enter a part of the name or the entire name for the object to be found.
3. Click either  **Search down** or  **Search up**, depending on the direction in which you want to search for objects. The next object whose name contains the term entered is selected. If it is located outside of the visible area it is placed in the visible area.
4. Click  **Search down** or  **Search up** again. The next object with the term in its name is selected.

Each time you click the up and down buttons the next occurrence is selected. If a corresponding object cannot be found in the one direction the first occurrence is selected again.

3.5.1.3.2.1.2 Show where object occurrences are used

You can display where occurrences of an object are used and select the required occurrence using the navigation controls.

Procedure

1. Select an object in the model.
2. Click  **Properties**. The Properties bar opens.
3. Click the **Occurrences** 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.
4. Click the left or right arrow to navigate to the next occurrence in the model. The next occurrence is selected and its number updated.
5. To directly select an occurrence, expand the drop-down list and click the occurrence number.
6. To open a model that contains an occurrence of the selected object, click the name of the model in the **In other models** 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 tab is shown, for example, **Overview**

In the **In other models** area, all models are displayed to which you have at least read access. You switched between the occurrences of an object using the navigation controls.

3.5.1.3.2.1.3 Place an object in an object

You can place an object in another object. The object then overlaps the object in which it is placed and has an implicit connection to this object. Implicit connections are connections that are not being displayed while an object is placed in another object.

Procedure

1. Click the object you want to place in another object, and hold down the mouse button.
2. Drag the object on top of the other object, position it inside the other object's borders, and release the mouse button. If multiple connections are available between the two objects, the connection selection is displayed. A right arrow is added to the outgoing connections of the embedded object, while a left arrow is added to the incoming connections.
3. Click the connection you want to draw between these two objects. The connection created is an implicit connection, which means that it is not displayed while the object is embedded in the other object.

The object is now placed in the other object. Due to the existing implicit connection, the embedded object is also selected or moved when the object in which it was placed is selected or moved.

Tip

You can place multiple objects of one type in an object at once.

3.5.1.3.2.1.4 Place an object on an object

You can place an object on another object. The object then overlaps the object on which it is placed, but has no implicit connection to this object. Implicit connections are connections that are not being displayed while an object is placed in another object.

Procedure

1. Click the object you want to place on another object, and hold down the mouse button.
2. Drag the object on top of the other object, position it inside the other object's borders, and release the mouse button. The connection selection is displayed.
3. Click **× No connection**. Thus, no connection is created between the two objects.

The object is now placed on the other object. Due to the lack of an implicit connection, the embedded object is neither selected nor moved when the object on which it was placed is selected or moved.

3.5.1.3.2.2 Use documents

3.5.1.3.2.2.1 Upload documents

You can upload documents to ARIS document storage and assign them to models and objects (page 327) in order to supplement these with detailed descriptions and graphics, for example. We strongly recommend that you check documents for malicious software before uploading.

Prerequisite

The filter in use (page 286) allows the **ARIS document storage Link** attribute.

Procedure

1. Open (page 288) the relevant model.
2. Click  **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Show the **ARIS document storage Link** attribute.
5. In the editing cell of the **ARIS document storage Link** attribute, click  **Edit**. The **Select document** dialog opens.
6. Select **ARIS document storage** if it is not yet selected.
7. Select the folder in which you want to save the document.
8. Click  **Upload new document**. The dialog opens.
9. Click **Browse**. The dialog opens.
10. Navigate to the relevant document, select it, and click **Open**.
11. The dialog closes and you may enter the document's title, a description, as well as tags (keywords) enabling the document to be identified in ARIS document storage.
12. Click **Upload**.

Once the upload of the document is complete, you can assign it to models and objects (page 327).

3.5.1.3.2.2 Assign documents

You can supplement individual models and objects with, for example, detailed information and graphics by assigning documents available in ARIS document storage to them.

Prerequisite

The filter in use allows the **ARIS document storage Link** attribute.

Procedure

1. Open (page 288) the relevant model.
2. Select the object to which you want to assign a document, or ensure that no object is selected if you want to assign the document to the model.
3. Click  **Properties**. The Properties bar opens.
4. Click the **Attributes** tab if it is not activated yet.
5. Show (page 266) the **ARIS document storage Link** attribute.
6. In the editing cell of the **ARIS document storage Link** attribute, click  **Edit**. The **Select document** dialog opens.
7. Select ARIS document storage if it is not yet selected.
8. Select the folder containing the relevant document.
9. Enable the option button of the document you want to assign.
10. Click **OK**.

The document is assigned to the item.

On the **Documents** tab, a document with the **ARIS document storage Link** attribute is marked with  for objects and  for models. If a document title was specified, it is shown, otherwise the complete link to the document in ARIS document storage. You can place the attribute (page 378). To ensure that the name you specify is placed in the model instead of the link, you can show the **ARIS document storage Title** attribute from the **Attributes** tab (**Properties** bar). If you specify a name for the attribute, this name is displayed in the model instead of the contents of the placed **ARIS document storage Link** attribute.

3.5.1.3.2.2.3 Open assigned document

You can easily open an assigned document.

Procedure

Placed attribute

You have placed the **ARIS document storage Link** attribute in the model.

Procedure

Double-click the placed attribute.

From the Attributes bar

1. Activate (page 266) the **Attributes** bar.
2. Show the **ARIS document storage Link** attribute.
3. Click the entry in the editing cell.

You can either open or save the assigned document.

3.5.1.3.2.2.4 Link documents

You can link documents available in ARIS document storage directly with individual models and objects and thus supplement them with detailed descriptions and graphics, for example.

Procedure

1. Open (page 288) the relevant model.
2. Select the object for which you want to create a link to a document, or ensure that no object is selected if you want to link the document with the model.
3. Click **i Properties**.
4. Activate the **Documents** bar.
5. Click **+ Add**.
6. In ARIS document storage, click the folder containing the relevant document.
7. Enable the check box for the required document, and click **OK**.

The document is linked with the item.

On the **Documents** tab, a mark is shown:  for objects and  for models. If a document title was specified, it is shown, otherwise the complete link in ARIS document storage.

3.5.1.3.2.2.5 Open linked document

You can easily open an assigned document.

Procedure

1. Activate (page 266) the **Documents** bar.
2. Click a document.

You can either open or save the linked document.

3.5.1.3.2.2.6 Use the Documentation attribute

You can describe database and model items (models, objects, groups, etc.) using formatted documents or other files and save these documents in the **Documentation** attribute. If you are using the Microsoft® Word file formats **DOC** and **DOCX**, a preview is available and the  **Edit** button is available. You can also create the documents directly from the **Documentation** attribute.

Procedure

Insert an external description

Prerequisite

You are using Microsoft® Word.

Procedure

1. Start ARIS Connect and open ARIS Connect Designer.
2. Select the item to which you want to assign the description and which does not yet have an external description.
3. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 266).
4. Click  **Edit** in the attribute row. Microsoft® Word opens with a blank document.
5. Enter your description and click Save.

The description is assigned to the item. When you click  **Edit** again, the document opens and you can edit it.

Import external description

1. Create an external description and save it, for example, in Microsoft Word.
2. Start ARIS Connect and open ARIS Connect Designer.
3. Select the item you want to assign the description to.
4. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 266).
5. Click  **Import** in the attribute row. The **Select document** dialog opens.
6. Click **Select file** and select the newly created external description in the dialog.
7. Click **Open**.

The document is inserted in the **Documentation** attribute.

Edit an external description

If you are using the Microsoft® Word file formats **DOC** and **DOCX**, a preview is available and the  **Edit** button is available.

Warning

Due to technical restrictions external descriptions cannot be locked if they are open in the editor. Therefore, it is possible that a user deletes an external description in ARIS Connect while it is being edited by another user in the text editor. In this case, all changes of the description are deleted without the editing user being notified.

Procedure

1. If the attribute is not displayed: Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 266).
2. Click  **Edit** in the attribute row. The word processor is launched and the document opens.
3. Edit and save the document.
4. Close Microsoft® Word and activate ARIS Connect.
5. If necessary, click  **Update**.

The document is added to the **Documentation** attribute and a preview is displayed.

Display external descriptions read-only

1. Select the item the description of which you want to display.
2. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 266).
3. Click  **Display**. Depending on your browser, you may be asked whether you want to save or open the file.
4. Select **Open**. The corresponding program launches and the file opens in read-only mode.

You can now find out about the content of the document.

If you decide to save the document, you must save it with a name that differs from its previous name. Thus, a copy is created. It is, however, not inserted into the **Documentation** attribute.

Refresh the preview of the external description

1. Select the item the description of which you want to display.
2. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 266).
3. Click  **Refresh**.

The display of the **Documentation** attribute is updated so that the changes you have made will be displayed.

You have described a database or model item with a formatted document.

3.5.1.3.2.3 Format items

3.5.1.3.2.3.1 Format painter

You can copy the formats of a selected item to another item or to several other items. This way, you can transfer the format of one object to all other objects and need not to transfer it to each object individually.

Procedure

1. Select the model item whose format you want to copy.
2. Activate the Start (page 312) tab bar.
3. Click  **Format painter**.
4. If you want to copy the format to one item: click the relevant item.
If you want to copy the format to more than one item: use the mouse to draw a border around the relevant items. You can also press the **Ctrl** key and click the required items one after the other.

The format of the selected items is adjusted accordingly.

3.5.1.3.2.3.2 Color model items

You can assign a different color to object symbols and graphic objects.

Procedure

1. Select the model items you want to color.
2. Activate the Start (page 312) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click the color you want to color the selected model item with. The selected model items are colored with the selected color. The color palette closes.

You have colored the selected model items.

3.5.1.3.2.3.3 Color model items with a user-defined color

You can assign your own color to object symbols and graphic objects.

Procedure

1. Select the model items you want to color.
2. Activate the Start (page 312) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click **Choose your own color**. The **Define color** dialog opens.
5. Select your own color in one of the ways described below. Your changes will be displayed in the preview window on the right:
 - a. Click the color bar and move the line to the relevant color range to select the basic color. Then click on the relevant position in the color box to select the brightness of the basic color.
 - b. Enter the respective share of each color from 0 to 255 in the **Red**, **Green** and **Blue** boxes. 0 means that the corresponding color is absent. If you enter **0** in all three boxes you have selected the color **black**.
 - c. Enter a hexadecimal color definition in the **Color code: #** box. The hexadecimal system uses the letters A to F in addition to the numerals of the decimal system, which means that it is based on the base 16. If you enter FFFF00, this sets the color to **Yellow**.
6. Click **OK**.

You have colored the selected model items with a self-defined color.

3.5.1.3.2.3.4 Color model items with a gradient

You can color object symbols and graphic objects with a gradient.

Procedure

1. Select the model items you want to color.
2. Activate the Start (page 312) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click **Choose your own color**. The **Define color** dialog opens.
5. Enable the **Gradient** check box. Two color boxes and a list box for the direction of the gradient are displayed.
6. Click the first color box and select the start color (page 332) for the gradient.
7. Click the second color box and select the second color (page 332) for the gradient.
8. Click the list box and select the direction of the gradient.
9. Click **OK**.

You have colored the selected model items with a gradient.

3.5.1.3.2.3.5 Display model items without color

You can display object symbols and graphic objects without a color fill.

Procedure

1. Select the model items you want to display without color.
2. Activate the Start (page 312) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click **No fill color**.

The selected model items are displayed without color.

3.5.1.3.2.3.6 Reset object symbol color

You can reset the color of an object symbol back to the default color if you have changed the color.

Procedure

1. Select the object symbol you colored.
2. Activate the Start (page 312) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click  **Reset**.

You have reset the color of the selected object symbols to their original color.

3.5.1.3.2.3.7 Color borders and lines

You can assign a different color to the borders of object symbols and graphic objects, as well as connections.

Procedure

1. Select the model items whose borders you want to color.
2. Activate the Start (page 312) tab bar.
3. Click  **Line color**. The color palette opens.
4. Click the color you want to color the borders and lines of the selected model items with.

You have colored the borders and lines of the selected model items.

3.5.1.3.2.3.8 Reset border and line color

You can reset the colors of the borders and lines of model items if you changed their color.

Procedure

1. Select the model items whose borders or lines you colored.
2. Activate the Start (page 312) tab bar.
3. Click  **Line color**. The color palette opens.
4. Click  **Reset**.

You have reset the colors of the borders and lines of selected model items.

3.5.1.3.2.3.9 Change line style

You can assign a different style to the borders of object symbols, graphic objects, and connections.

Procedure

1. Select the model items whose border and line style you want to change.
2. Activate the Start (page 312) tab bar.
3. Click  **Line style and weight**. The style selection opens.
4. Click **Dotted**, **Dashed**, or **Solid**, depending on which style you want to assign to the selected elements.

The style of the borders and lines of the selected model items is adjusted accordingly.

3.5.1.3.2.3.10 Change line weight

You can change the weight of the borders of object symbols, graphic objects, and connections.

Procedure

1. Select the model items whose line weight for borders and lines you want to change.
2. Activate the Start (page 312) tab bar.
3. Click  **Line style and weight**. The weight selection opens.
4. Click **0 point**, **2 point**, **4 point**, or **8 point**, depending on which weight you want to assign to the borders and lines of the selected model items.

The weight of the borders and lines of the selected model items is adjusted accordingly.

3.5.1.3.2.3.11 Change item appearance

You can change the appearance of model items in the model window.

Procedure

1. Select the model items whose appearance you want to define.
2. Activate the Start (page 312) tab bar.
3. Click  **Appearance**. The appearance selection opens.
4. Click **Shaded** if the selected items are to have a shadow. The check box is enabled. Connections cannot have a shadow.
5. Click **3-D effect** if the selected items are to be displayed in 3-D style. The check box is enabled. Connections cannot be displayed in a 3-D style.
6. Click **Active** if the selected items are to be displayed as inactive. The check box is disabled. Objects are displayed without color and with a gray border, connections are displayed in gray. Graphic objects cannot be displayed as inactive.

You have defined the appearance of model items. To change a setting again, click the relevant option again.

3.5.1.3.2.4 Assign models

3.5.1.3.2.4.1 Assign a model to an object

You can assign models to objects. The assignment enables you to describe objects in independent models in more detail, for example. Assigned models are displayed by way of an  assignment icon at the object and can be opened by double-clicking the assignment icon.

Procedure

1. In the open model, click the object to which you want to assign a new model.
2. Activate the Start (page 312) tab bar.
3. Click  **Assignment** >  **Create assignment**. The dialog opens.
4. Select the required model type. The model types that are allowed for the selected object by the method and by the method filter (page 286) in use are available for selection.
5. Enter the relevant model name. The name of the selected object is suggested as a model name.
6. Click **OK**.

The new model is assigned to the selected object and opens on a separate tab. You can model the required content.

3.5.1.3.2.4.2 Open assigned model

You can open models that you assigned to objects.

Procedure

1. Navigate to the object for which you want to open an assigned model.
2. Double-click the  assignment icon.
If multiple models are assigned to the object, the **Select model** dialog is shown, where you can select the model you want to open.
If only one model is assigned to the object, it will open without prompting.

The assigned model opens and you can use it.

3.5.1.3.2.4.3 Delete model assignments

You can delete the relationship between objects and assigned models.

Procedure

1. Click the object with the assignment that you want to delete.
2. Activate the Start (page 312) tab bar.
3. Click  **Assignment** >  **Delete assignment**. The **Delete model assignment** dialog opens.
4. Enable the check box(es) of the model(s) for which you want to delete the assignment relationships.
5. Click **OK**.

The selected assignment relationships are deleted without prompting for confirmation.

3.5.1.3.2.5 Use model items

3.5.1.3.2.5.1 Place model items one behind the other

You can specify in which order overlapping model items are placed one behind the other in the model window.

In the example below, it is assumed that you have created the three objects **1**, **2**, and **3** in sequence. As the most recently placed objects are created at the highest level, object **3** is at the highest level and object **1** is at the lowest level. You want to reverse this sequence.

Procedure

1. Activate the Start (page 312) tab bar.
2. Select the object **3** and click  **Arrange** >  **Send backward**.
3. Select the object **1** and click  **Arrange** >  **Bring forward**.

Now, when you place the objects one behind the other they are placed in the order 1, 2, and 3.

In the same manner, you can place graphic objects such as squares or circles behind parts of objects to highlight these areas separately.

3.5.1.3.2.5.2 Group model items

You can group model items and then handle them as if they were a single object.

Procedure

1. Select the model items you want to group.
2. Activate the Start (page 312) tab bar.
3. Click  **Group/Ungroup** > **Group**. The selected model items are combined in a group (page 539). The handles are placed around the grouping.

To select all items in a group, click one of the previously independent items. You can now move them all together, for example.

3.5.1.3.2.5.3 Ungroup

You can undo the grouping of model items and move and edit the items of the group separately once again.

Procedure

1. Select the grouping you want to undo.
2. Activate the Start (page 312) tab bar.
3. Click  **Group/Ungroup** > **Ungroup**. The grouping is ungrouped. Each item has its own handles.

When you click one of the previously grouped items, it is now selected separately once again and can be moved separately.

3.5.1.3.2.5.4 **Align model items**

You can quickly align selected model items relative to each other.

Procedure

1. Select the model items you want to align.
2. Activate the Start (page 312) tab bar.
3. Click  **Align** and then the relevant alignment, for example, **Align left** or **Distribute vertically**.

The selected model items are aligned accordingly.

3.5.1.3.2.5.5 **Match size of items**

You can resize selected items so that they match.

Procedure

1. Select the different-sized model items you want to match.
2. Activate the Start (page 312) tab bar.
3. Click  **Match size of items** and then the relevant size change, for example,  **Same height (maximum)**.

The height of the selected model items is matched to that of the tallest item.

3.5.1.3.2.6 Lanes

3.5.1.3.2.6.1 Add a column/row to lane models

You can add new columns/rows to lane models (page 540). In the example, a row is added. The procedure for columns is the same.

Procedure

1. Click the relevant row header. The **+** **Add column/row** button is displayed.
2. Click **+** **Add column/row**. The **Insert lane** dialog opens.
3. Select the lane type you want to add.
4. Click **OK**.

The selected row is inserted under the marked row.

3.5.1.3.2.6.2 Delete a column/row from lane models

You can delete columns/rows from lane models (page 540). In the example, a row is deleted. The procedure for columns is the same.

Procedure

1. Click the relevant row header. The **-** **Delete column/row** button is displayed.
2. Click **-** **Delete column/row**.
If the row is not mandatory and contains no objects, it is deleted without prompting.
If the row is mandatory and must always exist in the model, you are informed of this and the row is not deleted.
If the row contains objects, you will be asked whether you want to delete the objects because the row can only be deleted after doing this.
3. Click **OK** if you are sure that the objects can be deleted together with the row.

The objects and the selected rows are deleted.

3.5.1.3.2.7 Export

3.5.1.3.2.7.1 Export model as a graphic

You can export the model as a graphic and use it in other programs.

Procedure

1. Open (page 288) the relevant model.
2. Ensure that no model item is selected.
3. Activate the Model (page 314) tab bar.
4. Click  **Export as a graphic** in the tab bar. The model graphic is created.
5. Decide whether to open or save the graphic. To save the graphic, confirm the Save options in the dialog.

The model graphic either opens in your graphics program or is available as a PNG file in your download area.

3.5.1.3.2.7.2 Export model items as a graphic

You can export parts of models as a graphic and use the graphic in other programs.

Procedure

1. Open (page 288) the relevant model.
2. Select the model item you want to export as a graphic.
3. Activate the Model (page 314) tab bar.
4. Click  **Export as a graphic** in the tab bar. The model item graphic is created.
5. Decide whether to open or save the graphic. To save the graphic, confirm the Save options in the dialog.

The model graphic either opens in your graphics program or is available as a PNG file in your download area.

3.5.1.3.2.7.3 Export BPMN diagram

You can export (page 408) a BPMN diagram (page 404).

Procedure

1. In the  **Repository**, select the group of the database containing the BPMN diagram. The group content is displayed.
2. In the row of the relevant BPMN diagram, click  **More**.
3. Click  **BPMN export**. The BPMN 2.0 diagram is validated. If modeling errors occur, these are highlighted in the diagram and must be corrected. A tip for solving an error is displayed when you move the mouse pointer over the highlighting. You can open or save the BPMN file.
4. Save the file at the required location.

You can use the exported BPMN diagram in other applications.

3.5.1.3.2.8 Layout

3.5.1.3.2.8.1 Optimize layout

You can generate the layout of a model automatically.

Procedure

1. Open the model whose layout you want to generate automatically.
2. Activate the Model (page 314) tab bar.
3. Click  **Layout**. The layout options are provided.
4. Specify your settings and click **OK**.

The objects of the model are realigned.

3.5.1.3.2.8.2 Insert space

You can insert space between model items, either from top to bottom or from left to right. You can then insert additional model items between the items you moved.

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Horizontal space** to insert space from left to right.
Click  **Vertical space** to insert space from top to bottom.
A horizontal or vertical line is shown in the model window.
3. Click the position from where you want to insert space.
4. Move the mouse pointer to the right to insert horizontal space, or down to insert vertical space. The covered model area is highlighted in green and a plus sign is added. This allows you to immediately identify which area is being freed up for new model items.
5. Click the position up to where you want to insert space. Objects, graphic objects, and free-form text are moved from the highlighted area.

You have added space between existing model items, which you can use to place other model items.

3.5.1.3.2.8.3 Remove space

You can remove space between model items, either from right to left or from bottom to top.

Procedure

1. Activate the Model (page 314) tab bar.
2. Click  **Horizontal space** to remove space from right to left.
Click  **Vertical space** to remove space from bottom to top.
A horizontal or vertical line is shown in the model window.
3. Click the position from where you want to remove space.
4. Move the mouse pointer to the left to remove horizontal space, or to the top to remove vertical space. The model area you select is highlighted in red and a minus sign is added. This enables you to immediately identify how much space will be reduced between the model items.
Once you can no longer delete any space between model items, the area covered is no longer increased when moving the mouse pointer.
5. Click the position up to where you want to remove space. The model items are moved accordingly.

You have successfully removed space between model items.

3.5.1.3.2.9 ARIS and Alfabet

3.5.1.3.2.9.1 Map Alfabet objects to ARIS objects

You can map an Alfabet object to an ARIS object. Multiple mapping is not possible. By default, objects of the **Application system type** type can be mapped. In the description, this object type is used as an example.

Prerequisite

The database is connected with Alfabet.

Procedure

1. Open a model that contains objects of the **Application system type** type.
2. Select the relevant application system type.
3. In the Start (page 312) tab bar, click  **Alfabet** >  **Map Alfabet object**. The **Select Alfabet object** dialog opens.
4. Select the Alfabet table, for example, **Application**. You will see only those Alfabet objects you have the privileges to use. If you start typing the object name into the **Filter** field, the number of entries will decrease.
5. Click the Alfabet object you want to map to the ARIS object. The option button is activated.
6. Click **OK**.

The mapping between the Alfabet object and the ARIS object has been created. The name of the Alfabet object is now used for the ARIS object. Additional attributes have been entered for this object in the **Alfabet** attribute type group in ARIS.

3.5.1.3.2.9.2 Create Alfabet object

You can create a missing Alfabet object to be mapped to an ARIS object.

Prerequisite

The database is connected with Alfabet.

Procedure

1. Open a model that contains objects of the **Application system type** type.
2. Select the relevant application system type.
3. In the Start (page 312) tab bar, click  **Alfabet** >  **Map Alfabet object**. The **Select Alfabet object** dialog opens.
4. Select the Alfabet table, for example, **Application**.
5. Click **Create Alfabet object** button. The Alfabet login dialog opens.
6. Create the object in Alfabet.
7. In the **Select Alfabet object** dialog of ARIS Connect Designer, click  **Refresh**.

The new object is listed in the table.

3.5.1.3.2.9.3 Unmap Alfabet object

You can delete the mapping between an ARIS object and an Alfabet object. By default, objects of the **Application system type** type can be mapped. In the description, this object type is used as an example.

Prerequisite

The database is connected with Alfabet.

Procedure

1. Open a model that contains objects that are mapped to Alfabet objects (page 345).
2. Select the relevant **Application system type** object.
3. In the Start (page 312) tab bar, click  **Alfabet** >  **Unmap Alfabet object**.

The mapping between the selected ARIS object and the Alfabet object is removed without prompting. All attributes in the **Alfabet** attribute type group are deleted. The name of the Alfabet object continues to be used for the ARIS object.

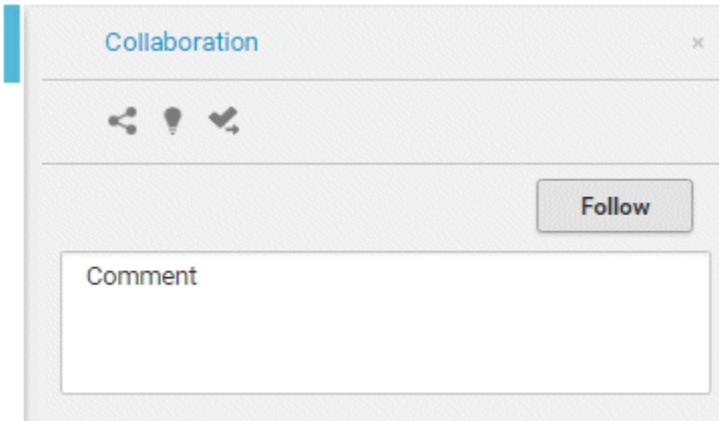
3.5.1.3.2.10 Enter comments

You can write comments about models, which can be read and answered by other users. This way you can participate in improving your own models and those of others.

