



ARIS CONNECT ADMINISTRATOR USER MANUAL

VERSION 10.0 - SERVICE RELEASE 8

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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

This manual contains the online help that is provided for ARIS Connect users with **Administrator** function privileges.

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_SR8_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 Help system

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

The content of the online help in some way represents the user interface of the Classic view, which is delivered as standard. The help structure of the subject area **Use ARIS Connect** thus reflects the entry points of the header of ARIS Connect: **Work in the portal**, **Use the Catalog**, **Collaborate with users**, **Search content**, and **Use the repository**.

You can use the Contents tab, the Index tab, and the help search to open the relevant help pages. In addition the following links directly open the frequently used help areas.

- ARIS Connect Designer quick start (page 751)
- ARIS Connect Designer (Create and edit models) (page 750)
- Catalog (page 704)
- Check models and objects (semantic checks) (page 996)
- Check a model in ARIS Connect Designer (semantic check) (page 999)
- Collaboration (page 707)
- Contribution (page 556)
- Dashboards (page 584)
- Documents (Repository) (page 467)
- Favorites (page 446)
- Filter (My content) (page 438)
- Highlighting (page 530)
- Model Viewer (Diagram fact sheet) (page 512)
- Reporting (Portal) (page 490)
- Repository (page 730)
- Search (page 359)
- Tasks (page 455)
- Versions (page 1007)

2.1 Text conventions

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

- Menu items, key combinations, dialogs, file names, entries, etc. are displayed in **bold**.
- User-defined entries are shown **<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.

2.2 What features does the online help offer?

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

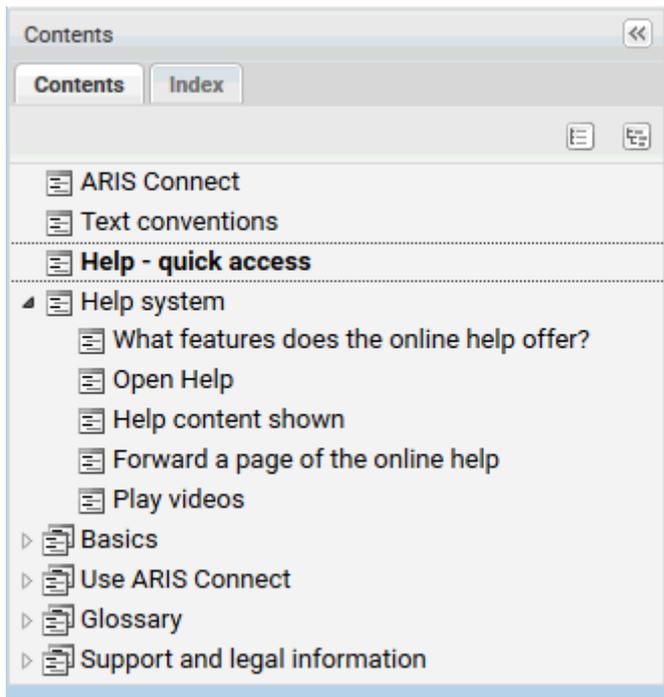
BUTTONS

The following buttons are available in the help viewer.

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

CONTENTS TAB

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



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

REPRESENTATION OF THE USER INTERFACE

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



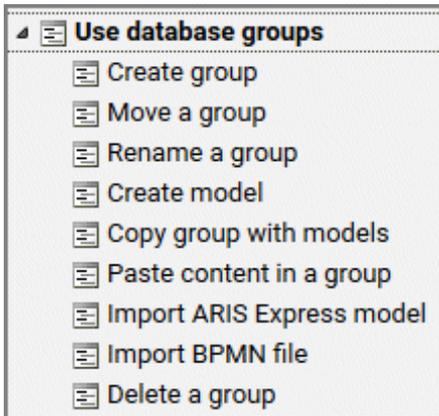
This makes it easy to assign the contents of the help to the program interface.

PROCEDURES AND CONCEPT DESCRIPTIONS

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

THEMATICALLY GROUPED

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



USE CASE ORIENTED

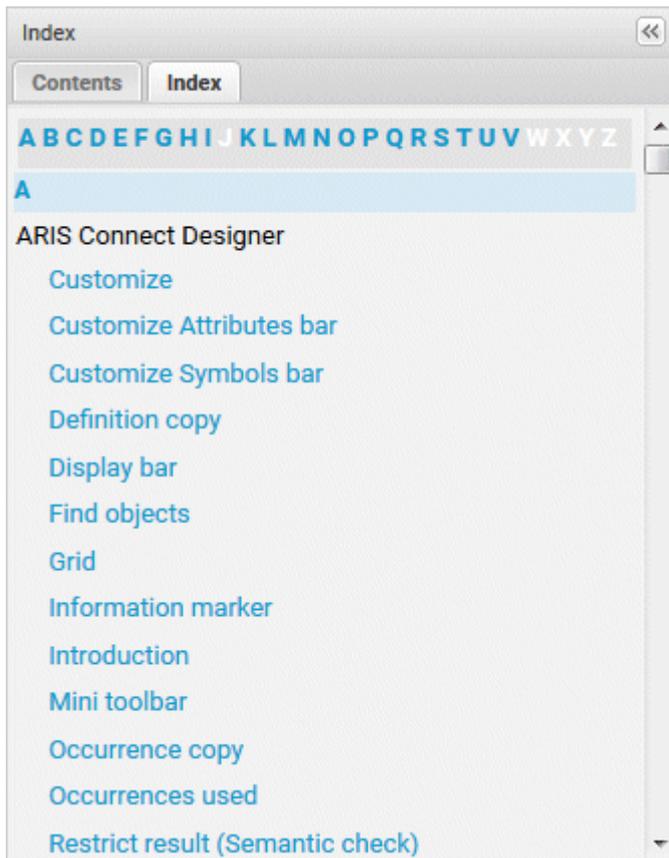
If possible, the procedure pages are arranged in such a way that they result in a use case. The following simple example shows the use case for groups: create group, manage group contents and, if no longer required, delete group.

DISTINCTION BETWEEN PROCEDURES AND CONCEPTS

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

INDEX TAB

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



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

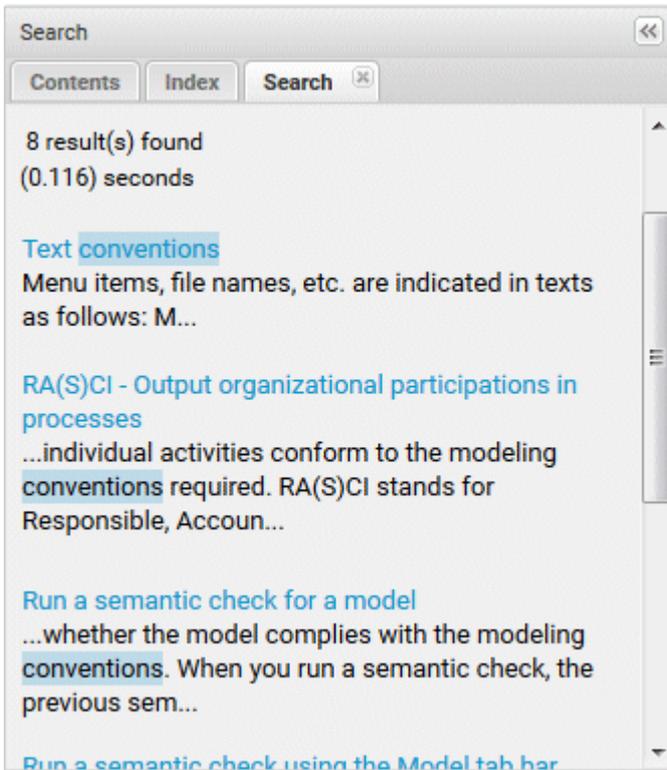
Click on a keyword to display the corresponding help page.

SEARCH

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



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



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

Click on a page to display it.

HELP PAGES

BREADCRUMB

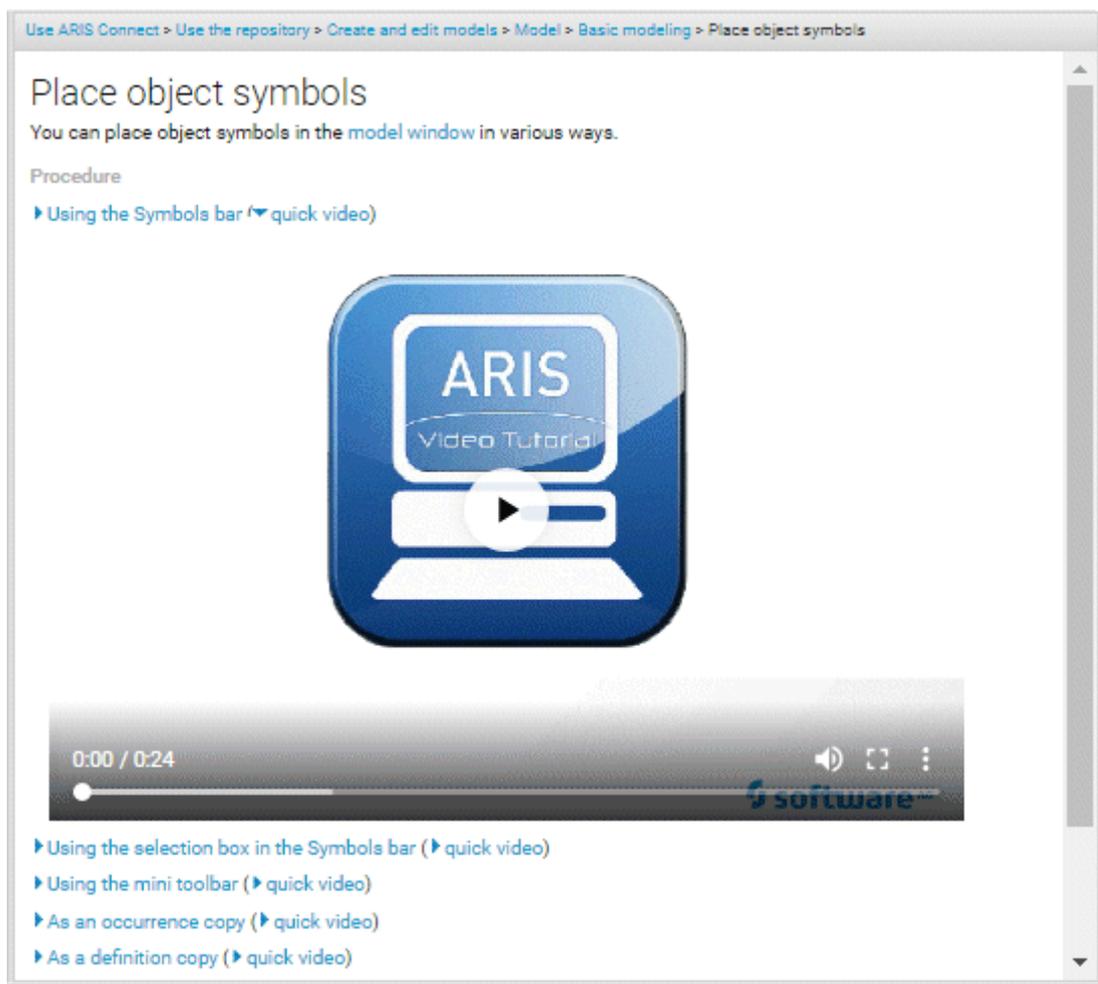
A breadcrumb navigation is displayed above the help pages.

[Use ARIS Connect](#) > [Work in the portal](#) > [Use models](#) > [Create model](#)

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

HELP PAGE CONTENT

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



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

Task-related processes are presented in video tutorials.

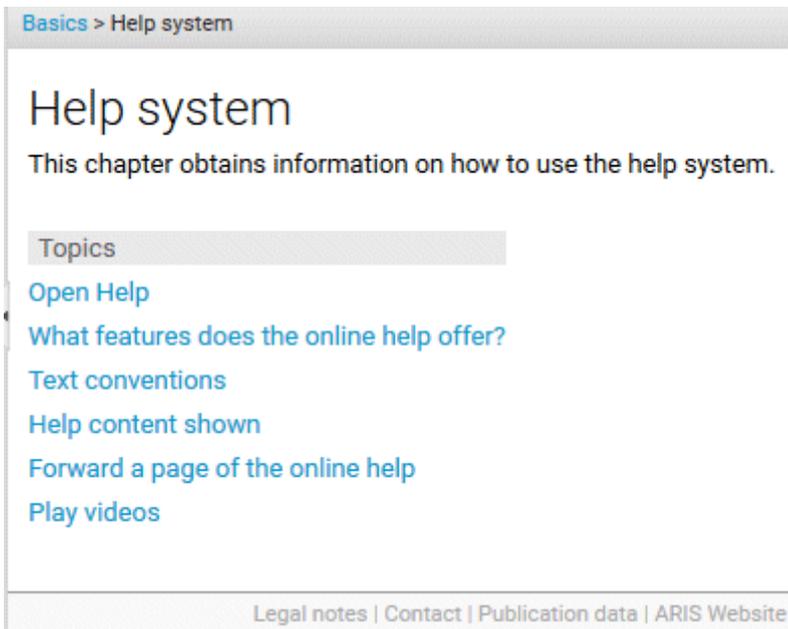
[ARIS video tutorial](#)
[Process administration overview \(approx. 3 minutes\)](#)

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

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

SKIP LINKS

Help pages of related topics are grouped thematically under superior pages in the content tree. If you select a parent page, you can access the skip links to open the corresponding help page.



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

FOOTER LINKS

LEGAL NOTES

Jumps to the **Legal Notices** web page of Software AG.

CONTACT

Jumps to the **How to contact Software AG** web page.

PUBLICATION DATA

Jumps to the **Edition notice** web page of Software AG.

ARIS WEBSITE

Jumps to the **ARIS** web page of Software AG.

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

Technical documents are available on:

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

2.3 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>**.
2. Click **Help**.

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

2.4 Help content shown

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

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

2.5 Forward a page of the online help

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

Prerequisite

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

Procedure

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

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

2.6 Play videos

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

Procedure

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

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

3 Manage ARIS Connect

Manage users, user groups, privileges, licenses, documents, configurations, and processes for all ARIS products. This ensures single sign-on for various ARIS products. Users can also be created using an LDAP system.

Depending on which administrator privileges you have, you will have access to the areas described here where you can make the appropriate settings. For example, you can only see the user administration if you have the **User administrator** function privileges.

3.1 Open ARIS Administration

Centrally manage users, user groups, privileges, licenses, documents, and configurations for all ARIS products. This ensures single sign-on for various ARIS products. Users can also be created using an LDAP system.

Prerequisite

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

Procedure

1. Click the link that was provided to you by e-mail or that you have saved as a bookmark in your browser. The **Login** dialog opens.
2. Enter your user name and your password.
3. Click **Log in**.
4. Click **<user name> > Administration**.

ARIS Administration opens.

ARIS video tutorial

ARIS Architect 'Administration' tab versus ARIS Administration

(<http://www.ariscommunity.com/videos/aris-architect-administration-tab-versus-aris-administration>) (approx. 2 minutes)

3.2 Manage licenses



Centrally manage licenses for all ARIS products to grant users the privileges required for the programs they use.

3.2.1 Import and display license file

Import a license file to give users the required privileges for the programs.

Prerequisite

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

Procedure

1. Click  **Licenses > Product**.
2. Click  **Import license file**. The corresponding dialog opens.
3. Select the relevant license file.
4. Click **Upload**.

The license file is transferred. It is shown how many licenses were imported, as well as which licenses could not be installed and why.

You can now assign users the required license privileges. If you need additional licenses later, simply import the new license file as described above. To display imported license files, click the relevant license, and select  **Open license file**.

3.2.2 Delete licenses

You can delete license files when they have expired. Before deleting licenses, back up user data, if required, in order to be able to reuse (page 53) them when new license are available. In the configuration, you can specify that administrators are notified before a license expires. Expired licenses are marked in the license overview: . Users or groups can no longer be assigned. Login is impossible with an expired license.

Prerequisite

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

Procedure

1. Click  **Licenses > Product**.
2. Click the relevant product or a subgroup.
3. Move the mouse pointer over the relevant license. The buttons of the available functions are displayed.
4. Click  **Delete license file**.

The license file is deleted.

3.2.3 Display information about licenses/license file

You can display information about licenses, such as the expiration date, number of licenses, etc. You can also open the imported license files.

Prerequisite

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

Procedure

1. Click  **Licenses > Product**.
2. Click the relevant product or a subgroup.
3. Move the mouse pointer over the relevant license. The buttons of the available functions are displayed.
4. Click  **Open license file**.

The imported license file is displayed as an XML file.

If license exhaustion notification is activated in **Configuration (User management > User-defined notifications > Licenses > Notify about license exhaustion)**, license administrators receive a notification once the specified number of licenses is reached.

3.2.4 Enable or disable license monitoring

You can customize the license monitoring as required.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Click  **Licenses > Monitoring > Configuration.**
2. Click  **Edit.**
3. Enable () or disable () license monitoring. License monitoring is disabled by default.
4. The license monitoring interval is indicated in minutes. By default, it is set to 5 minutes and should not be changed because this value guarantees an optimum outcome for the report evaluation (page 19).
5. Click  **Save.**

Your settings are saved. If you enabled license monitoring, you can now generate the License usage rule validation report (page 19).

3.2.5 Create and activate a license rule

Create license rules for the **License usage rule validation** report. You can have multiple license rules, but only one can be activated.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Click  **Licenses > Monitoring > Rules.**
2. Click **Create.** The corresponding dialog opens.
3. Enter a name and select the rule type (page 21).
4. Click **Create.** The license rule is created.
5. In the row of newly created license rule, click  **Edit license rule.** The fact sheet is displayed.
6. Under **License rule properties** click **Edit.** The corresponding dialog opens.
7. If required, also enter the license rule name in other languages.
8. For **Aggregated weighting** rule types enter a **Threshold.**
9. Click **Save.** The license rule properties are saved.
10. Create a license group for the license rule. To do so, click **Add** under **License groups.** The corresponding dialog opens.
11. Enter a license group name. If required, also enter the name in other languages.

12. For **Aggregated weighting** license rule types click **Add**, select the relevant product codes, for example, **ARIS Connect Viewer(YCSCC)** and **ARIS Connect Designer(YCSDC)**, and enter a weighting for each.

For **Base & Peak** license rule types click **Add**, select the relevant product codes and enter a limit for each.

For **DBP** license rule types enter a **Threshold** and select the relevant product codes.

13. Click **Save**.

The license group for the license rule is created.

14. Click  **Back**.

15. In the row of the newly created license rule, click  **Activate license rule**.

The license rule is created and activated. From now on, you can generate the License usage rule validation report (page 19).

To delete a license rule, click  **Delete** in the row of the relevant license rule.

3.2.6 Download and upload license rules

You can download and upload license rules as JSON file. The license rules are also included in the back up of user management data (page 52).

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Click  **Licenses > Monitoring > Rules**.
2. In the row of the license rule you want to download, click  **Download license rule**. The corresponding dialog opens.
3. Select **Save File** and click **Ok**.
The license rule file is saved as JSON file in the selected folder.
4. To upload a license rule file, click **Upload** above the list of license rules. The corresponding dialog opens.
5. Click **Select file**. The corresponding dialog opens.
6. Navigate to the JSON file you want to upload as a license rule.
7. Select the relevant file, then click **Open**.
8. Click **Upload**.

The license rule is displayed in the list of license rules.

Before you use it as the active license rule for the **License usage rule validation** report, check whether the license rule properties and the license groups are still valid. Example: If you uploaded a license rule from an older ARIS Connect version, check whether the product codes used for the license group exist in the system.

3.2.7 Generate License audit (password-protected) report

If your contract with Software AG contains a term under which you must regularly provide the usage data of the purchased licenses, generate the **License audit (password-protected)** report. This report is applicable to **Concurrent** and **Named user** licenses. For detailed information, contact your local Software AG sales organization (https://empower.softwareag.com/public_directory.asp).

Prerequisite

- You have the **User administrator**, **Configuration administrator**, and **License administrator** function privileges.
- **License monitoring** is enabled in  **Licenses > Monitoring > Configuration**.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Generate report**. The corresponding dialog opens.
4. Select **License audit (password-protected)** report.
5. Click **Run**.

The report is output as a password-protected ZIP file containing an Excel file and a JSON file. Send this password-protected report to Software AG for evaluation.

3.2.8 Generate License usage rule validation report

Generate a report that lists the license usage based on the license rule. This report is applicable to **Concurrent** and **Named user** licenses.

Prerequisite

- You have the **User administrator**, **Configuration administrator**, and **License administrator** function privileges.
- License monitoring is activated (page 17) ( **Licenses > Monitoring > Configuration**).
- An active license rule is available (page 17) ( **Licenses > Monitoring > Rules**).

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Generate report**. The corresponding dialog opens.
4. Select **License usage rule validation** report.
5. Click **Run**.

The report is output as an Excel file.

3.2.9 Valuable information

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

3.2.9.1 What license types exist?

You can use only one license type for each product. Exceptions are the **Named user** and **Cross-client** license types.

LICENSE TYPES FOR CLIENT PRODUCTS

The license types for client products must be assigned manually to users or user groups. You can increase the number of licenses by installing additional licenses.

NAMED USER

Users assigned to this license type have guaranteed login as the license is registered in their name. The number of licenses that can be assigned is specified in the license file.

CONCURRENT USER

For this license type, the number of users who can log in at the same time is specified. The assigned users share the available licenses. If the number of users logged in is the same as the number of available licenses, no other users can log in. The user must wait until another user logs off. However, the administrator can end (page 36) the sessions of users.

CROSS-CLIENT

This license type corresponds to a license of the **Named user** type. However, it can be imported and used for various tenants. It is intended for administrators who manage several tenants. The assigned users can log in with all tenants.

SERVER LICENSES

The license types for server products are activated automatically after the import.

3.2.9.2 What license rule types exist?

You can select the following license rule types, when you create a license rule (page 17).

AGGREGATED WEIGHTING

A threshold is specified for the license rule and a weighting is assigned to each product contained in the license rule. The number of unique users who are consuming licenses from the license group are multiplied by the respective weighting of the license. If the calculated total value exceeds the threshold, the license usage exceeds the purchased license volume.

Example

The license group contains ARIS Connect Designer licenses (weighting = 10) and ARIS Connect Viewer licenses (weighting = 5). The specified threshold is 100. At a given point in time, nine users are logged in with ARIS Connect Designer licenses and two with ARIS Connect Viewer licenses. The calculated value of the consumed licenses is 100 (= $9 \times 10 + 2 \times 5$) and therefore the license usage is not exceeded. As soon as an additional unique user logs in, the threshold is exceeded.

BASE & PEAK

A limit is specified for each product contained in the license rule. If the number of unique users who are consuming licenses from the license group exceeds the specified limit of the respective product, the license usage exceeds the purchased license volume.

Example

The license group contains ARIS Connect Designer licenses (limit = 10) and ARIS Connect Viewer licenses (limit = 5). At a given point in time, ten users are logged in with ARIS Connect Designer licenses and four with ARIS Connect Viewer licenses. Therefore, no limit is exceeded (base). As soon as an additional user logs in with ARIS Connect Designer license, the limit specified for this product is exceeded (peak).

DBP (DIGITAL BUSINESS PLATFORM)

The maximum number of products (threshold) and the products that can be concurrently used within a license group are specified (license bundle). Furthermore, a user should not use more than one license of a product concurrently. If the number of unique users who are consuming licenses from the license group exceeds the specified threshold, or if a user logs in with both products, the license usage exceeds the purchased license volume.

Example

The license bundle of the license group contains ARIS Connect Designer licenses and ARIS Connect Viewer licenses. The specified threshold is 10. At a given point in time, nine users are logged in with ARIS Connect Designer licenses and an additional user is logged in with ARIS Connect Viewer license. As soon as the user who is logged in with ARIS Connect Viewer license logs in with ARIS Connect Designer license, the threshold is exceeded.

3.2.9.3 When is a license consumed?

A license is consumed as soon as a user logs in and a session is created. Please note that a license is not only consumed when a user starts working, like creating models in ARIS Connect or administrating processes. If various licenses are assigned to a user, the license with the higher value is consumed first.

Example

User A is assigned to the licenses **ARIS Connect Viewer** and **ARIS Connect Designer** (both **Concurrent user** license type). As soon he logs in, the **ARIS Connect Designer** license is consumed.

3.2.9.4 What happens when a license expires?

Expired licenses are marked in the license overview: . Users or groups can no longer be assigned. Login is impossible with an expired license.

Before deleting licenses, back up user data, if required, in order to be able to reuse (page 53) them when new license are available. In the configuration, you can specify that administrators are notified before a license expires.

3.2.9.5 What is the difference between the license types 'Named user' and 'Concurrent user'

	Concurrent user	Named user
Assignment	Via user or user group	Via user or user group
License volume	Unlimited	Limited number
Guaranteed login	No	Yes
Term of guaranteed login	Current session	Unlimited

3.2.9.6 What dependencies exist within the privileges?

There are certain license privileges that you cannot assign to a user in combination with others. For example, you cannot assign ARIS Architect and ARIS Designer to a user at the same time.

You can only activate the subgroups of a license privilege if the superior license privilege is activated. If you remove a superior license privilege of a user, the user also automatically loses the assignment to the subgroups.

3.2.9.7 What License monitoring settings are available?

You can edit the license monitoring settings.

GENERAL

Description	Valid input	Default
<p>License monitoring</p> <p>Enables or disables the license monitoring. If this is enabled, the license usage is monitored. Together with this option, the audit logs must also be enabled.</p>	true, false	false
<p>License monitoring interval</p> <p>This interval specifies the monitoring window in minutes. By default, it is set to 5 minutes and should not be changed because this value guarantees an optimum outcome for the report evaluation (page 19). Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	5	5

3.3 Manage users



Users and privileges are managed centrally in ARIS Administration for all ARIS products. The role-dependent data access is controlled by privileges and filters that are assigned per database in ARIS Architect on the **Administration** tab.

3.3.1 Use case - Manage users

This use case provides a comprehensive description of all procedures that administrators must carry out for a tenant so that all authorized employees can work with ARIS Architect. We recommend that you use ARIS Administration to manage users, user groups, privileges, licenses, documents, configurations, and processes in ARIS Connect. This is what the use case is based on. Using User Management is advisable only for users of ARIS Risk & Compliance Manager, ARIS Publisher, PPM, and MashZone.

Scenario

After installation, the following system users exist: 'superuser' and 'system'. They are responsible for the user management of an activated tenant. The server was started, the password for the system user **superuser** has not been changed yet.

USER MANAGEMENT IN ARIS ADMINISTRATION

Procedure

1. Open ARIS Administration and log in as 'superuser'.
 - a. Click the link that was provided to you by e-mail or that you have saved as a bookmark in your browser. The **Login** dialog opens.
 - b. Enter your user name and your password.
 - c. Click **Log in**.

Click **<user name> > Administration**. ARIS Administration opens.
2. Change the passwords for the users 'superuser' and 'system'.
 - d. Change the passwords of the users **superuser** and **system** to prevent unauthorized access to the system. These users are created automatically after installation and have comprehensive function privileges and authorizations.
 - e. Click the user whose password you want to change.
 - f. Click  **Edit**.
 - g. Enable the **Change password** check box. The **Old password**, **New password**, and **Confirm password** fields are displayed.
 - h. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
 - i. Click **Save**.

The password is changed. The user receives a notification by e-mail.
3. Import the license purchased.

- j. Click  **Licenses > Product**.
- k. Click  **Import license file**. The corresponding dialog opens.
- l. Select the relevant license file.
- m. Click **Upload**.

The license file is transferred. It is shown how many licenses were imported, as well as which licenses could not be installed and why.

4. Create users or import LDAP users.

- a. Click  **Add user**. The **Create user** form opens.
- b. Enter the user name, first and last name, e-mail address, if applicable, and password. If a user that already exists in the LDAP system is created, the user name must match. The e-mail address is transferred automatically. For the other specifications you can enter any characters you wish because this information will automatically be transferred from the LDAP system after the user is created.
The user name does not necessarily have to correspond to a person's first or last name. In many cases, a randomly selected character string is used, or an abbreviation of the first and/or last name.
- c. Click **Save**. The detail view of the user is displayed.
The user has been created.

- a. Click  **Additional functions**.
- b. Click  **Start LDAP import**. The button is active only if an LDAP system is configured on the server.
- c. Select whether you want to import only users or user groups and associated users.
- d. Select if you want to use the default filter or create a custom one.
- e. Click **Preview** to check how many users or user groups are imported. The number is displayed, as well as up to 100 elements to be imported in alphabetical order.
- f. Click **Start import**.
The users or user groups and associated users are transferred from the LDAP system according to the selected options.

5. Create user groups or import LDAP user groups.

- a. Click  **User management**, and select **User groups**. The list of user groups opens.
- b. Click  **Add user group**.
- c. Enter the name of the user group and an optional description.
- d. Click **Save**.

The user group is created.

- a. Click  **Additional functions**.
 - b. Click  **Start LDAP import**. The button is active only if an LDAP system is configured on the server.
 - c. Select whether you want to import only users or user groups and associated users.
 - d. Select if you want to use the default filter or create a custom one.
 - e. Click **Preview** to check how many users or user groups are imported. The number is displayed, as well as up to 100 elements to be imported in alphabetical order.
 - f. Click **Start import**.

The users or user groups and associated users are transferred from the LDAP system according to the selected options.
6. Assign a user group to the user.
- a. Click the user whose user group association you want to change.
 - b. Click **Associated user groups**.
 - c. Click  **Edit assignment**. The **Associate user groups** dialog opens.
 - d. Enable the check boxes of the relevant items in the **Available user groups** box, and click  **Add**. The user groups are transferred to the **Associated user groups** box.
 - e. Click **OK**.
7. Assign function privileges to the user, if required.
- a. Click the user you wish to assign function privileges to. The user data (details) is displayed.
 - b. Click **Privileges**. The list of function privileges is displayed.
 - c. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.

The user is assigned the selected privileges. This provides the user with privileges for functions (for example, the **Database administrator** function privilege).
8. Assign license privileges to the user.
- a. Click the user you wish to assign license privileges to. The user data (details) is displayed.
 - b. Click **Privileges**. The list of function privileges is displayed.
 - c. Click **License privileges**.
 - d. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.

The user is assigned the selected privileges. This provides the user with access to the ARIS products relevant to him.

Users can now log in with their assigned privileges. Product-specific privileges are assigned in each ARIS product.

USER MANAGEMENT IN ARIS ARCHITECT

Procedure

These actions can also be carried out by users with the **Database administrator** and **User administrator** function privileges.

1. Start ARIS Architect.
2. Log in as **system** user and connect to the **default** tenant.
Please use the new password that you just changed in ARIS Administration. ARIS Architect starts.
3. Create databases. All users with the **Database administrator** function privilege can do so.
 - a. Click **ARIS >**  **Administration** or **ARIS >**  **Explorer**.
 - b. Click  **Navigation** in the bar panel if the **Navigation** bar is not activated yet.
 - c. In the Explorer tree, right-click your connection to the ARIS Server and select  **New >**  **Database**.
 - d. Enter a name. Do not use any special characters.
 - e. Enable the **Versionable** check box if you want the content of the new database to be versioned.
 - f. Click **OK**. The database is created and displayed in the **Navigation** bar, either as a  non-versionable or  versionable database. All users and user groups are automatically transferred from ARIS Administration.
 - g. Change the password of the system user **system**.
 - h. Assign access privileges.
 - i. Assign function privileges to users and user groups.
 - j. Assign filters to users and user groups.The database is available to authorized users.
4. Assign access privileges for database groups. These actions can be carried out by all users with the **User administrator** function privilege.
 - a. Click **ARIS >**  **Explorer**.
 - b. Log in to the database.
 - c. Click  **Navigation** in the bar panel if the **Navigation** bar is not activated yet.
 - d. Right-click the group for which you want to edit the access privileges, and select  **Properties**.
 - e. Click **Access privileges (users)** or **Access privileges (user groups)** on the **Selection** tab.
 - f. Select the users/user groups for which you want to assign privileges.

- g. Select the required access privileges. You can assign **Read (r)**, **Write (w)**, and **Delete (d)** access privileges. The **Version (v)** access privilege is available for versionable databases only. The selection is displayed in the **Privileges** column.
- h. If you click the **Pass on privileges** button, the selected access privileges are applied to all subgroups. This also applies to all new subgroups created below this group in the future.
- i. Click **OK**.

After the user logs in to the database again the changed access privileges will be in effect.

5. Assign database-specific function privileges to users and user groups.

- a. Click **ARIS >  Administration**.
- b. Click  **Navigation** in the bar panel if the **Navigation** bar is not activated yet.
- c. Log in to the database.
- d. In the **Navigation** bar, click  **Users** or  **User groups**.
- e. In the table, right-click the user or user group, and select  **Properties**.
- f. Click **Function privileges** on the **Selection** tab.
- g. In the **Assign** column, click the relevant function privileges. You can assign only function privileges that are assigned to you, too.
- h. You cannot change function privileges for system users.
- i. If you selected **User** in the **Navigation** bar and are logged on as system user, you can enable the **System user** check box. This user receives all function and access privileges.
- j. Click **OK**.

The function privileges are now assigned.

For users to be able to view specific content of the database, you assign access privileges to them.

6. Assign filters to users and user groups.

- a. Click **ARIS >  Administration**.
- b. Click  **Navigation** in the bar panel if the **Navigation** bar is not activated yet.
- c. Log in to the database.
- d. In the **Navigation** bar, click  **Users** or  **User groups**.
- e. In the table, right-click the user or user group, and select  **Properties**.
- f. Click **Method filter** on the **Selection** tab.
- g. In the **Assign** column, enable the checkboxes of the relevant filters.
- h. Click **OK**.

The selected filters are assigned. Users can now log in using these filters.

You can select a default filter for each database. This filter is automatically assigned when you create users and user groups.

All users with the corresponding privileges can work with ARIS Architect.

For new databases, these privileges must be assigned by authorized users.

ARIS video tutorial

ARIS Architect 'Administration' tab versus ARIS Administration

(<http://www.ariscommunity.com/videos/aris-architect-administration-tab-versus-aris-administration>) (approx. 2 minutes)

3.3.2 Create user

Create a user for authorized employees. The default users system (page 56), superuser (page 57), arisservice (page 57), and guest (page 57) are created automatically. You can create additional system users (page 32).

Prerequisite

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

Warning

If this user is also modeled in an organizational chart, all differing data and assignments are overwritten when the executable process is subsequently generated or the organizational chart is updated. This does not apply to LDAP users.

To prevent this, enable the attribute **Consider user group association from user management**.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Add user**. The **Create user** form opens.
3. Enter the user name, first and last name, e-mail address, if applicable, and password. If a user that already exists in the LDAP system is created, the user name must match. The e-mail address is transferred automatically. For the other specifications you can enter any characters you wish because this information will automatically be transferred from the LDAP system after the user is created.

The user name does not necessarily have to correspond to a person's first or last name. In many cases, a randomly selected character string is used, or an abbreviation of the first and/or last name.
4. Click **Save**. The detail view of the user is displayed.
5. Assign a user group to the user, if required.
6. Click **Associated user groups**.
7. Click  **Edit assignment**. The **Associate user groups** dialog opens.
8. Enable the check boxes of the relevant items in the box of the available items, and click **▶ Add**. The items are transferred to the box of the associated items. To remove items from the associated items box, enable the check boxes of the relevant items in this box, and click **◀ Remove**.
9. Click  **Save**.
10. Enable (page 46) the required function and license privileges for the user under **Privileges**.

In order to make a user a system user, enable all function privileges.

The user is created with the corresponding user group and privilege assignments. The user cannot be created if a mandatory field was not filled out or a user name was entered that is already in use by another user in the system. LDAP users are indicated by a different symbol () than the other users (.

Additional information about the user is displayed under Attributes.

Tip

- To associate all available items, click  **Add all**, and click  **Remove all** to remove all associations.
- To transfer a user's group and privilege assignments to a new user, go to the overview of users and click **Copy user** in the row of the relevant user. Enable the check box of assignments to be transferred and add the remaining data, such as user name, first and last name, etc. of the new user.

3.3.3 Edit user

Edit user accounts. You cannot change the user name. If you are using an LDAP system, you cannot change the password either.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user whose data you want to change. The user data (details) is displayed.
3. Click  **Edit**.
4. Change the relevant information, such as name, e-mail address, etc.
5. To change a password, enable **Change password**. The **Old password**, **New password**, and **Confirm password** fields are displayed.
6. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
7. Change the user group association (page 35), if necessary.
8. If required, change the profile or the function, license, and database privileges for the user.
9. Click **Save**.

The user's data is changed. After you have changed the password, the user is informed per e-mail about the new password.

Tip

To change or delete a user's picture, click  **Change picture**. If a different picture is uploaded in ARIS Administration or in Collaboration, it is automatically transferred to the other application.

3.3.4 How to make a user a system user

Create additional system (page 56) users. Having more than one system user can avoid problems, if, for example, your single system user has forgotten his password.

Prerequisite

You have the **User administrator** function privilege. If all users including the system users are deleted, use the superuser. The superuser cannot be deleted.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the relevant user. The user data (details) is displayed.
3. Click  **Edit**.
4. Click **Privileges**. The list of function privileges is displayed.
5. Enable all check boxes.

Now, the user is a system user. The **system** user has all function privileges. This user can log in to process administration, ARIS Administration, User Management, and My tasks. In ARIS Architect and ARIS Designer, this user has all access privileges for all database groups of all databases.

If your only system user was deleted accidentally, create a new one by using the superuser (page 57).

3.3.5 Copy a system user

Copy an existing system (page 56) user. Having more than one system user can avoid problems, if, for example, your single system user has forgotten his password.

Prerequisite

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

Warning

If this user is also modeled in an organizational chart, all differing data and assignments are overwritten when the executable process is subsequently generated or the organizational chart is updated. This does not apply to LDAP users.

To prevent this, enable the attribute **Consider user group association from user management**.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the relevant user. The user data (details) is displayed.
3. Click  **Copy**. The **Copy user** form opens.
4. Enable **Transfer function privileges**.
5. Enable **Transfer user group associations** and/or **Transfer license privileges**, if required.

6. Enter the user name, first and last name, e-mail address, if applicable, and password. If a user that already exists in the LDAP system is created, the user name must match. The e-mail address is transferred automatically. For the other specifications you can enter any characters you wish because this information will automatically be transferred from the LDAP system after the user is created.

The user name does not necessarily have to correspond to a person's first or last name. In many cases, a randomly selected character string is used, or an abbreviation of the first and/or last name.

7. Click  **Save**.

An additional system user is created. The **system** user has all function privileges. This user can log in to process administration, ARIS Administration, User Management, and My tasks. In ARIS Architect and ARIS Designer, this user has all access privileges for all database groups of all databases.

3.3.6 How to make a user a system user for a specific database in ARIS Architect

You can assign users system user function privileges for a specific database in ARIS Architect.

Prerequisite

- You have the **User administrator** function privilege.
- The user is already created (page 30) in ARIS Administration.

Procedure

1. Start ARIS Architect.
2. Click **ARIS >**  **Administration**. The **Administration** tab opens.
3. Log in to the database for which you want to create a system user.
4. Double-click the database name to expand the tree.
5. Click  **Users**.
6. In the user list, right-click the user's name you want to assign system user privileges to and click  **Properties**. The **Properties** dialog opens.
7. Click **Function privileges**.
8. At the bottom of the dialog, enable the **System user** check box.
9. Click **OK**.

The user receives all function and access privileges for this database in ARIS Architect. This affects the privileges in ARIS only. The user's function privileges in ARIS Connect are not changed.

3.3.7 Find users/user groups

You can search for users and user groups.

Prerequisite

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

Procedure

In the Find box, enter the characters contained in the user name, user group name, first or last name, or e-mail address you want to find.

If there are hits for the search query, the first fifty items are displayed. LDAP users are indicated by a different symbol () than the other users (.

3.3.8 Display assignment of users to a privilege

Obtain an overview of what privileges are assigned to which users. License privileges can be assigned through the group or directly to the user. The type of assignment is displayed in the user management.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click **Privileges**.
3. Click the privileges for which you want to display the assignment.

The associated users are displayed.

Note

To obtain an overview of the privileges assigned, you can also export (page 53) a user statistics.