Procedure

1. Click **Collaboration**. The Collaboration bar opens.

Click **Collaboration** to show the **Collaboration** bar that you can use to enter comments, improvement proposals, questions, etc., pertaining to the model (page 347).



1. Enter a comment or answer an existing comment.
2. Enter an http link to a Web site that provides additional information, e. g., **http://www.ariscommunity.com**. The entry must start with **http://**.
3. Click **Post**.

Your comment or reply is added and can be read by the other users. Accordingly, users can react to your input and you can improve the model together with them as required.

3.5.1.3.2.11 Select object or model in Repository

You can navigate from a model to the occurrence of a selected object or of the model in Explorer.

Prerequisite

Selected objects are saved.

Procedure

1. Select the object to whose occurrence you want to navigate to in Explorer. If you want to navigate to the occurrence of the model, make sure that no object is selected.
2. Activate the Start (page 312) tab bar.
3. Click  **Go to occurrence in Repository**.

A new tab showing the repository opens. The group structure of the database expands and the check box in front of the selected object or model is enabled in the detail view.

3.5.1.3.2.12 Generate report

You can generate and download a report for the open model or selected objects.

Procedure

1. Click  **Reports**. The **Reports** bar opens.
2. Select one or more objects or deselect all model elements to perform the action on the model.
3. Click the drop-down list box to display the list of available reports.
4. Leave the mouse pointer on the name of a report if you want to display its description.
5. Click the name of the relevant report.
6. Click the **Start** button if you want to output the report in the displayed format (page 157). To select a different output format, click the **Output format** field and select the format you want to use, e. g. **Output PDF**.
7. Click the **Start** button. The report is created.
8. If additional settings are required, dialogs are opened. Specify the settings.
9. When the report is created, the result is listed in the **Reports** bar, and a dialog to download the result opens.
10. Click  **Download result**. Depending on your browser settings, you can specify the download folder or the result is downloaded in the default download folder.
11. To download the result later, click  **Download report** in the **Reports** bar.

You generated the report for the open model or for the selected objects.

3.5.1.3.2.13 Create infographic

You can create an infographic for selected personas (objects of the **Persona** type). You can select an object in a fact sheet 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 you proceed 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 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
4. Click  **Navigation** if the navigation bar is not shown.
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 141)** report.
11. Select the output format (page 157), 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**.

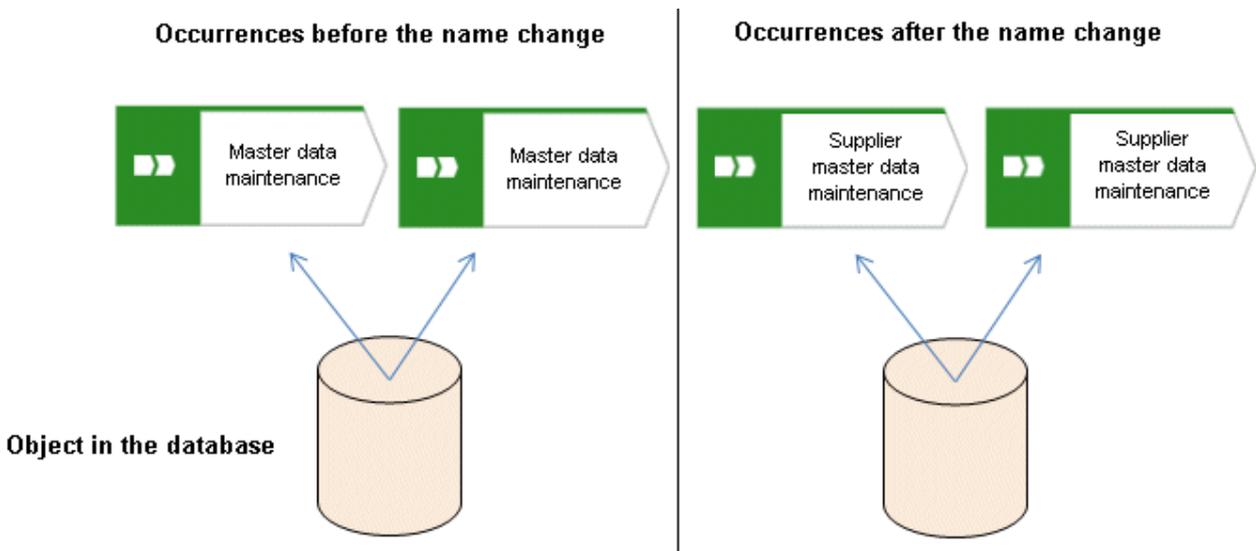
You have created an infographic for a persona. Depending on the attributes entered for the persona, the information graphic provides information about the personality, the goals, the frustrations, etc.

3.5.1.3.2.14 Valuable information

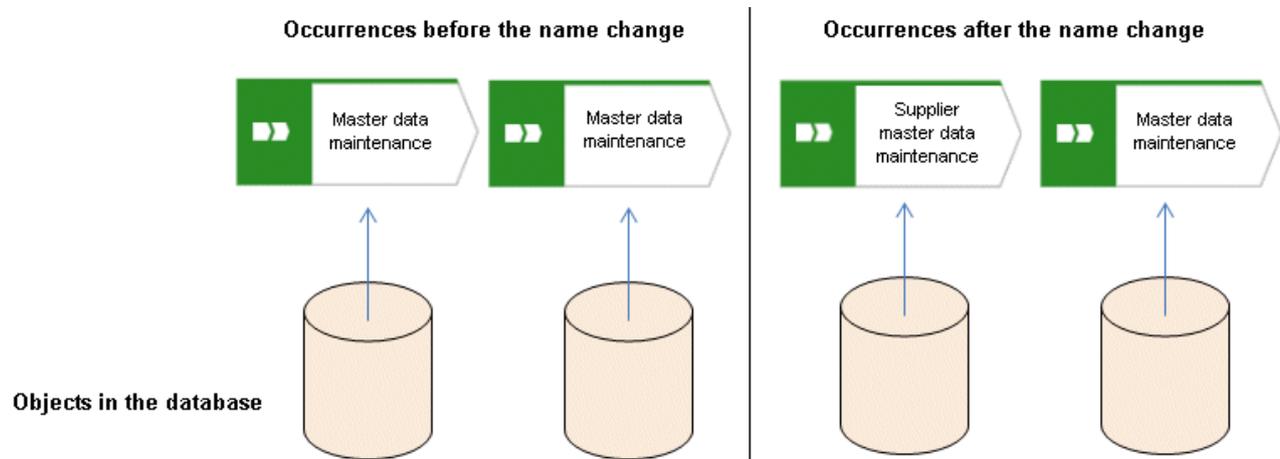
This section provides background information to assist you in carrying out the relevant procedures.

3.5.1.3.2.14.1 What is the difference between occurrence copy and definition copy?

An occurrence copy is only the copy of a graphical representation of an object. Thus, when you create an occurrence copy, a graphic is created that references the copied object:



When you create a definition copy, an entirely new object is created whose attributes are identical with those of the copied object:



If attributes of an object are changed, this change also applies to the corresponding attributes in all occurrences of the object. This becomes clear when changing the **Name** attribute:

	Source object	Occurrence copy	Definition copy
Before the name change			
After the name change			

3.5.1.3.2.14.2 Which items can be copied from one model to another?

You can copy graphic objects, such as circles, free-form texts, graphics, and objects, from one model to another.

However, for an object to be pasted in the target model it has to be allowed there by the method. For example, if you copy functions and organizational units in the source model, only the organizational units will be pasted into a model of the **Organizational chart** type because functions are not allowed in this model type. The corresponding information is provided by the preview frames of the copied functions, showing as crossed out with an X when they are pasted into the organizational chart.

3.5.1.3.2.14.3 Which formats are copied to which items?

You can copy the formats of a selected item to another item or to several other items. This depends on whether the format has been copied to one or more items and also the items between which the format is copied.

THE FOLLOWING FORMATS ARE COPIED:

- Fill color, including transparency and gradient
- Line style, weight, and color
- Shadow
- Active information of objects and connections
- Connection direction arrow (if the source and target connections are of the same connection type)

THE FORMAT CAN BE COPIED BETWEEN THE FOLLOWING ITEMS:

- Object occurrences
- Connection occurrences
- Attribute occurrences
- Graphic objects, for example, circle, square, etc.
- Free-form texts and placed model attributes
- Groupings (as the target, with the formats being copied to all items in the grouping as if the items were selected individually)

FORMAT COPYING AFFECTS THE FOLLOWING ATTRIBUTE PLACEMENT CHARACTERISTICS:

- Placement and sorting
- Font formats and individual characters as well as paragraph formatting for attribute definitions if the formatting includes the entire text.
- Alignment
- **With attribute name** and **As a symbol** settings

WHEN A FORMAT IS COPIED, IT AFFECTS THE FOLLOWING CHARACTERISTICS OF FREE-FORM TEXTS/PLACED MODEL ATTRIBUTES/ATTRIBUTE OCCURRENCES:

- Font formats
- Alignment
- **As a comment** setting
- **Character formatting** setting
- General character formatting.

3.5.1.3.2.14.4 Which formats are not copied?

You can copy the formats of a selected item to another item or to several other items. This depends on whether the format has been copied to one or more items and also the items between which the format is copied.

However, some formats are not copied:

- Model properties, for example, background color, grid, and print settings, and the **New connections only right-angled** setting are not copied for models.
- In terms of attribute placements, the text area size is not copied.
- The size is not copied for objects, free-form text/placed model attributes/attribute occurrences in order not to destroy the layout of models.

3.5.1.3.2.14.5 **How are formats copied to identical and different items?**

You can copy the formats of a selected item to another item or to several other items. This depends on whether the format has been copied to one or more items and also the items between which the format is copied.

It is possible to copy formats from one item to another identical item, but also from one item to a different item, for example, from an object occurrence to a connection occurrence. The items can be placed in different models.

Of course, the formats copied between different items are based on the formats that are available to all these items. Below, we will use the example of object occurrences to explain how formats are copied.

The object symbol size is not copied in order not to destroy the layout of models.

SOURCE AND TARGET OCCURRENCES ARE IDENTICAL

Object occurrences are identical if they are based on the same object type and have the same object symbol. All formats are copied.

PLACED SOURCE AND TARGET ATTRIBUTES ARE IDENTICAL

The copy format function causes the attribute placements of the source object occurrence to be transferred to the target object occurrence. This means that the target object occurrence receives the attribute placements of the source object occurrence.

SOURCE AND TARGET OBJECT OCCURRENCES DIFFER

- The source object occurrence is based on another object type than are the target object occurrences/All target object occurrences are identical: All formatting except for the fill color is copied.
For example, the formatting of an activity can be copied to a group of organizational units or graphic objects.
- The source object occurrence is based on another object type than are the target object occurrences/Target object occurrences differ: The formats are copied only to object occurrences that are identical to the source object occurrence. None of the other objects change at all.
This enables you to use the mouse to select model areas and copy the format without having to consider whether object occurrences will be changed unintentionally.

PLACED SOURCE AND TARGET ATTRIBUTES DIFFER

The copy format function copies the formats only from placed attributes that exist in both the source and target object occurrences. The position is not copied. If the source and target attributes have different placements, the attribute placements are not deleted or created.

3.5.1.3.2.14.6 How is the format copied to placed attributes?

You can copy the formats of a selected item to another item or to several other items.

The following applies to placed attributes and free-form texts:

- If object or connection occurrences are the target, all of the placed attributes of the target are modified. The position is not changed.
- If placed attributes or free-form texts are the target, the target text is modified. The position is not changed.

3.5.1.3.2.14.7 How is navigation via process interface enabled?

If you want to navigate from one process model of the **EPC** type to another, you can place an object of **Process interface** type in a model and assign the relevant process model (page 336) to the process interface.

If you open the **Steps** fact sheet of the model containing the process interface, you can easily jump to the assigned model by clicking on the process interface (page 104).

3.5.1.3.2.14.8 How can documents be linked?

Documents can be linked to models or objects in two ways:

Using the attributes of a model or object (page 327)

Directly using the Documents tab (page 328)

3.5.1.3.2.14.9 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.

3.5.1.3.2.14.9.1 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.

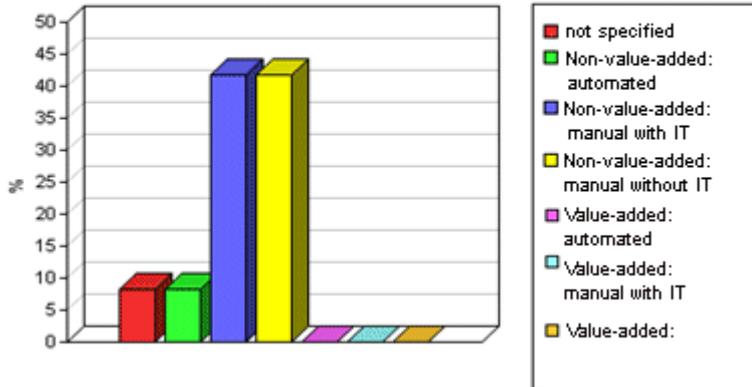
The following example is based on an analysis of the **Purchase order processing (actual)** and **Purchase order processing (target)** models. The **Assessment of value added** attribute is evaluated separately for each model. In this case, one worksheet is output with a table and one with charts.

TABLE

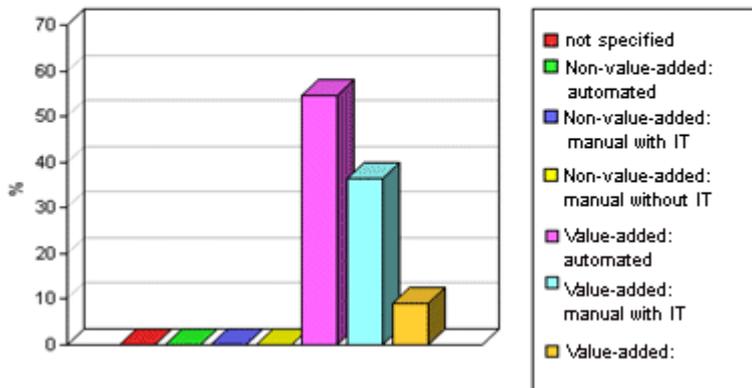
Analysis: Evaluate assessment of value added				
Created: 5/25/09 11:21 AM				
Server: horus.me.corp.ids-scheer.com				
Database: DemoDB-United Motors Group				
User: system				
File: Report0.xls				
Analyze classification				
Models:				
1.) United Motors Group\2. Processes\Process Architecture\Core 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

3.5.1.3.2.14.9.2 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:

Lukas Andrews



Age	32
Job title	Software Engineer
Family status	married
Location	Saarbruecken
Customer segment	Family

"The Best Things in Life Are Free"

About

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 has enough space that the entire family can drive into holidays.

Personally, he owns many electronic gadgets. Generally, he is sensitive to cost but can get carried away if he sees an innovative solution.

Personality

- conscientious
- detail oriented
- humorous
- playful

Goals

- save money for buying a house
- get promoted in his company
- exercise his favorite sport more often: Climbing

Frustrations

- reading manuals
- services that are overly time consuming
- sharing his personal data to unknown entities







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	<p>This text is shown beneath the About topic.</p> <p>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 has enough space that the entire family can drive into holidays.</p> <p>Personally, he owns many electronic gadgets. Generally, he is sensitive to cost but can get carried away if he sees an innovative solution.</p>

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	<ul style="list-style-type: none"> ▪ conscientious ▪ detail oriented ▪ humorous ▪ playful
Frustration	<ul style="list-style-type: none"> ▪ reading manuals ▪ services that are overly time consuming ▪ sharing his personal data to unknown entities
Goals	<ul style="list-style-type: none"> ▪ 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 **Customer segment Family** 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

3.5.1.3.2.14.9.3 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

3.5.1.3.2.14.9.4 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

3.5.1.3.2.14.9.5 **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

3.5.1.3.2.14.9.6 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

3.5.1.3.2.14.9.7 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

3.5.1.3.2.14.9.8 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

3.5.1.3.2.14.9.9 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

3.5.1.3.2.14.9.10 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

3.5.1.3.2.14.9.11 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

3.5.1.3.2.14.9.12 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:

- **Responsible** 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. Execution responsibility must be assigned to at least one role, although others (see **Supportive**) can be delegated to assist in the work required.
- **Accountable** 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.

- **Supportive** relates to the person supporting the person responsible (see 'Responsible') in performing the activity.
- **Consulted** 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.
- **Informed** 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

3.5.1.3.2.14.10 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

3.5.1.3.3 Use attributes

You can use attributes to describe and distinguish between models, objects and connections. You can place attributes directly in the model window (page 379), and specify for specific attributes that they are to be displayed as a symbol (page 382).

3.5.1.3.3.1 Customize Attributes tab

You can show additional attributes or specify whether and when attributes are to be shown.

Procedure

1. Click **i Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Edit language** if you want to show (page 376) an additional language column for language-specific attributes. You can select an additional database language and view and edit it next to the language currently used.
4. Click **Add** on the **Attributes** tab. The **Select attribute** dialog opens.
5. Enter a search term for the attribute you want to display. A list of all attributes whose names contain the term you entered is displayed.
6. Click the relevant attribute.
7. Click **OK**. The selected attribute is added to the **Attributes** tab.
8. Click **More** next to the attribute whose visibility you want to specify.
9. Click **Hide always** if you want to hide the attribute from the **Attributes** tab even if a value has been specified. For the attribute to be displayed at a later time you need to select it explicitly by clicking **Add**.
10. Click **Hide, if not specified** if you want the attribute to be displayed in the **Attributes** tab only if a value has been specified.
11. Click **Place attribute** and the relevant position in the model window if you want the attribute value to be displayed in the model.
12. Click **Delete attribute**, if you want to delete the attribute value. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

The attributes will be displayed in line with your settings.

3.5.1.3.3.2 Edit attributes

You can edit model attributes and the attributes of objects or connections.

Prerequisite

The attribute you selected can be edited. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. If you want to edit model attributes, ensure that no model item is selected.
If you want to edit object or connection attributes, select the corresponding object or connection.
4. Display the relevant attribute (page 300) if it is not listed.
5. Click the cell that comes after the name of the attribute. A dialog is displayed. If you can enter any text for an attribute, a dialog including the formatting toolbar is displayed. If required, you can enlarge (page 378) this dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times.
7. Click **OK**.

You have changed the attribute value.

3.5.1.3.3.3 Show language column

You can show a column for another language next to the original column. This enables you to compare and edit (page 377) the contents of language-dependent items in different languages. For example, you can use this option to translate language-dependent contents from one language into another.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click  **Edit language**. A second column is shown for language-dependent attributes.
4. Click the  **down arrow** in the header cell and select the required language.

The content of the language column is displayed in the language you have selected. If you change or enter attribute values, this is done in the selected language.

3.5.1.3.3.4 Hide language column

You can hide the shown language column (page 376) when you no longer need it.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click  **Hide language**.

The additional column for language-dependent attributes is removed, and only the column of the original language remains visible.

3.5.1.3.3.5 Edit attributes of various languages

You can edit model, object, and connection attributes in various languages as long as they are not system attributes.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Show the relevant attribute if it is not listed.
4. Show the required language column (page 376).
5. Click in the cell behind the attribute name. The **Edit** dialog and the selected language column are shown. If required, you can enlarge (page 378) the dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.
7. If you have specified your input for the language displayed and want to specify input for other languages, click the name of the selected language in the dialog. The list of available languages opens.
8. Select another language and make your entries.
9. Click **OK**.

Your changes are saved in the various languages.

3.5.1.3.3.6 Increase size of attribute editing dialog

You can increase the size of the attribute editing dialog so that you can conveniently edit comprehensive content.

Procedure

1. Open the dialog (page 301) for the attribute you want to edit.
2. Click  **Zoom in**. The size of the dialog increases and offers more space for editing the attribute.
3. Click  **Zoom out** to display the dialog in the original size again.

You have resized the attribute editing dialog according to your requirements.

3.5.1.3.3.7 Place attributes at fixed positions

You can place any attribute of objects and connections, not just the name, visibly in the model window. For quick placement several fixed positions in and around the object are offered.

Procedure

Place new attributes at fixed positions

1. Select the object you want to place a new attribute for.
2. Activate the Start (page 312) tab bar.
3. Click  **Attribute placement**.
4. Click **Create attribute placement**. The **Select attribute** dialog opens.
5. Enable the **Show specified attributes only** checkbox. Then only the attributes with a value are made available for selection.
6. Enter the first letters of the required attribute name. All attributes are displayed whose names contain the term you entered.
7. Click the name of the attribute you want to place.
8. Click **OK**. The dialog closes and a frame for the attribute is displayed in the model window.
9. Click anywhere in the model window.
10. Click the newly placed attribute so that the handles are colored.
11. Click  **Attribute placement**.
12. Click the position of the object where the attribute is to be placed, for example,  **Top right**.

The attribute is placed in the selected position at the object. You can specify that the attribute name is to be displayed for the placed attribute. You can also specify for certain attributes that they are to be displayed as a symbol.

Place freely placed attributes at fixed positions

1. Select the freely placed attributes you want to place at a fixed position. Their handles will be colored.
2. Activate the Start (page 312) tab bar.

3. Click  **Attribute placement**.
4. Click the position of the object where the attribute is to be placed, for example,  **Top right**.

The attributes are placed at the objects at the position selected. You can specify that the attribute name is to be displayed for placed attributes. You can also specify for certain attributes that they are to be displayed as a symbol.

You have placed attributes at fixed positions.

3.5.1.3.3.8 Place attributes at any position

You can place any attribute of objects and connections, not just the name, visibly in the model window. These cannot only be placed at fixed positions (page 378), but also freely.

Procedure

Place new attribute freely

Select the object you want to place a new attribute for.

1. Activate the Start (page 312) tab bar.
2. Click  **Attribute placement**.
3. Click **Create attribute placement**. The **Select attribute** dialog opens.
4. Enable the **Show specified attributes only** checkbox. Then only the attributes with a value are made available for selection.
5. Enter the first letters of the attribute name. All attributes are displayed whose names contain the term you entered.
6. Click the name of the attribute you want to place.
7. Click **OK**. The dialog closes and a frame for the attribute is displayed in the model window.
8. In the model window, click the position where you want to place the attribute.

The attribute is placed in the selected position in the model window.

Reposition a placed attribute

1. Click the placed attribute you want to reposition. The handles will be colored.
2. Hold down the mouse button.
3. Drag the attribute to the position in the model window where you want to place it and release the mouse button.

The attribute is placed in the selected position in the model window.

You have placed attributes at any positions.

3.5.1.3.3.9 Place attributes from Attributes tab

Use the **Attributes** tab to quickly place an attribute.

Procedure

1. Select the object you want to place a new attribute for.
2. Click  **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Behind the attribute you want to place, click  **More**.
5. Click  **Place attribute**.
6. Move the mouse pointer to the model window. A frame is displayed.
7. Drag the frame in the model window to the position where you want to place the attribute.
8. Click the relevant position.

The attribute is placed.

3.5.1.3.3.10 Display names of placed attributes

You can specify that the attribute name of placed attributes is to be displayed in the model window.

Procedure

1. Select the placed attribute whose attribute name you want to display in the model window.
2. Activate the Start (page 312) tab bar.
3. Click  **Attribute placement**.
4. Enable the **With name** check box.

The attribute value is placed in front of the attribute name.

3.5.1.3.3.11 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 382).

Procedure

1. Click a placed attribute in the model window. The attribute is marked by a colored handle.
2. Press the **Ctrl** key, and click additional placed attributes you want to reposition or remove.

You can now delete or reposition (page 378) the selected attributes.

3.5.1.3.3.12 Edit placed attributes

You can edit placed text attributes of models, objects, and connections in the model window. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Click the placed attribute. It now has handles.
2. Click on the text attribute again. The attribute is selected for editing.
3. Change the text attribute as necessary.
4. Press **Enter** or click in the model background.

The text attribute is changed.

3.5.1.3.3.13 Directly format placed attributes

You can format model, object, and connection attributes when editing in the model window.

Prerequisite

The attribute you selected can be edited. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Double-click the placed attribute of a model, object, or connection so that the text is selected. The formatting toolbar is shown.
2. In the formatting toolbar, click the button for the formatting you want to assign to the selected attribute, for example,  **Increase indent**. The formatting information is directly applied to the selected attribute.
3. Click an empty area in the model window. The attribute selection is undone.

You have formatted the placed attribute.

3.5.1.3.3.14 Move placed attribute

You can move placed attributes of objects and connections.

Procedure

1. Click the placed attribute and hold down the mouse button. The attribute now has handles.
2. Drag the attribute to the required position and release the mouse button.

The attribute is placed at the new position.