3.3.9 Display information on users/user groups

You can retrieve history and information on all users and their active sessions.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user you want to retrieve information about.
3. Click **Active sessions** to obtain information on the time the user was logged in. This is where you can also log out (page 36) the user.
4. Click the relevant user/user group.
5. Click History (page 61) to retrieve information on the events and details of a user/user group, for example, the privilege assigned to a user.

The requested information is displayed.

3.3.10 Change association of user groups to a user

You can change the association of user groups for a user. License privileges can be assigned through the group or directly to the user. The type of assignment is displayed in the user management. If required, product-specific groups must be created and assigned in each ARIS product.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user whose user group association you want to change.
3. Click **Associated user groups**.
4. Click  **Edit assignment**. The **Associate user groups** dialog opens.
5. Enable the check boxes of the relevant user groups in the **Available user groups** box, and click ► **Add**. The user groups are transferred to the **Associated user groups** box. To remove user groups from the **Associated user groups** box, enable the check boxes of the relevant user groups in this box, and click ◀ **Remove**.
6. Click **OK**.

The user groups assigned to the user have been changed.

Tip

To associate all available items, click ► **Add all**, and click ◀ **Remove all** to remove all associations.

3.3.11 Log out user

You can end the sessions of users. This can be necessary, for example, if all licenses of the **Concurrent user** license type (page 20) are used up because users have forgotten to log out. It can also be useful to end sessions if the assignment of function or license privileges was changed, as these privileges only take effect after users have logged in again.

Prerequisite

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

LOG OUT SINGLE USER

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user you wish to log out. The user data (details) is displayed.
3. Click **Active sessions**.
4. Click  **Log out user**.
5. Click **OK**.

The user is logged out and can log back in again.

LOG OUT MULTIPLE USERS USING A SPECIFIC LICENSE

Procedure

1. Click **Privileges**, and select **License privileges**.
2. Click the license privilege for which you want to log out users.
3. Click **Active sessions**.
4. Enable the check boxes of the users you want to log out.
5. Click  **Log out user**.
6. Click **OK**.

The users are logged out.

Note

To obtain an overview of all users currently logged in, export (page 53) a user statistics.

3.3.12 Delete user

Delete users when they are no longer relevant.

Prerequisite

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

Warning

Do not delete your system user (page 56). Having more than one system user can avoid problems. If your single system user was deleted accidentally, create a new one by using the superuser (page 57). The superuser cannot be deleted.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Move the mouse pointer to the relevant user name. The buttons of the available functions are displayed.
3. Click  **Delete**. The **Confirmation** dialog opens.
4. Click **OK**. The user data is deleted. It takes about 30 minutes until the deletion is written to the log files.
5. To comply with GDPR, delete the log files of ARIS Administration/User Management 30 minutes after deletion of the user data. You can find them in this path:

<Your installation

folder>\ARIS<version>\server\bin\work\work_umcadmin_<size>\base\logs

6. Delete the log files.

The user data and the log files are deleted.

To anonymize users according to GDPR, refer to the online help of the respective component (page 58).

Tip

To delete several users at the same time, enable the check boxes for the relevant users, and click  **Delete**.

3.3.13 Delete all users and user groups

If you want to set up user management from scratch, you should delete all users and user groups. This is recommended before you change to or deactivate LDAP, for example. The default users system (page 56), superuser (page 57), arisservice (page 57), and guest (page 57) are retained.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Remove all**. The **Confirmation** dialog opens.
4. Click **OK**.

All users and user groups are deleted except for the default users.

3.3.14 Refresh items

Refresh items in user management. This can be useful if several users are working in user management simultaneously.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Refresh**.

The users and user groups are refreshed.

3.3.15 Manage user groups

User groups define the tasks or functions that a person performs in a company. A certain set of function, license and database privileges, as well as profiles, is assigned to different user groups. If a user group is assigned to a user, the user has all privileges and profiles assigned to that user group. You can combine different user groups, that is, a user can belong to several different user groups at the same time, or the user's user groups may change, depending on the context.

3.3.15.1 Create user group

Create a new user group. If required, product-specific groups must be created and assigned in each ARIS product.

Prerequisite

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

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Click  **Add user group**.
3. Enter the name of the user group and an optional description. If a user group that already exists in the LDAP system is created, the user group names must match. This is the only way to assign an existing ARIS user group with the LDAP user group.
4. Click **Save**.

The user group is created.

Tip

To transfer user and privilege assignments of a group to a new group, go to the overview of groups and click **Copy group** in the row of the relevant group. Enable the check box of assignments to be transferred and add the remaining data, such as group name, etc. of the new group.

3.3.15.2 Copy user group

You can copy user groups. If required, product-specific groups must be created and assigned in each ARIS product.

Prerequisite

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

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Move the mouse pointer over the user group you want to copy. The buttons of the available functions are displayed.
3. Click  **Copy user group**.
4. Click **Transfer user associations** to assign the users of the group copied to the new group.
5. Click **Transfer privilege assignments** to assign the function privileges of the group copied to the new group. License privileges are transferred only with the **Concurrent user** license type. For the other license types, the license privileges must be assigned (page 44) in a separate step.
6. Enter the name of the user group.
7. Click **Save**.

The user group is created based on the group copied.

If applicable, assign the group the required license privileges.

3.3.15.3 Edit user group

You can change user group data. If required, product-specific groups must be created and assigned in each ARIS product.

Prerequisite

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

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group whose data you want to change.
3. Click  **Edit**.
4. Change the description, if necessary.
5. Click **Save**.
6. Change the user association (page 42), if necessary.
7. Change the function privileges for the user group, if necessary.

The user group data is changed.

3.3.15.4 Find users/user groups

You can search for users and user groups.

Prerequisite

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

Procedure

In the Find box, enter the characters contained in the user name, user group name, first or last name, or e-mail address you want to find.

If there are hits for the search query, the first fifty items are displayed. LDAP users are indicated by a different symbol () than the other users (.

3.3.15.5 Display information on users/user groups

You can retrieve history and information on all users and their active sessions.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user you want to retrieve information about.
3. Click **Active sessions** to obtain information on the time the user was logged in. This is where you can also log out (page 36) the user.
4. Click the relevant user/user group.
5. Click History (page 61) to retrieve information on the events and details of a user/user group, for example, the privilege assigned to a user.

The requested information is displayed.

3.3.15.6 Change association of users to a user group

You can change the association of users for a user group. License privileges can be assigned through the group or directly to the user. The type of assignment is displayed in the user management. If required, product-specific groups must be created and assigned in each ARIS product.

Prerequisite

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

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group whose user association you want to change.
3. Click **Associated users**.
4. Click  **Edit assignment**. The **Associate users** dialog opens.
5. Add all users you want to assign to the group. Use the  **Filter** to limit the list of users, based on specific search criteria.

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

6. Click **OK**.

The users associated to the user group have been changed.

Tip

To associate all available items, click  **Add all**, and click  **Remove all** to remove all associations.

3.3.15.7 Delete user group

You can delete user groups that are no longer relevant. If required, product-specific groups must be created and assigned in each ARIS product.

Prerequisite

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

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Move the mouse pointer over the relevant user group name. The buttons of the available functions are displayed.
3. Click  **Delete**. The **Confirmation** dialog opens.
4. Click **OK**.

The user group is deleted.

Tip

To delete several user groups at the same time, enable the check boxes for the relevant groups, and click  **Delete**.

3.3.15.8 Delete all users and user groups

If you want to set up user management from scratch, you should delete all users and user groups. This is recommended before you change to or deactivate LDAP, for example. The default users system (page 56), superuser (page 57), arisservice (page 57), and guest (page 57) are retained.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Remove all**. The **Confirmation** dialog opens.
4. Click **OK**.

All users and user groups are deleted except for the default users.

3.3.16 Assign privileges and profiles

3.3.16.1 Assign a license privilege to new users/user groups

Assign license privileges to new users or user groups.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click **Privileges**.
3. Click the privilege you want to assign to the user or user groups. The current assignment is displayed.
4. Click  **Edit assignment**. The **Associate user groups** dialog opens.
5. Click  **Edit assignment**. The **Associate users/user groups** dialog opens.
6. Enable the check boxes of the relevant items in the box of the available items, and click **▶ Add**. The items are transferred to the box of the associated items. To remove users/user groups from the **Associated users/user groups** box, enable the check boxes of the relevant users/user groups in this box, and click **◀ Remove**.

The user/user group is assigned the corresponding privileges. If users are assigned a privilege directly and via associated user groups, this is detected automatically so that the user only uses one license.

Tip

To associate all available items, click **▶ Add all**, and click **◀ Remove all** to remove all associations.

3.3.16.2 Assign a license pool to a user group

Assign a number of licenses (license pool) exclusively to a user group.

Prerequisite

- You have the **User administrator** function privilege.
- License pools at user group level is enabled in ARIS Administration configuration (**Security > Advanced settings**).
- The used license type (page 20) is **Concurrent user**.

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group whose license limit you want to change.
3. Click **Privileges > License privileges**.
4. Move the mouse pointer over the relevant license. The buttons of the available functions are displayed.
5. Click  **Change licenses**. The corresponding dialog opens.
6. Enable the **Granted** check box.
7. Enter the number of licenses you want to assign in the **Assigned licenses** box.
8. Click **Save**.

The licenses are assigned to the user group.

3.3.16.3 Change function, license, and database privileges for users or user groups

Assign the relevant function, license, and database privileges to allow usage of specific programs and functions. Product-specific privileges are assigned in each ARIS product. There are certain license privileges that you cannot assign to a user in combination with others. For example, you cannot assign ARIS Architect and ARIS Designer to a user at the same time.

You can only activate the subgroups of a license privilege if the superior license privilege is activated. If you remove a superior license privilege of a user, the user also automatically loses the assignment to the subgroups.

Prerequisite

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

CHANGE FUNCTION, LICENSE, AND DATABASE PRIVILEGES FOR INDIVIDUAL USERS

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user whose privileges you want to change.
3. Click **Privileges**. The list of function privileges is displayed. A distinction is made between privileges assigned directly and those assigned via a user group.
4. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.

In order to make a user a system user, enable all function privileges.

5. Click **License privileges**. A distinction is made between privileges assigned directly and those assigned via a user group.
6. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
7. Click **Database privileges**.
8. Enable/disable the check boxes of the privileges whose assignment you want to add/remove. No database privileges are assigned yet.
9. Click  **Edit**. The **Edit database privileges** dialog opens.
10. Assign the relevant privilege.
11. Click **OK**.

The user is assigned the selected privileges. The assignment of these privileges is displayed as **Granted** in the overview of function and license privileges for a user.

CHANGE FUNCTION PRIVILEGES FOR ALL MEMBERS OF A USER GROUP

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group whose privileges you want to change.
3. Click **Privileges**. The list of function privileges is displayed.
4. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
5. Click **License privileges**.
6. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
7. Click **Database privileges**.
8. Enable/disable the check boxes of the privileges whose assignment you want to add/remove. No database privileges are assigned yet.
9. Click  **Edit**. The **Edit database privileges** dialog opens.
10. Assign the relevant privilege.
11. Click **OK**.

All members of the user group are assigned the selected privileges. The assignment of these privileges is displayed as **Via user group** in the overview of function and license privileges for a user.

Product-specific privileges are assigned in each ARIS product.

The following special features apply for process automation:

If the **Process Governance administrator** function privilege has been assigned to the user in the model but not in user management, the user is also assigned the **Process Governance administrator** function privilege in user management the next time the executable process is generated. If the user has the **Process Governance administrator** function privilege from user management but not from the model, the **Process Governance administrator** function privilege is removed from the user in user management the next time the executable process is generated.

3.3.16.4 Assign profiles to users or user groups

Assign the relevant profile (page 64) in order to enable 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 59) and license (page 61) privileges.

Prerequisite

- Assignment of profiles is enabled in ARIS Administration configuration.
- You have the **User administrator** function privilege.

ASSIGN PROFILES TO INDIVIDUAL USERS

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user you want to assign a profile to. The user data (details) is displayed.
3. Click **Privileges > Profiles**. The list of profiles is displayed. A distinction is made between profiles assigned directly and those assigned via a user group.
4. Enable/disable the check boxes of the profiles whose assignment you want to add/remove.

The user is assigned the selected profiles.

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.

ASSIGN PROFILES TO ALL MEMBERS OF A USER GROUP

Procedure

1. Click  **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group you want to assign a profile to. The user data (details) is displayed.
3. Click **Privileges > Profiles**. The list of profiles is displayed.
4. Enable/disable the check boxes of the profiles whose assignment you want to add/remove.

All members of the user group are assigned the selected profiles. The assignment of these profiles is displayed in the overview of profiles for a user as **Via user group**.

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.

3.3.17 Handle password

Assign a new password to a user or generate it automatically. You can request a new password if you have forgotten your current password.

3.3.17.1 Change user password

Assign a new password to a user or generate it automatically. Passwords of LDAP users cannot be changed.

Prerequisite

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

CHANGE PASSWORD MANUALLY

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user whose password you want to change. The user data (details) is displayed.
3. Click  **Edit**.
4. Enable the **Change password** check box. The **Old password**, **New password**, and **Confirm password** fields are displayed.
5. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
6. Click **Save**.

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

GENERATE PASSWORD

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user whose password you want to change. The user data (details) is displayed.
3. Click  **Generate password**. The button is only displayed for users who are not LDAP users.

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

3.3.17.2 Request new password

You can request a new password if you have forgotten your current password. If an LDAP system is used for user management, please contact your LDAP administrator to request a new password.

Procedure

1. Click **Reset password** in the **Login** dialog. The corresponding dialog opens.
2. Enter your user name.
3. Click **Reset password**.

Depending on your configuration, you will either receive an e-mail with a new password immediately or you must first confirm your password change using a link.

3.3.18 Apply LDAP

You can import users from the LDAP system and you can synchronize user and user group data with the data stored in the LDAP system.

3.3.18.1 Import users and user groups from LDAP

You can import users from the LDAP system.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Start LDAP import**. The button is active only if an LDAP system is configured on the server.
4. Select whether you want to import only users or user groups and associated users.
5. Select if you want to use the default filter or create a custom one.
6. Click **Preview** to check how many users or user groups are imported. The number is displayed, as well as up to 100 elements to be imported in alphabetical order.
7. Click **Start import**.

The users or user groups and associated users are transferred from the LDAP system according to the selected options.

3.3.18.2 Synchronize users or user groups with the LDAP system

You can synchronize user and user group data with the data stored in the LDAP system. LDAP users are indicated by a different symbol () than the other users (.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click the user or user group you wish to synchronize.
3. Click  **Synchronize with LDAP**. The button is active only if an LDAP system is configured on the server.

Data is transferred from the LDAP system for the selected item.

3.3.19 Manage user data

You can backup and restore management data, export user statistics and generate reports (page 63) about users, user groups, privileges, licenses, assignments, etc.

3.3.19.1 Back up user management data

You can create a backup file based on the data in user management.

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Back up data**. The **Back up user management data** dialog opens.
4. Enter a password and confirm it. The password is required for restoring this file.
5. Optionally, you can include the user's photos in the data backup.
6. Click **Start**.

The user management data is saved in JSON format in a ZIP file. The file is separated into several areas to enable even large data volumes to be saved easily: users, user groups, user settings, licenses, license rules, pictures, privileges, configuration, and charts. Backups from an ARIS installation version 9.7 and older can be restored. Backups from the current ARIS installation cannot be restored in older versions.

3.3.19.2 Restore user management data

You can restore previously backed up user management data in Administration. Deactivate LDAP before restoring the data to speed up the process. Backups from an ARIS installation version 9.7 and older can be restored. Backups from the current ARIS installation cannot be restored in older versions.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Restore data**. The corresponding dialog opens.
4. Select the backup file.
5. Enter the password to open the file.
6. Click **Start**.

The user management data is restored.

3.3.19.3 Export user statistics

Export statistics about users. Optionally, you can export usage patterns, assignments, changes to data and database items made by the user, the information used most often or the information used last, etc.

Prerequisites

- You have the **User administrator** function privilege.
- **Generate user statistics (com.aris.umc.audit.enabled)** is enabled in the configuration (page 290) (**User management > Security > Advanced settings**). If **License monitoring (User management > License monitoring > General)** is enabled, **Generate user statistics** is automatically enabled.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Export user statistics**. The corresponding dialog opens.
4. Select the information that the report should output (event type).
5. Select the output format.
6. Select the time period over which the statistics should be created.
7. Click **OK**.

The user statistics are output in the selected format.

3.3.19.4 Generate report

Generate reports (page 63) about users, user groups, privileges, licenses, assignments, etc.

Prerequisite

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

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Generate report**. The corresponding dialog opens.
4. Select the relevant report.
5. Select the output format.
6. Click **Start**.
7. Click **OK**.

The report is output as an Excel file.

3.3.19.5 Generate License audit (password-protected) report

If your contract with Software AG contains a term under which you must regularly provide the usage data of the purchased licenses, generate the **License audit (password-protected)** report. This report is applicable to **Concurrent** and **Named user** licenses. For detailed information, contact your local Software AG sales organization (https://empower.softwareag.com/public_directory.asp).

Prerequisite

- You have the **User administrator**, **Configuration administrator**, and **License administrator** function privileges.
- **License monitoring** is enabled in  **Licenses > Monitoring > Configuration**.

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Generate report**. The corresponding dialog opens.
4. Select **License audit (password-protected)** report.
5. Click **Run**.

The report is output as a password-protected ZIP file containing an Excel file and a JSON file. Send this password-protected report to Software AG for evaluation.

3.3.19.6 Generate License usage rule validation report

Generate a report that lists the license usage based on the license rule. This report is applicable to **Concurrent** and **Named user** licenses.

Prerequisite

- You have the **User administrator**, **Configuration administrator**, and **License administrator** function privileges.
- License monitoring is activated (page 17) ( **Licenses > Monitoring > Configuration**).
- An active license rule is available (page 17) ( **Licenses > Monitoring > Rules**).

Procedure

1. Click  **User management**. The list of users is displayed.
2. Click  **Additional functions**.
3. Click  **Generate report**. The corresponding dialog opens.
4. Select **License usage rule validation** report.
5. Click **Run**.

The report is output as an Excel file.

3.3.20 Valuable information

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

3.3.20.1 What is the difference between ARIS Architect 'Administration' tab and ARIS Administration?

Users and privileges are managed centrally for all databases and ARIS products of an activated tenant. The role-dependent data access is controlled by access privileges and filters that are assigned per database in ARIS Architect on the **Administration** tab.

MANAGEMENT IN ARIS ADMINISTRATION

You can use User Management to manage users, user groups, privileges, licenses, and configurations for all ARIS products. This ensures single sign-on for various ARIS products. Users can also be created using an LDAP system.

MANAGEMENT IN ARIS ARCHITECT

When you create a database, all users and user groups from the user management are automatically imported into the database. Administrators assign function and access privileges, as well as filters to users and user groups in each database so that only authorized users can view certain database content or perform specified actions. Use the prefix management to track which user created or changed database items.

If you are using the server LOCAL, you can log in only with the user **system**.

ARIS video tutorial

ARIS Architect 'Administration' tab versus ARIS Administration

(<http://www.ariscommunity.com/videos/aris-architect-administration-tab-versus-aris-administration>) (approx. 2 minutes)

3.3.20.2 What is the 'system' user?

The **system** user is created automatically. By default, the system user has all function privileges. This user can log in to process administration, ARIS Administration, User Management, and My tasks. In ARIS Architect and ARIS Designer, this user has all access privileges for all database groups of all databases. This user only uses up a license if a license privilege is activated for this user. The default password is **manager**. You should change the default password to prevent unauthorized access. You can change all user data except for the user name.

Having more than one system user can avoid problems, if, for example, your single system user has forgotten his password. You can create (page 32) additional system users or copy (page 32) the existing system user. If your only system user was deleted accidentally, create a new one by using the superuser (page 57).

3.3.20.3 What is the user superuser?

The user **superuser** is created automatically. By default, this user is assigned the **User management**, **License management**, and **Configuration administrator** function privileges. This user can also enable this function privilege for other users. Users of the **superuser** type do not use up a license. They manage the system administration, but cannot use ARIS products due to license restrictions. The default password is **superuser**. You should change the default password to prevent unauthorized access. The password of the superuser is very important, as it is the only user who cannot be deleted. You can change all user data except for the user name.

3.3.20.4 What is the user 'arisservice'?

The user **arisservice** is created automatically. By default, this user is assigned the **Database administrator** and **Process Governance administrator** function privileges. This user only uses up a license if a license privilege is activated for this user. The default password is **arisservice**. You should change the default password to prevent unauthorized access. You can change all user data except for the user name.

3.3.20.5 What is the user 'guest'?

The user **guest** is created automatically. By default, no function or license privileges are assigned to this user. This user serves technical purposes only. It is not for use by end users. Logging in to ARIS Connect or other Software AG products with this user is not allowed. Further information is available in the Software AG license terms (<http://softwareag.com/licenses>).

3.3.20.6 How can user accounts be deleted and anonymized?

Users can only be deleted (page 37) in ARIS Administration. To anonymize users in the different ARIS components according to GDPR, follow the instructions of the respective online help or manual:

- **ARIS Cloud Controller (ACC) Command-line Tool** manual
- **ARIS Server Administrator Command-line Tool** manual
- **ARIS document storage Command-Line Tool** manual
- **ARIS Process Governance Command-Line Tool** manual
- **User Management Command-Line Tool** manual
- **ARIS Risk & Compliance Manager online help > Procedures > Use ARIS Risk & Compliance Manager administration > Anonymize users** and **Specify anonymization patterns**
- **Collaboration > online help > Administrate Collaboration > How can user accounts be deleted and anonymized?**

After anonymization, users and their activities are shown with **Anonymized user** instead of with the user name.

3.3.20.7 What are user groups used for?

User groups define the tasks or functions that a person performs in a company. A certain set of function, license and database privileges, as well as profiles, is assigned to different user groups. If a user group is assigned to a user, the user has all privileges and profiles assigned to that user group. You can combine different user groups, that is, a user can belong to several different user groups at the same time, or the user's user groups may change, depending on the context.

3.3.20.8 What function privileges can be assigned?

Function privileges provide users with specific functions and control their privileges. Additionally the user must be assigned to a license privilege. You can assign (page 46) the following function privileges to users or user groups. Additional privileges can be assigned in each ARIS product at the database level.

ARCM ADMINISTRATOR

Manage ARIS Risk & Compliance Manager system settings and run data exports/imports.

ARIS CONNECT ADMINISTRATOR

Specify which version of which database is to be published in the portal, and manage the corporate design.

ANALYSIS ADMINISTRATOR

Back up, restore, and manage the analysis database of a tenant. Import and export queries and ad hoc analyses.

ANALYSIS PUBLISHER

Publish and delete ad hoc analyses and queries for other users. Back up ad hoc analyses and queries.

ARIS CLOUD CONTROLLER CONFIGURATION ADMINISTRATOR

Edit the ARIS Cloud Controller server configuration including registered nodes and application types.

COLLABORATION ADMINISTRATOR

Manage private groups, flagged posts, announcements and e-mail templates.

COMPONENT ADMINISTRATOR

Add, start, stop, and remove components on the ARIS Cloud Controller server.

CONFIGURATION ADMINISTRATOR

Configure ARIS Design Server or ARIS Connect server, export and import a tenant's configuration files, for example, ARIS filters, templates, and XML structures.

DASHBOARD ADMINISTRATOR

Create and manage visual content in ARIS Connect, for example, dashboards.

DATABASE ADMINISTRATOR

Manage tenant databases. System user (page 56) in all databases.

DOCUMENT ADMINISTRATOR

Manage documents, document versions, folders, and access privileges in ARIS document storage.

IMPERSONATION

Manage data in other tenants using impersonated users and their privileges.

LICENSE ADMINISTRATOR

Use ARIS Administration/User Management to import, export, or delete licenses.

PORTAL ADMINISTRATOR

Manage the portal's corporate design.

PPM USER

Use PPM.

PROCESS GOVERNANCE ADMINISTRATOR

Manage Process Governance processes.

PUBLISHER ADMINISTRATOR

Generate, update, and delete ARIS Publisher exports.

PUBLISHING ADMINISTRATOR

Specify which version of which database is to be published in the portal.

SCRIPT ADMINISTRATOR

Manage report scripts and macros of ARIS Design Server or ARIS Connect Server.

SERVER ADMINISTRATOR

Query and terminate sessions on ARIS Design Server or ARIS Connect Server. Back up and update the system database, and display database statistics and all databases.

SERVICE ADMINISTRATOR

Register external systems and services (for example, external database systems, mail servers, or proxy servers) on the ARIS Cloud Controller server.

TECHNICAL CONFIGURATION ADMINISTRATOR

Configure systems, such as LDAP or SMTP, use ARIS Administration/User Management to import or export configuration files, and manage documents.

TENANT ADMINISTRATOR

Create, back up, restore, and delete tenants on the ARIS Cloud Controller server.

UML VIEWER

View UML content in ARIS Connect.

USER ADMINISTRATOR

Manage users, user groups, and privileges in ARIS Administration/User Management.

ARIS video tutorial

ARIS Architect 'Administration' tab versus ARIS Administration

(<http://www.ariscommunity.com/videos/aris-architect-administration-tab-versus-aris-administration>) (approx. 2 minutes)

3.3.20.9 What license privileges can be assigned?

License privileges provide users with specific products and components. You can assign (page 46) the license privileges to users or user groups (**ARIS Administration > User management > Users** or **Usergroups > <user name>** or **<usergroup name> > Privileges > License privileges**). Move the mouse pointer over a license privileges name to display the description. Additional privileges can be assigned in each ARIS product at the database level.

3.3.20.10 What information does the history of users and user groups show?

Various events including their timestamp are shown in the history.

USERS

- User created
- User updated
- Privilege assigned
- User assigned to a group
- Synchronized with LDAP
- Login failed
- Password changed

USER GROUPS

- User group created
- User group updated
- Privilege assigned
- User assigned
- Synchronized with LDAP

3.3.20.11 How can the password be changed?

There are several possibilities for changing a user's password. Passwords of LDAP users cannot be changed.

PASSWORD IS CHANGED BY THE ADMINISTRATOR

A user with the **User management** function privilege can change the passwords of other users.

CHANGE PASSWORD MANUALLY

A password can be changed (page 49) manually in the user management (**Change password**).

GENERATE PASSWORD

Alternatively, a password can be generated (page 49) automatically in the user management (**Generate password**).

PASSWORD IS CHANGED BY THE USER

The user has two possibilities for changing his password in the login dialog.

CHANGE PASSWORD

If a user's password has expired, he will be asked to change it in the login dialog (**Change password**). The user will receive an e-mail containing the new password.

RESET PASSWORD

If the user has forgotten his password, he can request a new one (**Reset password**). The rest of the procedure depends upon whether a one-stage or two-stage password change is enabled (**Administration > Configuration > User management**). For the one-stage change the user immediately receives an e-mail with the new password. For a two-stage change the user first receives an e-mail asking him to confirm the resetting of his password within a specific period of time. The user receives a new password after he has confirmed.

3.3.20.12 Which reports exist?

You can generate the following reports as Excel files.

LICENSE AUDIT (PASSWORD-PROTECTED)

Lists the maximum consumption of each license per day.

USER GROUPS WITH ASSIGNED USERS AND PRIVILEGES

Outputs a list of the selected user groups and the users assigned to them, along with the function and license privileges granted to the user via the group.

ACTIVE USER SESSIONS

Outputs a list of all users currently logged in to ARIS, along with the start date and time of the session.

ASSIGNED AND UNUSED ARIS LICENSES

Outputs the total number of products and licenses, along with the number of licenses used and available.

LICENSE USAGE RULE VALIDATION

Based on the license rule specified, this report lists the license violations that occur in the system.

USERS WITH ASSIGNED PRIVILEGES

Outputs a list of the selected users with their assigned function and license privileges.

3.3.20.13 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 59) and license (page 61) 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 48) 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.

3.3.20.14 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. 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. 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, create new or reuse existing items, as well as delete items in the  **Portal**.

ARIS API

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

3.4 Manage 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.

ARIS document storage was tested with 40.000 document items. This includes documents, document versions or folders. We recommend monitoring the number and overall size of stored document items and archiving some document items if needed.

3.4.1 Configure jobs for ARIS document storage

You can configure jobs for ARIS document storage, which are executed regularly at a defined time.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Document storage**.
4. Click **Infrastructure**.
5. In the **Batch job schedule** field, enter the time at which a lock should be removed automatically. The time defined in the string must be a CRON expression (for example, '0 0 2 * * ?' if this is to happen every night at 2:00 a.m.).

You have defined the point in time at which the automatic jobs should be run.

3.4.2 Display charts for documents

You can display various charts for documents.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

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

The charts for documents are displayed.

3.4.3 Use ARIS document storage with WebDAV

ARIS document storage supports WebDAV. You can connect only one tenant with a specific repository.

To grant users without the **Document management** role access to ARIS document storage content, ARIS document storage can be used as a WebDAV network drive.

With a Microsoft® Windows 7 operating system you just need to connect the relevant network and access ARIS document storage directly. With older operating systems, you need to use Web folders (select **Tools > Map Network Drive > Sign up for online storage connect to a network server** in Microsoft® Windows Explorer). If this does not work you need to configure your computer as follows.

Procedure

1. Open the Registry Editor.
2. Navigate to **HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\WebClient\Parameters** and find the DWORD entry **BasicAuthLevel**.
3. Check if the value of this entry is **2**. If the value of this entry differs, please change it to **2**. If the DWORD entry does not exist, create it.
4. With operating systems older than Microsoft® Windows 7 you also need to find the DWORD entry **UseBasicAuth**. If it does not exist, create it.
5. Change the value of this entry to the hexadecimal value **1**. Thus, you enable HTTP Basic Access Authentication for SSL and non-SSL connections.
6. Close the Registry Editor.
7. Restart Microsoft® Windows.

You can now use ARIS document storage as a WebDAV network drive.

3.4.4 Export statistics

You can export statistics for documents if **Generate usage statistics** is configured (page 314) for ARIS document storage.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Documents**.
4. Click **Administrative actions**.
5. Click **Export statistics**. If you want to export all event types, enable the check box in front of **Event types**.

You can save the document statistics file of ARIS document storage at the relevant location for further use.

3.4.5 Use metadata

Metadata can be used to classify documents and is displayed in the properties (page 70) of a document.

3.4.5.1 Define custom metadata for documents

You can define custom metadata for documents saved in ARIS document storage. You can define attributes of type **String** or **Value**. If you define an attribute of type **Value**, you need to specify the allowed value range. For example, this user-defined metadata could be the color (green, blue, yellow) or the company size (small, medium, large). This metadata can be used to classify documents and is displayed in the properties (page 70) of a document.

Prerequisite

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

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Documents**.
3. Click the arrow next to ARIS document storage.
4. Click  **Open properties**. The details (page 93) of the folder are displayed.
5. Click **Attribute types**.
6. Click  **Add new attributes**. The **Add attribute type** dialog opens. Add the relevant attribute type.

You have defined custom metadata.

A user-defined attribute type cannot be changed. You can add or delete values.

3.4.5.2 Delete custom metadata

You can delete custom metadata.

Prerequisite

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

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Documents**.
3. Click the arrow next to ARIS document storage.
4. Click  **Open properties**. The details (page 93) of the folder are displayed.
5. Click **Attribute types**.
6. Move the mouse pointer over the attribute type to be deleted.
7. Click  **Delete**.

You have deleted custom metadata.

3.4.5.3 Display document properties

You can view the properties of a document or a folder.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.

The properties of the document are displayed.

3.4.5.4 Edit document properties

You can edit the properties of a document.

Prerequisite

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

Procedure

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

You have edited the properties of the document.

3.4.5.5 Generate a dashboard link

You can generate a link to a permanent document (page 80) located in ARIS document storage. This link can be used in data feeds or dashboards for ARIS Aware.

Prerequisite

- You have the **Dashboard administrator** function privilege.
- You have an ARIS Connect Designer (page 61) or ARIS Connect Viewer license.
- Your ARIS Server is enabled for ARIS Aware.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the document for which you want to generate a link to the document location in ARIS document storage.
4. Click **Show server location**.
5. Click **Copy to clipboard**.

The link to the document is copied to the clipboard and can be used in data feeds or dashboards for ARIS Aware.

3.4.5.6 Edit document tags

You can edit the tags of a document. You cannot edit an existing tag, you can only delete it and replace it with a new one.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.
5. Click  **Edit**.
6. Enter a new tag. You can separate multiple tags by a comma.
7. Click **Save**.

You have edited the tags of the document.

3.4.5.7 Delete tags of a document

You can delete the tags of a document.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.
5. Click  **Edit**.
6. Click the little cross beside the tag name.
7. Click **Save**.

You have deleted a tag.

3.4.5.8 Change the document owner

You can change the owner of a document.

Prerequisite

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

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. Next to the **Owner** field, click  **Edit**. The **Select owner** dialog opens.
7. Enter a character string that is part of the user name of the new owner. The matching users are displayed.
8. Enable the relevant user.

You have changed the owner of a document.

3.4.6 Use folders

The folder structure of ARIS document storage provides a better overview and the possibility to specify access privileges (page 75).

3.4.6.1 Create folder in ARIS document storage

You can manage documents in your ARIS document storage. For a better overview, create a folder structure.

Prerequisite

You have the license right **ARIS Connect Designer** and have the corresponding permissions (**Document administrator**, **Local administrator**, or write permission).

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the arrow next to a folder to open the menu.
5. Click  **Add folder**.
6. Enter a name for the folder, and click **OK**.

You have created a new folder.

3.4.6.2 Display folder details

You can view the details of a folder.

Prerequisite

You have the license right **ARIS Connect Designer** and have the corresponding permissions (**Document administrator**, **Local administrator**, or write permission).

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant folder, and click the arrow to open the menu.
4. Click  **Open properties**.

The details (page 93) of the folder are displayed.

3.4.6.3 Edit folder details

You can edit the properties of a folder.

Prerequisite

You have the license right **ARIS Connect Designer** and have the corresponding permissions (**Document administrator**, **Local administrator**, or write permission).

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant folder, and click the arrow to open the menu.
4. Click  **Open properties**. The details (page 93) of the folder are displayed.
5. Click  **Edit**.

You can edit the properties (page 93) of the folder.

3.4.6.4 Move folders in ARIS document storage

You can move folders in your ARIS document storage. The subfolders contained are also moved to the target folder.

Prerequisite

- You have the **ARIS Connect Designer** license privilege.
- You have access privileges (page 76) for the source folder and read and write privileges for the target folder.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the arrow next to a folder to open the menu.
5. Click  **Move to another folder**.
6. Select the folder and click **OK**.

You have moved a folder and its subfolders.

3.4.6.5 Manage folder access for user groups

By default, no access privileges are defined in ARIS document storage. All users have access to all folders - including the root folder - and documents. You can limit the access (page 79) to individual folders of ARIS document storage so that not all ARIS document storage users can access all folders and their contents.

Warning

If you edit the access of a user or a user group to a folder for the first time, you also have to adapt the access privileges of the remaining users or user groups accordingly. Otherwise, all the remaining users or user groups will have no access at all.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant folder, and click the arrow to open the menu.
4. Click  **Open properties**.
5. Click **Access privileges**.
6. Click **Users groups**.
7. Enable the check boxes of the user groups whose access privileges you want to change.
8. Click  **Edit access privileges**. The **Edit access privileges** dialog opens.
9. Enable **Pass access privileges on to all subfolders** if users or user groups should have access to the subfolders below the selected folder. Select the relevant access privilege from the list.
10. Click **OK**.

You have restricted the access to ARIS document storage folders.

Tip

If you want to change the access privileges for a single user group, move the mouse pointer to the row of the relevant user group and click  **Edit access privileges**.

3.4.6.6 Manage folder access for users

By default, no access privileges are defined in ARIS document storage. All users have access to all folders - including the root folder - and documents. You can limit the access (page 79) to individual folders of ARIS document storage so that not all ARIS document storage users can access all folders and their contents.

Warning

If you edit the access of a user or a user group to a folder for the first time, you also have to adapt the access privileges of the remaining users or user groups accordingly. Otherwise, all the remaining users or user groups will have no access at all.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant folder, and click the arrow to open the menu.
4. Click  **Open properties**.
5. Click **Access privileges**.
6. Click **Users**.
7. Enable the check boxes of the users whose access privileges you want to change.
8. Click  **Edit access privileges**. The **Edit access privileges** dialog opens.
9. Enable **Pass access privileges on to all subfolders** if users or user groups should have access to the subfolders below the selected folder. Select the relevant access privilege from the list.
10. Click **OK**.

You have restricted the access to ARIS document storage folders.

Tip

If you want to change the access privileges for a single user, move the mouse pointer to the row of the relevant user and click  **Edit access privileges**.

3.4.6.7 Show assigned users or user groups

You can restrict the view to those users or user groups who have access privileges to the selected folder.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant folder, and click the arrow to open the menu.
4. Click  **Open properties**.
5. Click **Access privileges**.
6. Click **Users** or **User groups**.
7. Enable **Show assigned users**.

Users or user groups who have access privileges to folders in ARIS document storage are displayed.

3.4.6.8 Exclude folder(s) from search

You can exclude ARIS document storage folders from the search.

Prerequisite

- You have the ARIS Connect Designer license privilege.
- You have read and write privilege for the relevant folders.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click the relevant folder, and click the arrow to open the menu.
4. Click  **Open properties**.
5. Click  **Edit**.
6. Enable **Exclude from search**.
7. Click **Save**.

You have excluded folders from the search. If you search for documents that are located in the excluded folder, no document is found. Only the folders not excluded are searched through. This has no effect on the subfolders of the excluded folder.

3.4.6.9 Delete folder in ARIS document storage

You can manage documents in your ARIS document storage. For a better overview, create a folder structure.

Prerequisite

You have the license right **ARIS Connect Designer** and have the corresponding permissions (**Document administrator**, **Local administrator**, or write permission).

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the arrow next to a folder to open the menu.
5. Click  **Delete**. The **Confirmation** dialog opens.
6. Click **OK**.

You have deleted the folder.

3.4.7 Valuable information

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

3.4.7.1 What are the access privileges for folders?

By default, no access privileges are defined in ARIS document storage. All users have access to all folders - including the root folder - and documents. You can limit the access to individual folders of ARIS document storage so that not all ARIS document storage users can access all folders and their contents. The following access privileges exist:

- All access privileges

The users or user groups with this privilege have full access to the folder and can view, edit, create subfolders and delete the folder but cannot assign privileges to users or user groups. They can upload new documents, new document versions, and delete documents.

- Folder administration access

The users or user groups members with this privilege are local administrators for the folder and can view, edit, create subfolders, delete the folder, and assign privileges to the users and groups. But they cannot assign the **Folder administration access** privilege to other users or user groups. They can upload new documents, new document versions, and delete documents.

When the **Folder administration** access privilege of a folder is revoked, the user also loses the **Folder administration** access privilege for all the subfolders that have implicit pass-on behavior. Thus, if no other restrictions apply, all users have access to these folders again.

- Reset access privileges

The users or user groups with this privilege can revoke the permission on the folder if already assigned.

- 'Read' access privilege

The users or user groups with this privilege can view the folder but are unable to upload new documents and new document versions or delete documents in the folder nor create new subfolders.

- 'Read + Write' Access privilege

The users or user groups with this privilege can view and edit the properties of the folder and create subfolders. They can upload new documents, new document versions, and delete documents.

3.4.7.2 What are permanent documents?

Permanent documents remain in the ARIS document storage until they are explicitly deleted.

You can set up (page 75) access restrictions on the folder level for permanent documents. If you use Process Governance, it is recommended that you specify that documents are to be saved permanently in ARIS document storage when modeling a dialog for an executable process, otherwise the location for these documents within ARIS document storage cannot be specified in the dialog. These documents are called temporary documents (page 80).

You can restrict access privileges on folder level only, not for individual documents. Users having the **Document administrator** function privilege can access all folders. If no roles are defined for access to a folder, all users have access to it.

3.4.7.3 What are temporary documents?

Temporary documents are documents that were not explicitly uploaded to ARIS document storage, but were added to the process during process instance runtime if you use Process Governance. They can be transformed into permanent documents and added to ARIS document storage, if required.