3.5.1.3.3.15 Display placed attributes as a symbol

You can display certain attributes as a symbol (page 385) if they are placed.

Prerequisite

The attribute can be represented by a symbol. This is the case if you select the attribute and the **As a symbol** check box becomes available.

Procedure

1. Select the placed attribute you want to represent with a symbol.
2. Activate the Start (page 312) tab bar.
3. Click  **Attribute placement**.
4. Enable the **As a symbol** check box.

The placed attribute is represented as a symbol.

3.5.1.3.3.16 Remove placed attribute

You can remove placed attributes from the model window. Of course, only the attribute placement is deleted and not the value that was placed. To change the attribute value, edit the attribute (page 301) on the **Attributes** tab of the  Properties bar.

Procedure

1. Select the placed attribute (page 380) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

3.5.1.3.3.17 Remove multiple placed attributes

You can remove multiple placed model, object, or connection attributes from the model window in only one step. Of course, only the attribute placement is deleted and not the value that was placed.

Procedure

Remove directly

1. Use the Ctrl key to select the placed attributes you want to delete in the model window directly.
2. Press the **Del** key.

The placements of the selected attributes are removed without prompting for confirmation.

Use a dialog

1. Select the object or connection whose attribute placements you want to remove.
2. Activate the Start (page 312) tab bar.
3. Click  **Attribute placement > Delete attribute placement**. The dialog is displayed.
4. Enable the check boxes for the placed attributes whose attribute placement you want to delete. You can enable all check boxes at once by enabling the superior check box **Attribute name**.
5. Click **OK**.

The placements of the selected attributes are removed without prompting for confirmation.

You have removed multiple placed attributes.

3.5.1.3.3.18 Delete attributes

Use the Attributes bar to delete attributes.

Procedure

1. Select the object or connection whose attribute you want to delete. If you want to delete model attributes, you must ensure that no object or connection is selected so that the model attributes will be displayed on the **Attributes** tab of the **Properties** bar.
2. Click  **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Behind the attribute you want to delete, click  **More**.
5. Click  **Delete attribute**.

The value of the attribute will be deleted. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

3.5.1.3.3.19 Valuable information

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

3.5.1.3.3.19.1 What placed attribute does an object have?

If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window.

If you want to place more attributes, it is useful to place them near the object to which they belong. It can however occur that in the layout objects are positioned very close to one another making it difficult to say which object a placed attribute belongs to. In addition, it is also possible to place attributes freely. If an attribute was placed farther away from its object it may be difficult to assign the placed attribute after the layout is changed.

By clicking on an object it is given colored handles as a marker and its attributes are given handles that are not colored. This enables you to identify which placed attributes an object has. This also applies to placed attributes that do not have an attribute value. They are invisible in the model window until you assign a value to them. If the associated object is selected the "invisible" placed attribute also receives attribute handles.

3.5.1.3.3.19.2 What to consider when placing objects in/on objects

You can place objects on other objects (page 325) or in other objects (page 325). The difference between these two procedures is as follows: When placing an object **on** another object you specify that no implicit connection will be created between the objects. In contrast, when placing an object **in** another object you specify that an implicit connection is to be created between the objects.

You can place multiple objects of one type in an object at once. If you want to embed two objects at once and object 1 already has a connection to the enclosing object while object 2 has none, proceed as follows when creating connections:

- Select the connection that exists between object 1 and the enclosing object: This connection now links both objects to the enclosing object.
- Select a connection other than the one that exists between object 1 and the enclosing object: Object 1 is now linked to the enclosing object via two connections - the existing connection and the one you have selected. Object 2 uses the new connection.

Objects that were placed in other objects are also moved when the enclosing object is moved. If an enclosing object is selected, the embedded object is selected as well. This indicates clearly that an object is embedded in another object. In contrast, a non-embedded object is neither selected nor moved when the object on which it was placed is selected or moved.

You can drag an embedded object from an enclosing object to the model background. The connections linking the objects are then displayed.

3.5.1.3.3.19.3 What does place attribute as a symbol mean?

Attributes of objects can be placed in the model window which allows them to emphasize additional, important aspects in the model.

A symbol can be placed instead of a value for some attributes, which allows the attribute value to be identified immediately.

If such an attribute was specified and placed, for example, the **Existence** attribute, the **As a symbol** check box becomes available. If you enable the check box, a plus sign is placed in the model instead of **Yes** for the **Existence** attribute, and a minus sign instead of **No**.

3.5.1.3.3.19.4 Which attributes can be placed as a symbol?

There are attributes for which a default symbol is defined.

If such an attribute was specified and placed, for example, the **Existence** attribute, the **As a symbol** check box becomes available. If you enable the check box, a plus sign is placed in the model instead of **Yes** for the **Existence** attribute, and a minus sign instead of **No**.

Other attributes can be assigned attribute symbols for placement by a user with the **Configuration administrator** function privilege. This is done on the **Administration** tab in ARIS Architect.

3.5.1.3.3.19.5 What happens to placed attributes that have no attribute value?

If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window. The usual procedure is to place attributes with an attribute value that can be seen directly in the model.

However, it may be useful to place attributes that are assigned a value at a later point in time. If, for example, it was defined that, as a rule, the maximum processing time is to be placed to the upper left of the **Function** object type this may happen even if the attribute value of this attribute has not been entered for all functions. If the value is entered later it is automatically displayed in the model window.

If a placeholder is to be used to make the placement of attributes without a value visible in the model window, you can define that they are to be placed with an attribute name. In our example, **Max. processing time:** would then be output for the relevant functions, and a value entered would appear behind the colon.

3.5.1.3.3.19.6 How is the format copied to placed attributes?

You can copy the formats of a selected item to another item or to several other items.

The following applies to placed attributes and free-form texts:

- If object or connection occurrences are the target, all of the placed attributes of the target are modified. The position is not changed.
- If placed attributes or free-form texts are the target, the target text is modified. The position is not changed.

3.5.1.3.4 Model table-based

Table-based modeling enables rapid and comfortable modeling of EPCs and BPMN diagrams (page 396). The modeling table is shown by default.

Objects are modeled in a table and simultaneously placed in the model displayed above. Layout takes place automatically. Table-based modeling provides a quick and easy way to model processes and process frameworks at an early stage, for example, in meetings during the project planning phase.

Moreover, additional information (page 390) can be added for models and objects.

It can also be used to navigate in the model. If an object is selected in the table, it is selected in the model and the selected object is moved into the visible area. If an object is selected in the model, it is also selected in the table and the row is displayed in the visible area.

3.5.1.3.4.1 Hide/Show modeling table

You can hide or show the modeling table.

Procedure

1. Open (page 288) a model to edit or create (page 277) a new model.
2. Click  **Modeling table**.

If the modeling table is shown, it will be hidden. If it is hidden, it will be shown.

When a model is opened for the first time, the modeling table is shown. The setting made will be applied.

3.5.1.3.4.2 Switch full-screen mode on/off

You can hide or show the model above the table. By default, it is shown.

Procedure

1. Open (page 288) a model to edit or create (page 277) a new model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Click  **Collapse/Expand table**. The model is hidden.
4. Click  **Collapse/Expand table**. The model is shown.

You have hidden or shown the model.

3.5.1.3.4.3 Show/Hide BPMN container

For BPMN diagrams, you can specify whether or not the **Belongs to container** column is displayed. This column exists only in BPMN diagrams and is displayed by default.

Procedure

1. Open (page 288) a BPMN diagram.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Click  **Add or remove columns**.
4. Enable the **Show BPMN container column** check box to show the **Belongs to container** column. Disable the check box to hide the **Belongs to container** column.

You have specified whether or not the **Belongs to container** column is to be displayed.

3.5.1.3.4.4 Create object

You can add objects to a model. In the modeling table, a new object is always inserted below the selected object. You can use the table (page 389) to insert lanes into the model.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. In the modeling table, click the cell where you want to create an object.
4. Press **Ins**. Alternatively, click  **Add new object**.
5. Select a symbol from the list and enter a name.
6. Start typing the name of the object to be created.
7. Press **Enter**.

The first object you add to a BPMN diagram is automatically placed within a pool.

Click **Undo** or press **CTRL + Z** if you do not want the object to be added to a pool. The object is then placed directly in the diagram.

The object is inserted and the model items are rearranged in the model. The color of the object type is displayed before of the name.

3.5.1.3.4.5 Create object with special object symbol

You can use an object symbol that is not directly displayed. The example description is based on the **Function (target)** object symbol, which you can add to an EPC. It must be included in the filter you are using.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. In the modeling table, click the cell where you want to create an object.
4. Start typing the name of the object to be created. Alternatively, click **+ Add new object**.
5. Enter the term **target**, which is part of the name for the relevant object symbol. All object symbols and existing objects whose name contains the term are displayed.
6. Click **Function (target)** in the **Symbols** area. The symbol is inserted and the name is selected for overwriting.
7. Enter a name.
8. Press **Enter**.

You have created a new object using the **Function (target)** object symbol. The color of the object type is displayed before of the name.

3.5.1.3.4.6 Use existing object

You can reuse existing objects in the model.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. In the modeling table, click the cell where you want to create an object.
4. Start typing the name of the object to be created. Alternatively, click **+ Add new object**.
5. Enter a term that appears in the name of the existing object you want to insert. All objects whose name contains the term are displayed.
6. Select the required object in the **Existing objects** area.
7. Press **Enter**.

The selected object is reused. The color of the object type is displayed before of the name.

3.5.1.3.4.7 Rename structurally relevant object

In the modeling table, you can edit structurally relevant objects that have already been modeled.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Select the object you want to edit.
4. Press **F2**. Alternatively, click  **Edit table cell**.
5. Rename the object.
6. Press **Enter**.

You have renamed an object.

3.5.1.3.4.8 Edit the Description/Definition column

You can specify descriptions and definitions for objects.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. If the **Description/Definition** column is not shown, add (page 393) it.
4. Select the **Description/Definition** column for the relevant object and press **F2**.
Alternatively, double-click the **Description/Definition** column, or click the **Description/Definition** column and select **Edit table cell**. The **Edit Description/Definition** dialog opens.
5. Enter the description or definition. The text can be formatted.
6. Click **OK**.

The new or changed description is saved.

3.5.1.3.4.9 Create split paths

You can use operators such as **AND**, **XOR**, or **OR** to model split paths in a model.

You can also add split paths without using any operators, if this is permitted by the method, for example, in BPMN diagrams.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Select the object row below which the operator is to be modeled.
4. Press **Ins**. Alternatively, click  **Add new object**.
5. Select an operator.
By default, the list displays an **OR** operator for EPCs and a **gateway** for BPMN diagrams. If you want to use a different operator, enter part of the operator name. Corresponding operators are displayed. Select the relevant operator.
6. Press **Ins**. Alternatively, click  **Add new object**. Select the first object that will follow the operator and enter a name.
7. Press **Enter**. The object is placed below the operator in EPCs, and beside the operator in BPMN diagrams.
8. Select an operator.
9. Press **Ctrl + Shift + Ins**. Alternatively, click  **Add new object as a split path**. Select another object and enter a name. The object is placed next to the operator.
10. Press **Enter**.
11. Model (page 388) additional objects for the relevant split path.

You have modeled a split path.

The objects in a split path are outlined in the table by a thicker grid line.

3.5.1.3.4.10 Remove object from model

You can remove an object from the model. It is retained in the database and you can reuse it.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. In the modeling table, click the object you want to remove.
4. Press the **Del** key.

The object is removed from the model without prompting for confirmation.

Connections from and to the deleted object are also deleted. The preceding object is linked to the following object using a connection.

3.5.1.3.4.11 Model satellites

You can insert not a structurally relevant object (page 543) [satellites (page 543)] in the model or diagram.

MODEL NEW SATELLITES

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Double-click the cell for the satellite you want to model for an object, for example, an **Organizational unit** object.
4. Select an object symbol.
5. Enter the name and press **Enter**.
6. Enter more names if you want to create additional satellites of the same type. If you want to create additional satellites of a different type in the same column, first select the object type.
7. Exit the cell (page 396) when you have created the required satellites.

You have modeled one or more satellites.

MODEL EXISTING SATELLITES

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Double-click the cell for the satellite you want to model for an object, for example, an **Organizational unit** object.
4. Enter a term that appears in the name of the existing object you want to insert. All objects whose name contains the term are displayed.
5. Select the required object in the **Existing objects** area.
6. Exit the cell (page 396) when you have created the required satellites.

You have modeled one or more existing satellites.

Tip

You can also open the dialog for the relevant column by pressing **F2**. Select an object type and press **Enter**. You can enter a name. Press an arrow key to exit the cell.

3.5.1.3.4.12 Add object column

You can add columns for satellite objects to the modeling table and also show these objects in the model area. Columns are always inserted to the right of the column that is selected. If no column is selected, the new column is inserted to the right of the **Name** column.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Click  **Add or remove columns**.
4. Click **Add object column**. A dialog opens.
5. Select an object and a connection from the list and click **OK**.

You have added an object.

3.5.1.3.4.13 Add attribute column

You can add an attribute column to specify model item attributes that are not initially displayed. Columns are always inserted to the right of the column that is selected. If no column is selected, the new column is inserted to the right of the **Name** column.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. In the table, click the object for which you want to specify attributes.
4. Click  **Add or remove columns**.
5. Click  **Add attribute column**. The **Add attribute** dialog opens.
6. Select an attribute.
7. Click **OK**.

The attribute column is added to the right of the selected column and you can enter an attribute value.

3.5.1.3.4.14 Edit attribute

You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, for example, Creation date. System attribute columns have a gray background.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Select the cell for the relevant attribute.
4. Press **F2**.
5. Edit (page 401) the attribute value.
6. Exit the cell (page 396) once you have finished editing the attribute value.

You have edited an attribute.

3.5.1.3.4.15 Arrange columns

You can re-arrange columns as required by removing and recreating them. This example shows how to move the default **creates output to Information carrier** column next to the default **Name** column.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Click  **Add or remove columns**.
4. Click the  **Remove symbol** for the **creates output to Information carrier** column.
5. Click the name of an object in the **Name** column.
6. Click  **Add or remove columns**.
7. Click  **Add object column**. The **Add new object column** dialog opens.
8. Select an object and a connection. In this case, select the **Information carrier** object and the **creates output to** connection. This will create the **creates output to Information carrier** column header.
9. Click **OK**.

The **creates output to Information carrier** column is placed next to the **Name** column.

All columns can be re-arranged as described.

3.5.1.3.4.16 Remove column

You can remove columns for attributes or objects from the modeling table.

Procedure

1. Open (page 288) a model.
2. Click  **Hide/Show modeling table** if the modeling table is not displayed.
3. Click  **Add or remove columns.**
4. Click the  **Remove** symbol in front of the name of an attribute or object column.

The attribute or object column is removed from the modeling table without prompting for confirmation, while the attribute value or the object is retained.

If required, you can add both the attribute value and the object to the modeling table.

3.5.1.3.4.17 Valuable information

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

3.5.1.3.4.17.1 What models can be edited using a table?

The following model types and the model types derived can be edited using a table:

- EPC
- BPMN collaboration diagram (BPMN 2.0)
- Enterprise BPMN collaboration diagram
- BPMN process diagram (BPMN 2.0)
- Enterprise BPMN process diagram

If you open a model of this type, you can  show and hide the modeling table (page 387).

3.5.1.3.4.17.2 How to control the table using the keyboard

You can control the modeling table using the keyboard:

How to model an EPC using the keyboard (video 4 min. 23 sec.)

How to model a BPMN diagram using the keyboard (video 2 min. 31 sec.)

Key/Keyboard shortcut	Context	Action
Arrow keys	Table selected	Move to next column/row in direction of arrow.
Ctrl + End	Table selected	Activates the last cell in the modeling table.
Ctrl + Home	Table selected	Activates the first cell in the modeling table.
Ctrl + Shift + Ins	Operator selected	Create split paths.
Del	Object name selected	Delete object.
End	Table selected	Activates the last column in the current row.
Enter	Name column activated	To next row/End editing.
F2	<ul style="list-style-type: none"> ▪ Name cell selected 	<ul style="list-style-type: none"> ▪ Activates the name editing mode.

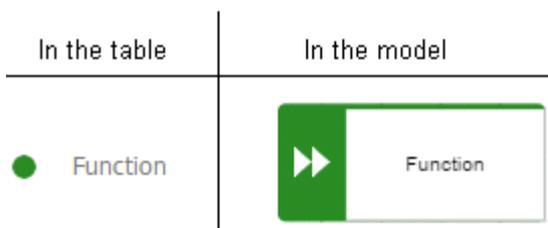
Key/Keyboard shortcut	Context	Action
	<ul style="list-style-type: none"> ▪ Description/Definition cell selected ▪ Object cell selected ▪ Attribute cell selected 	<ul style="list-style-type: none"> ▪ Opens the Description/Definition dialog. The description/definition can be edited. ▪ Opens the object symbols list if symbols can be inserted. ▪ Opens the Edit attribute dialog for you to insert the attribute value.
Home	Table selected	Activates the first column in the current row.
Ins	Table selected	Adds an object row.
PageDown	Table selected	Scrolls one page down.
PageUp	Table selected	Scrolls one page up.
Shift + F2	BPMN container cell	Enables renaming of the container.
Tab	Table cell selected	Activates the cell to the right of the cell currently selected.
Shift + Tab	Table cell selected	Activates the cell to the left of the cell currently selected.

3.5.1.3.4.17.3 What do different colors mean in table-based modeling?

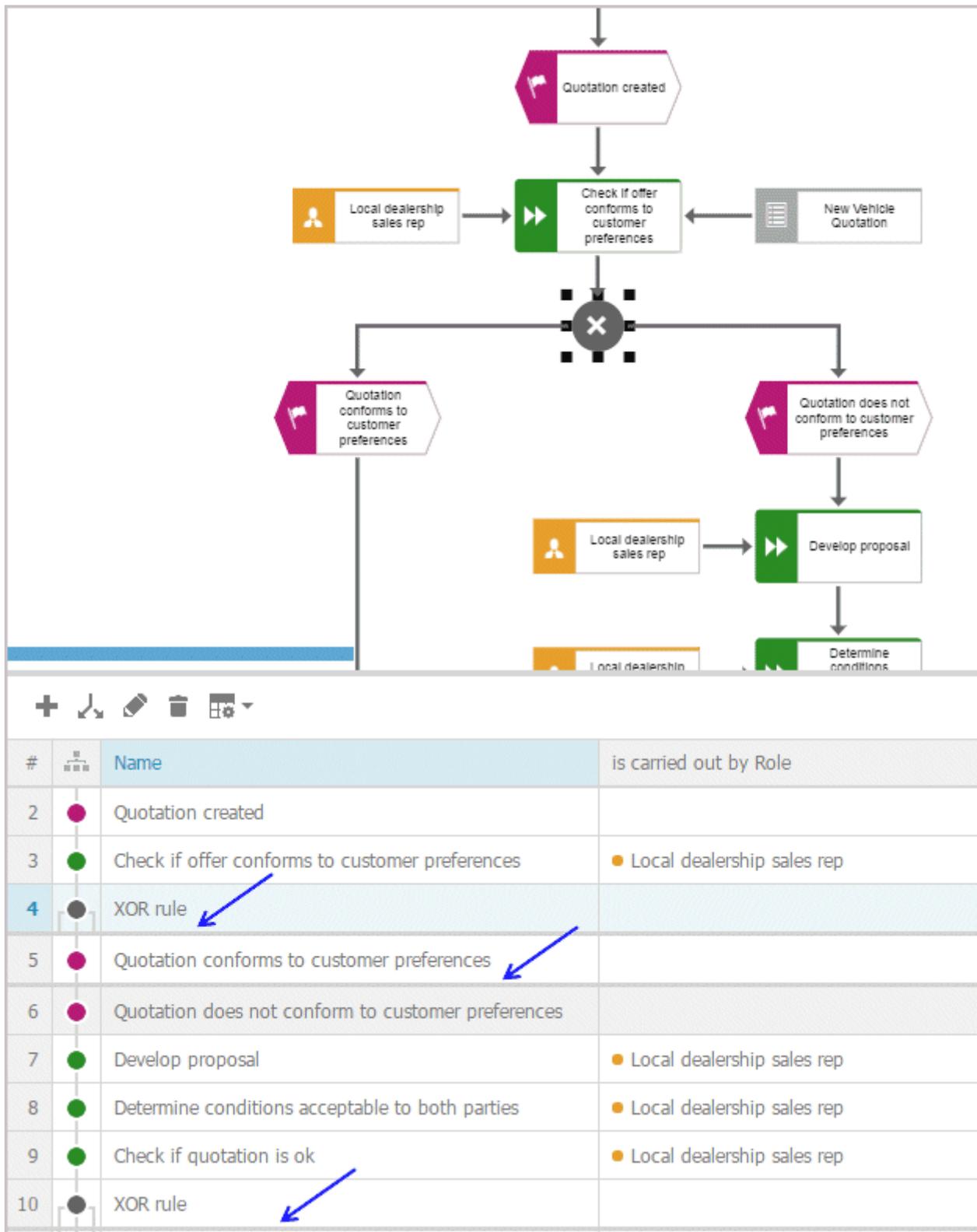
The colors help you to distinguish between the object types. They correspond to the object colors. A flashing cursor in an empty row indicates that entries can be made. A gray background indicates that no entries can be specified.

Examples

- A table for a model of the **EPC** type contains, for example, green highlighting for functions because functions are displayed in green in the model. In a table for a BPMN diagram, a task appears in blue, as in the diagram.



- Split paths are outlined by a thicker line.



- In BPMN models, lanes are outlined by a thicker line.

3.5.1.3.4.17.4 What default columns are available?

There are columns that are displayed by default when the modeling table is opened for the first time. However, you can hide all of them except for the numbering, color, and name column. Your setting is saved, which means that when you create or open a model, the table is displayed with the columns you specify.

IN AN EPC

- **Numbering**
Shows the line number.
- **Color column**
Displays the color of the object symbol.
- **Name**
The object name is entered here.
- **Description/Definition**
A description or definition of the object is entered here.
- **is carried out by Role**
The performing role or job description for the object is entered here. If the role or job description are not suitable for this object, a message is displayed.
- **is support by Application system type**
An application system type is inserted here. If such an object is not permitted for an object, for example, for an event, a message is displayed.
- **receives input from Information carrier**
An information carrier is inserted here. If such an object is not permitted for an object, for example, for an event, a message is displayed.
- **creates output to Information carrier**
An information carrier is inserted here. If such an object is not permitted for an object, for example, for an event, a message is displayed.

IN A BPMN DIAGRAM

- **Numbering**
Shows the line number.
- **Color column**
Displays the color of the object symbol.
- **Name**
The object name is entered here.

- **Description/Definition**

A description or definition of the object is entered here.

- **Belongs to container**

Shows the pool or lane to which an object belongs. This column cannot be edited.

3.5.1.3.4.17.5 **What are the special features of BPMN diagrams?**

For BPMN diagrams, you can specify whether or not the **Belongs to container** column is displayed. This column exists only in BPMN diagrams and is displayed by default. Lanes are automatically enlarged in table-based modeling if a new object does not fit completely into the lane.

3.5.1.3.4.17.6 What attribute values and processing types are available?

You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, for example, Creation date. System attribute columns have a gray background.

The processing of an attribute value may change depending on the attribute type. For example, if you want to process an attribute of the **Time date** type, you can do this using the calendar displayed.

The following attribute types are available:

Date attributes

The calendar is displayed when you click in the cell containing the attribute value. For an attribute of the **Time date** type, you can select a time in addition to the date.

The screenshot shows a date and time selection dialog box. At the top, there are dropdown menus for the year (2016) and the month (March). Below these is a calendar grid with days of the week (Mon to Sun) and dates. The date 14 is highlighted with a blue border. Below the calendar is a time input field labeled "Time:" with the value "12:41:10". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Boolean

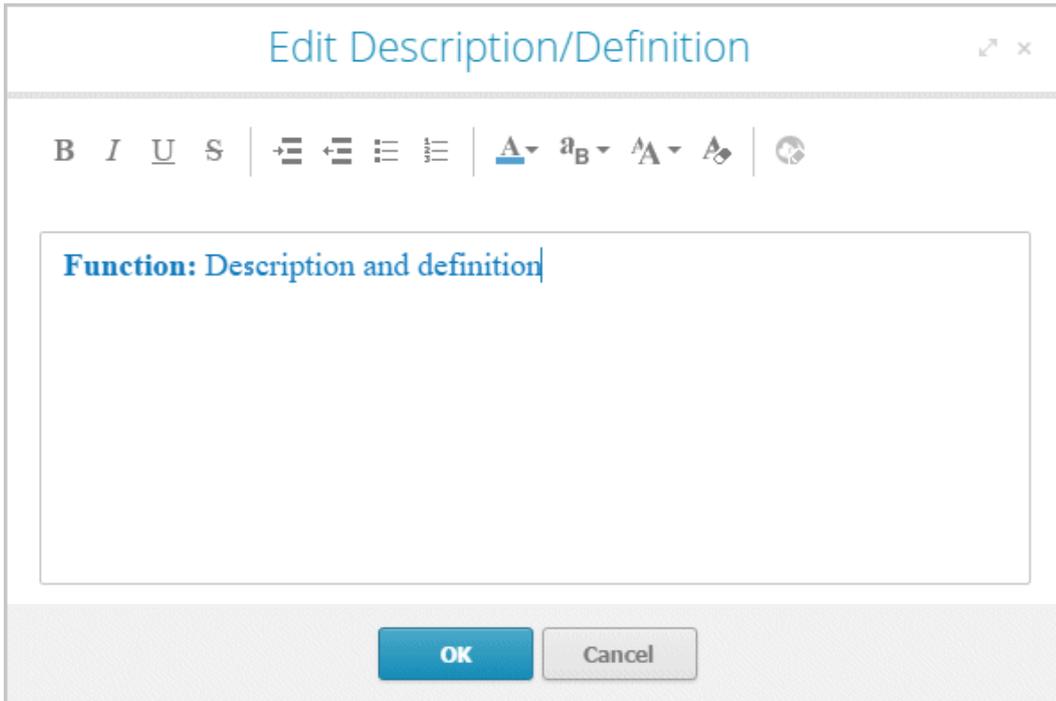
You can change the attribute value by enabling (true:) or disabling (false:) the check box. The check box for an attribute value that is not specified is shaded in color ().