Temporary documents are also saved in the safe area of ARIS document storage when you use an external document management system. These documents are deleted when the process instance is terminated.

You can transform a temporary document into a permanent document by moving it to ARIS document storage.

3.4.7.4 Which options are available for models or objects?

There are two options to connect documents with an object or model: The first is using the **ARIS document storage** attribute of an object or model. In the document details, documents connected with an object are preceded by the  symbol, and documents connected with a model are preceded by the  symbol.

The second option is to assign documents to an object or model in ARIS Connect Designer. The assignment is marked by the  link symbol for objects and  for models.

In this case, the document details show that this document is connected via attributes with an object () or a model (.

The second option includes direct attachment to an object or model in ARIS Connect Designer. This is marked by the  or  link symbols.

3.4.7.5 Which external document management systems can you use?

This is where permanent documents (page 80) are managed. The storage for temporary documents (page 80) is not affected by this.

Available is Microsoft® SharePoint 2013.

3.4.7.6 What is the folder Dashboarding used for?

Data is collected by scheduled reports (page 82) and form the basis for data feeds that are stored in the **Dashboarding** folder in ARIS document storage.

These reports generate XML files.

By default, all users have access to the **Dashboarding** folder. Therefore, it is strongly recommended that you restrict the access (page 75) to the **Dashboarding** folder and all its subfolders to the user that is configured in the URL alias.

The **United Motor Group** database is supplied with your ARIS installation by default. With this database, you receive a set of default dashboards that can be displayed within ARIS Connect.

By default, at least the following folders are available in the **Dashboarding** folder:

- Collaboration - containing the dashboards for Collaboration
- Governance - containing the dashboards for Process Governance
- Matomo - containing the dashboards collected by Matomo

Under United Motor Group folders

- CoE - containing the dashboards for Center of Excellence
- CXM - containing the dashboards for Customer Experience Management
- EA - containing the dashboards for Enterprise Architecture
- Exported Tables - containing the dashboards for metadata, for example, for the person responsible for a process
- GRC - containing the dashboards for Governance, Risk & Compliance (GRC)
- IoT - containing the dashboards for Internet of Things
- Matomo - containing the dashboards collected by Matomo from the **United Motor Group** database
- PPM - containing the dashboards for ARIS Process Performance Manager
- SAP - containing the dashboards for ARIS for SAP® Solutions
- Strategy - containing the dashboards for Business strategy

3.4.7.7 What are scheduled reports?

Scheduled reports are reports that start automatically at a defined point in time.

They run in the background and you can view the results later. For example, you can define that a report that strongly affects system performance is to run only at night when no one is working with the system.

You specify the schedule for reports in ARIS Architect. For further information please refer to the **Evaluate data > Use reports > Create schedule for report** chapter of the ARIS Architect online help.

3.4.7.8 What charts are available for documents?

3.4.7.8.1 What does the 'Number of documents' chart show?

This chart only displays information.

It shows the total number of all documents per repository in ARIS document storage, if multiple repositories exist. Otherwise, the total number of documents is displayed.

3.4.7.8.2 What does the 'Used space' chart show?

This chart is a speedometer display.

If memory space (in kilobyte) for ARIS document storage for a tenant is restricted, the memory used is shown in the form of a speedometer. If no maximum memory space has been defined, the memory used is shown in megabytes.

3.4.7.8.3 What does the 'Most viewed documents' chart show?

This chart is a bar chart.

It shows the 15 most viewed or downloaded documents including their file size.

3.4.7.8.4 What does the 'Most changed documents' chart show?

This chart is a bar chart.

It shows the 15 most changed documents including their file size.

3.4.7.8.5 What does the 'Largest documents' chart show?

This chart is a bar chart.

It shows the 20 largest documents including their file size.

3.4.7.8.6 What does the 'Latest documents' chart show?

This chart is a simple list.

This chart shows the 15 latest documents.

3.4.7.8.7 What does the 'Document status overview' chart show?

This chart is a pie chart.

It shows the distribution and number of documents in the various document statuses.

Document statuses are **In progress**, **Under review**, **Reviewed**, **Rejected**, and **Published**.

3.4.7.8.8 What does the 'Outdated documents' chart show?

This chart is a simple list.

This chart shows the 15 oldest documents.

3.4.7.9 How can user accounts be deleted and anonymized?

Users can only be deleted (page 37) in ARIS Administration. Then, they must be anonymized according to GDPR. Users are anonymized either with `y-admintool.bat` for Windows operating systems or `y-admintool.sh` for Unix operating systems. For detailed information, refer to **ARIS document storage Command-Line Tool**.

After anonymization, activities of ARIS document storage users, such as uploads of documents, downloads of documents, changes to metadata, are shown with **Anonymous** instead of with the user name.

3.4.8 What pages are available in ARIS document storage?

3.4.8.1 ARIS document storage attribute types

Enables the definition of custom metadata for documents saved in ARIS document storage. This page is available only for the root folder.

GENERAL BUTTONS

Add new attributes

Opens the **Add attributes types** dialog in which you can enter new attribute types for documents.

TABLE

Key

Specifies the key of the attribute. This is the name that is displayed in front of the box of allowed values.

Type

Specifies the type of the attribute.

Value range

Specifies the values that a user-defined attribute may have.

Edit

Opens the **Change attribute type** dialog. This is only available for attributes of the **Value** data type.

Delete

Deletes a value from the list of allowed values for an attribute of the **Value** type.

3.4.8.2 Document details

Displays document details.

GENERAL BUTTONS

Buttons on the top right, whose functionality applies to the entire document including its versions.

Upload new version

Uploads a new version of the current document and creates the versioning information.

Download

Downloads the selected document to the local directory.

Lock

Locks the selected document for editing by other users. This symbol is displayed if the document is not locked.

Unlock

Unlocks the selected document and enables editing by other users. This symbol is displayed if the document is locked.

Delete

Deletes the current document and all its versions.

A confirmation prompt is shown. The document will be deleted if you click **Delete**. If you decide not to delete the document, click **Cancel**.

Edit

Enables the editing of a document.

TABLE

File name

Displays the name of the document.

Path

Displays the path to the document.

Title

Displays the title of the document.

Current 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 **New**, **Approved**, **Rejected**, **In process**, and **To be approved** exist.

Revision

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.

Status

Shows the status of the document. The states **New, Approved, Rejected, In process,** and **To be approved** exist.

ID

Displays the ID of the document.

File size

Displays the size of the file.

Owner

Displays the name of this document's owner.

Locked by

Displays who has opened or locked the selected document.

Created by

Displays who created the document in ARIS document storage.

Created on

Displays the creation date of the document.

Description

Displays a detailed description of the document if the description is specified.

List of tags

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

Link

Displays the link to the physical location.

Optional: Custom metadata

Displays the custom metadata, if defined.

3.4.8.3 Document history

Displays the history of a document.

GENERAL BUTTONS

Buttons on the top right, whose functionality applies to the entire document including its versions.

Upload new version

Uploads a new version of the current document and creates the versioning information.

Download

Downloads the selected document to the local directory.

Lock

Locks the selected document for editing by other users. This symbol is displayed if the document is not locked.

Unlock

Unlocks the selected document and enables editing by other users. This symbol is displayed if the document is locked.

Delete

Deletes the current document and all its versions.

A confirmation prompt is shown. The document will be deleted if you click **Delete**. If you decide not to delete the document, click **Cancel**.

TABLE

Timestamp

Shows the timestamp of the change to a document to the second, as well as the date of the change.

User name

Shows the user name that the user who performed the change was logged in with.

Event

Shows the change made, for example, an update of the document relationship or a change to a document's metadata.

Details

Shows the event in detail.

3.4.8.4 Document relations

Displays the relationships of a document.

GENERAL BUTTONS

Buttons on the top right, whose functionality applies to the entire document including its versions.

Upload new version

Uploads a new version of the current document and creates the versioning information.

Download

Downloads the selected document to the local directory.

Lock

Locks the selected document for editing by other users. This symbol is displayed if the document is not locked.

Unlock

Unlocks the selected document and enables editing by other users. This symbol is displayed if the document is locked.

Delete

Deletes the current document and all its versions.

A confirmation prompt is shown. The document will be deleted if you click **Delete**. If you decide not to delete the document, click **Cancel**.

TABLE

Type

Shows the type of the relationship, for example, **ARIS_Model**, if the document is directly connected to a model. The following relationship types are displayed:

- The document is connected to a model via a link (**ARIS document storage** attribute type group)
- The document is connected to an object via a link (**ARIS document storage** attribute type group)
- The document is connected directly to a model (**ARIS_Model**)
- The document is connected directly to an object (**ARIS_OBJECT**)

Reference

Shows the document's reference to a model or object. The GUID of the model or object is shown, as well.

Delete

Deletes the relation of the document.

If, for example, the document is connected with a model, this relationship is deleted from the model.

A confirmation prompt is shown. Click **OK** to delete the relation. If you decide not to delete the relation, click **Cancel**.

3.4.8.5 Document versions

Displays the versions of a document.

GENERAL BUTTONS

Buttons on the top right, whose functionality applies to the entire document including its versions.

Upload new version

Uploads a new version of the current document and creates the versioning information.

Download

Downloads the selected document to the local directory.

Lock

Locks the selected document for editing by other users. This symbol is displayed if the document is not locked.

Unlock

Unlocks the selected document and enables editing by other users. This symbol is displayed if the document is locked.

Delete

Deletes the current document and all its versions.

A confirmation prompt is shown. The document will be deleted if you click **Delete**. If you decide not to delete the document, click **Cancel**.

TABLE

Revision

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

Shows the date a document version was changed.

Changed by

Shows which user changed a version of a document.

Comment

Shows the comment entered when changing the version of the document.

Status

Shows the status information of the document. The following status information is possible:

- NEW
- ON_APPROVAL
- IN_PROGRESS
- APPROVED

- REJECTED
- PUBLISHED

VERSION-SPECIFIC BUTTONS

If you move the mouse pointer to the row of a version the version-specific buttons are displayed.

Open version

Downloads the version of that row to the local directory.

Delete

Deletes the version of that row.

This button is not available for the current version. This version can be deleted only together with the document itself.

A confirmation prompt is shown. The version will be deleted if you click **Delete**. If you decide not to delete the version, click **Cancel**.

3.4.8.6 Folder access privileges for user groups

Displays the folder access privileges of the associated user groups.

GENERAL BUTTONS

Delete

Deletes the selected folder, its subfolders and all documents in them.

Enter search term field

Enter the name of the user group or user you want to edit.

Pass on access privileges to all subfolders

Activates the function based on which the restriction of access privileges is extended to all subordinate folders of the selected folder.

TABLE

User group name

Displays the name of the user group.

Access type

Displays the access privilege of a folder for a user group or a user.

Edit

Opens the **Edit access privileges** dialog.

3.4.8.7 Folder access privileges for users

Displays the folder access privileges assigned to users.

GENERAL BUTTONS

Delete 

Deletes the selected folder, its subfolders and all documents in them.

Enter search term field

Enter the name of the user group or user you want to edit.

Pass on access privileges to all subfolders

Activates the function based on which the restriction of access privileges is extended to all subordinate folders of the selected folder.

TABLE

User name

Displays the name of the user.

Full name

Displays the full name of a user.

Access type

Displays the access privilege of a folder for a user group or a user.

Edit

Opens the **Edit access privileges** dialog.

3.4.8.8 Folder

Displays the content of a folder.

GENERAL BUTTONS

Upload 

Opens the dialog to upload a new document.

Refresh 

Refreshes the page displayed.

TABLE

Name

Displays the name of the document.

File type

Displays the file type of the document.

Status

Shows the status of the document. The states **New**, **Approved**, **Rejected**, **In process**, and **To be approved** exist.

Upload new version 

Uploads a new version of the current document and creates the versioning information.

Download 

Downloads the selected document to the local directory.

Open properties 

Opens the properties of the document.

Move to another folder 

Opens the **Move document** dialog.

Delete 

Deletes the document from ARIS document storage.

3.4.8.9 Folder details

Displays the details of a folder. (page 73)

GENERAL BUTTONS

Delete

Deletes the selected folder, its subfolders and all documents in them.

Edit

Enables editing mode for the folder details.

TABLE

Folder name

Displays the name of the folder.

Path

Displays the path to the folder.

ID

Displays the ID of the folder.

Created by

Displays who created the folder in ARIS document storage.

Created on

Displays the creation date of the folder.

Exclude from search

Enables that folders are excluded from the search. If you search for documents that are located in the excluded folder, no document is found. Only the folders not excluded are searched through. This has no effect on the subfolders of the excluded folder.

3.4.8.10 Folder history

Displays the folder history.

GENERAL BUTTONS

Delete 

Deletes the selected folder, its subfolders and all documents in them.

Refresh 

Refreshes the page displayed.

TABLE

Timestamp

Displays the timestamp of the changes to the folder details.

User name

Displays the user who changed the folder details.

Event

Displays what changes were made to the folder, for example, the creation of a new subfolder.

Details

Displays a detailed comma-separated list of the changes made to the folder.

3.4.8.11 Select document page

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

ARIS document storage

Enables you to select a document that is stored in ARIS document storage.

Microsoft® SharePoint 2013

Enables you to select a document that is stored in a third-party document management system.

Properties

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

Previous version

Opens the **Document versions** dialog, which displays a list of document versions with the corresponding change list numbers, the change date, and the name of the editor.

Add to selection

Adds the selected document to the document selection.

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.

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.

SEARCH TAB

Find what

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

Search result

Displays the documents that match the search criteria.

Selected documents

Displays the list of documents already included in the selection.

3.4.8.12 Select tags page

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

Specify tag filter...

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

Select tags to be added

Enable the check box in front of the tags you wish to identify the document with.

3.4.8.13 Upload document page

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.

3.5 Administrate automated processes

Process administration (page 116) in ARIS Connect provides information and functions pertaining to automated processes.

3.5.1 Open process administration

You can perform different actions in process administration (page 116) and retrieve information.

Prerequisite

You have the Process Governance administrator (page 117) function privilege.

Procedure

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

The functions and information of process administration are available.

Depending on whether you select **Processes**, an executable process, a version, or a process instance of an executable process, different information and functions are displayed.

ARIS video tutorial

Process administration

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

3.5.2 Find process instances

Find process instances that have a certain status or property.

Prerequisites

You have the Process Governance administrator (page 117) function privilege.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Instances**. The list of process instances is displayed.
3. Click  **Show/hide filter**. The filter criteria are displayed.
4. Enable () the relevant filter criteria, for example, the **QUEUED** status (page 122).
5. Click **Apply filter**.

The list of queued process instances is displayed.

You can combine different filter criteria.

3.5.3 Start governance process in process administration

You can start the executable process in process administration for processes or process versions.

Prerequisite

You have the Process Governance administrator (page 117) function privilege.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Navigate to the executable process you want to start, or to the process version.
3. Under **Processes**, click the relevant process or process version.
4. Click  **Start governance process**. The **Select context** dialog opens. The items are displayed on which the executable process can be started depending on the specified execution context (page 119).
5. Select the relevant model. To select multiple models, hold down the **Ctrl** key and click the required models one after the other.
6. Click **OK**.

The governance process is started for the selected item.

3.5.4 Export process administration content as a CSV file

You can export data of **Human tasks** (page 121), **Instances** (page 121), **Variables** (page 122), **Archive** (page 118), or **Console** (page 119), for example, for evaluation purposes.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Human tasks**, **Instances**, **Variables**, or **Console**, or go to **Processes** and click the process instance and then **History**.
3. Click  **Export as a CSV file** in the navigation bar. The corresponding dialog opens.
4. Select the output options.
5. Click **Export**.

The content is exported as a CSV file.

3.5.5 Send reminder about executing human tasks

You can send reminders about human tasks to the relevant executors.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Open the relevant human task.
3. Click  **Send reminder**.

The users assigned to the human tasks as executors receive an e-mail with the information that the task is to be edited.

If 75% of the processing time has expired, the executors automatically receive a reminder.

If the task is not edited by the due date the escalation manager (page 127) is notified.

Statistics data in the form of charts (page 128) for human tasks are available under **ARIS Administration > Charts > Governance > Human tasks**.

ARIS video tutorial

Process administration overview

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

(approx. 3 minutes)

3.5.6 Suspend execution of a process instance

You can suspend the execution of a process instance. This can be useful, for example, if a server outage would cause the process execution to fail.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click  **Suspend**.

The execution of the process instance is suspended. It has the status **Suspended**. It can be resumed (page 100) again later. Unlike the  **Suspend recurrence** function, it is not the creation of recurrences that is suspended for the entire process, but only the execution of this process instance.

Example

The **Save data** process is started at midnight each night. The process comprises the two steps **Copy data** and **Archive data**.

- **Suspend recurrence**

If  **Suspend recurrence** is selected, the process will no longer be started as of the next night and will not resume until  **Resume recurrence** is selected. However, all running process instances are completed.

- **Suspend process instances**

If  **Suspend** is selected at night for a running process instance that has just finished copying data, this specific process instance is suspended, in other words, the data will no longer be archived. Process execution stops at this point. The next night, however, a new instance of the process is started, and the data is backed up and archived. The suspended process instance will not continue to run until  **Resume** is selected.

3.5.7 Resume execution of a process instance

You can resume the execution of a process instance that was previously suspended (page 100).

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click  **Resume**.

The execution of the process instance is resumed.

3.5.8 Terminate execution of a process instance

You can terminate the execution of a process instance permanently if, for example, the executable process is no longer relevant.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click  **Terminate**.

The execution of the process instance is terminated permanently.

3.5.9 Suspend recurrence for the executable process

You can suspend the recurrence of an executable process.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. In the navigation, click the relevant process version under **Processes**. Processes for which a recurrence has been configured are identified in process administration by the symbol .
3. Click  **Suspend recurrence**.

The recurrence of the executable process is suspended. You can continue (page 102) later with the existing configuration.

Unlike the  **Suspend** function, the creation of recurrences is suspended for the entire process, not just for the execution of a given process instance.

Example

The **Save data** process is started at midnight each night. The process comprises the two steps **Copy data** and **Archive data**.

- **Suspend recurrence**

If  **Suspend recurrence** is selected, the process will no longer be started as of the next night and will not resume until  **Resume recurrence** is selected. However, all running process instances are completed.

- **Suspend process instances**

If  **Suspend** is selected at night for a running process instance that has just finished copying data, this specific process instance is suspended, in other words, the data will no longer be archived. Process execution stops at this point. The next night, however, a new instance of the process is started, and the data is backed up and archived. The suspended process instance will not continue to run until  **Resume** is selected.

3.5.10 Resume recurrence for the executable process

You can resume the recurrence of an executable process that was previously suspended.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. In the navigation, click the relevant process version under **Processes**. Processes for which a recurrence has been configured are identified in process administration by the symbol .
3. Click  **Resume recurrence**.

The recurrence of the executable process is resumed with the existing configuration.

3.5.11 Delete executable process

You can deactivate the executable process if, for example, this process is outdated and should therefore no longer be used.

Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

When a generated executable process is deactivated, the process version and all related information, such as instances, subprocesses, etc., are removed from process administration. The deactivated processes are not exported to ARIS Process Performance Manager.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Under **Processes**, click the process, process version, or process instance.
3. Click  **Delete**.

The selected item is deactivated.

3.5.12 Suspend, resume, or terminate simulation runs

You can suspend and resume active simulation runs or terminate them. This can be useful, for example, if a server outage would cause the process execution to fail.

Prerequisite

You have the Process Governance administrator (page 117) function privilege.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**. Processes versions for which a Process Governance Simulation was performed are marked with , simulation runs and process instances with .
3. To suspend a simulation run, click the relevant process instance and select  **Suspend**.
4. Use  **Resume** to continue the simulation run at a later time.
5. To stop a simulation run, select  **Terminate**. The simulation run is terminated and cannot be restarted.

The simulation run is suspended, resumed, or terminated depending on the selected action.

3.5.13 Use the process instance archive

Archive completed process instances regularly to avoid a large number of instances that can have a negative effect on runtime and start times in process administration and Process Governance.

Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

Prerequisites

- You have the Process Governance administrator (page 117) function privilege.
- The instances have the **COMPLETED** status (page 126).

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Instances**. The list of process instances is displayed.
3. Click  **Show/hide filter**. The filter criteria are displayed.
4. Enable () the **COMPLETED** status.
5. Click **Apply filter**. The list of completed process instances is displayed.
6. Enable () the instances to be archived. You can archive a maximum of 100 instances in one step.
7. Click  **Archive selected instances**. (The function is only available if at least one instance is enabled.)

The instances are removed from the **Instances** (page 121) list and are displayed in the **Archived instances** (page 118) list.

8. To move instances back from the archive to the **Instances** list, open the **Archived instances** list, move the mouse pointer over the relevant table row, and click  **Unarchive archived instances**.
9. To delete archived instances, open the **Archived instances** list, move the mouse pointer over the relevant table row and click  **Delete**.
10. To suspend archiving, unarchiving, or deletion, click **Suspend** in the progress dialog. Alternatively, you can use the suspend function in **Archive history**. Please note that operations that have been already completed are not reverted. Example: An operation is running to archive ten instances. You suspend the operation after three instances have already been archived. Only the seven remaining instances are not archived.
To resume the operation, open **Archive history**, click **Resume** in the row of the previously suspended archiving execution. This is also helpful if an operation was suspended automatically, for example, during a backup.

Your operations were performed.

Note

The archiving functionality can affect the total runtime and size of the backup.

3.5.14 Prioritize and deprioritize process instances

For each tenant there is a queue of process instances waiting to be executed. Each newly started process instance is appended to the end of the queue according to the first in, first out principle. However, you can prioritize process instances so that they are preferably executed.

Prerequisite

- You have the Process Governance administrator (page 117) function privilege.
- The instances have the **Running** status (page 126).

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click  **Increase priority**. The **Prioritized** status is set and displayed in **Details**. The process instance is executed with a higher priority.
4. Click  **Decrease priority** to remove the **Prioritized** status. The **Prioritized** status is removed.
5. To display the process instances with **Prioritized** status, click **Instances**.
6. Click  **Show/hide filter**. The filter criteria are displayed.
7. Enable () the **Priority status** filter.
8. Click **Apply filter**.

The process instances with **Prioritized** status are displayed.

To prioritize/deprioritize multiple instances simultaneously, open **Instances**, enable the relevant instances () and click  **Increase priority**/ **Decrease priority**. The function is only available if all selected instances meet the prerequisites for prioritization.

3.5.15 Find and correct problems in processes

To ensure a smooth process flow the Process Governance administrator must be able to query information on processes and intervene, if required. Information and functions are provided in process administration (page 116) in ARIS Connect for this purpose. If problems occur during process execution, for example, if an error occurs during an automated task or the recipient of an e-mail message is not recorded as a user, the Process Governance administrator is informed by e-mail.

3.5.15.1 List processes and display instance/version in the Explorer tree

You can display a list of process instances in their various statuses (page 126). You can check if process instances failed so that you can correct (page 108) and restart them, if required.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Instances**. The list of process instances is displayed.
3. Click  **Filter** to restrict the number of process instances displayed based on various criteria.
4. Select filter criteria.
5. Click **Apply filter**. The list is filtered according to the selected filter criteria. To display the unfiltered list of process instances, click **Reset filter**.
6. To display a specific instance/version, move the mouse pointer over the relevant table row and click  **Display process instance** or  **Display process version**. The instance/version is selected in the Explorer tree.

The list of process instances in their various statuses is displayed.

Tip

You can also display instances or versions in the Explorer tree by using **Human tasks**.

ARIS video tutorial

Find and correct problems in processes

(<http://www.ariscommunity.com/videos/learn-how-find-problems-process-and-correct-processes>) (approx. 9 minutes)

3.5.15.2 Review input and output data of an activity

When you receive an e-mail informing you that an activity has failed you can review the input and output data of the activity to find out whether they caused the failure.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Select the process instance of the executable process containing the failed activity. You were informed about the relevant activity in the notification.
3. Click **History**.
4. Click the activity whose execution failed.

Input and output data of the activity are displayed. Review the data.

You can change the output data using the function Skip activity (page 108).

ARIS video tutorial

Find and correct problems in processes

(<http://www.ariscommunity.com/videos/learn-how-find-problems-process-and-correct-processes>) (approx. 9 minutes)

3.5.15.3 Restart activities with status FAILED

You can restart failed activities. You are notified by e-mail if an activity failed.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the process instance of the executable process containing the failed activity. You were informed about the relevant activity in the notification.
3. Click **History**.
4. Move the mouse pointer over the activity whose execution failed. The buttons of the available functions are displayed.
5. Click **Retry**.

The activity is restarted with the same data as the failed activity.

If the activity cannot be restarted, you will receive a notification. You can skip (page 108) the activity.

ARIS video tutorial

Find and correct problems in processes

(<http://www.ariscommunity.com/videos/learn-how-find-problems-process-and-correct-processes>) (approx. 9 minutes)

3.5.15.4 Skip activities with status 'Failed'

If a restart (page 107) is impossible, you can skip failed activities. You are notified by e-mail if an activity failed.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click a process instance of an executable process.
3. Click **Activities**. The process instance activities are listed.
4. Move the mouse pointer over the activity you want to skip. The buttons of the available functions are displayed.
5. Click  **Skip activity**. If output data was specified for the activity, a dialog opens for you to correct the data and thus avoid further failure. If no output data was specified for the activity, the activity is skipped immediately.
6. Change the output data.
7. Click **Save**.

The process continues with the next activity.

ARIS video tutorial

Find and correct problems in processes

(<http://www.ariscommunity.com/videos/learn-how-find-problems-process-and-correct-processes>) (approx. 9 minutes)

3.5.15.5 Correct and restart process instances with status 'Failed'

You can restart failed process instances. You are notified by e-mail if a process instance failed.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Instances**. The list of process instances is displayed.
3. Click  **Filter**, select the filter **Status** and the status **FAILED**.
4. Click **Apply filter**. The list of failed process instances is displayed.
Alternatively, you filter process instances with the filter **ID** by entering the ID of the failed process instance, which you received in the notification.
5. Move the mouse pointer over the process instance you want to correct. The buttons of the available functions are displayed.
6. Select  **Display process instance**. The instance is displayed.
7. Click **Console** to obtain further information on why the instance failed.
8. Correct the errors that led to the process instance failing.
9. Click the relevant process instance.

10. Click **History**.

11. Move the mouse pointer over the activity whose execution failed. The buttons of the available functions are displayed.

12. Click **Retry**.

The activity is restarted and the process instance continues.

ARIS video tutorial

Find and correct problems in processes

(<http://www.ariscommunity.com/videos/learn-how-find-problems-process-and-correct-processes>) (approx. 9 minutes)

3.5.16 Display information

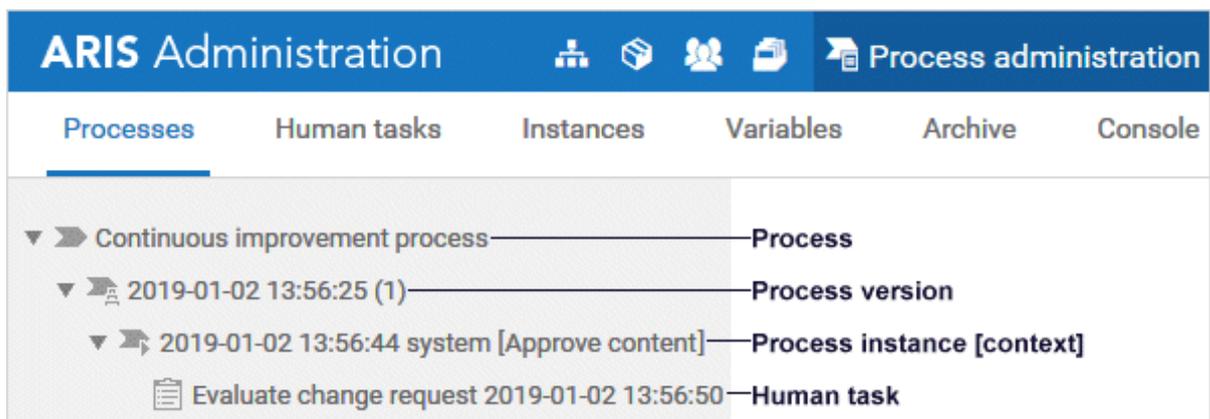
Process administration in ARIS Connect provides functions (page 116) for process automation and information about executable processes.

3.5.16.1 Display information about executable processes

In process administration, existing executable processes are displayed. You receive detailed information on processes, process versions/instances, and human tasks.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the process, process version, process instance, or human task.



3. Activate the required function in the navigation bar.

The information available for this item is displayed (Activities (page 117), Archive (page 118), Assignments (page 118), Console (page 119), Context (page 119), Details (page 119), Diagram (page 119), History (page 120), Human tasks (page 121), Instances (page 121), Variables (page 122)). Processes versions for which a Process Governance Simulation was performed are marked with , simulation runs and process instances with . Processes for which a recurrence has been configured are identified in process administration by the symbol . Statistics data in the form of charts (page 128) for Governance processes are available under **ARIS Administration >  Charts > Governance > Processes.**

ARIS video tutorial

Process administration overview

(<http://www.ariscommunity.com/videos/process-administration-aris-connect-overview>)
(approx. 3 minutes)

3.5.16.2 Display information about activities

You can display details of an activity.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click **History**.
4. Click the relevant activity in the table.
5. Click **Input activities**.
6. Click **Show associated activity in the history** to display the corresponding activity in the history table. Then click **Input activities** again.

Alternatively, you can click **Used by** so that all activities for which the selected activity acts as an input activity are displayed.

7. Click **Input variables** or **Output variables** to show the values read (input) or stored (output) during execution of an activity.
8. Click **Input data** or **Output data** to check the data. Additionally, you can click  **Show details** to display the XML data.

The relevant details are displayed.

3.5.16.3 Display human tasks of a process instance

You can display the human tasks associated with a process instance.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the process instance whose human tasks you want to display.
3. Click  **Show tasks**.

The associated human tasks are displayed.

ARIS video tutorial

Process administration overview

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

(approx. 3 minutes)

3.5.16.4 Display information about variables

You can display detailed information of a variable (page 122), for example, value, value history, XML data.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Variables** to display the variables of all processes. Or click the relevant process version or process instance under **Processes** and then click **Variables**. The variables used with their value, timestamp, type and scope are displayed.
3. To display the XML data of the variable value, click a variable in the table.
4. To show the previous values of a variable including their timestamps, click **History**. Additionally, you can show the values read (input) or stored (output) during execution of an activity.
5. Once you selected a variable in the table, you can use  **Show details** to display or hide **Value as XML** and **History**.

The details of the variable selected are displayed.

To export (page 98) the content, click  **Export as a CSV file** in the navigation bar.

3.5.16.5 Display and delegate executors of a human task

You can display the executors of human tasks and delegate tasks.

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**).

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click **Human tasks**.
3. Move the mouse pointer over the relevant task. The buttons of the available functions are displayed.
4. Click  **Show details**. The human task is displayed in **Processes**.
5. Click  **Navigate to occurrence in Explorer tree**, to show the location of the human task.
6. Click **Assignments**.
7. Move the mouse pointer over the relevant task. The buttons of the available functions are displayed.
8. Click  **Delegate task**. The corresponding dialog opens.
9. Enter the first characters of the group, user name, first name, or last name, and click **Find**. If hits exist for the current search, the results are displayed.
10. To select a group or user, select the relevant element. If you select a group, you also need to select a user.
11. You can also enter a comment, such as a reason or notes for the new executor.
12. Click **Delegate**.

The task is passed on to the selected executor and its status (page 126) is displayed as **Delegated**.

Statistics data in the form of charts (page 128) for human tasks are available under **ARIS Administration > Charts > Governance > Human tasks**.

ARIS video tutorial

Process administration overview

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

(approx. 3 minutes)

3.5.17 Handle simulation

The simulation of executable processes (Process Governance Simulation) enables you to test the modeling of processes before release. The automated execution of all process passes and the possible data combinations is less error-prone and quicker than the manual method.

3.5.17.1 Display simulation information

In process administration, the processes for which Process Governance Simulation was performed are displayed. Processes versions for which a Process Governance Simulation was performed are marked with , simulation runs and process instances with . You receive further information and tips regarding errors. If the simulation of a process instance fails, the Process Governance administrator receives a notification and a message is displayed in Console (page 119).

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click **Details** (page 119), if not already activated, to display information about the status and progress of the simulated process instances.
4. To display simulation data for simulated activities, click **History** (page 120), and activate the relevant activity in the table.
5. If you need an overview of the process instances a simulation was performed for, click **Instances** (page 121). The simulated activities are marked with  in the **Simulated** column.
6. To display messages regarding the process instance, activate the Console (page 119) bar. The various process passes of the instance are displayed under the process instance, for example, when an XOR operator is used in the process.

This information can be used to resolve modeling errors and optimize the process.

3.5.17.2 Release simulated process

You can release process versions that were created and checked by Process Governance Simulation, that is, transform the simulated process into a normal process. It is not possible to start a governance process for processes generated by the simulation (/). This can be done after the transformation into a released process.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Select the relevant process version.
3. Click  **Transform simulated version into a normal process.**

The process version is transformed into a normal process.

3.5.17.3 Delete simulation runs

You can delete terminated simulation runs to make process administration clearer. Processes versions for which a Process Governance Simulation was performed are marked with , simulation runs and process instances with .

Prerequisite

You have the Process Governance administrator (page 117) function privilege.

Procedure

1. Open (page 97)  **Process administration** in ARIS Connect.
2. Under **Processes** click the relevant simulation run.
3. Click  **Delete.**
4. Confirm the confirmation prompt by clicking **OK.**

The simulation run is deleted and removed from Process administration.

3.5.18 Valuable information

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

3.5.18.1 What does the process administration include?

Process administration provides information about executable processes as well as control and error handling functions (page 117). You need the **Process Governance administrator** function privilege.

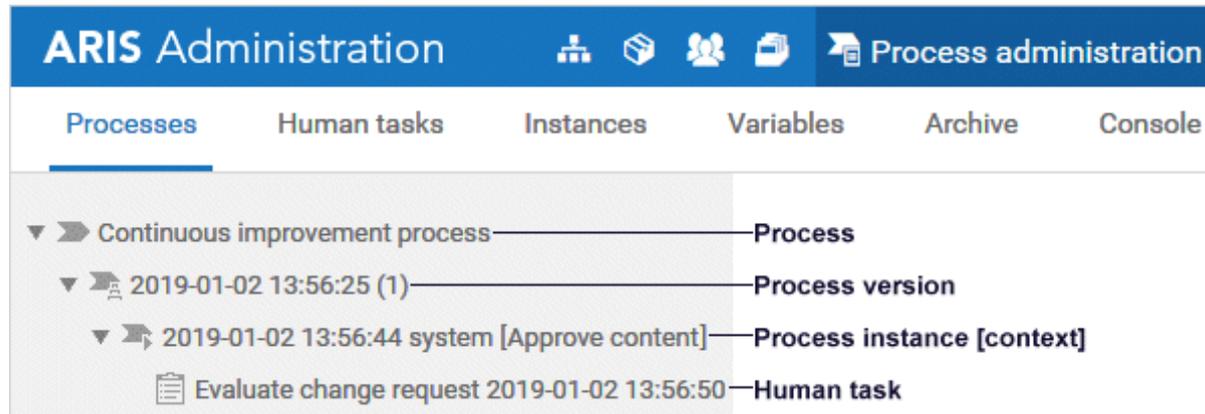
Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

Depending on the selected process level and menu item, various information and functions are available.

Process levels



The superordinate menu items display information for all processes. The menu items in the information area apply only to the selected process. You can select: Activities (page 117), Archive (page 118), Assignments (page 118), Console (page 119), Context (page 119), Details (page 119), Diagram (page 119), History (page 120), Human tasks (page 121), Instances (page 121), and Variables (page 122).

ARIS video tutorial

Process administration overview

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

Find and correct problems in processes

(<http://www.ariscommunity.com/videos/learn-how-find-problems-process-and-correct-processes>) (approx. 9 minutes)

3.5.18.2 What tasks does the Process Governance administrator perform?

The Process Governance administrator manages the executable processes. Process administration provides information about executable processes as well as control and error handling functions (page 117). Depending on the selected process level and menu item, various information and functions are available.

- Start (page 98) governance processes in process administration, for example, older versions of the process.
- Deactivate (page 102) executable processes.
- Restart (page 107) activities in the status **FAILED**.
- Suspend (page 100) the execution of process instances.
- Resume (page 100) the execution of process instances that were previously suspended.
- Terminate (page 101) the execution of process instances if, for example, the executable process is no longer relevant.
- Prioritize and deprioritize (page 105) process instances
- Use the process instance archive (page 104) to improve performance.
- Configure recurrences for an executable process.
- Suspend (page 101) the recurrence of an executable process.
- Resume (page 102) the recurrence of an executable process that was previously stopped.
- Suspend the recurrence of an executable process
- Resolve error in process.
- Read privileges for the Console (page 119) bar also at the process level.
- View all tasks of other users in **My tasks**.

Statistics data in the form of charts (page 128) for Governance processes are available under **ARIS Administration** >  **Charts** > **Governance** > **Processes**.

3.5.18.3 What functions/information does 'Activities' provide?

Activities are displayed if you have selected a process instance of an executable process. It displays the activities of the executable process of the **BPMN process diagram (BPMN 1.x)** type. To skip (page 108) an activity, move the mouse pointer over the relevant row, and click  **Skip activity**.

3.5.18.4 What functions/information do 'Archive' and 'Archive history' provide?

The archived instances are listed. Use  **Show/hide filter** to restrict the number of process instances displayed according to various criteria. You can export the data as a CSV file (.

To unarchive instances, move the mouse pointer over the relevant table row and click  **Unarchive selected instances**. To delete archived instances, move the mouse pointer over the relevant table row and click  **Delete**.

To suspend archiving, unarchiving, or deletion, click **Suspend** in the progress dialog. Alternatively, you can use the suspend function in **Archive history**. Please note that operations that have been already completed are not reverted. Example: An operation is running to archive ten instances. You suspend the operation after three instances have already been archived. Only the seven remaining instances are not archived.

To resume the operation, open **Archive history**, click **Resume** in the row of the previously suspended archiving execution. This is also helpful if an operation was suspended automatically, for example, during a backup.

Click **Archive history** to display the list of archiving executions (**ARCHIVING, UNARCHIVING, DELETE**). You can export the data as a CSV file (.

Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

3.5.18.5 What functions/information do 'Assignments' provide?

Assignments display the assigned users for a human task. To delegate (page 113) a human task, move the mouse pointer over the relevant task, and click  **Delegate task**.

3.5.18.6 What functions/information does 'Console' provide?

The console can be shown for all processes or for a process instance. The following messages are displayed:

- Log messages for process instance execution.
- Messages that were generated by the user interface during execution of process instances (log, server, and user management messages). You can filter the messages by their severity.

You can export the data as a CSV file ()

3.5.18.7 What functions/information does 'Context' provide?

The context and the process settings can be displayed for the process version or the process instance. The execution context determines from which items (database, group, model/object type, document), in which applications (for example, ARIS Connect), and by which users a governance process can be started. The context and the process settings must be defined in ARIS before generating the executable process. The context selected for the process instance is displayed in the navigation tree (page 116) and in Instances (page 121).

3.5.18.8 What functions/information do 'Details' provide?

Details (page 110) provide different information, such as ID, status, priority, depending on whether you selected a process, a process version, process instance, or a human task.

3.5.18.9 What functions/information does 'Diagram' provide?

Diagram is displayed if you have selected a version of an executable process or a process instance of an executable process. Use **Toggle between EPC and BPMN diagram** to toggle between the EPC display of the executable process and the BPMN diagram generated by the automatic model transformation.

Activities that are currently running or have failed are selected in both models (EPC and BPMN diagram). Compared to the EPC, the BPMN diagram can contain additional activities as these are required for the technical process. In this case, the last selected activity remains selected in the EPC until the next matching activity is reached.

All processes involved are displayed for executable processes that consist of multiple processes.

- If nothing is active, the start model is displayed.
- If an object is active, the models containing active objects are displayed.

To display the properties of the running activity, click the  **Show details** button.

3.5.18.10 What functions/information does 'History' provide?

History is displayed if you have selected a process instance of an executable process. Activities run by process instances are listed. If an entry contains a process instance with the **Failed** status, the activity can be restarted (page 107) from here.