Text attributes

You can change the attribute value directly in the cell.

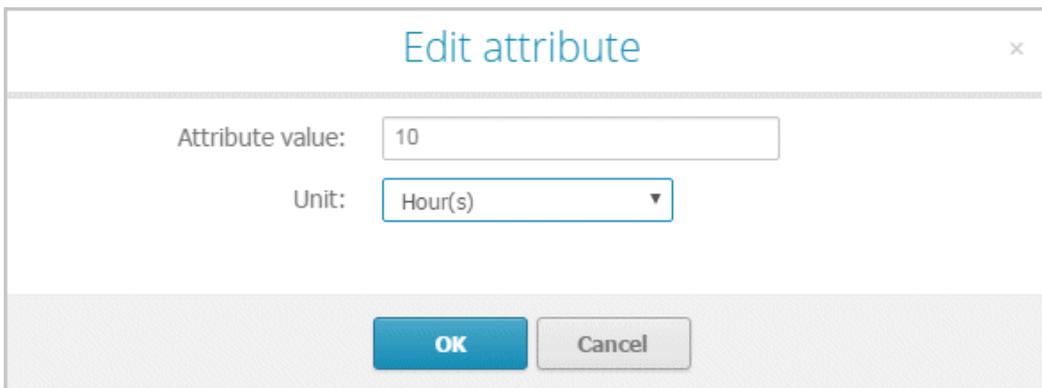
Formatable text attributes

A dialog opens. You can edit the text and formatting.



Attribute values with unit

A dialog opens. When saving the attribute value for numerical attributes, a check is made as to whether the value entered is a number. If not, you are notified.

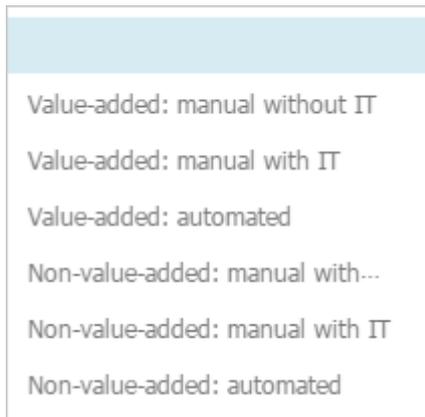


Numerical attributes

You can change the attribute value directly in the cell. When saving the attribute value, a check is made as to whether the value entered is a number. If not, you are notified.

List attributes

You can select from a list of attribute values specified by the method by clicking the relevant value.



3.5.1.3.5 Use BPMN modeling support

ARIS Connect Designer can assist you in modeling BPMN (page 535) diagrams. When placing objects, you automatically receive alternative object symbols for placement. Furthermore, when you work with BPMN diagrams, a specific tab bar is shown enabling you to quickly access BPMN functionality you frequently require.

3.5.1.3.5.1 Change BPMN object symbol

You can change the symbol for selected objects if various symbols are available for them.

Prerequisite

The method filter in use (page 286) includes different symbols of the objects you selected.

Procedure

1. Click an object, or hold the **Ctrl** key pressed to select multiple objects of the same type.
 2. Activate the BPMN (page 317) tab bar.
 3. Click  **Change symbol**. The list of object symbols available for the selected object(s) is shown.
 4. Click the symbol you want to use from now on for the selected object/s in this model.
- The symbol for the selected object is or the symbols of the selected objects are changed.

3.5.1.3.5.2 Change loop type

You can use the **Loop type** attribute to specify the loop behavior for objects of the **Task** type.

Procedure

1. Select the task whose behavior you want to change.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Change symbol**.
4. Click  **Marker**.
5. Click one of the loop behaviors  **None**,  **Standard**,  **Multi-instance parallel** or  **Multi-instance sequential**.

The loop behavior of the **Task** object has been changed.

3.5.1.3.5.3 Add lane

You add additional lanes to placed pools and lanes.

Procedure

1. Select the lane for which you want to add an additional lane.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Add lane**. The options for adding lanes are displayed.
4. Click the corresponding option.

A lane is added to the selected lane according to your selection.

3.5.1.3.5.4 Insert lane into a pool or lane

You can easily insert a lane that is placed directly in the model into a pool or lane.

Prerequisites

The lane or pool into which a lane is to be inserted contains no flow objects.

Procedure

1. Activate the BPMN (page 317) tab bar.
2. Select the lane you want to insert.
3. Press the **Ctrl** key and select the pool or lane into which you want to insert the lane.
4. Click  **Insert lane**. If you have selected a pool into which to insert the lane, the lane is inserted immediately. If you have selected a lane into which to insert the lane, the **Specify which lane to insert** dialog opens.
5. Enable the options button of the lane you want to insert.
6. Click **OK**. The lane for which you have activated the options button is inserted into the other lane.

You have inserted a lane into a pool or lane.

3.5.1.3.5.5 Move lane

You can subsequently reposition lanes that you have placed within pools or lanes.

Procedure

1. Click the lane you want to place at another position. The lane and all embedded objects are highlighted. Depending on where the lane is located with regard to the other lanes the corresponding options for moving are provided.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Move lane** and select the required direction, such as  **Lane up**,  **Lane down**,  **Lane to the left**, or  **Lane to the right**.

The lane you selected is placed at the new position.

3.5.1.3.5.6 Delete pool or lane

You can easily delete a lane or pool.

Prerequisites

Flow objects and lanes must not be located side by side in the same pool, otherwise the lane cannot be deleted.

Procedure

1. Activate the BPMN (page 317) tab bar.
2. Select the pool or lane you want to delete.
3. Click  **Delete pool or lane.**

The pool or lane is deleted.

3.5.1.3.5.7 Transform communication into call conversation

You can easily transform a communication into a call conversation.

Procedure

1. Open or create a BPMN conversation diagram containing a communication object.
2. Activate the BPMN (page 317) tab bar.
3. Select the communication symbol of the communication object you want to transform.
4. Click  **Transform into call conversation.**

The communication object is transformed into a call conversation and the conversation symbol is marked in bold.

3.5.1.3.5.8 Change type of sequence flow

You can change the sequence flow type in models of the **BPMN process diagram (BPMN 2.0)**, **BPMN collaboration diagram (BPMN 2.0)**, **Enterprise BPMN collaboration diagram**, and **Enterprise BPMN process diagram** type.

Procedure

1. Click the flow connection you want to change.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Change type of sequence flow.**
4. Click one of the available types:  **Regular sequence flow**,  **Default sequence flow** or  **Conditional sequence flow.**

You changed the sequence flow type.

3.5.1.3.5.9 Collapse subprocess

You can collapse a symbol for the **Subprocess** type. This way the process modeled in the subprocess is assigned to the subprocess and the subprocess is collapsed.

Procedure

1. Select the subprocess you want to collapse.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Collapse subprocess**. The process contained in the subprocess is assigned to the object and, at the same time, is displayed as embedded in the object, which is indicated by a  **plus sign**. If a process is not yet assigned to the subprocess, the **Create assignment** dialog opens in which you can assign a new BPMN process.
4. Click the subprocess again.

The process contained is assigned to the subprocess (page 336) and can be opened by double-clicking the assignment icon.

3.5.1.3.5.10 Expand subprocess

You can expand a collapsed symbol of the **Subprocess** type. This way the process modeled and assigned in this subprocess is displayed as embedded in the subprocess.

Procedure

1. Select the subprocess you want to expand.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Expand subprocess**.

The process contained is displayed as embedded in the subprocess. (page 336) The process remains assigned to the subprocess (page 336).

3.5.1.3.5.11 Edit subprocess

You can edit a subprocess.

Procedure

1. Activate the BPMN (page 317) tab bar.
2. Select the relevant subprocess symbol with an assigned model.
3. Click  **Edit subprocess**.

The assigned model is opened for editing.

3.5.1.3.5.12 Assign global reference to call activity

You can assign a global process or a task to an object of the **Call activity** type. If you place a call activity, the **Select global process or task** dialog opens and you can assign the relevant global process or task. You can change the assignment later.

Procedure

1. Select the relevant call activity.
2. Activate the BPMN (page 317) tab bar.
3. Click  **Select global reference**. The **Select global process or task** dialog opens.
4. Navigate to the database group in which the relevant global process or task is stored.
5. Select the global process or task.
6. Click **OK**.

The selected global process or task is assigned to the call activity.

3.5.1.3.5.13 How to import a BPMN file

The following applies when importing (page 280) a BPMN 2.0 diagram:

- You can import BPMN diagrams of the **BPMN collaboration diagram (BPMN 2.0)** and **BPMN process diagram (BPMN 2.0)** type.
- **<bpmn:import>** elements are not supported (see chapter 15.3.1 **Document Structure** of the BPMN specification (<http://www.bpmn.org/>)).
- Existing ARIS objects are not reused. Importing the same file multiple times results in new models and definition copies. Occurrence copies of objects are not generated.
- XSD ID references are supported. QNames that can contain namespaces are not supported (see chapter 15.3.2 **References within the BPMN XSD** of the BPMN specification (<http://www.bpmn.org/>)).
- There are character limits for attributes in ARIS. For example, the Name (AT_NAME) attribute can have a maximum of 250 characters. If the BPMN import exceeds this number of characters, the first 250 characters are used and the remaining characters are cut off.

3.5.1.3.6 Matrix model

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, display only one connection in the matrix model, or add new connections.

In the matrix model, you can place or move objects as required, sort them alphabetically or according to methods, or arrange them hierarchically.

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

3.5.1.3.6.1 Open matrix model for editing

You can open models in different ways.

Prerequisite

- You have a **Designer** license.
- The model type of the model is allowed (page 287) by the method filter (page 286) in use.

Procedure

From Groups or the Processes area

1. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the  **Portal** at the top right below the search.
2. Click **Groups** (page 27) in the classic view (page 55) or **Processes** (page 40) in the default view (page 56).
3. Select the group or process area containing the required model. The content of the selected group or process area is listed.
4. Click the name of the relevant model.
5. Click **Matrix** if this display is not enabled yet. The matrix is displayed.
6. Click  **Edit** >  **Edit model**.

From Home tab

1. Click **Home**.
2. Click **Manage models & objects**.
3. In the database, select the group containing the relevant model. The content of the selected group is listed.
4. Click the name of the model you want to open.
- 5.

From the repository

1. Click  **Repository**.
2. In the database, select the group containing the relevant model. The content of the selected group is listed.
3. Click the name of the model you want to open.
- 4.

Using the search

1. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the  **Portal** at the top right below the search.
2. At the top right, click the **Search** box and enter a term that is included in the model name. All models and objects containing this term are listed immediately.
3. In the **Models (Repository)** category, click the name of the model you want to open.
- 4.

From the 'Recent changes' area

1. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the  **Portal** at the top right below the search.
2. Click  **Recent changes** in the **Home** area. All models are listed that have recently been changed or created.
3. Click the name of the model you want to open. Depending on active configuration set, the **Groups** or **Process** area opens and the model is activated.
4. Click **Matrix** if this display is not enabled yet. The matrix is displayed.
5. Click  **Edit** >  **Edit model**.

The matrix model opens in a separate tab.

3.5.1.3.6.2 Specify symbols and connections

Before creating new objects and connections in a matrix model, you have to define the symbols and connections to be used.

3.5.1.3.6.2.1 Specify symbols for a matrix

Before you add new objects in a matrix model, you must select the symbols to be displayed.

Procedure

1. Create a matrix model. (page 281)
2. If you want to display symbols in the row header, click the row header. If you want to display symbols in the column header, click the column header.
3. Click  **Display symbols and connections** >  **Display symbols**. The corresponding dialog opens.
4. Click  **Add**. The corresponding dialog opens.
5. Enter the first characters in the **Enter symbol name** field to reduce the number of object symbols displayed.
6. Click the symbols you want to select.
7. Click **Apply** twice.

You have selected the symbols to be displayed in a matrix model.

Symbol types that are not enabled and do not have occurrences in the matrix are deleted from the menu. If you want to delete a symbol type, delete all occurrences in the model first.

3.5.1.3.6.2.2 Specify connection types for a matrix

Before you add connections to a matrix model, you must select the connection types to be used.

Prerequisite

You have modeled at least one object in the column and in the row header.

Procedure

1. Create a matrix model. (page 281)
2. Double-click in an empty cell between two objects or click  **Display symbols and connections** >  **Display connections**. The corresponding dialog opens.
3. Enter the first characters in the **Enter text to filter** field to reduce the amount of connection types displayed.
4. Move the mouse cursor over the connection type you want to add and click  **Show connection in menu**.
5. Click **Apply**.

You have selected the connection types to be used in a matrix model.

3.5.1.3.6.2.3 Specify default connection

You can specify a default connection for the matrix model.

Prerequisite

You have modeled at least one object in the column and in the row header.

Procedure

1. Create a matrix model. (page 281)
2. Click  **Display symbols and connections** >  **Display connections**. The corresponding dialog opens.
3. Enter the first characters in the **Enter text to filter** field to reduce the amount of connection types displayed.
4. Move the mouse cursor over the connection type you want to specify as default connection and click  **Use as default connection**.
5. Click **Apply**.

You have selected the default connection type to be used in a matrix model.

3.5.1.3.6.2.4 Specify an abbreviation for a connection

You can specify abbreviations for connections in a matrix model.

Prerequisite

You have modeled at least one object in the column and in the row header.

Procedure

1. Create a matrix model. (page 281)
2. Click  **Display symbols and connections** >  **Display connections**. The corresponding dialog opens.
3. Enter the first characters in the **Enter text to filter** field to reduce the amount of connection types displayed.
4. Move the mouse cursor in the  **Abbreviation for connection** column over the connection you want to specify an abbreviation for and click  **Rename**.
5. Enter a letter, a number, or a special character as a code.

This connection type will no longer be represented by a check mark in the matrix model, but by the character. If multiple connections are defined between objects, this is indicated by an asterisk in the cell in the matrix model. In a matrix model, connections are created (page 430) at definition level only.

6. Click **Apply**.

You have specified abbreviations for connections in a matrix model.

3.5.1.3.6.2.5 Remove connection types from the matrix

You can remove connections types from the list of connection types to be used in a matrix model.

Prerequisite

You have modeled at least one object in the column and in the row header.

Procedure

1. Create a matrix model. (page 281)
2. Click  **Display symbols and connections** >  **Display connections**. The corresponding dialog opens.
3. Enter the first characters in the **Enter text to filter** field to reduce the amount of connection types displayed.
4. Move the mouse cursor over the connection types where the  **Show connection in menu** icon is displayed.
5. Click  **Show connection in menu** to remove the connection type from the list.
6. Click **Apply**.

You have removed connection types from the list of connection types to be used in the matrix model.

All modeled connections of this type still exist but are not displayed in the matrix.

3.5.1.3.6.3 Label column or row header title

You can enter a label for the column or row header title.

Procedure

1. Open a matrix model. (page 409)
2. Double-click the column or row header title of the matrix model. The corresponding dialog opens.
3. Enter the title.

You have defined the label of the column or row header title.

3.5.1.3.6.4 Create matrix model from existing objects

Using models of type **Matrix model** you can show existing connections between objects in a table.

Procedure

1. Open a matrix model. (page 409)
2. Click in the rows or the column header.
3. Click  **Insert existing object**. The corresponding dialog opens.
4. Select the object you want to insert.

You have created a matrix model from existing objects. The symbol types are added to your matrix.

3.5.1.3.6.5 Insert objects from other groups in matrix model

You can insert objects from the entire database into a matrix model.

Procedure

1. Open a matrix model. (page 409)
2. Click in the rows or the column header.
3. Click  **Insert existing object**. The corresponding dialog opens.
4. Select the object you want to display in the matrix model and click **OK**.

The selected object is displayed in the matrix model.

3.5.1.3.6.6 Create matrix model from new objects

Using models of type **Matrix model** you can show existing connections between objects in a table.

Procedure

1. Open a matrix model. (page 409)
2. Double-click in the row or the column header. If no symbols are specified (page 411) yet, the **Add/Remove symbols** dialog opens (page 411).
3. Select the object types and click **Close**.
4. Click **Apply**.
5. Select an object and enter a name.

You have added a new object to the matrix model.

Tip

If symbol types are already specified (page 411), click a row or column header, press **F2**, select the object type using the arrow keys, press **Return** and enter a name for the object and press **Return**. Leave the row or column header using the arrow keys and press **F2** to add the next object to the matrix.

3.5.1.3.6.7 Apply color to row or column

You can apply a color background to entire rows or columns.

Procedure

1. Open a matrix model. (page 409)
2. Click in a row or column header.
Select multiple rows or columns by holding down the Shift key and clicking the first and last row or column. You can select rows or columns that are not adjacent by holding down the Ctrl key.
3. Click  **Fill color**. The color palette opens.
4. Click the relevant color.

A color background is applied to the row or column containing objects. Only those cells in which connections are not allowed have no color background.

3.5.1.3.6.8 Change size of row or column

You can change the size of a row or a column.

Procedure

1. Open a matrix model. (page 409)
2. Click in a row or column header.
Select multiple rows or columns by holding down the Shift key and clicking the first and last row or column. You can select rows or columns that are not adjacent by holding down the Ctrl key.
3. Click  **Change row and column size**. The corresponding dialog opens.
4. Enter the size in pixels.

The size of the selected rows or columns is changed.

Tip

You can change the size of a single row or column by dragging its border with the mouse.

3.5.1.3.6.9 Change text orientation of row or column header

You can change the size of a row or a column.

Procedure

1. Open a matrix model. (page 409)
2. Click in a row or column header.
3. Click the **Format** tab.
4. If you want a horizontal text orientation, click the row or column header and click **T** **Text orientation** > **T** **Horizontal**.

If you want a vertical text orientation, click the row or column header and click **T** **Text orientation** > **V** **Vertical**.

The text is oriented accordingly.

Example

Column header title	▶▶ Function 1	Column header title	Function 1
Row header title		Row header title	▶ Function 1
▶ Event 1		Event 1	
		▶ Event 1	

3.5.1.3.6.10 Align text of row or column horizontally

You can change the size of a row or a column.

Procedure

1. Open a matrix model. (page 409)
2. Click in a row or column header.
3. Click the **Format** tab.
4. If you want to align the text left, click the row or column header and click  **Align horizontally** >  **Align left**.

If you want to align the text left, click the row or column header and click  **Align horizontally** >  **Align center**.

If you want to align the text right, click the row or column header and click  **Align horizontally** >  **Align right**.

The text is aligned accordingly.

Example

Column header title Row header title	Function 1 	Column header title Row header title	Function 1 	Column header title Row header title	Function 1 
 Event 1		 Event 1		 Event 1	

3.5.1.3.6.11 Align text of row or column vertically

You can change the size of a row or a column.

Procedure

1. Open a matrix model. (page 409)
2. Click in a row or column header.
3. Click the **Format** tab.
4. If you want to align the text top, click the row or column header and click  **Align vertically** >  **Align top**.

If you want to align the text center, click the row or column header and click  **Align vertically** >  **Align center**.

If you want to align the text bottom, click the row or column header and click  **Align vertically** >  **Align bottom**.

The text is aligned accordingly.

Example

Column header title Row header title	Function 1 	Column header title Row header title	Function 1 	Column header title Row header title	Function 1 
 Event 1		 Event 1		 Event 1	

3.5.1.3.6.12 Generate a PDF file of a matrix model

You can generate a PDF file of a matrix model and use this to print the matrix, for example.

Procedure

1. Open a matrix model. (page 409)
2. Click  **Reports**. The **Reports** bar opens.
3. Click the drop-down list box to display the list of available reports.
4. Select the **Export graphic as PDF** report.
5. Click the **Start** button. The corresponding dialog opens.
6. Select your settings and click **OK**.
7. When the report is created, the result is listed in the **Reports** bar, and a dialog to download the result opens.
8. Click  **Download result**. Depending on your browser settings, you can specify the download folder or the result is downloaded in the default download folder.
9. To download the result later, click  **Download report** in the **Reports** bar.

You have generated a PDF of a matrix model.

3.5.1.3.6.13 Export matrix model to Microsoft Excel

You can use a report to export the completed matrix model to Microsoft® Excel so that it can be prepared for use in a presentation, for example.

Procedure

1. Open a matrix model. (page 409)
2. Click  **Reports**. The **Reports** bar opens.
3. Click the drop-down list box to display the list of available reports.
4. Click the **Export relationship matrix** report.
5. Click the **Start** button.
6. When the report is created, the result is listed in the **Reports** bar, and a dialog to download the result opens.
7. Click  **Download result**. Depending on your browser settings, you can specify the download folder or the result is downloaded in the default download folder.
8. To download the result later, click  **Download report** in the **Reports** bar.

You have exported a matrix model as a XLS file.

You can open the file in Microsoft® Excel.

3.5.1.3.6.14 Create connections

3.5.1.3.6.14.1 Create new connections between objects in matrix model

Besides being able to view existing connections, you can also create new connections between objects.

Procedure

1. Open a matrix model. (page 409)
2. Select a matrix cell between two objects.
3. Click  **Create connections**. If several connections are possible, the **Create connection** dialog opens.
4. Click the connection you want to create, and click **OK**.
5. To add a connection that is not displayed, click **Add connection types**. The corresponding dialog opens.

If multiple connections are defined between objects, this is indicated by an asterisk in the cell in the matrix model. In a matrix model, connections are created (page 430) at definition level only.

You have created a connection between objects in a matrix model.

Tip

Double-click a matrix cell to open the **Create Connection** dialog.

3.5.1.3.6.14.2 Draw connections using keyboard

You can draw connections between objects with the keyboard if you have defined abbreviations (page 412) for these connections.

Procedure

1. Open a matrix model. (page 409)
2. Click in a cell in your matrix model.
3. In the cells where you want to create connections, enter the abbreviation for the required connection.

If there are several possible connections with the same abbreviation, the **Create connections** dialog opens. Enable the relevant connections and click **OK**.

The connections that correspond to the abbreviation are created in your matrix model. In a matrix model, connections are created (page 430) at definition level only.

Tip

If abbreviations are specified for the connections, you can move in the matrix model using the arrow keys and create connections using only the keyboard.

3.5.1.3.6.14.3 Temporarily hide connections in a matrix model

For a better overview, you can hide connections.

Prerequisite

You have modeled at least one object in the column and in the row header.

Procedure

1. Open a matrix model. (page 409)
2. Click  **Display symbols and connections** >  **Display connections**. The corresponding dialog opens.
3. Enter the first characters in the **Enter text to filter** field to reduce the amount of connection types displayed.
4. Move the mouse cursor over the connection types where the  **Show connection in menu** icon is displayed.
5. Click  **Show connection in menu** to remove the connection type from the list.
6. Click **Apply**.

The connections are no longer displayed in the matrix model. These settings are saved when you close the matrix model. When it is opened again, these settings are active. You can show (page 411) these connections again.

3.5.1.3.6.14.4 Delete connections in matrix model

You can delete connections in the matrix model.

Prerequisite

The connection you want to delete must not have any occurrences in models.

Procedure

1. Open a matrix model. (page 409)
2. Click the relevant cell in the matrix model and click  **Delete**. All connections except those that are used in other models are deleted.

The connections are deleted.

3.5.1.3.6.14.5 Delete connections using the inspector

You can delete connections in the matrix model.

Prerequisite

The connection you want to delete must not have any occurrences in models.

Procedure

1. Open a matrix model. (page 409)
2. Click  if the inspector panel is not enabled yet.
3. Click the relevant cell in the matrix model.
4. In the inspector panel, select the connection to be deleted and click  **Delete**. The specific connection is deleted

The connection is deleted.

You can delete all connections except those that are used in other models.

3.5.1.3.6.15 Edit objects

3.5.1.3.6.15.1 Temporarily hide connections in the matrix model

In a matrix model, you can represent connections between objects and create new objects or connections. You can hide objects.

Procedure

1. Open a matrix model. (page 409)
2. If you want to hide symbols for the row header, click the row header. If you want to hide symbols for the column header, click the column header.
3. Click  **Display symbols and connections** >  **Display symbols**. The corresponding dialog opens.
4. Disable the symbol types you want to hide temporarily.
5. Click **Apply**.

The symbol type is no longer displayed in the matrix model. These settings are saved when you close the matrix model. When it is opened again, these settings are active. The symbol type is also removed from the list if there are no occurrences in the matrix.

SHOW OBJECT AGAIN

Click  **Display symbols and connections** >  **Display symbols**. Enable the check box of the relevant symbol type.

NO LONGER DISPLAY OBJECT IN MATRIX MODEL

If the object is no longer needed, you can delete (page 429) it from the matrix model.

3.5.1.3.6.15.2 Sort objects in matrix model

New objects are always inserted in the selected row or column in the matrix model. You can change the arrangement of objects in the matrix model subsequently.

Procedure

1. Open a matrix model. (page 409)
2. Select the objects you want to sort.
3. Click  **Sort**.
4. Click  **Sort ascending (A-Z)**,  **Sort descending (Z-A)**, or  **Sort by type**.

The matrix model is sorted based on your settings.

Tip

Select adjacent objects by holding down the Shift key and clicking the first and last object. You can select objects that are not adjacent by holding down the Ctrl key and clicking the relevant objects. You can extend or reduce your selection using the arrow keys.

3.5.1.3.6.15.3 Move objects in a matrix model

You can move objects within a matrix model.

Procedure

1. Open a matrix model. (page 409)
2. Select the object in the matrix model.
3. Hold down the mouse button and drag the selected object to the relevant position.

The object is now displayed in the matrix model in the way you arranged it. A hierarchically grouped object is moved in its entirety.

Tip

You can move hierarchies by moving the top level.

Select adjacent objects by holding down the Shift key and clicking the first and last object. You can select objects that are not adjacent by holding down the Ctrl key and clicking the relevant objects.

3.5.1.3.6.15.4 Group objects hierarchically

You can hierarchically group any objects both in rows and in columns.

Procedure

1. Open a matrix model. (page 409)
2. Select the object that you want to position below another object in a hierarchy. The objects must be arranged directly below or beside each other.
3. Click  **Down one level.**

For a row, the object is grouped hierarchically below the object that is placed directly above it. For a column, the object is grouped below the object that is placed directly to the left of it. The row or column can be reduced to the top level of the hierarchy by clicking it, that is, the subordinate rows or columns are hidden.



Tip

Select adjacent objects by holding down the Shift key and clicking the first and last object. You can extend or reduce your selection using the arrow keys.

3.5.1.3.6.15.5 Cancel hierarchical grouping of objects

You can hierarchically group any objects both in rows and in columns. All actions performed on the top object are also performed on the subordinate objects.

Procedure

1. Open a matrix model. (page 409)
2. Click the arrow sign for an object to display the objects grouped below it if applicable.
3. Click the object for which you want to undo the hierarchical structure.
4. Click  **Up one level.**

The object is placed one level higher in the hierarchy.

Tip

Select adjacent objects by holding down the Shift key and clicking the first and last object. You can select objects that are not adjacent by holding down the Ctrl key and clicking the relevant objects. You can extend or reduce your selection using the arrow keys.

3.5.1.3.6.15.6 Remove symbol types from the matrix

You can remove symbols from the list of symbols to be used in a matrix model.

Procedure

1. Create a matrix model. (page 281)
2. If you want to remove symbols from the row header, click the row header. If you want to remove symbols from the column header, click the column header.
3. Click  **Display symbols and connections** >  **Display symbols**. The corresponding dialog opens.
4. Deselect the symbols you want to remove from the list of symbols to be used in a matrix.
5. Click **Apply**.

You have removed symbols from the list of symbols to be used in a matrix model. You can only remove a symbol type from the list if there are no objects of that symbol type used in the matrix.

3.5.1.3.6.15.7 Change object symbol

You can change the symbol for selected objects if various symbols are available for them.

Prerequisite

The method filter in use (page 286) includes different symbols of the objects you selected.

Procedure

1. Click an object, or hold the **Ctrl** key pressed to select multiple objects of the same type.
 2. Activate the Start (page 312) tab bar.
 3. Click  **Change symbol**. The list of object symbols available for the selected object(s) is shown.
 4. Click the symbol you want to use from now on for the selected object/s in this model.
- The symbol for the selected object is or the symbols of the selected objects are changed.

3.5.1.3.6.15.8 Copy objects and paste them into matrix model

You can copy objects in a matrix model and paste them into the same or another matrix model.

COPY AND PASTE OBJECTS

Procedure

1. Open (page 409) a matrix model.
2. Select one or more objects in the matrix model.
3. Click  **Copy** or use the keyboard shortcut **Ctrl + C**.
4. Click the relevant position in the matrix model.
5. Click  **Paste** or use the keyboard shortcut **Ctrl + V**.

The objects are pasted into the matrix model as occurrence copies.

COPY AND PASTE HIERARCHICALLY GROUPED OBJECTS

Procedure

1. Open (page 409) a matrix model.
2. Select one or more objects in the matrix model. If you select the top object in the hierarchy, the entire structure is copied.
3. Click  **Copy** or use the keyboard shortcut **Ctrl + C**.
4. Click the relevant position in the matrix model.
5. Click  **Paste** or use the keyboard shortcut **Ctrl + V**.

The hierarchically grouped objects are pasted into the matrix model as occurrence copies.

Tip

Select adjacent objects by holding down the Shift key and clicking the first and last object. You can select objects that are not adjacent by holding down the Ctrl key and clicking the relevant objects. You can extend or reduce your selection using the arrow keys.

3.5.1.3.6.15.9 Copy objects from graphical models and paste them into a matrix

You can copy objects in a matrix model and paste them into the same or another matrix model.

COPY AND PASTE OBJECTS

Procedure

1. Open (page 409) a matrix model.
2. Open (page 288) a graphical model.
3. Select one or more objects in the graphical model.
4. Click  **Copy** or use the keyboard shortcut **Ctrl + C**.
5. Click the relevant position in the matrix model.
6. Click  **Paste** or use the keyboard shortcut **Ctrl + V**.

The objects are pasted into the matrix model as occurrence copies.

3.5.1.3.6.15.10 Delete objects in a matrix model

You can delete objects from a matrix model.

Procedure

1. Open a matrix model. (page 409)
2. Click the relevant cell in the matrix model and click  **Delete**.

The object is deleted from the matrix model.

3.5.1.3.6.16 Delete matrix model

You can delete a matrix model.

Prerequisite

You require the **Delete** access privilege for the groups in which the items are saved.

In order to restore the status of a database after unintentionally deleting something, please use versioned databases or back up your databases before you delete items.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Repository**.
3. Move the mouse cursor over the matrix model to be deleted and click  **Delete**.

After a confirmation prompt, the matrix model is deleted.

3.5.1.3.6.17 Valuable information

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

3.5.1.3.6.17.1 What is a matrix model?

In a matrix model, connections between any object types can be created at the definition level.

3.5.1.3.6.17.2 What are connections at definition level?

In matrix models, only the definition level is visualized for connections. This means that matrix models do not contain occurrences of connections, only of objects.

3.5.1.3.6.17.3 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.

3.5.1.4 Check models and objects

You can use the provided or your own semantic checks to check whether models and objects meet predefined conditions. If rules are not adhered to, detailed error descriptions, warnings, and/or notes are displayed. Based on semantic check results, you can customize the models and ensures that they are properly modeled. As a result, expensive modification efforts and rework can be avoided if models are created by several people or even across department boundaries.

You can use the repository to check the content of a group (page 438), multiple models, and multiple objects (page 438). Errors, warnings, and notes are indicated in the **Semantic checks** bar.

You can use ARIS Connect Designer to check an open model and its objects (page 431). Errors are marked in the model itself and listed in the **Semantic checks** bar that is displayed under the model. The **Semantic checks** bar also lists warnings and notes.

Both the semantic check results (page 439) of the checks using the repository and the semantic check results (page 435) of the checks using ARIS Connect Designer can be downloaded in the format selected.

3.5.1.4.1 Run a semantic check for a model

You can check whether the model complies with the modeling conventions.

When you run a semantic check, the previous semantic check results are deleted from the results list.

Procedure

1. Open a model (page 288).
2. Click  **Semantic checks** to open the **Semantic checks** (page 270) bar.
3. Click in the semantic check list box. The relevant semantic checks are listed.
4. Select the required semantic check. You can select a semantic check to check the model or a semantic check to check specific objects.
5. Click  **Run the selected semantic check**. Depending on the rules to be checked, the semantic check is executed without further input or dialogs are opened and you have to make settings.

The **Semantic check** is executed and the result is displayed. Errors, warnings, and notes are listed in the **Semantic checks** bar and the corresponding objects are marked by error, warning, and note markers (page 442) in the model. The result can be downloaded (page 435) in the selected format (page 434).

3.5.1.4.2 Run a semantic check for objects

You can rerun the last executed semantic check to ensure that your adjustments have fixed previous errors.

Procedure

1. Run a semantic check (page 431).
2. Fix the errors displayed by the semantic check.
3. Click  **Rerun the last semantic check**. Based on the previous profile and data, the last semantic check is performed independently of the current selection.
4. Check whether all errors have been corrected. If not, proceed with troubleshooting.

You have corrected modeling errors using the semantic check.

3.5.1.4.3 Run a semantic check using the Model tab bar

You can check whether the model or selected objects complies with the modeling conventions. When you run a semantic check, the previous semantic check results are deleted from the results list.

Procedure

1. Open a model (page 288).
2. If you want to run a semantic check for the model, ensure that no model element is selected or select objects if you want to run a semantic check for objects.
3. Click the **Model** tab bar.
4. Click  **Check diagram**. The semantic checks available for the model or for the selected objects are displayed.
5. Select the required semantic check. Depending on the rules to be checked, the semantic check is executed without further input or dialogs are opened and you have to make settings.

The **Semantic check** is executed and the result is displayed. Errors, warnings, and notes are listed in the **Semantic checks** bar and the corresponding objects are marked by error, warning, and note markers (page 442) in the model. The result can be downloaded (page 435) in the selected format (page 434).

3.5.1.4.4 Review semantic check results

You can review semantic check results for errors, warnings, and notes.

Prerequisites

You have run a semantic check for the open model.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** (page 270) bar. The result of the last executed semantic check is listed.
2. Click  **Go to next error, warning, or note**. The next entry is highlighted. If the corresponding object is not in the visible model area, it is moved to the visible model area.
3. Click  **Go to previous error, warning, or note**. The previous entry is highlighted. If the corresponding object is not in the visible model area, it is moved to the visible model area.

You have reviewed the listed semantic check results.

3.5.1.4.5 Restrict the result view to errors, warnings or notes

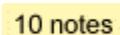
You can restrict the result to errors, warnings, or notes to focus on items you want to edit.

Prerequisite

You have run a semantic check for the open model. The semantics check found errors, warnings, and notes.

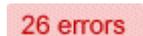
Procedure

1. Click  **Semantic checks** to open the **Semantic checks** (page 270) bar. The number of errors, warnings and notes is displayed.

2. Click **errors**, **warnings**, or **notes**.

Depending on your choice, only the errors, warnings, or notes are listed. You can display all semantic check entries again by clicking **Show all**.

3.5.1.4.6 Show additional information for errors, warnings, and notes

You can show additional semantic check results in the model and in the **Semantic checks** bar. A marker is displayed above the corresponding object in the model, depending on the type of result. Each finding is displayed in a row in the **Semantic checks** bar.

Prerequisites

You have run a semantic check for the open model.

Procedure

1. Click the entry in the **Semantic checks** bar you want to show in the model. A marker is placed above the corresponding object in the model.
2. In the model, position the mouse pointer over the marker. Additional information is displayed in a pop-up.
3. In the **Semantic checks** bar, click  **Expand** of an error, warning, or note. Detailed information is displayed, such as the rule on which the entry is based.

You have shown additional information (page 321) in the model and in the **Semantic checks** bar.

3.5.1.4.7 Set up the output options of the semantic check

You can specify in which format the result of the semantic check is to be generated for downloading.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** bar.
2. Click  **Select output format**. The corresponding dialog opens.
3. Click the  down arrow and select the output option you want to use, for example, **Output PDF**.
4. Click **OK**.

You have set up the output options for semantic check results. If you now run a semantic check and click  **Download result as a document**, the result is downloaded in the selected format.

3.5.1.4.8 Download the result of a semantic check

You can download the result of a semantic check that is listed in the **Semantic checks** bar.

Prerequisites

You have run a semantic check for the open model.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** (page 270) bar. The result of the last executed semantic check is listed.
2. Click  **Download result as a document**.

The **Save As** dialog opens and you can navigate to the folder in which you want to save the semantic checks result in the chosen format (page 434).

3.5.1.4.9 Clear the result of the last semantic check

You can clear the result of the last semantic check. As a consequence, you will no longer be able to download the corresponding semantic check results.

Prerequisites

You have run a semantic check for the open model.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** (page 270) bar. The result of the last executed semantic check is listed.
2. Click  **Clear semantic check result**.

The entries of the semantic check result for the current model are deleted.

3.5.1.4.10 Close the Semantic checks bar

You can close the **Semantic checks** bar when you no longer need it.

Procedure

Click  **Semantic checks** or click  **Close** in the **Semantic checks** bar.

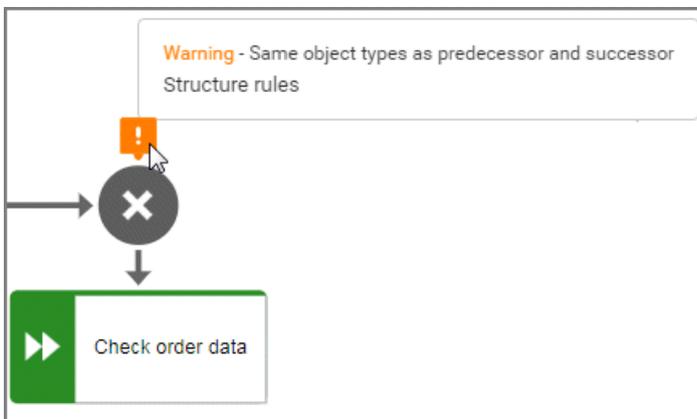
The **Semantic checks** bar is closed.

3.5.1.4.11 How are errors, warnings, and notes marked in the model?

If a semantic check finds errors, warnings, or notes, the corresponding object is marked in the model.

Information type	Marker
Error	
Warning	
Note	

If, for example, a warning is found, the warning marker is placed above the corresponding object. When you position the mouse pointer over the warning marker, additional information on the warning is displayed.



You can show detailed information in the **Semantic checks** bar by expanding an entry.

#	Item	Finding	Description
Rules for data elements 0 errors 2 warnings 0 notes 			
1	> ● AND rule	 Structure rules	Same object types as predecessor and successor
2	▼ ● XOR rule	 Structure rules Warning	Rule: Order at the rule must be observed At occurrence level, this rule checks whether or not at objects of type "Rule" redundancies exist for the set of preceding object types and the set of subsequent object types. When all incoming connections come from events, then all outgoing connections may only lead to functions, and vice versa.

3.5.2 Check models and objects

You can use the provided or your own semantic checks to check whether models and objects meet predefined conditions. If rules are not adhered to, detailed error descriptions, warnings, and/or notes are displayed. Based on semantic check results, you can customize the models and ensures that they are properly modeled. As a result, expensive modification efforts and rework can be avoided if models are created by several people or even across department boundaries.

You can use the repository to check the content of a group (page 438), multiple models, and multiple objects (page 438). Errors, warnings, and notes are indicated in the **Semantic checks** bar.

You can use ARIS Connect Designer to check an open model and its objects (page 431). Errors are marked in the model itself and listed in the **Semantic checks** bar that is displayed under the model. The **Semantic checks** bar also lists warnings and notes.

Both the semantic check results (page 439) of the checks using the repository and the semantic check results (page 435) of the checks using ARIS Connect Designer can be downloaded in the format selected.

3.5.2.1 Set up the output options of the semantic check

You can specify in which format the result of the semantic check is to be generated for downloading.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** bar.
2. Click  **Select output format**. The corresponding dialog opens.
3. Click the  down arrow and select the output option you want to use, for example, **Output PDF**.
4. Click **OK**.

You have set up the output options for semantic check results. If you now run a semantic check and click  **Download result as a document**, the result is downloaded in the selected format.

3.5.2.2 Run a semantic check for models and objects

You can check one or multiple models and objects for semantic correctness.

When you run a semantic check, the previous semantic check results are deleted from the results list.

Procedure

1. Click  **Repository**.
2. In the tree, select the database group containing the models and/or objects you want to check.
3. In the detailed view, enable the check boxes of the relevant models and/or objects.
4. Click  **Semantic checks** to open the **Semantic checks** bar. The **Semantic checks** bar displays the name of the selected item. If you have selected more than one item, the **Semantic checks** bar displays the number of selected items.
5. Click in the semantic check list box. The relevant semantic checks are listed.
6. Select the required semantic check.
7. Click **Start**. Depending on the rules to be checked, the semantic check is executed without further input or dialogs are opened and you have to make settings.

The **Semantic check** is executed. The result is listed in the **Result** area and can be downloaded (page 439) in the selected format (page 434).

3.5.2.3 Run a semantic check for the content of a group

You can check the content of a group for semantic correctness.

Procedure

1. Click  **Repository**.
2. In the tree, select the database group containing the models and/or objects you want to check. The **Semantic checks** bar displays the name of the selected database group.
3. Click in the semantic check list box. The relevant semantic checks are listed.
4. Select the required semantic check.
5. Click **Start**. Depending on the rules to be checked, the semantic check is executed without further input or dialogs are opened and you have to make settings.

The **Semantic check** is executed. The result is listed in the **Result** area and can be downloaded (page 439) in the selected format (page 434).

3.5.2.4 Jump from objects in the Semantic checks bar to the repository

You can jump from objects listed in the **Result** area of the **Semantic checks** bar to where they are stored in the repository.

Prerequisites

You have already run a semantic check.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** bar.
2. Click the name of a listed object in the **Result** area.

The object is moved to the visible area of the detail view of the repository. The object is highlighted and its check box enabled.

3.5.2.5 Download the result of a semantic check

You can download the results of semantic checks that are listed in the **Semantic checks** bar.

Prerequisites

You have already run a semantic check.

Procedure

1. Click  **Repository**.
2. Click  **Semantic checks** to open the **Semantic checks** bar. The result of the last executed semantic check is listed.
3. Click  **Download result as a document**.

The **Save As** dialog opens and you can navigate to the folder in which you want to save the semantic checks result in the chosen format (page 434).

3.5.2.6 Open a checked model in ARIS Connect Designer

You can open a model in ARIS Connect Designer for which you ran a semantic check in the repository. This provides you with the extended functionality of the **Semantic checks** bar of ARIS Connect Designer.

Prerequisites

You have already run a semantic check for a model.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** bar.
2. Click the name of a model in the **Result** area.

The model is opened and the **Semantic checks** bar contains the semantic check results. Objects with errors, warnings, and/or notes are marked in the model. You can restrict the result to errors, warnings or notes (page 433).

3.5.2.7 Clear the result of the last semantic check

You can clear the result of the last semantic check. As a consequence, you will no longer be able to download the corresponding semantic check results.

Prerequisites

You have already run a semantic check.

Procedure

1. Click  **Semantic checks** to open the **Semantic checks** bar. The result of the last executed semantic check is listed.
2. Click  **Clear semantic check result.**

The entries of the semantic check results for all items are deleted.

3.5.2.8 Valuable information

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

3.5.2.8.1 What should you know about semantic checks?

You can use semantic checks to ensure correct modeling in ARIS. Your models are checked using the defined rules. These rules ensure that your business process models are logically structured in ARIS and are meaningful. Only models such as these can produce meaningful and correct analysis results in further work and be used to help make decisions.

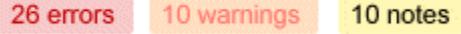
ARIS provides standard semantic checks. You can use ARIS Architect to define your own checks and make them available to ARIS users.

Using ARIS Connect, semantic checks can be run for selected content (page 438) or the content of a group (page 438) in the repository or for an opened model (page 431) and its objects (page 432) in ARIS Connect Designer.

Certain semantic checks can be applied to different items, while others can only be applied to one item or item type, for example, only to models of one model type. This depends on which rules a semantic check verifies.

3.5.2.8.2 What icons symbolize the semantic check results?

Results of semantic checks are also displayed graphically.

	<p>If a semantic check is executed in the  Repository without finding a rule violation, this is indicated by a green symbol.</p>
	<p>If a semantic check is executed in the  Repository and it finds rule violations, the number and type of rule violations are displayed. The number with a dark red background indicates the errors, the number with a light red background displays the warnings, and the number with a yellow background displays the notes.</p>
	<p>If a semantic check is executed using ARIS Connect Designer without finding a rule violation, this is indicated by a green symbol.</p>
	<p>If a semantic check is executed in ARIS Connect Designer and it finds rule violations, the number and type of rule violations are displayed. You can restrict the result view to errors, warnings, or notes.</p>
	<p>If you have restricted the result view in ARIS Connect Designer to errors, warnings, or notes, you can show all result entries again by clicking on Show all.</p>

3.5.3 Lock models and objects

You can permanently lock models and objects to prevent editing by other users, and unlock locked items again.

Locking models and objects is useful during Release Cycle Management (RCM), for example, to perform an assessment of the required items.

The versioning and permanent locking functions support key aspects of Release Cycle Management.

You can lock:

- objects
- models
- content of groups

3.5.3.1 Lock models

You can lock models so that they cannot be edited, for example, to perform a review. As long as the lock is enabled, only the user who applied it can edit the locked items.

Prerequisite

- The models must be closed.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the  **Repository**, navigate to the database group containing the content you want to lock. When you select the group, its content is displayed.
2. If you want to lock a model, move the mouse pointer to the row with the model and click  **More**.
If you want to lock multiple models, enable the check boxes for the relevant models and click  **More** above the item list. The menu is displayed.
3. Click  **Lock**. The lock is applied and you will be informed of the result. If it was impossible to lock one or multiple objects of a model, you will be informed of the items that were locked and those that could not be locked.

Locked models and objects can only be edited by you. The locked items remain locked until you or a system user unlocks them again.

3.5.3.2 Lock objects

You can lock objects so that they cannot be edited, for example, to perform a review. As long as the lock is enabled, only the user who applied it can edit the locked items.

Prerequisite

You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the  **Repository**, navigate to the database group containing the content you want to lock. When you select the group, its content is displayed.
2. If you want to lock an object, move the mouse pointer to the row with the object and click  **More**.
If you want to lock multiple objects, enable the check boxes for the relevant objects and click  **More** above the item list. The menu is displayed.
3. Click  **Lock**. The lock is applied and you will be informed of the result. If it was impossible to lock one or multiple objects, you will be informed of the objects that were locked and those that could not be locked.

Locked objects can only be edited by you. The locked objects remain locked until you or a system user unlock them again.

3.5.3.3 Unlock models

You can unlock locked models in order to release them for editing for all users with the corresponding privilege.

Prerequisite

- The models must be closed.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the  **Repository**, navigate to the database group containing the content you want to unlock. When you select the group, its content is displayed.
2. If you want to unlock a model, move the mouse pointer to the row with the model and click  **More**.
If you want to unlock multiple models, enable the check boxes of the relevant models and click  **More** above the item list. The menu is displayed.
3. Click  **Unlock**. The lock is removed and you will be informed of the result. If it was impossible to unlock one or multiple objects of a model, you will be informed of the items that were unlocked and those that could not be unlocked.

The dialog closes and the models (and objects, if applicable) are unlocked.

3.5.3.4 Unlock objects

You can unlock locked objects in order to release them for editing for all users with the corresponding privilege.

Prerequisite

- The models must be closed.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the  **Repository**, navigate to the database group containing the content you want to unlock. When you select the group, its content is displayed.
2. If you want to unlock an object, move the mouse pointer to the row with the object and click  **More**.
If you want to unlock multiple objects, enable the check boxes of the relevant objects and click  **More** above the item list. The menu is displayed.
3. Click  **Unlock**. The lock is removed and you will be informed of the result. If it was impossible to unlock one or multiple objects of a model, you will be informed of the objects that were unlocked and those that could not be unlocked.

The dialog closes and the objects are unlocked.

3.5.4 Manage versions

In ARIS Connect you can version models and thus store different model states.

The different model versions can be opened for information, while the workspace model is the only one available for editing.

Within the scope of Release Cycle Management (RCM) you can identify and explain specific model versions. The change lists are used to continuously document the changes made to models. This means that the documentation can be used both internally and externally.

The permanent locking and versioning functions support key aspects of Release Cycle Management.

Versioning is not performed automatically when saving; it is performed when the content is suitable for versioning. "Suitable for versioning" means that a model has reached a state that is to be archived.

3.5.4.1 Version models

You can version models, for example, to use them in Release Cycle Management (RCM).

Prerequisite

- You have opened a versionable database.
- You have the **Version** access privilege.