To display the input/output data or the simulation data for simulated activities, click the activity in the table.

To get additional details of an input activity, you can display the corresponding activity in the history table. In the row of the relevant input activity, click **Show associated activity in the history**. Alternatively, you can click **Used by** so that all activities for which the selected activity acts as an input activity are displayed.

Click **Input variables** or **Output variables** to show the values read (input) or stored (output) during execution of an activity.

Click **Input data** or **Output data** to check the data. Additionally, you can click  **Show details** to display the XML data.

3.5.18.11 What functions/information does 'Human tasks'/'Human task' provide?

The human tasks of all executable processes are displayed. Use  **Show/hide filter** to restrict the number of process instances displayed according to various criteria. You can sort the table by different columns, for example, by status. You can export the data as a CSV file (.

To display a specific instance/version, move the mouse pointer over the relevant table row and click  **Display process instance** or  **Display process version**.

To display (page 113) detailed information about a specific human task, move the mouse pointer over the relevant human task, then select  **Show details**. Here, you can send (page 99) a reminder to the executors. To check the assigned users and delegate (page 113) a human task, click **Assignments**.

Statistics data in the form of charts (page 128) for human tasks are available under **ARIS Administration > Charts > Governance > Human tasks**.

3.5.18.12 What functions/information does 'Instances' provide?

It provides an overview of the process instances and their various statuses (page 126). Use  **Show/hide filter** to restrict the number of process instances displayed according to various criteria. You can sort the table by different columns, for example, by status. You can export the data as a CSV file (.

You can check if process instances failed so that you can correct (page 108) and restart them, if required.

To display a specific instance/version, move the mouse pointer over the relevant table row and click  **Display process instance** or  **Display process version**.

To archive instances that have the status (page 126) **Completed**, enable the relevant instances () and click  **Archive selected instances**.

To prioritize/deprioritize multiple instances simultaneously, open **Instances**, enable the relevant instances () and click  **Increase priority**/ **Decrease priority**. The function is only available if all selected instances meet the prerequisites for prioritization.

Statistics data in the form of charts (page 128) for Governance processes are available under **ARIS Administration >  Charts > Governance > Processes**.

Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

3.5.18.13 What functions/information does 'Variables' provide?

The variables can be shown for all processes, for a process version, or for a process instance. The variables used and their values are listed. You can export the data as a CSV file (.

To display the XML data of the variable value, click a variable in the table. To show the previous values of a variable including their timestamps, click **History**. Additionally, you can show the values read (input) or stored (output) during execution of an activity. Once you selected a variable in the table, you can use  **Show details** to display or hide **Value as XML** and **History**.

3.5.18.14 How many process instances can be started?

The number of process instances that can be processed in parallel by the engine is limited to 1000 by default (**Configuration > Process Governance > Infrastructure > Batch processing size**). However, this number can be lower depending on the workflow design and the use of custom report scripts. The process instances have the **RUNNING** status. If the specified batch processing size is reached, the process instances started additionally have the **QUEUED** status. You can display (page 97) them in **Instances**. This  **Cross-tenant** setting applies to all tenants on this server. To change it, use ARIS Cloud Controller. For further information, refer to **ARIS Cloud Controller (ACC) Command-line Tool** manual.

Archive completed process instances regularly to avoid a large number of instances that can have a negative effect on runtime and start times in process administration and Process Governance.

3.5.18.15 What functions/information does a recurrence provide?

The information on recurrences is displayed for process versions for which a recurrence is configured in the model. You can suspend (page 101) and resume (page 102) recurrences in process administration (page 97). Recurrence configuration and cancelation of recurrences is done in ARIS Architect.

3.5.18.16 What is an executable process?

An executable process is a process that reflects a certain process flow in your company with all the related steps. All information relevant to Process Governance is recorded in EPCs, value-added chain diagrams, organizational charts, dialogs, and data flows (BPM process). The BPM process is automatically transformed into a technical process that can be executed by Process Governance. All relevant information for the BPM process is interpreted, transformed into a BPMN diagram, and all relevant models and objects are archived. The BPMN diagram is the basis for Process Governance. It controls the governance process. The executable process can then be started for a specified context.

Further information is available in the **Modeling conventions for automation** manual on your installation media.

3.5.18.17 Where can the executable process be started?

The executable process can be started in ARIS Architect, ARIS Designer, ARIS Connect, or in the ARIS Connect process administration. The message displayed after starting the governance process can be specified individually for each process (EPC, VACD).

3.5.18.18 What is the context for executable processes?

The execution context determines from which items (database, group, model/object type, document), in which applications (for example, ARIS Connect), and by which users a governance process can be started. The context and the process settings must be defined in ARIS before generating the executable process. After this, the context can no longer be changed for the generated process version. If no execution context is defined, the governance process can be started for all items (**Without context** option). The defined execution context is displayed in process administration.

3.5.18.19 What has to be considered for prioritization of process instances?

For each tenant there is a queue of process instances waiting to be executed. Each newly started process instance is appended to the end of the queue according to the first in, first out principle. However, you can prioritize process instances so that they are preferably executed. You can only archive instances that have the **Running** status (page 126).

The priority queue is limited to 100 process instances by default (**Configuration > Process Governance > Infrastructure > Priority queue size**). If the specified priority queue size is exceeded, so that no further process instances can be prioritized, a message is displayed. This  **Cross-tenant** setting applies to all tenants on this server. To change it, use ARIS Cloud Controller. For further information, refer to **ARIS Cloud Controller (ACC) Command-line Tool** manual.

3.5.18.20 What happens when an executable process is deactivated?

When a generated executable process is deactivated, the process version and all related information, such as instances, subprocesses, etc., are removed from process administration. The deactivated processes are not exported to ARIS Process Performance Manager.

3.5.18.21 What happens when process instances are archived?

Archiving instances gives you the following advantages:

- Process Governance starts faster.
- The process runtime is reduced.
- A better overview of your process instances.

You can only archive instances that have the status (page 126) **Completed**.

During archiving, the data of the corresponding instances is moved from the Process Governance database to an archive entry of ARIS document storage. Each tenant has its own archive. The information about simulation, recurrence, and substitution is not archived.

Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

3.5.18.22 How to schedule archiving

Warning

To avoid data inconsistencies and possible data loss, you must not perform any of the following activities in parallel, neither manually nor scheduled:

- Deleting any Process Governance process instance, process version, or process
- Archiving Process Governance process instances
- Backup/restore tenant (containing Process Governance or ARIS document storage data)

If you want to automatically archive process instances, for example every night at a certain time, write a report in ARIS Script

([../..../..../..../abs/help/en/script/ba/index.htm#scripthelp.html](#)) and schedule it. This is done in ARIS Architect ([../..../..../..../abs/help/en/handling/ba/index.htm#72345.htm](#)).

3.5.18.23 Which status can activities have?

An activity can have any of the following statuses:

- **ACTIVE**

The activity is just being performed.

- **TERMINATED**

The Process Governance administrator terminated the activity manually during process execution. This may be called for if, for example, the executable process is no longer relevant.

- **FAILED**

The activity could not be performed completely due to an error. Failed activities can be restarted after the error is fixed.

- **SUSPENDED**

The activity has been automatically canceled.

- **COMPLETED**

The activity was completely performed.

3.5.18.24 Which status can process instances have?

A process instance can have any of the following statuses:

- **Running**
The process instance is running the process.
- **Suspended**
The Process Governance administrator suspended (page 100) the process instance manually during process execution. This can be useful, for example, if a server outage would cause the process execution to fail.
- **Terminated**
The Process Governance administrator terminated (page 101) the process instance manually during process execution. This may be called for if, for example, the executable process is no longer relevant.
- **Failed**
The process instance was not able to pass through the process completely due to an error. Failed process instances can be restarted (page 108) after the error is fixed.
- **Idle**
The process instance is in wait state because something unforeseen has happened while the process was passed through. The Process Governance administrator must check and resolve this.
- **Completed**
The process instance has completely passed through the process.

3.5.18.25 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.
- **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.

- **Delegated**

Editing of the task was passed on permanently 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.

3.5.18.26 What is the 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. It is specified in the data flow diagram or in the model using an organizational element and the **is escalated to** connection.

3.6 Use charts



Charts represent accumulated statistics data graphically.

3.6.1 Display charts

You can view statistics data for the **Users, Documents, Modeling, and Governance** areas as charts. Charts can be used, for example, to perform real-time checks.

Prerequisite

You have one of the following function privileges:

- **User administrator** (charts on user management)
- **Database administrator** (charts on modeling)
- **Document administrator** (charts on ARIS document storage)
- **Process Governance administrator** (charts on Process Governance)
- **Generate user statistics** (**com.aris.umc.audit.enabled**) is enabled in the configuration (page 290) (**User management > Security > Advanced settings**). If **License monitoring** (**User management > License monitoring > General**) is enabled, **Generate user statistics** is automatically enabled. Only the **Users > License usage** chart is displayed regardless of this activation.

Procedure

1. Click  **Charts**.
2. Click the relevant area (**Users, Documents, Modeling, Governance**).

The charts for the selected area are displayed. The user management charts do not contain any data for technical users by default (system, superuser, arisservice, and guest). Move the mouse pointer over a chart to view an explanation.

You can update the charts to reflect the current state by clicking  **Refresh**. You can also export (page 53) statistics on usage patterns, assignments, changes to data and database items made by the user, the information used most often or the information used last, etc.

3.6.2 What charts exist?

There are charts from the user management, document storage, modeling, and Process Governance (processes and human task) areas. The user management charts do not contain any data for technical users by default (system, superuser, arisservice, and guest). Move the mouse pointer over a chart to view an explanation.

3.7 Configure ARIS Connect



ARIS Connect can be configured and customized to meet specific requirements that can differ between various customers.

3.7.1 Configure Portal

By default, ARIS Connect provides the classic configuration set and the default configuration set as examples. Using these as basis, you can define modification sets to customize how data is displayed.

3.7.1.1 Publish database as a process portal

Select the database to be published as the process portal.

Prerequisite

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

Procedure

1. Click **<user name>**.
2. Click **Administration**.
3. Click **Portal > Publish** on the **Configuration** tab. All available databases are displayed.
4. Enable the check boxes of the databases you want to publish in the portal.
5. For versioned databases, select the relevant version.
6. Click **Apply**.

The content of the databases is published in the portal in the selected configuration or modification set (page 137). As long as the databases are available in the portal they cannot be deleted in ARIS.

3.7.1.2 Specify a default database

You can specify the database to which users with **ARIS Connect Viewer** license privileges are connected when they start ARIS Connect for the first time. The database placed at the top of the database list is the default database.

Prerequisite

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

Procedure

1. Click **<user name>**.
2. Click **Administration**.
3. Click **Portal > Publish databases** on the **Configuration** tab. All available databases are displayed. The check boxes of published databases are enabled. If you want to publish (page 129) further databases to be shown in the process portal, enable the check boxes of these databases.
4. Move the mouse pointer over the row of the published database you want to define as the default database. The move symbols are displayed.
5. Click  **Move to top** to shift the database to the top of the database list.
6. Click **Apply**.

You have defined the default database.

3.7.1.3 Change sort order of published databases

You can sort published databases that are offered by the process portal.

Prerequisite

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

Procedure

1. Click **<user name>**.
2. Click **Administration**.
3. Click **Portal > Publish** on the **Configuration** tab. All available databases are displayed. The check boxes of published databases are enabled. If you want to publish further databases to be shown in the process portal, enable the check boxes of these databases. (page 129)
4. Position the mouse pointer over the row of the database you want to move. The move symbols are displayed.
5. Click  **Move up** to shift the database one row up.
6. Click  **Move down** to shift the database one row down.
7. Click  **Move to top** to shift the database to the top of the database list.
8. Click **Apply**.

You have changed the sort order of the published databases. The published database at the top of the list is the default database (page 130).

3.7.1.4 Manage configuration and modification sets

Portal administrators select the configuration set to show portal data. Hierarchies determine the way you are able to navigate through the data.

By default, ARIS Connect provides the classic configuration set and the default configuration set.

You can use the supplied configuration sets to publish databases in the portal. As an administrator, you can also create (page 134) and custom the supplied configuration sets as modification sets.

It is recommended to save the customized modification set once it is finished. After a software update, you can restore the customized modification set to restore the look and feel of the portal.

If you need extended configuration sets with different functions that you cannot configure in ARIS Administration, please contact your local Software AG sales organization (<http://www.softwareag.com>).

3.7.1.4.1 Save configuration set

You can save a configuration set. You can restore saved configuration sets at any time or provide them on other tenants.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a configuration set.
6. Click  **Backup**.
7. Save the file in any directory.

The **<name of the configuration set>.zip** backup file is downloaded.

3.7.1.4.2 Duplicate configuration set

You can generate a new modification set by duplicating a configuration set.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a configuration set.
6. Click  **Create modification set**.

The modification set is created below the selected configuration set. It contains all elements from the selected configuration set.

Change (page 138) the new modification set by adding the required items, properties, and fact sheets, or by adapting existing ones.

3.7.1.4.3 Restore configuration set

If you require further modification sets, please contact your local Software AG sales organization (<http://www.softwareag.com>). Restore a saved configuration set.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have access to the backup file.

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Click **Restore** in the **Configuration and modification sets** area. The file selection dialog opens.
6. Double-click the ZIP file (syntax: **<name of the configuration set>.zip**).

The configuration set is tested, and is applied if it is an error-free configuration set. Notes are displayed in yellow, errors in red. The configuration set is displayed in the list with the original name. If a configuration set with the same name exists, an error message is displayed. An already existing configuration set cannot be overwritten. The **classic** and **default** configuration sets cannot be overwritten or deleted.

3.7.1.4.4 Delete configuration set

You can delete a configuration set. The **classic** and **default** configuration sets cannot be overwritten or deleted.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a configuration set.
6. Click  **Delete**.
7. Click **Delete** to confirm.

The configuration set is no longer available in ARIS Connect.

3.7.1.4.5 Create modification set

You can create (page 134) your own modification sets based on the classic configuration set, on the default configuration set or based on a user-defined configuration set. If you require a user-defined configuration set, please contact your local Software AG sales organization (<http://www.softwareag.com>).

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Click **Create** in the **Configuration and modification sets** area. The **Create modification set** dialog opens.
6. Enter the name for the new modification set.
7. In the **Template** box, select the configuration set that your new modification set is to be based on.
8. Click **Create**.

The modification set is created. It contains all elements from the selected template.

Change (page 138) the new modification set by adding the required items, properties, and fact sheets, or by adapting existing ones.

3.7.1.4.6 Duplicate modification set

You can create (page 134) your own modification sets based on the classic configuration set, on the default configuration set or based on a user-defined configuration set. If you require a user-defined configuration set, please contact your local Software AG sales organization (<http://www.softwareag.com>).

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a user-defined modification set.
6. Click  **Duplicate**.

The modification set is created with a technical name. It contains all elements from the selected modification set. You can rename (page 138) the modification set.

Change (page 138) the new modification set by adding the required items, properties, and fact sheets, or by adapting existing ones.

3.7.1.4.7 Save ARIS Connect modification set

Save user-defined modification sets (page 134) for data migration or before you modify them. You can restore saved modification sets at any time or provide them on other servers.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a user-defined modification set.
6. Click  **Backup**.
7. Save the file in any directory.

The **<name of the modification set>.zip** backup file is downloaded.

Based on this backup, you can restore this version of the modification set (page 136).

3.7.1.4.8 Restore ARIS Connect modification set

Restore saved modification sets (page 135).

Prerequisite

- You have the **Portal administrator** function privilege.
- You have access to the backup file.

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Click **Restore** in the **Configuration and modification sets** area. The file selection dialog opens.
6. Double-click the ZIP file (syntax: **<name of the modification set>.zip**).

If a modification set with the same name exists, it is overwritten. If you want to keep the original modification set, you must define another name before the import (page 138).

3.7.1.4.9 Select modification set

Select the modification set to show the portal data. By default, ARIS Connect provides the classic configuration set and the default configuration set. If required, user-defined modification sets (page 134) and restored modification sets (page 136) are also displayed here.

You can create (page 134) your own modification sets based on the classic configuration set, on the default configuration set or based on a user-defined configuration set. If you require further modification sets, please contact your local Software AG sales organization (<http://www.softwareag.com>).

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a user-defined modification set.
6. Click  **Activate**.

The selected configuration or modification set is marked as **(active)**.

All of the databases selected for the portal are published in the configuration or modification set selected.

3.7.1.4.10 Rename modification set

Change the names of modification sets.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**.
5. Move the mouse pointer over a user-defined modification set.
6. Click  **Rename**. The **Rename modification set** dialog opens.
7. Enter the new name.
8. Click **Rename**.

All of the databases selected for the portal are published in the configuration or modification set selected.

3.7.1.4.11 Edit modification set

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Click **<user name>**.
3. Click **Administration**.
4. Click **Manage configuration sets**.
5. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**. You can edit custom (page 134) modification sets only.
6. Click  **Edit**.

The **Define modification set** page opens and you can edit the modification set.

3.7.1.4.11.1 Edit user interface

As a portal administrator, you customize the user interface.

3.7.1.4.11.1.1 Customize font and colors

Customize the settings according to the corporate design of your company.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Customize font and color**.
4. Scroll to **Basic settings**.
5. Specify the required settings.
6. Click  **Back**.

The changes are applied. The page is refreshed if the modification set was specified as **active**.

Example

Default font and colors:

Customize font and color Customize font and color

Select language

Insert logo

Basic settings

Primary color:

Color for primary header: ↓

Color for font on active header tab: ↓

Color for font on non-active header tab: ↓

Color for background on non-active header tab: ↓

Color for background on active header tab: ↓

Color for hover over header tab: ↓

Color for content background:

Color for sidebar background:

Color for generic background:

Color for control background:

Title color, level 1-6: ↓

Title font, level 1-6: "Roboto Light", "Roboto", "HelveticaNeue..."

Default color for text (for example, fact sheet content):

Content text font: Roboto, Geneva, sans-serif

Color for item links: ↓

Color for icons:

Show advanced settings

Restore defaults

Configuration and modification sets

[Create](#)[Restore](#)

classic (System) (active)

classic_customized (Modification set of classic)



classicSAP (Directory)

default (System)

defaultSAP (Directory)

Customized font and color:

Customize font and color

Select language

Insert logo

Customize font and color

Basic settings

- Primary color:
- Color for primary header: ↓
- Color for font on active header tab:
- Color for font on non-active header tab:
- Color for background on non-active header tab:
- Color for background on active header tab: ↓
- Color for hover over header tab: ↓
- Color for content background:
- Color for sidebar background:
- Color for generic background:
- Color for control background:
- Title color, level 1-6: ↓
- Title font, level 1-6: Arial Narrow
- Default color for text (for example, fact sheet content):
- Content text font: Arial Narrow
- Color for item links: ↓
- Color for icons:

Show advanced settings

Restore defaults

Configuration and modification sets

Create
Restore

- classic (System)
- classic_customized (Modification set of classic) (active)

📄 ✎ ↓ 📄
- classicSAP (Directory)
- default (System)
- defaultSAP (Directory)

3.7.1.4.11.1.2 Restore default font and color

You can undo all font, color, and logo settings you have specified.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Customize font and color**.
4. Scroll to **Basic settings**.
5. Click **Restore defaults**.
6. Click **← Back**.

The default settings are loaded. The page is refreshed if the modification set was specified as **active**.

3.7.1.4.11.1.3 Select languages

Customize the settings according to the requirements of your company.

Prerequisite

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

The selected languages are available as the interface, method, and database language (page 213).

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Select language**.
4. In the **Current language** list, select the languages you do not require, and then click **Deactivate**. The languages are added to the **More languages** list.
5. In the **More languages** list, select the languages you require, and then click **Activate**. The languages are added to the **Current language** list.
6. Click **Apply**.
7. Click **← Back**.

The activated languages are available for selection by ARIS Connect users.

3.7.1.4.11.1.4 Upload logo

Select the graphics file you want to display as the logo.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have access to a graphic file in PNG format.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Insert logo**.
4. Click **Browse** next to the **Logo** field, and navigate to the required PNG file.
5. Click **Open**.

The graphic is uploaded. It is shown in the header of ARIS Connect portal.