Procedure

1. In the  **Repository**, navigate to the database group containing the models you want to version. When you select the group, its content is displayed.
2. If you want to version a model, move the mouse pointer to the row with the model and click  **More**.
If you want to version multiple models, enable the check boxes for the relevant models and click  **More** above the item list. The menu is displayed.
3. Click  **Versioning**. The **Enter description** dialog opens.
4. Enter a change description. This description informs users of the changes made since the last version and why they were made.
5. Click **OK**.

The model/s is/are saved as a version and a change list including the description is created.

3.5.4.2 Show versions

You can display a list of versions of a model.

Procedure

1. In the  **Repository**, navigate to the database group containing the model whose versions you want to view. When you select the group, its content is displayed.
2. Move the mouse pointer to the row with the relevant model and click  **More**. The menu is displayed.
3. Click  **Show versions**. The **Version overview** dialog opens.

All versions of the model are displayed. The date it was saved, its change list numbers, and the version descriptions are shown.

3.5.4.3 Open version

You can open a version of a model for information purposes.

Procedure

1. In the  **Repository**, navigate to the database group containing the model whose version you want to open. When you select the group, its content is displayed.
2. Move the mouse pointer to the row with the relevant model and click  **More**. The menu is displayed.
3. Click  **Show versions**. The **Version overview** dialog opens.
4. Click the name of the version you want to open.

The write-protected version of the model opens in ARIS Connect Designer and you can obtain information on the model's contents. Furthermore, you can view reports on the model or selected objects (page 348).

3.5.5 Use dashboards

If you have an ARIS Aware (page 451) license, you can use predefined dashboards that are supplied with the software, or create your own dashboards.

3.5.5.1 Open a dashboard in the Repository

You can open an existing dashboard from the  Repository of ARIS Connect . The dashboard is displayed in view mode provided by the dashboard editor.

Prerequisite

- You have the **View** permission for the dashboard. See Manage dashboard permissions (page **Error! Bookmark not defined.**) for details.
- You have the **View** permission for the assigned data feeds. See Manage data feed permissions (page **Error! Bookmark not defined.**) for details.

Procedure

1. Start ARIS Connect.
2. Click  **Repository**.
3. Activate the **Dashboards & Data feeds** tab.
4. Click  **Dashboards**.
5. To open a dashboard, click the relevant dashboard name.

The selected dashboard opens in view mode of the dashboard editor.

In edit mode, you can edit the dashboard (page **Error! Bookmark not defined.**) currently opened, provided you have the **Dashboard administrator** function privilege. Click  **Edit dashboard** in the main menu.

3.5.5.2 Create a dashboard in the Repository

ARIS Connect allows you to create your own dashboards (page **Error! Bookmark not defined.**).

By default, dashboards and the relevant data feeds are provided in the  Repository of ARIS Connect.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click  **Repository**.
3. Activate the **Dashboards & Data feeds** tab.
4. Click  **Dashboards**.
5. Click  **New**.

The dashboard editor is opened in edit mode.

6. Configure and save your dashboard using the dashboard editor (page **Error! Bookmark not defined.**).
7. Click  **Refresh**.

Your dashboard is created and available in the **Dashboards** list in the  Repository of ARIS Connect.

3.5.5.3 Open a data feed in the Repository

You can open an available data feed in the  Repository of ARIS Connect. The data feed is opened in the data feed editor.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click  **Repository**.
3. Activate the **Dashboards & Data feeds** tab.
4. Click  **Data feeds**.
5. To open a data feed, click the relevant data feed name.

The selected data feed opens in the data feed editor.

You can edit the data feed currently open using the data feed editor (page **Error! Bookmark not defined.**), provided you have the **Dashboard administrator** function privilege.

3.5.5.4 Create a data feed in the Repository

ARIS Connect allows you to create your own data feeds (page **Error! Bookmark not defined.**).

By default, the available dashboards and the relevant data feeds are provided in the  Repository of ARIS Connect.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click  **Repository**.
3. Activate the **Dashboards & Data feeds** tab.
4. Click  **Data feeds**.
5. Click  **New**.
The data feed editor is opened.
6. Configure and save your data feeds using the data feed editor (page **Error! Bookmark not defined.**).
7. Click  **Refresh**.

Your data feed is created and available in the **Data feeds** list in the  Repository of ARIS Connect.

3.5.5.5 Valuable information

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

3.5.5.5.1 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. ARIS Aware is equipped with ready-to-go templates for common scenarios in the context of business process management, including Center of Excellence (CoE) (page 453), Business Usage Monitoring (page 483), Enterprise Architecture Management (page 494), Customer Experience Management (CXM) (page 471), Process Performance Management, and Governance Risk and Compliance Management. These templates can be extended and customized according to the individual requirements of a company.

3.5.5.5.2 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 (page 526).

CREATE DASHBOARDS AND DATA FEEDS

You can create and connect dashboards (page **Error! Bookmark not defined.**) and data feeds (page **Error! Bookmark not defined.**). Dashboards and data feeds are stored on the server you defined (page **Error! Bookmark not 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 (page **Error! Bookmark not defined.**). 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 (page **Error! Bookmark not defined.**) 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 (page **Error! Bookmark not defined.**). You can use the supplied database United Motor Group to show various dashboards (page 115).

3.5.5.5.3 What dashboards are available by default?

ARIS Aware offers many demo dashboards by default. The predefined dashboards consist of charts or tables that show the results of various visual analyses of the **United Motor Group** database content.

3.5.5.5.3.1 Dashboards using Center of Excellence (CoE) data

Here you can find information about Center of Excellence dashboards delivered by default. Consequently, the dashboards provide information about leadership and best practice for the focus area business concept via Business Process Modeling.

3.5.5.5.3.1.1 CoE - Aggregated maturity level (overview)

This dashboard is shown on the **Overview** fact sheet of process models. It 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.

CHARTS

Aggregated modeling progress

Overview of the percentage of maintained mandatory data (attributes).

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.

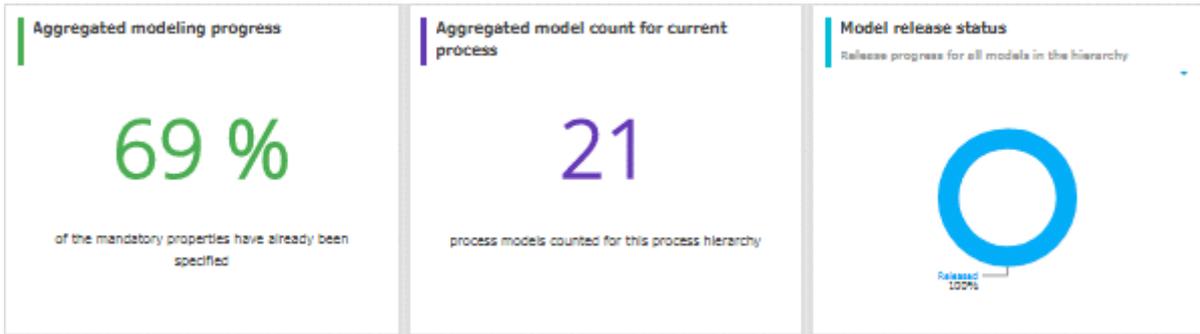
Data feed

CoE - Model status

Calculation

Aggregation of the property **Model status** in the hierarchy level.

EXAMPLE



3.5.5.5.3.1.2 CoE - Aggregated maturity - Diagram

This dashboard is shown on the **Diagram** fact sheet of process models. It 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.

CHARTS

Aggregated modeling progress

Overview of the percentage of maintained mandatory data (attributes).

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 been 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.

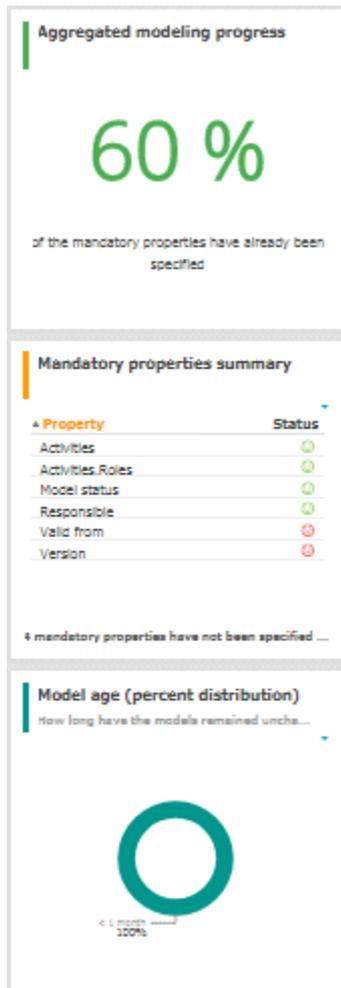
Data feed

CoE - Model age

Calculation

Aggregation of the **Last change** property in the hierarchy level.

EXAMPLE



3.5.5.5.3.1.3 CoE - Local maturity level

This dashboard is shown for selected process models and organizational charts.

CHARTS

Total number of change requests

Shows the number of change requests submitted for a specific model via 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.

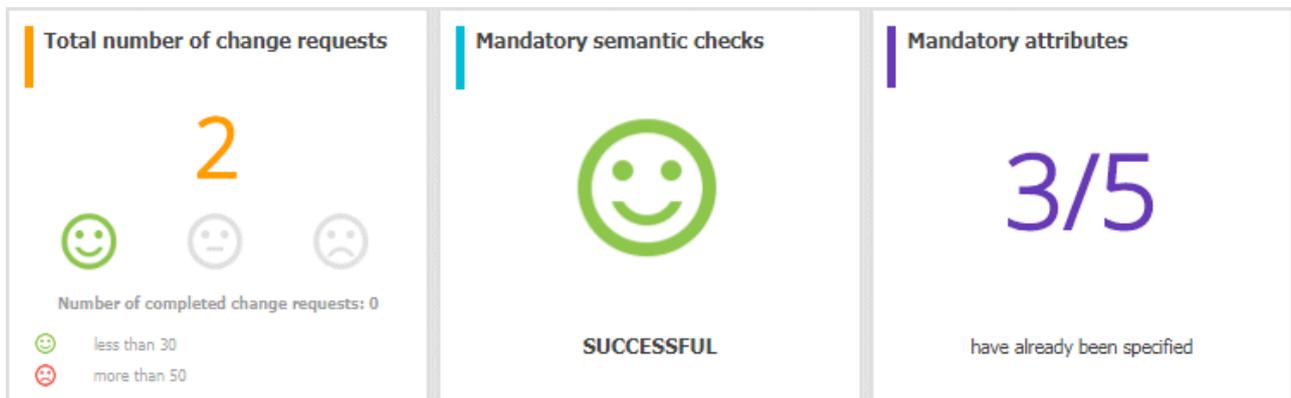
Data feed

CoE - Local maturity - Conventions

Calculation

Collection of the statuses of the mandatory attributes - whether they are maintained or not.

EXAMPLE



3.5.5.5.3.1.4 CoE - Global maturity level

This dashboard provides different types of information on all process models and organizational charts within a database.

CHARTS

Validity date status

Overview of the validity date of the models in the database. Shows when models will expire based on the value that was specified for the **Validity** attribute value.

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 models which have been shared most frequently using the **Share model** mini workflow.

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 seven top 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

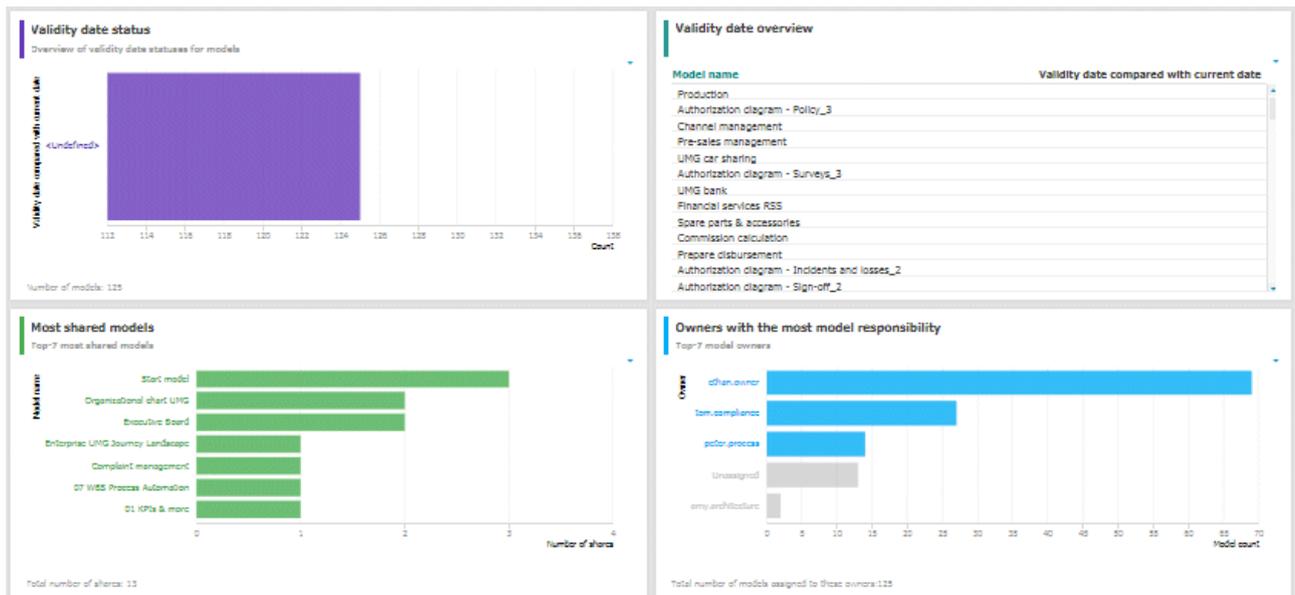
CoE - Process Owners

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



3.5.5.5.3.1.5 CoE - Process Change Management

The dashboard shows governance information based on Process Governance.

CHARTS

Status of change requests for models

Shows the processes with change requests in the RUNNING 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:

- RUNNING (pending 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 requests count is

Shows the increase or decrease in the number of change requests within three months based on the submission date of change requests submitted for models the  **Submit change request** mini workflow.

Shows the number of overall change requests in the system based on 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 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 top seven models with the highest number of pending change requests.

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 PENDING 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 PENDING 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)

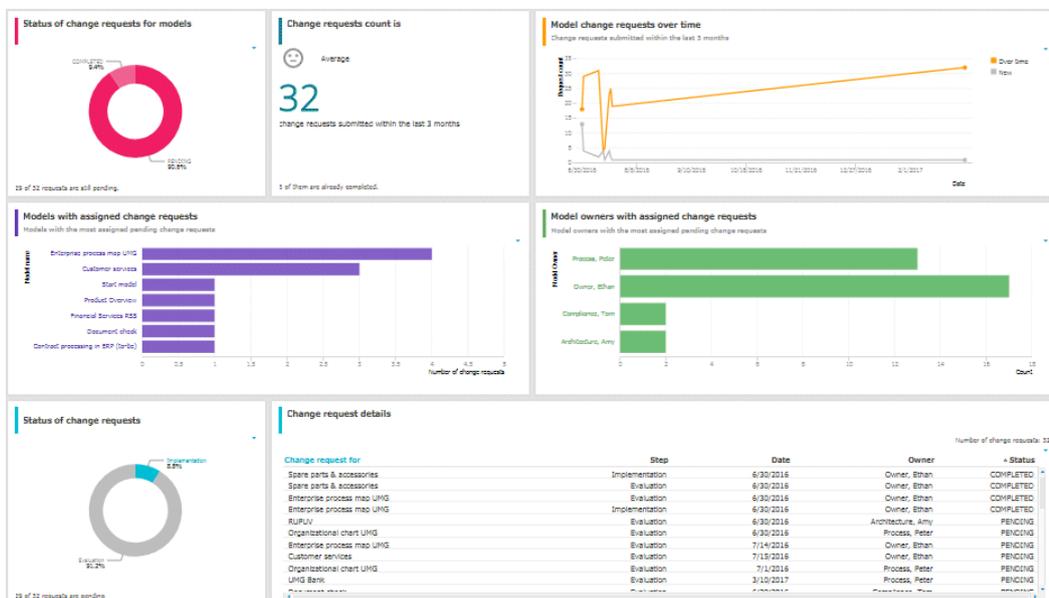
Calculation

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 (PENDING or COMPLETED).

The ID of the workflow to be considered can be configured.

EXAMPLE



3.5.5.5.3.1.6 CoE - Human tasks

This dashboard shows overall governance information about the human tasks submitted via Process Governance

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

Month	Count
July	15
July	4
August	3
August	4
August	1
August	2
September	2
October	2
November	2
December	2
2017	2
February	2
March	1

Human task details

Human task	Prior...	Creation date	Status	Participant	Item	Description	Database
Realize change request for model [Spare parts & ac...	NOR...	2016-06-30	COMPLET...	Owner, Eth...	Spare parts & acces...	please adapt	United Motor ...
Change request for model [Spare parts & accessori...	NOR...	2016-06-30	COMPLET...	Owner, Eth...	Spare parts & acces...	please adapt	United Motor ...
Change request for model [Enterprise process map ...	NOR...	2016-06-30	COMPLET...	Owner, Eth...	Enterprise process ...	Please adapt to the cur...	United Motor ...
Realize change request for model [Enterprise proce...	NOR...	2016-06-30	COMPLET...	Owner, Eth...	Enterprise process ...	Please adapt to the cur...	United Motor ...
Change request for model [Product Overview] Fina...	NOR...	2016-06-30	COMPLET...	Owner, Eth...	Product Overview	please change	United Motor ...

3.5.5.5.3.2 Dashboards using Customer Experience Management (CXM) data

Available dashboards 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 and create their infographics (page 112). In this way, target groups can be clearly distinguished from each other and their needs can be addressed.

3.5.5.5.3.2.1 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.

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, 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 (page **Error! Bookmark not defined.**).

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 471).

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 (page **Error! Bookmark not defined.**).

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 471).

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.

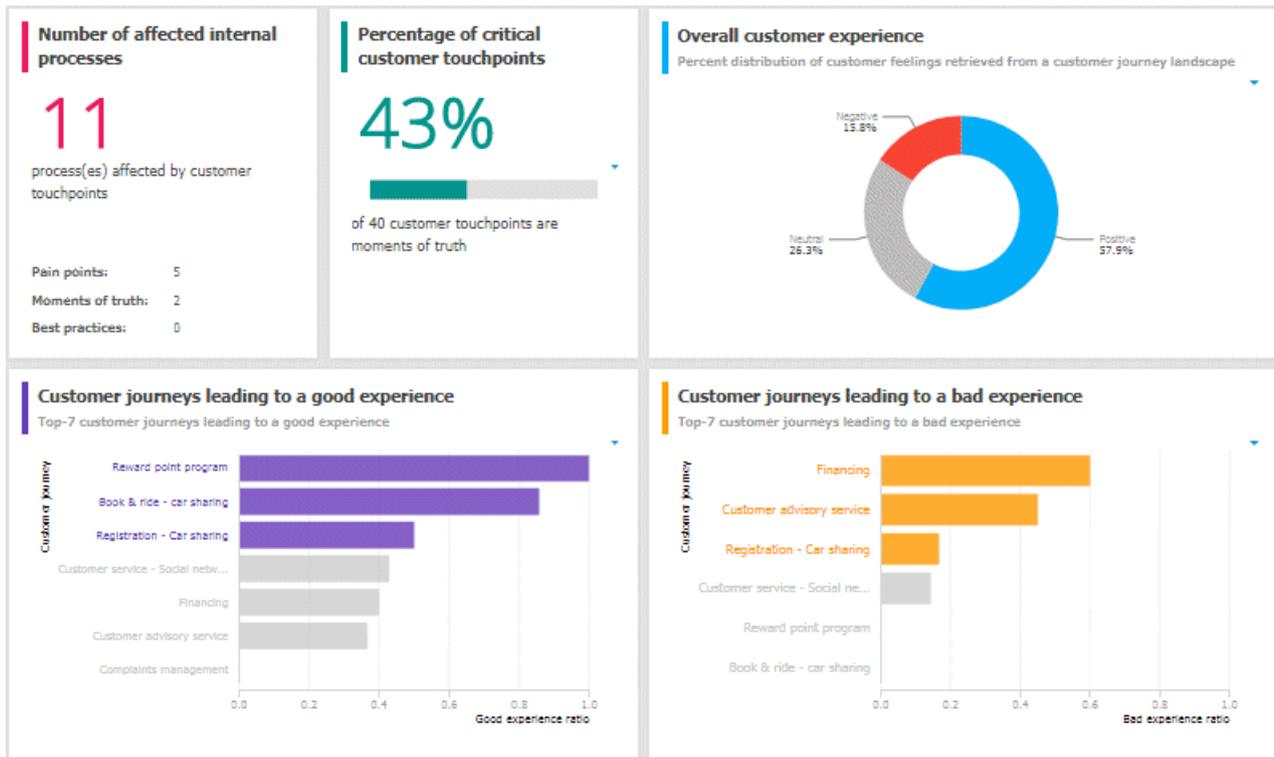
Data feed

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



3.5.5.5.3.2 Responsibilities

Customer experience dashboard evaluating business units and channels.

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 seven 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 seven 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**.

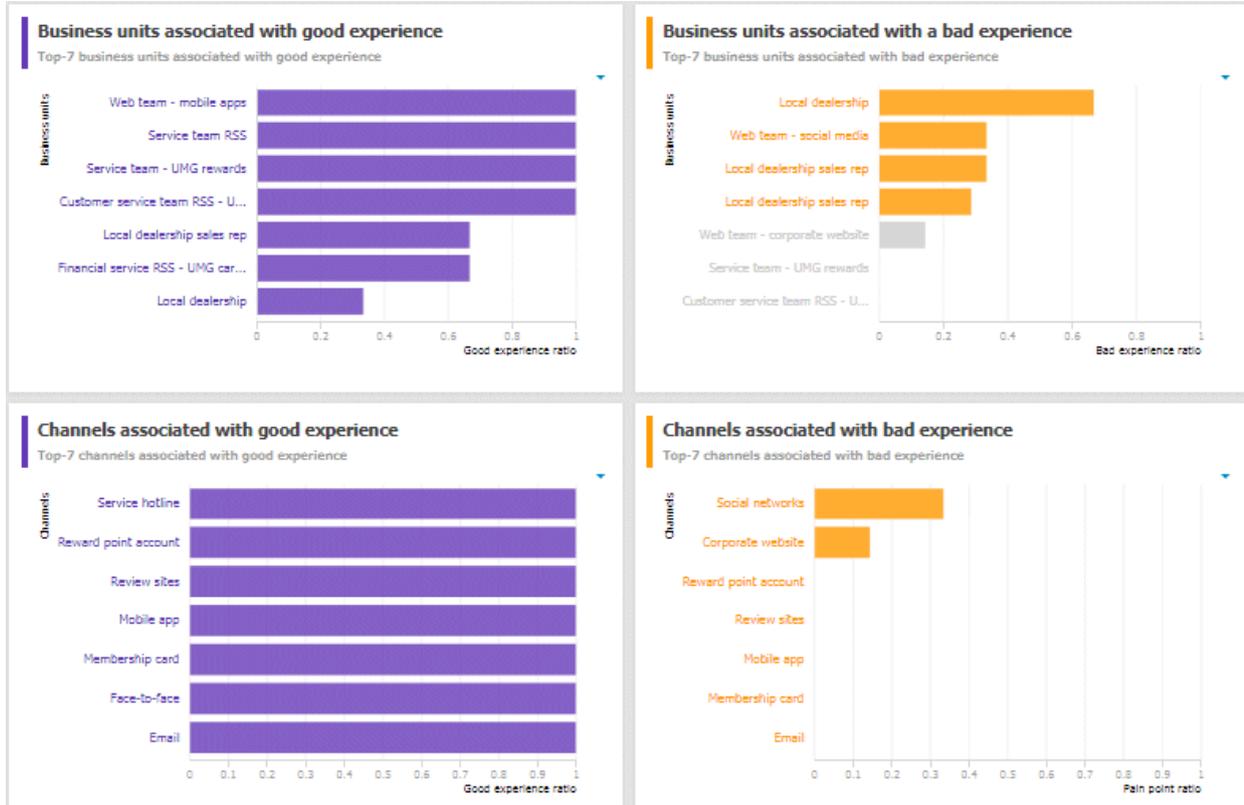
Data feed

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



3.5.5.5.3.2.3 Customer journey map

Customer journey map dashboard that evaluates customer touchpoints and retrieves the customer touchpoints with high market potential.

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.

Importance and feelings customers associate with touchpoints

Importance and feelings that customers associate with customer touchpoints.

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 (page **Error! Bookmark not defined.**).

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 471).

CONTEXT

Database

Report configurable?

No

Data collection

.-

Data feed

CXM - Importance vs. feelings

Calculation

Values from the **Customer feeling** and **Importance to customer** attributes specified for customer touchpoints.

Customer touchpoints with high market potential

Customer touchpoints with high market potential and the corresponding transformation costs retrieved from customer journey maps.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

-,-

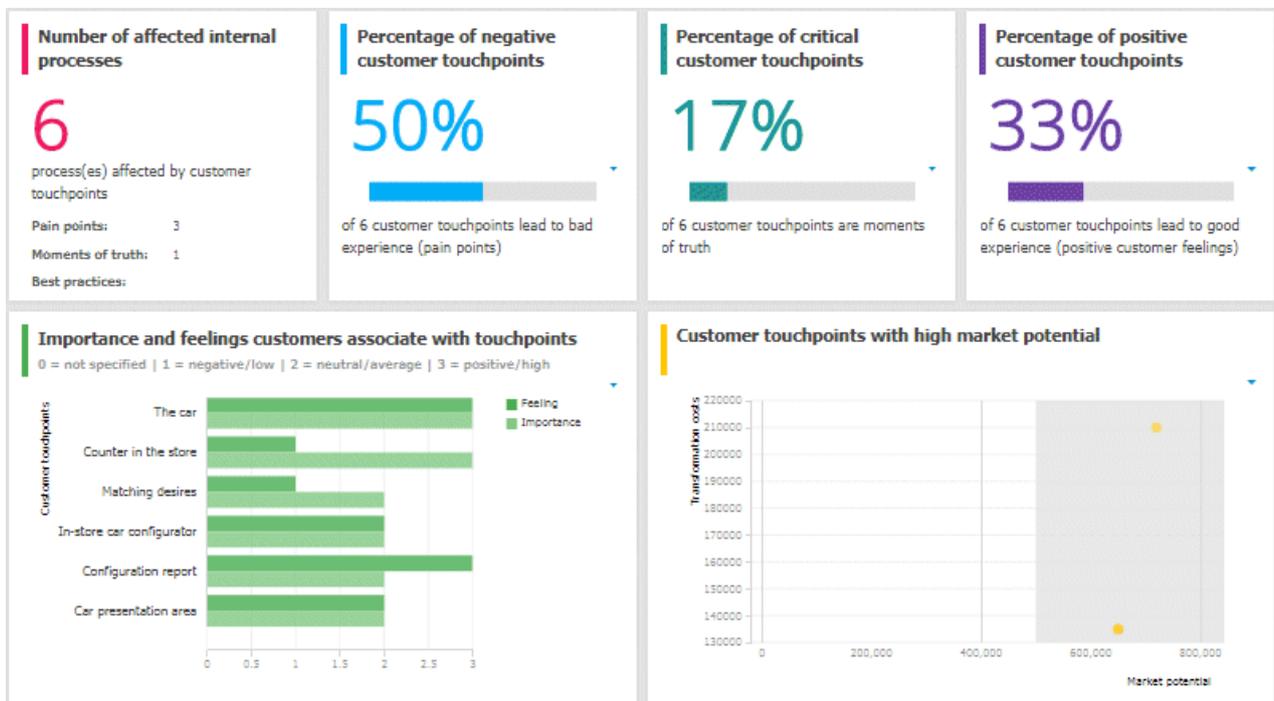
Data feed

CXM - Analyze customer experience

Calculation

Values from the **Market potential** and **Transformation costs** attributes specified for customer touchpoints.

EXAMPLE



3.5.5.5.3.3 Dashboards using content that is retrieved by ARIS reports that access Piwik data

Available dashboards using content that is retrieved by ARIS reports that access Piwik data. Piwik is an open-source analytics platform.

3.5.5.5.3.3.1 Piwik - 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.

CHARTS

Number of visits over time

Shows the number of visits (visits/unique visitors) over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage running the Piwik **VisitsSummary** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Piwik** (page **Error! Bookmark not defined.**).

The report result is used as input for the Piwik - Technical KPIs (page 489) 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

Piwik - 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: Piwik - Database-specific portal usage running the Piwik **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik 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>/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 483) dashboard.

CONTEXT

Database

Data feed

Piwik - Most viewed item types

Most viewed items

Top seven items most viewed over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Database-specific portal usage running the Piwik **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik 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>/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 483) dashboard.

CONTEXT

Database

Data feed

Piwik - Most viewed items

Most searched keywords

Top seven of the keywords most searched over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Database-specific portal usage running the Piwik **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik 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>/**Piwik** subgroup. The report result is used as input for the Piwik - Publications (page 483) dashboard.

CONTEXT

Database

Data feed

Piwik - 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: Piwik - Database-specific portal usage running the Piwik **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik 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>/**Piwik** subgroup. The report result is used as input for the Piwik - Publications (page 483) dashboard.

CONTEXT

Database

Data feed

Piwik - 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: Piwik - Database-specific portal usage running the Piwik **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik 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>/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 483) dashboard.

CONTEXT

Database

Data feed

Piwik - 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: Piwik - Database-specific portal usage running the Piwik **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik 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>/Piwik subgroup. The report result is used as input for the Piwik - Publications (page 483) dashboard.

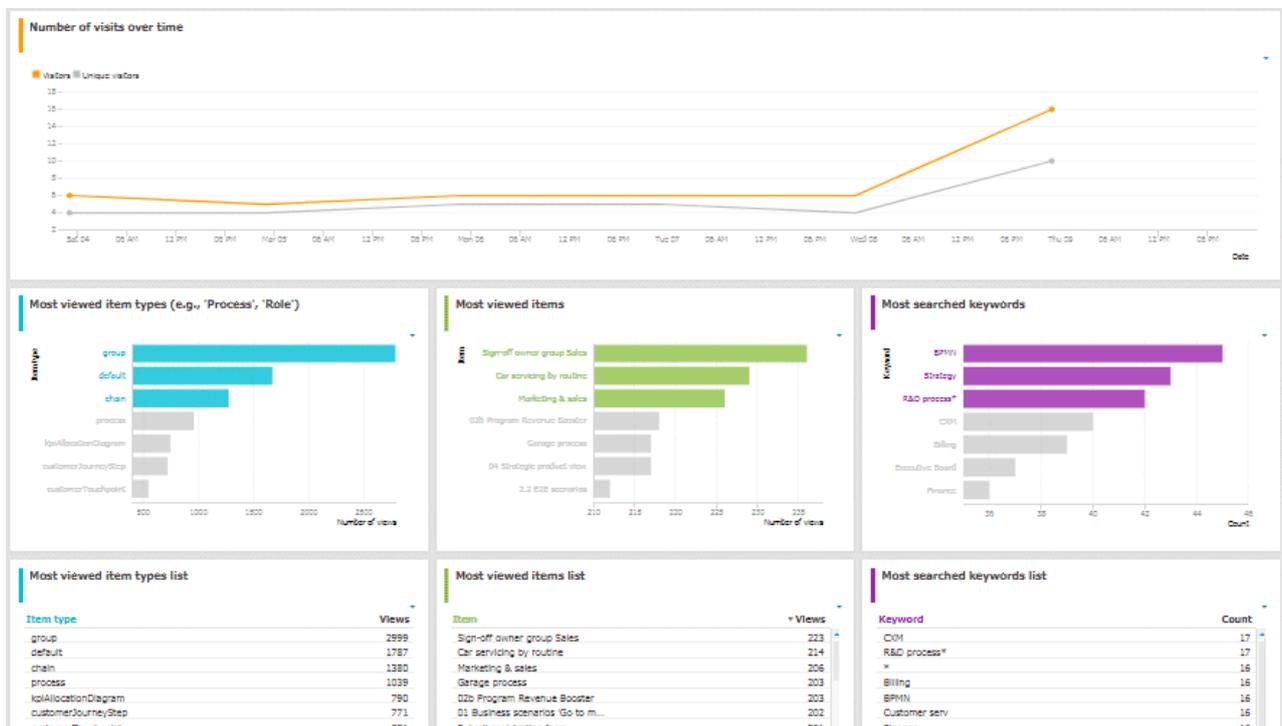
CONTEXT

Database

Data feed

Piwik - Most searched keywords

EXAMPLE



3.5.5.5.3.3.2 Piwik - 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.

CHARTS

Percent distribution of browser engines

Percent distribution of the browser engines used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage running the Piwik **BrowserEngines** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Piwik** (page **Error! Bookmark not defined.**).

The report result is used as input for the Piwik - Technical KPIs (page 489) 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

Piwik - Browser engines

Most used operating systems

Operating systems most used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage running the Piwik **OsVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Piwik** (page **Error! Bookmark not defined.**).

The report result is used as input for the Piwik - Technical KPIs (page 489) 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

Piwik - Operating system version

Most used browser versions (list)

Browser versions most used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage running the Piwik **BrowserVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Piwik** (page **Error! Bookmark not defined.**).

The report result is used as input for the Piwik - Technical KPIs (page 489) 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

Piwik - Browser version

Most used portal languages (list)

Portal languages most used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage running the Piwik **Language** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Piwik - Global portal usage and Piwik - Database-specific portal usage reports, make sure to have Piwik installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Piwik** (page **Error! Bookmark not defined.**).

The report result is used as input for the Piwik - Technical KPIs (page 489) dashboard.

CONTEXT

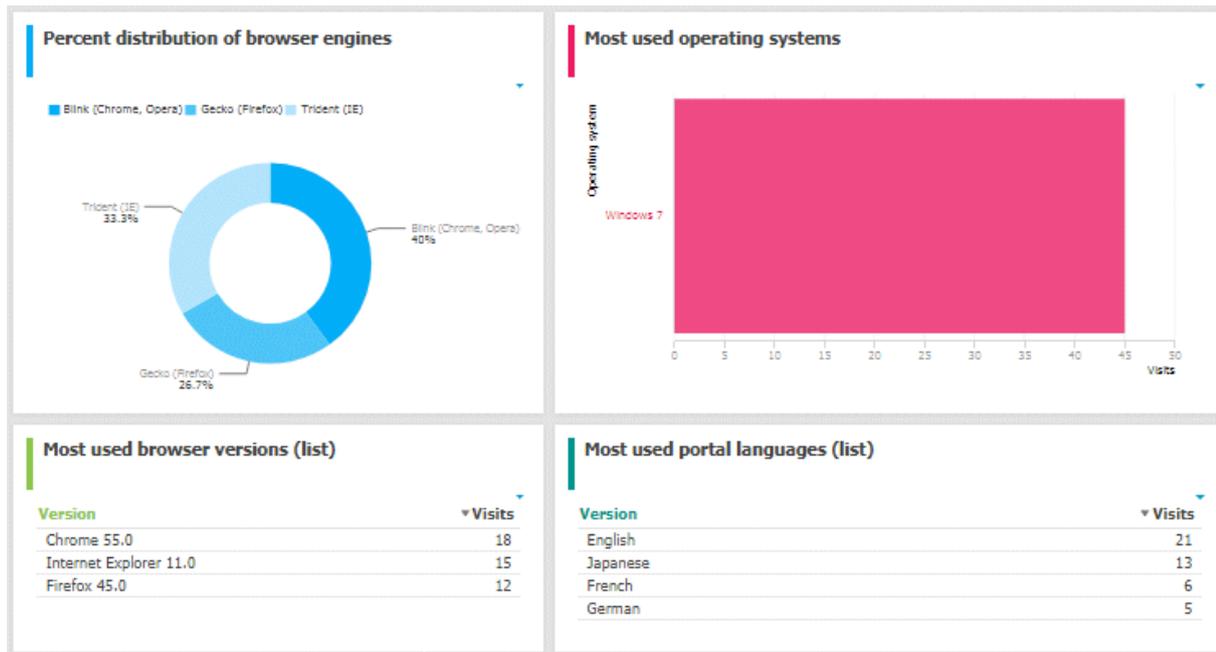
Database

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

Piwik - Portal language

EXAMPLE



3.5.5.5.3.4 Dashboards using Enterprise Architecture (EA) data

Available dashboards based on Enterprise Architecture (EA) information.

3.5.5.5.3.4.1 EA dashboard for organizational units

Shows a separate tab for organizational units, that is, for object of type **Organizational unit** and **Organizational unit type**.

CHARTS

Systems having expired

Number of systems used by the selected organizational unit which 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 - Organizational unit - Systems expired
Uses the **EA - Organizational unit (Systems with lifecycle data)** data feed as a sub-feed.
- EA - Organizational unit - 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 used by the selected organizational unit which will become 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 - Organizational unit (systems phasing in)
Uses the **EA - Organizational unit (Systems with lifecycle data)** data feed as a sub-feed.
- EA - Organizational unit - 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 - Organizational unit (systems phasing out)
Uses the **EA - Organizational unit (Systems with lifecycle data)** data feed as a sub-feed.
- EA - Organizational unit - 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 - Organizational unit (standard systems expiring)
Uses the **EA - Organizational unit (Systems with lifecycle data)** data feed as a sub-feed.
- EA - Organizational unit - 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.

Usage of non-standard systems

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 - Organizational unit (standard versus non-standard systems)

Uses the **EA - Organizational unit (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 (page **Error! Bookmark not defined.**).

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 494) 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 redundancy

Seven pairs of systems used by the selected organizational unit with the greatest overlap of capabilities.

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 (page **Error! Bookmark not defined.**).

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 494) 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

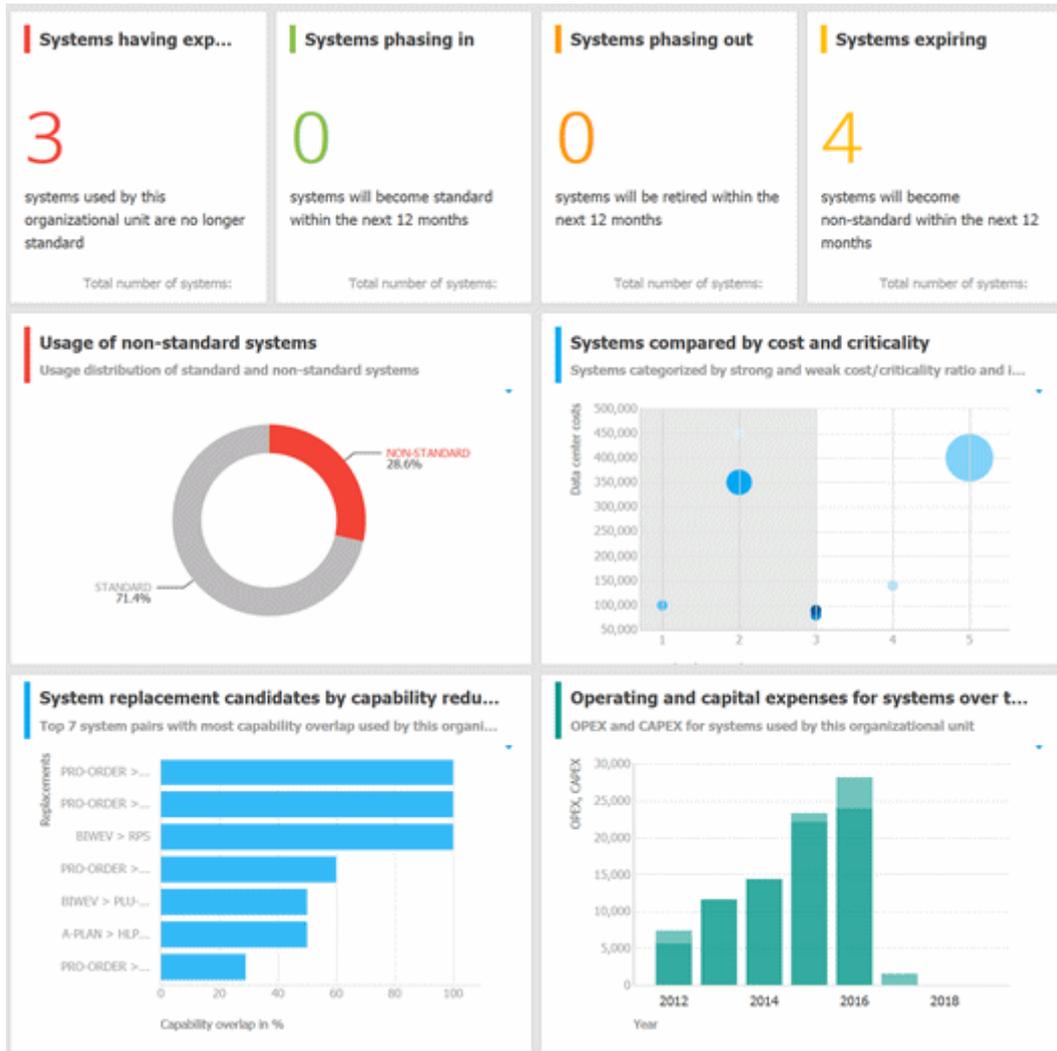
Data feed

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



3.5.5.5.3.4.2 EA dashboard for IT systems

Shows a separate tab for IT systems, that is, for object of type **Application system type**.

CHARTS

Organizational units with most system supports

Based on process support maps, seven organizational units with most processes actively supported by the selected 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, all organizational units supported by the selected system and their 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.

Processes with most system supports

Seven processes with most functions actively supported by the selected system - not based on process support maps.

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

All processes supported by the selected system and their distribution - not based on process support maps.

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

Seven replacement possibilities involving the selected system as source or target with the most capability overlap.

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 costs for the selected IT system by different cost types over time.

Data source

ARIS Architect:

Report: EA/Alfabet - System costs

Report configurable?

No

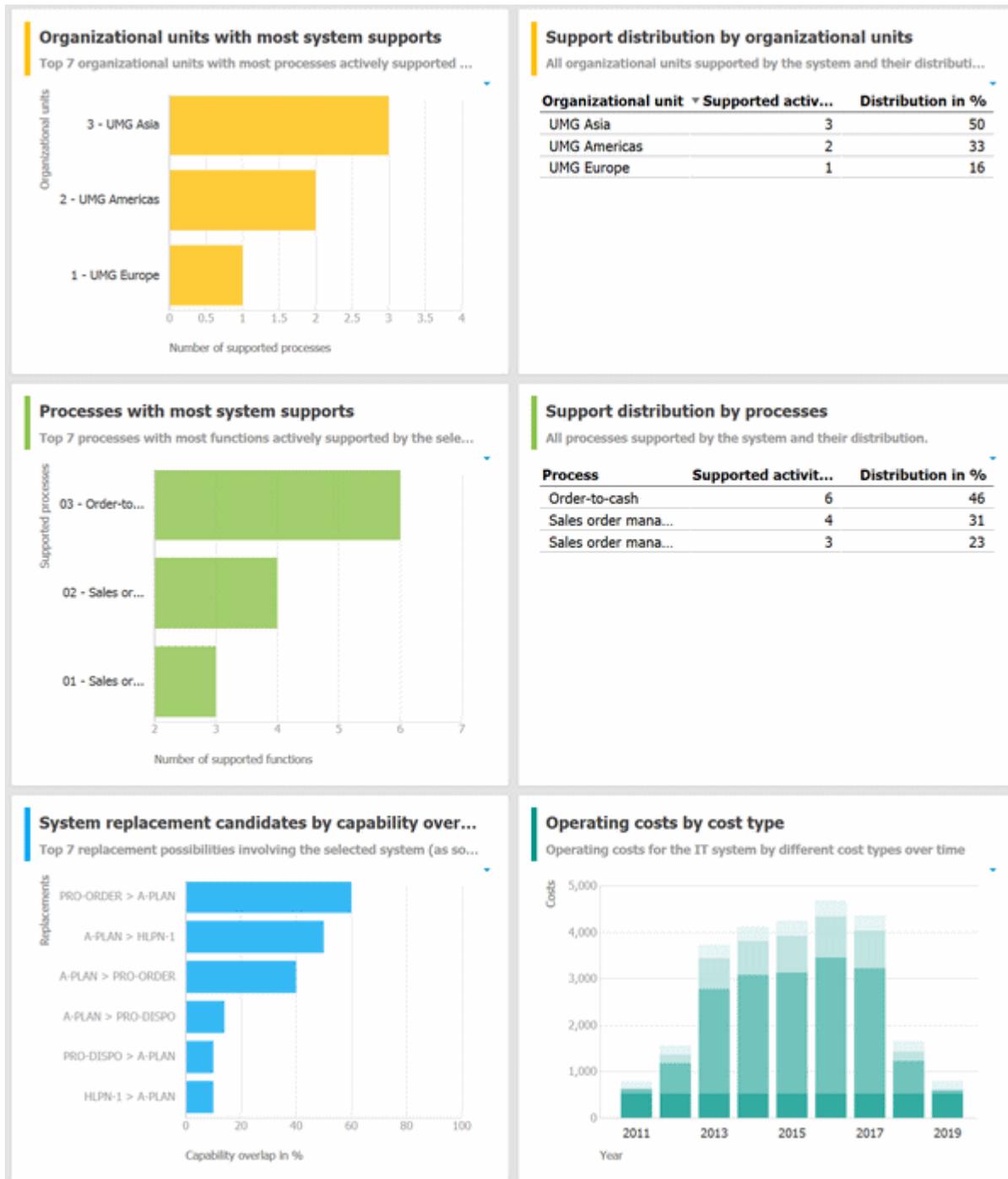
Data feed

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



3.5.5.5.3.4.3 EA dashboard for objectives

Shown as side bar for the **Diagram** fact sheet of the model types **Strategy diagram** and **Objective diagram**.

CHARTS

Objectives

Shows all objectives in the model and their goal accomplishments over all KPIs.

Data source

ARIS Architect:

- Report: EA - Models and objectives
- Report: EA - Objectives with data

Report configurable?

No

Data feed

EA - Goal accomplishment (objectives)

Calculation

Lists all **Strategy diagram** and **Objective diagram** model types and the objectives contained with their goal accomplishments.

KPIs of the objective

Shows the KPIs of the objective selected in the diagram and their respective values.

Data source

ARIS Architect:

- Report: EA - Objectives and KPIs
- Report: EA - KPIs with data

Report configurable?

No

Data feed

EA - 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. €	<input type="radio"/>
Acquisition of profitable niche play...	<input type="radio"/>
Align 100% delivery processes ac...	<input type="radio"/>
Be the future no. 1 premium car s...	<input type="radio"/>
Design game changing 21st centur...	<input type="radio"/>
Improve buying experience	<input checked="" type="radio"/>
Improve decision making experience	<input type="radio"/>
Improve operating margin to 6%	<input type="radio"/>

KPIs of the objective

Goal accomplishment for each KPI

▲ **KPI** GA

Cycle time improvement rate	<input checked="" type="radio"/>
Over all error ratio	<input checked="" type="radio"/>
Over all process effectiveness (OPE)	<input checked="" type="radio"/>

3.5.5.5.3.5 Dashboards using Process Performance Manager data

Available dashboards based on Process Performance Manager data.

3.5.5.5.3.5.1 Process and Finance KPIs dashboard

Shows an overview of a sample assembly process (manufacturing).

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.

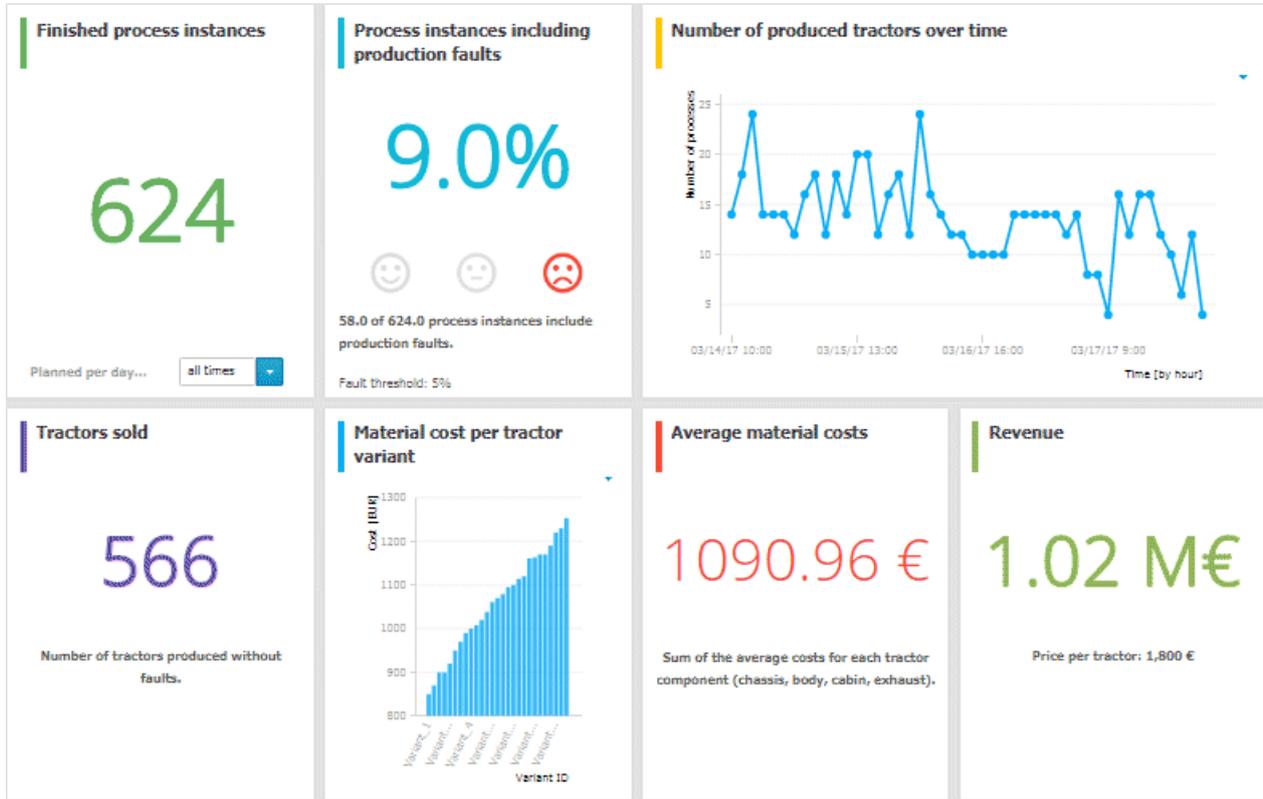
Data feed

PPM instances (persisted)

Calculation

Number of sold tractors multiplied by the price per tractor.

EXAMPLE



3.5.5.5.3.5.2 Comparison of production process variants (persistent)

Shows modeled process variants side-by-side.

CHARTS

Process variant with the shortest cycle time (minutes)

Shows the function flow describing the process variant with the shortest process cycle time 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 describing the process variant with the longest process cycle time of all recorded instances.

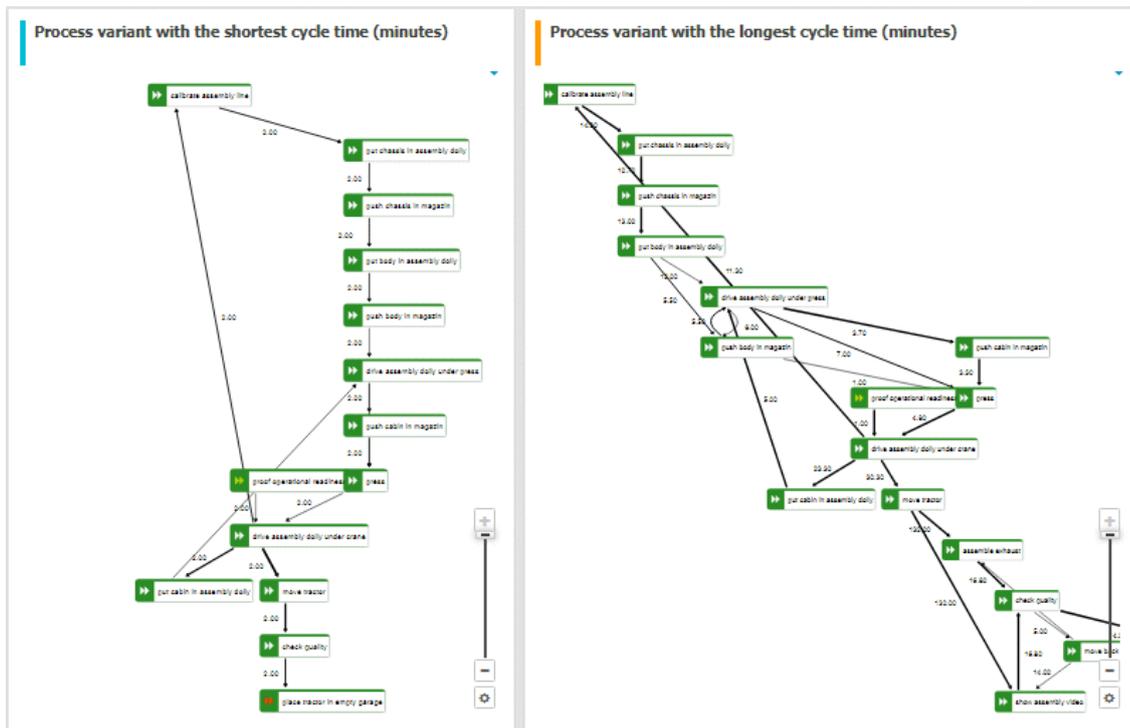
Data source

PPM instances (persisted)

Data feed

PPM - Workflow with shortest cycle time (persisted)

EXAMPLE



3.5.5.5.3.6 Dashboards using Collaboration

Here you can find information about Collaboration dashboards delivered by default.

3.5.5.5.3.6.1 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** (page **Error! Bookmark not defined.**) (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



3.5.5.5.3.6.2 Content overview (Collaboration)

Shows the most frequently used Collaboration and ARIS content by users.

AVAILABILITY

- **ARIS Connect** >  **Portal** >  **Dashboards**
- **ARIS Connect** >  **Collaboration** > **Administration** >  **Dashboards** (page **Error! Bookmark not defined.**) (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



3.5.5.5.3.6.3 Group monitoring (Collaboration)

Shows the most frequently used groups and details of Collaboration groups.

AVAILABILITY

- **ARIS Connect** >  **Portal** >  **Dashboards**
- **ARIS Connect** >  **Collaboration** > **Administration** >  **Dashboards** (page **Error! Bookmark not defined.**) (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.

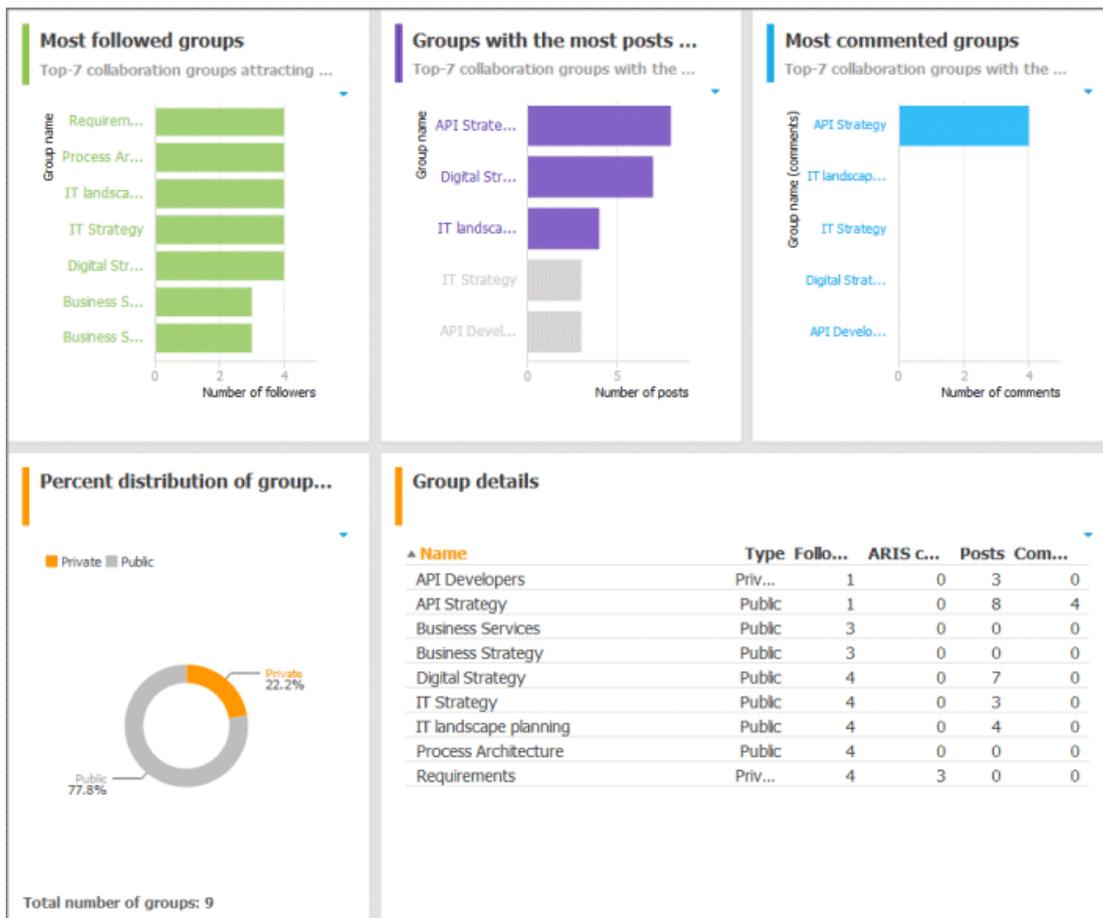
DATA SOURCE

Private and public groups in Collaboration

DATA FEED

Collaboration – Largest groups

EXAMPLE



3.5.5.5.3.6.4 Users

Shows details of Collaboration users.

AVAILABILITY

ARIS Connect >  **Collaboration** > **Administration** >  **Dashboards** (page **Error! Bookmark not defined.**) (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

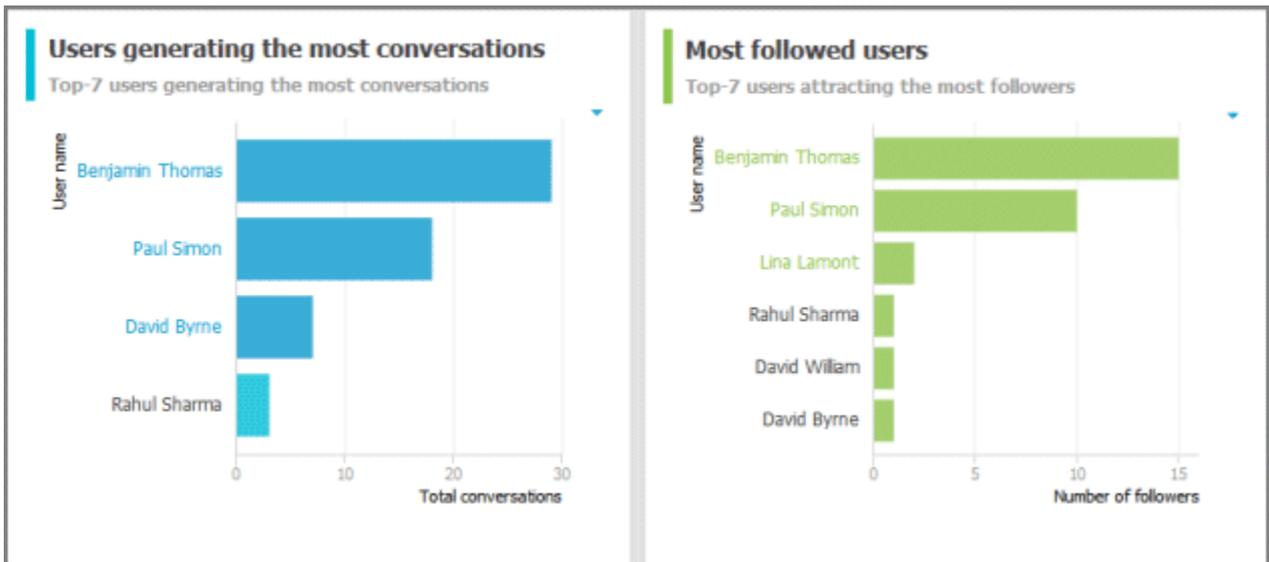
The top seven most followed Collaboration users.

DATA SOURCE

Users in Collaboration

DATA FEED

Collaboration – Most followed users

EXAMPLE**3.5.5.5.3.7 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.

3.5.6 Handle documents

ARIS document storage enables you to manage and temporarily or permanently save documents. Access restriction on folder level is possible in ARIS document storage.

3.5.6.1 Have document approved

Ask the person in charge to approve the documents you changed so that the changed document can be made available to all users.

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  **Repository**.
2. Click **Documents**.
3. Click the document you want to have approved.
4. Click  **Request approval**. The corresponding dialog opens.
5. Enter a comment describing what you changed.
6. Click **Send**.

The person responsible receives an e-mail with the relevant information and a link to the associated task in My tasks. If the person responsible approves the changes, the current version of the document is made available in ARIS Connect (status APPROVED). The document is visible in the portal on the **Documents** tab. If rejected, the document receives the status 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**.

3.5.6.2 Share document

You can share documents with other users.

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  **Repository**.
2. Click **Documents**.
3. Click the document you want to share.
4. Click  **Share document**. The corresponding dialog opens.
5. Select the user you want to share the document with.
6. Enable **Send copy to me** to receive a copy of the message, if required.
7. You can also enter a subject and a comment.
8. Click **Send**.

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

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**.

3.5.6.3 Rename document

You can rename a document.

Prerequisite

You have the **Document management** 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  **Edit**.
6. Enter the new name in the **File name** box.
7. Click **Save**.

The name is changed.

3.5.6.4 Show links of a document

You can display the links of a document, for example, the ARIS models in which the document is used.

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. Click **Relations**.

The relations of the document are displayed.

3.5.6.5 Show history of a document

You can show the version history of a document. If a document is changed and uploaded again, a version history is created automatically.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant document. The **Document details** page opens.
4. Click **History**.

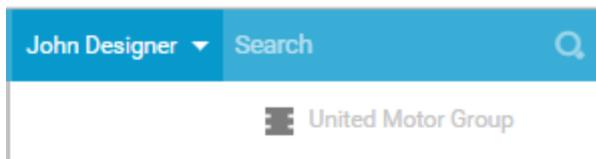
The history of the document is displayed. All changes to the document such as changes to metadata, locking, unlocking, and the uploading of a new version are displayed.

3.5.6.6 Find a document

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

Procedure

1. Select **Documents** from the list.
2. Click in the **Search** box.



3. Enter the relevant term.
A list with the first results (page 258) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

The document will open.

3.5.6.7 Handle document versions

3.5.6.7.1 Upload version of a document

If you have edited a document after downloading it and want to update this version in ARIS document storage, you can upload the new version in your ARIS document storage. We strongly recommend that you check documents for malicious software before uploading.

Prerequisite

- You have the **Document management** function privilege.
- The document has the same name and document type as the first uploaded version of this document.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click  **Upload new version of this document** in the document row.



	1.gif Last change 2012.12.20, 08:37:19 by system Document	
	1.txt Last change 2012.12.20, 08:37:02 by system Document	   

The dialog for uploading a document opens.

5. Enter the relevant optional additional information, and click **OK**.

You have updated an existing document in ARIS document storage. This works for Microsoft® SharePoint 2013 as well.

3.5.6.7.2 Sort versions of a document

You can sort versions of a document.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click a document.
5. Click **Versions**.
6. Click a column title.

The document versions are sorted.

You can reverse the sort order by clicking the column title again.

3.5.6.7.3 Show version history

You can show the version history of a document. If a document is changed and uploaded again, a version history is created automatically.

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 **Versions**.

The different versions of the document are displayed. The change description is in the **Comment** column.

3.5.6.7.4 Show version of a document

You can show the version history of a document. If a document is changed and uploaded again, a version history is created automatically.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant document. The **Document details** page opens.
4. Click **Versions**.
5. In the row of the relevant version, click  **Open version**.
6. Select **Open with** in your browser.

The document opens if the software required for opening the document is available on your local system.

3.5.6.7.5 Delete version of a document

If a document is changed and uploaded again, a version history is created automatically. You can delete all versions of a document except for the last.

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 **Versions**.
6. In the row of the relevant version, click  **Delete**.
7. Click **Delete version**.
8. A confirmation prompt is displayed. Click **OK**.

You have deleted this version of the document from ARIS document storage.

3.5.6.8 Handle document with Document administrator privilege

3.5.6.8.1 Add document to ARIS document storage

You can manage documents in your ARIS document storage. You can add documents to your ARIS document storage. We strongly recommend that you check documents for malicious software before uploading.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click  **Upload**. The **Upload document** (page **Error! Bookmark not defined.**) dialog opens.
5. Enter the relevant optional additional information, and click **OK**.

You have added a document to ARIS document storage.

Administrators can import all documents in a directory to ARIS document storage.

3.5.6.8.2 Open/Download document

You can download and open documents from ARIS document storage. If a document is highlighted as locked, only the person who locked the document can open it and upload a new version. We strongly recommend that you check documents for malicious software before you open them.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.

Click  **Download** in the document row.



	1.gif Last change 2012.12.20, 08:37:19 by system Document	
	1.txt Last change 2012.12.20, 08:37:02 by system Document	   

4. Select **Open with** in your browser.

The document opens if the software required for opening the document is available on your local system.

3.5.6.8.3 Download multiple documents

You can download multiple documents. We strongly recommend that you check documents for malicious software before you open them.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Enable the check boxes in front of the relevant documents.
5. Click  **Download selected documents**.

The selected documents are packed in a ZIP archive and then downloaded.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

3.5.6.8.4 Select documentowner or responsible

You can edit the properties of a document.

Prerequisite

You have the **Document management** 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.

3.5.6.8.5 Move document

You can move a document to another folder.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click  **Move to another folder** in the **Actions** bar of the relevant document. The **Move document** dialog opens.
5. Select the relevant folder, and click **OK**.

You have moved the document to another folder.

3.5.6.8.6 Move multiple documents

You can move documents to another folder.

Prerequisite

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

You have access to ARIS document storage and/or the relevant third-party document management system.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Enable the check boxes in front of the relevant documents.
5. Click  **Move to another folder**. The **Move document** dialog opens.
6. Select the relevant folder, and click **OK**.

You have moved the documents to another folder.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

3.5.6.8.7 Browse ARIS document storage

You can search for a document.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Depending on your installation, you can also click  **Attributes** to refine your search so that you restrict the search to metadata, to contents, or to metadata and contents. You can also specify that the term is to be searched only in the current version.
4. Enter the search term.

Possible hits are displayed as soon as you enter the first few letters.

3.5.6.8.8 Lock document

You can lock documents that are in your ARIS document storage to prevent them from being edited by other users.

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  **Lock document**.

The document is locked to prevent it from being edited by other users. Only you or administrators can unlock the document.

3.5.6.8.9 Unlock document

You can unlock documents that are locked and thus make them available to other users for editing.

Prerequisite

You have the **Document management** 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  **Unlock document**.

The document can be edited by other users.

3.5.6.8.10 Delete document from ARIS document storage

You can remove documents from ARIS document storage.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the arrow to navigate in the structure, and select the folder containing the relevant document.
5. Click  **Delete** in the **Actions** bar of the relevant document. A confirmation prompt is displayed.
6. Click **OK**.

The document is no longer displayed within ARIS document storage.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

3.5.6.8.11 Delete multiple documents from ARIS document storage

You can remove multiple documents from ARIS document storage in one operation.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Select the check boxes of the documents you want to delete.
5. In the top right screen, click  **Delete selected documents**. A confirmation prompt is displayed.
6. Click **OK**.

The selected documents are no longer displayed within ARIS document storage.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

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 in which database content is displayed if attribute values are not specified in the database language used. When you create a database, **English (United States)** is selected automatically. On the **Administration** tab, you can change the alternative language.

ARIS API

ARIS API is a programming interface with which you can access ARIS and its data from external applications.

ARIS Administration

Manages users, user groups, privileges, licenses, documents, configurations, and processes for a tenant (page 545).

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.

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.

Assignment

A model assigned to an object by an assignment relationship.

If a model is assigned to an object, this can be indicated by an assignment icon. 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

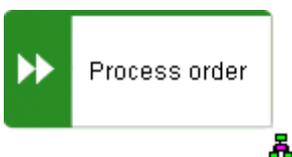
Icon that shows that one or more models are assigned to an object by an assignment relationship.

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 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.

B

BPMN

Business **P**rocess **M**odel and **N**otation (**BPMN**) is a graphical notation used to describe business processes.

C

Change list (versioning)

Includes selected content of a database. This may comprise individual models, multiple models without interdependencies, related models, group content, or the entire database contents. They will be versioned together and saved under one change list number. Change lists are sorted in ascending order.

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 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. You have only read access for the content.

Change lists are sorted in ascending order. (Versioning state)

Configuration set

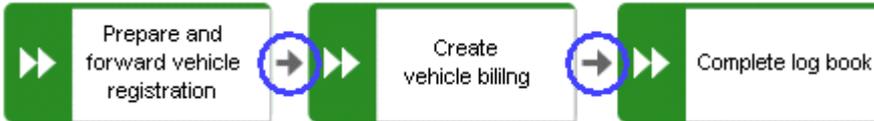
A configuration set specifies the graphical user interface of ARIS Connect. Configuration sets are based on XML files and cannot be changed within ARIS Connect but only in the relevant XML file. By default, ARIS Connect provides the classic configuration set (page 55) and the default configuration set (page 56).

You can specify a modification set based on a configuration set.

Connection

Visible relationship between objects, which is created during modeling. It is thus a graphical representation of a relationship.

A connection is usually represented by lines in the model window. 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.



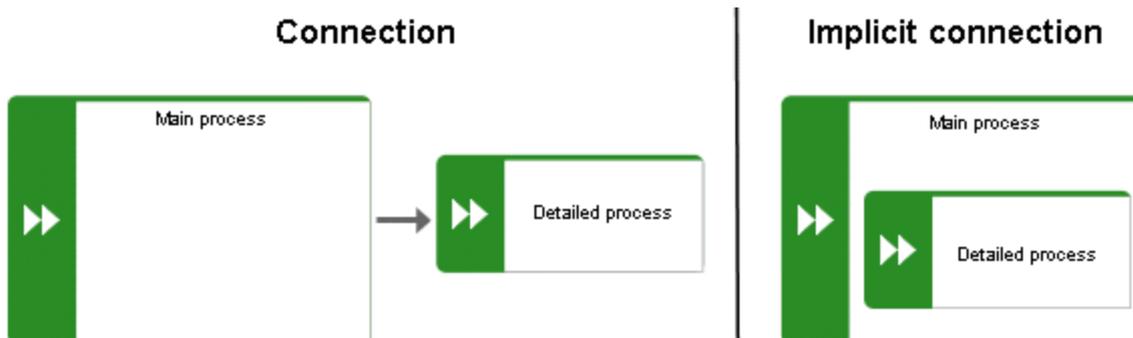
Connection, implicit

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 model window. This line is displayed again, for example, if you drag an object from another object down into the free area of the model window.

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.

Function	Organizational unit
	

This needs to be differentiated from implicit relationships (page 542).

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: ***, /, , -**.

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 created for a database (versioning state).

D

Definition copy

Copy of the object definition, that is of the entire object, rather than just the occurrence as is the case with the occurrence copy.

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

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 use function privileges to provide users with specific functionality and thus control their authorizations across a database in ARIS Architect. Function privileges are assigned 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

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 elements include circles, squares, and polygons.

Grid

Placement markings in the model window in the form of dots that you can show for modeling support (page 290).

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 (page 338).

They can be moved, enlarged or reduced, and deleted as if they were one item.

GUID

Globally **U**nique **I**dentifier (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 (page **Error! Bookmark not defined.**) 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.

Infographic

An infographic (also **information graphic**) shows its information content mainly visually. By combining images and text, it is easy for users to understand the information contained.

An infographic can simplify a complicated topic. 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.

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.

M

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 (page 299) that are used for placing and drawing connections.

It is shown if you select an object in the model.

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.

Modification set

A modification set is based on a configuration set and specifies the graphical user interface of ARIS Connect.

Administrators create (page **Error! Bookmark not defined.**) and enable custom modification sets for you based on the classic configuration set (page 55) or default configuration set (page 56) to change the appearance of the portal.

O

Occurrence

Graphical representation of objects, connections, and free-form texts.

It is used to represent items in a model.

With an occurrence copy 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 of an object is changed, the change is displayed for all occurrences.

Occurrence copy

Copy of the occurrence, that is, only the graphical representation of an object, rather than the entire object as with the definition copy.

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-Time Pad (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 471) 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, implicit connections, implicit relationships, assignment, 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.

Root element

Model 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 Assertion Markup Language (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 543) 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.

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 Socket Layer (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 543).

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 activate 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.

User 'system'

The system user **system** (page **Error! Bookmark not defined.**) 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, 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.

System users

System users are users who have all function and access privileges in a database and who have the required privileges (page **Error! Bookmark not defined.**) in 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** (page **Error! Bookmark not defined.**) 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, 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.

What is the user 'arisservice'?

System database

This database manages the content of the **Configuration** and **Evaluations** folders, which is displayed on the **Administration** tab. This includes filters, templates, 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.

T

Tenant

A tenant is a container providing its own ARIS Administration 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.

TLS

Transport Layer Security (**TLS**).

TLS is known under the name of its predecessor **Secure Sockets Layer (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

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 (**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.

V

Variant relationship

Reference in a variant to the GUID of its master.

When you create variants of objects or models, they receive a reference to the GUID 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, e. g. to evaluate differences between items.

Version

A model that remains fixed and can no longer be changed in a change list.

The versioning state of the last version created is the current version.

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.

A versioning state can include models of different versions with different or identical version numbers that represent a specific state. While Workspace represents a state that is editable but has not yet been versioned, the versions are included in the Current version state and in the revisions associated with the Change list numbers.

W

Workspace (versioning)

Indicates the database content that has not yet been versioned. It can be edited. (Versioning state)

5 Support information

5.1 Support

ON THE WEB

Open Empower (<https://empower.softwareag.com/>) to get support.

A valid support contract allows you to access the solution database.

If you have any questions on specific installations that you cannot perform yourself, please contact your local Software AG sales organization.

TELEFONISCH

If you have a valid support contract, you can contact Global Support ARIS at:

+800 ARISHELP

The plus sign stands for the prefix required in a given country to dial an international connection.

Example for dialing within Germany with a direct extension line: 00 800 2747 4357

If this number is not supported by your telephone provider, please refer to Empower https://empower.softwareag.com/public_directory.asp.

5.2 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 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 when working with process administration, ARIS Administration, ARIS document storage, and My tasks, and when generating 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 documents. We recommend monitoring the number and overall size of stored documents and archiving some documents if needed.

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