3.7.1.4.11.1.5 Restore default logo

You can undo all font, color, and logo settings you have specified.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Insert logo**.
4. Click **Restore**.

The default logo is loaded and the page is refreshed.

3.7.1.4.11.1.6 Customize the header

You can customize the header background color, as well as text and highlighting color.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Scroll to **Basic settings**.
4. In the **Basic settings** section, customize the header background color, and text and highlighting color.
5. Click **← Back**.

You have changed the header.

Example

Default header:



Header with green background, light yellow highlighting and yellow ochre text:



3.7.1.4.11.1.7 Customize the sidebars

You can customize the background color of the sidebars.

Prerequisite

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

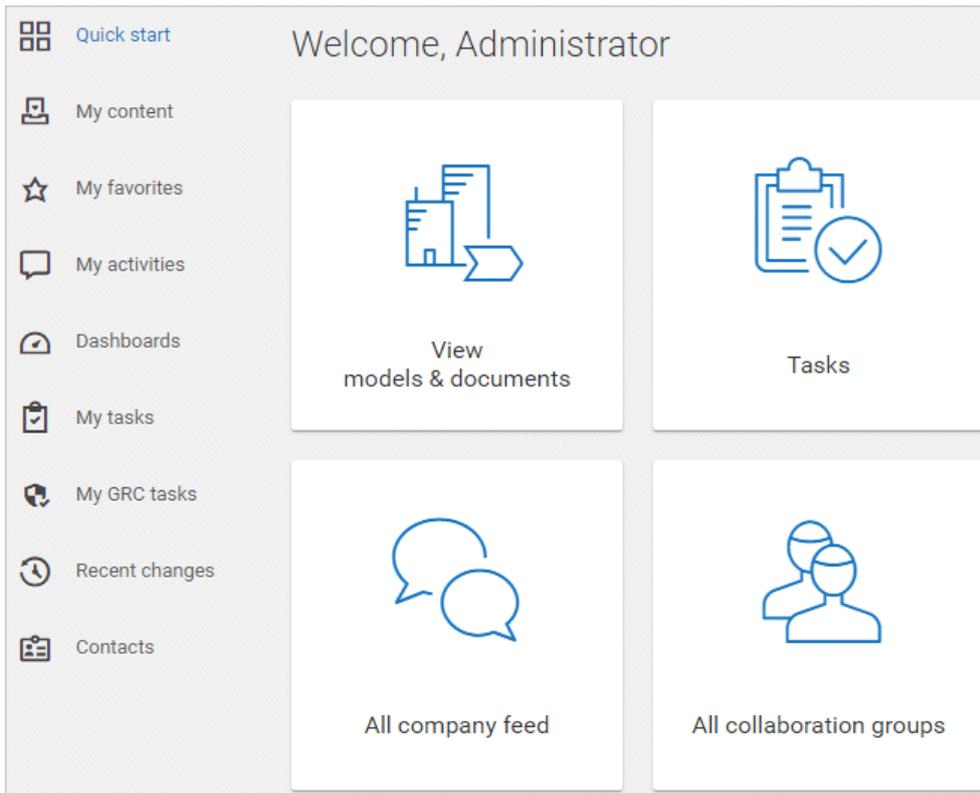
Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Scroll to **Basic settings**.
4. Click the color indicated in the **Color for sidebar background** line. Customize the sidebar background color .
5. Click **OK**.
6. Click **← Back**.

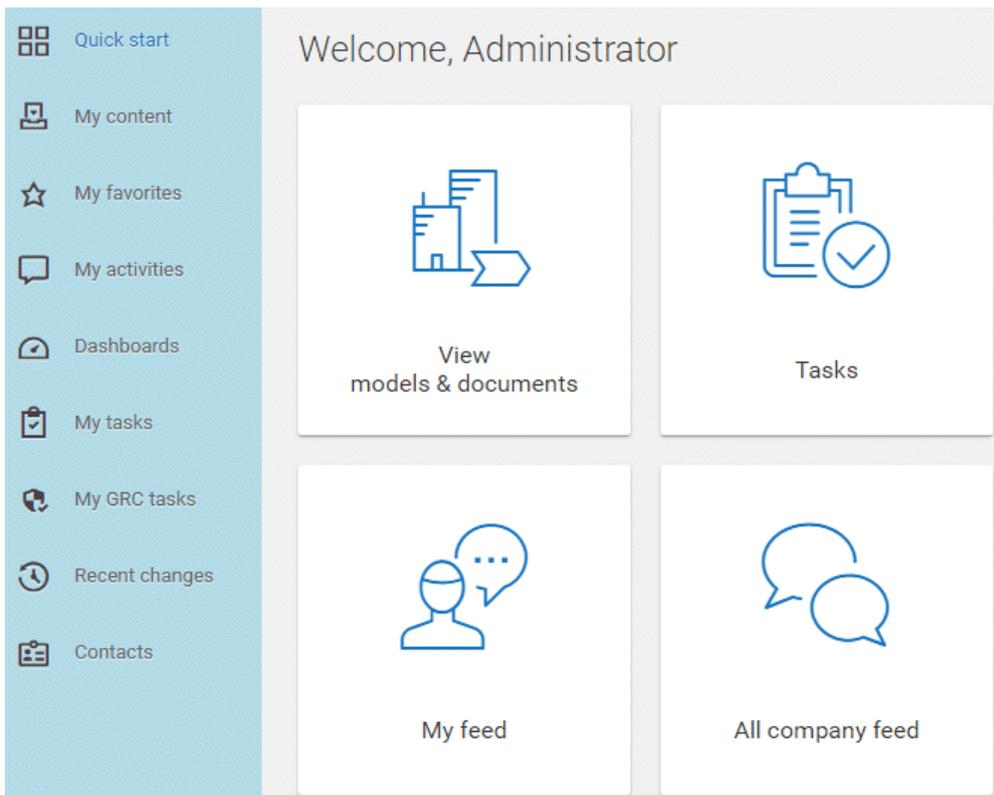
You have changed the left and right sidebar.

Example

Default sidebar:



Sidebar with light blue background:



3.7.1.4.11.1.8 Advanced customization

3.7.1.4.11.1.8.1 Customize 'Home' elements

You can customize the elements of the **Home** page.

Prerequisite

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

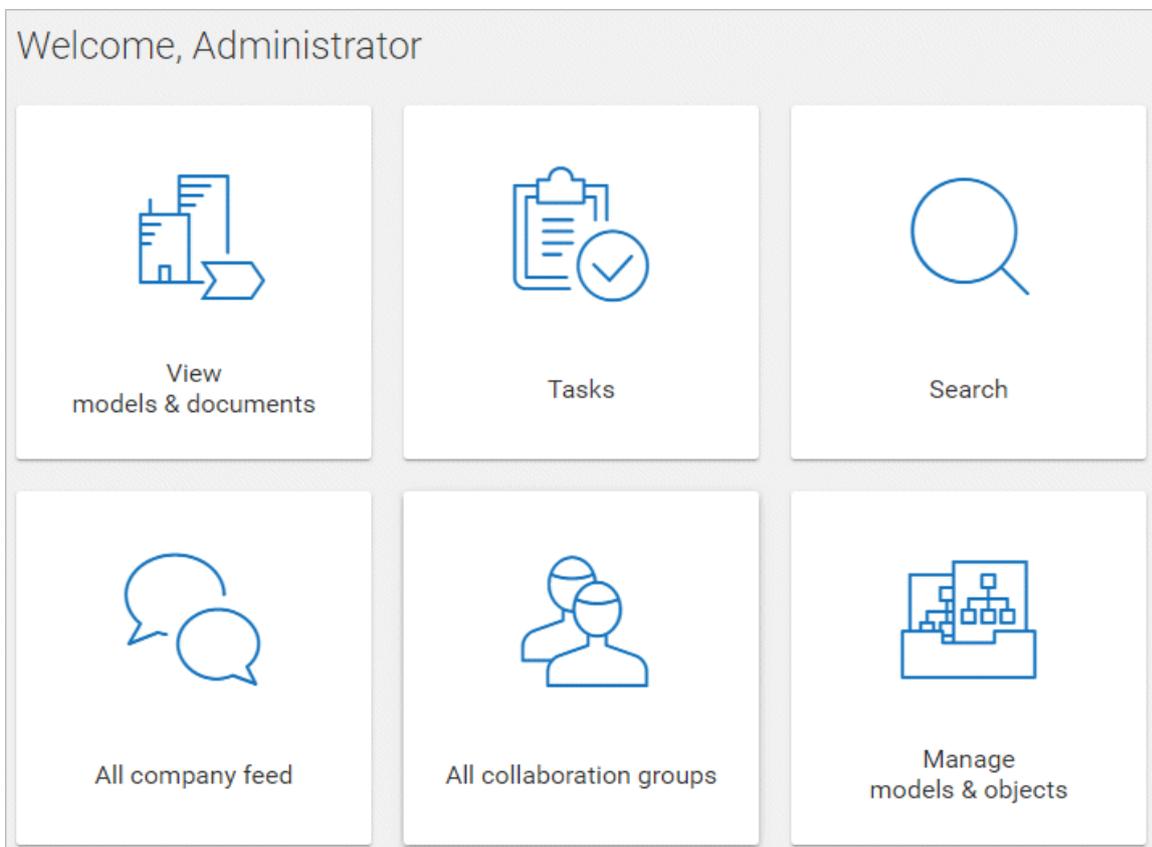
Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Home elements (Quick start, Contact)**.
5. Customize the background color and the tile size, color, and font color.
6. Click **← Back**.

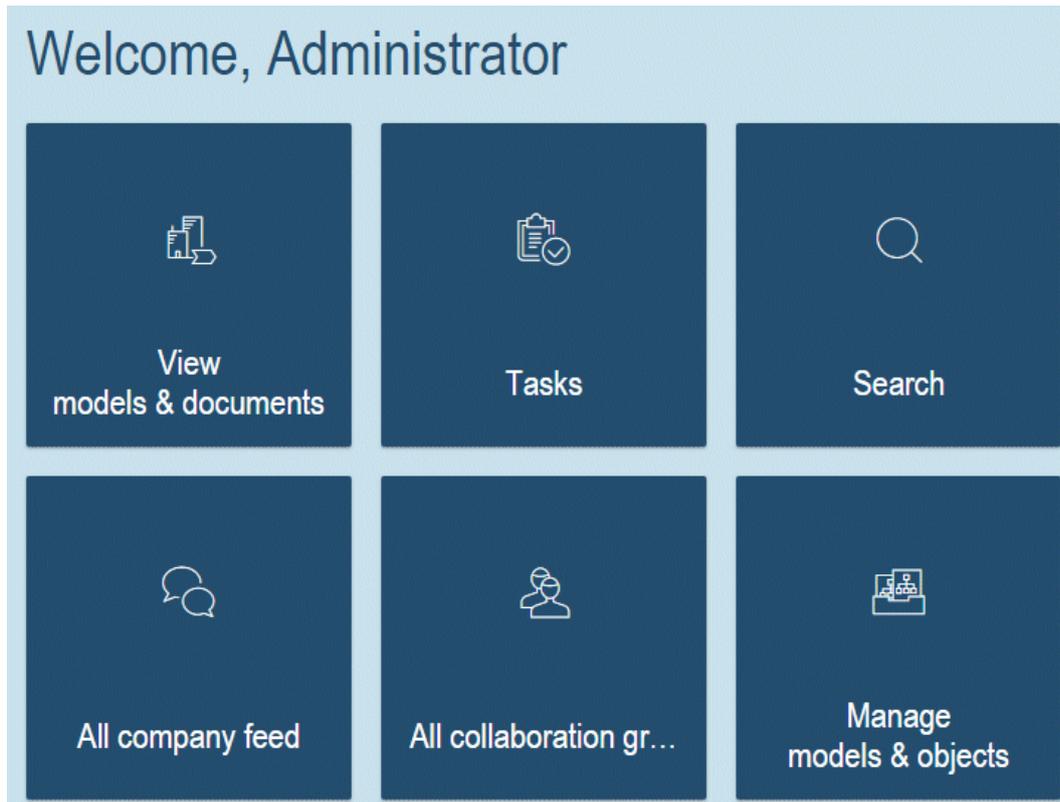
You have customized the **Home** page of ARIS Connect.

Example

Default **Home** page:



Customized **Home** page:



3.7.1.4.11.1.8.2 Customize Fact sheets (Overview)

You can customize fact sheets, such as **Overview** and **Steps**.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Fact sheets (Overview, Steps)**.
5. Customize the colors and font sizes.
6. Click **Back**.

You have customized the fact sheets of ARIS Connect.

Example

Default **Overview** fact sheet:

The screenshot shows the ARIS Connect interface for a fact sheet titled "Hold in-house fair". The top navigation bar includes "Overview", "Steps", "Table", and "More". The "Overview" tab is selected. The fact sheet content includes a date "Aug 31, 2017" and "Last change". The "Description" section contains the text "This process describes how to hold an in-house fair". The "Activities" section is a table with columns for Name, Description, Roles, IT systems, and Documents.

Name	Description	Roles	IT systems	Documents
Prepare in-house fair		Head of sales at local dealership Local dealership sales rep		

Custom **Overview** fact sheet:

< > ↑

Hold in-house fair ☆

Edit ▾

Overview
Steps
More ▾

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Aug 31, 2017
Last change

i Description

This process describes how to hold an in-house fair

⚙️ Activities

↓	Name	Description	Roles	IT systems	Documents
	Prepare in-house fair		Head of sales at local dealership Local dealership sales rep		

3.7.1.4.11.1.8.3 Customize 'Steps'

You can customize the **Steps** fact sheet.

Prerequisite

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

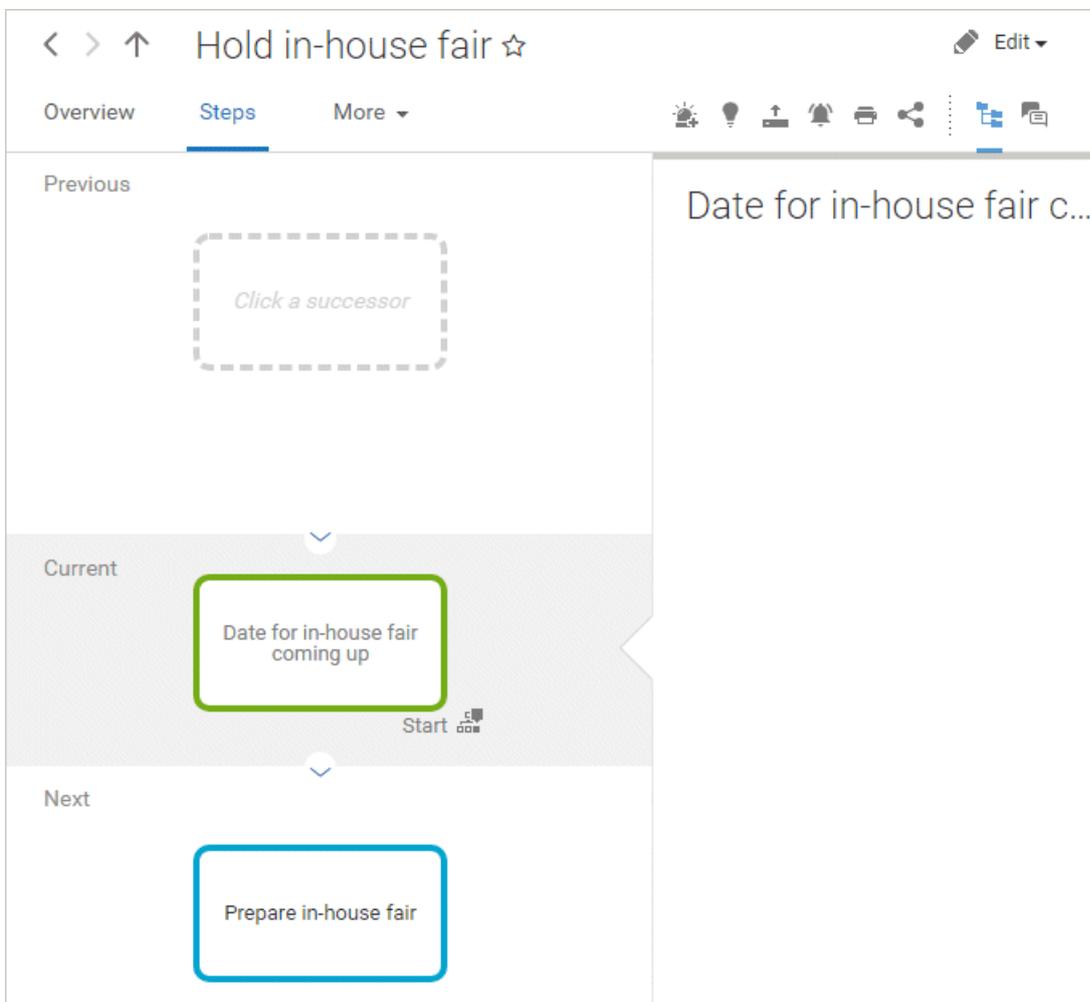
Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Steps**.
5. Customize the colors, box sizes, and font sizes.
6. Click **Back**.

You have customized the **Steps**.

Example

Default **Steps** fact sheet:



Custom **Steps** fact sheet:

The screenshot displays a user interface for a fact sheet titled "Hold in-house fair". At the top, there are navigation icons (back, forward, up) and an "Edit" button. Below the title, there are tabs for "Overview", "Steps", and "More". A toolbar with various icons is also visible. The main content area is divided into three sections: "Previous", "Current", and "Next".

- Previous:** Contains a dashed box with the text "Click a successor".
- Current:** Contains a box with the text "Date for in-house fair coming up" and a "Start" button with a calendar icon.
- Next:** Contains a box with the text "Prepare in-house fair".

On the right side of the interface, there is a large text area with the heading "Date for in-hou..." and a dotted border.

3.7.1.4.11.1.8.4 Customize buttons

You can customize the buttons.

Prerequisite

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

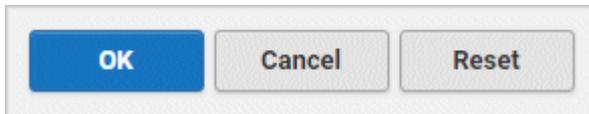
Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. In the **Buttons (for example, Save or Cancel)** section, customize the button colors and shapes.

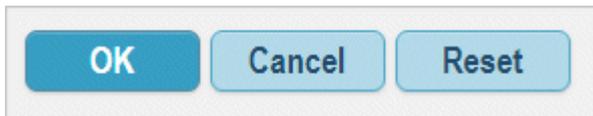
You have changed the button colors and shapes.

Example

Default buttons:



Customized buttons:



3.7.1.4.11.1.8.5 Customize font sizes in general

You can customize the general font sizes.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Font sizes**.
5. Customize the font sizes for the different text sizes.

You have customized the font sizes in general.

3.7.1.4.11.1.8.6 Customize My tasks

You can customize the logo, as well as the logo height and width of My tasks.

Prerequisite

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

Procedure

1. Copy the new logo to **<installation directory>\server\bin\work\work_apg_s\base\webapps\processboard\tasklist**, for example, **C:\SoftwareAG\ARIS10\server\bin\work\work_apg_s\base\webapps\processboard\tasklist**.
2. Open a user-defined modification set for editing. (page 138)
3. Click **User interface**.
4. Click **Show advanced settings**.
5. Scroll down to **Process Governance**.
6. Enter the file name of the new logo.
7. Enter the height of the new logo in pixels.
8. Enter the width of the new logo in pixels.
9. Click **Save**.

You have changed the logo of My tasks.

3.7.1.4.11.1.8.7 Customize Legacy settings

You can customize the operation border and the color for highlighting on the header tab for older modification sets. These settings are no longer used in the current ARIS version.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Legacy settings**.
5. Customize the operation borders and the color for highlighting on the header tab.

You have customized the legacy settings.

3.7.1.4.11.2 Manage items

Edit your own modification sets created based on the classic configuration set or the default configuration set.

3.7.1.4.11.2.1 Add items

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Items**. All items defined in this modification set for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Click **+ Create item**. The dialog opens.
4. Enter the technical name of the new item as an identifier, for example, **Risk**.
5. For each language enter the name of the element that it is to be displayed with in the portal. By default, the first three languages defined for the modification set are displayed.
6. In the **Source** box, select the type of ARIS item, for example, **Object** or **Model**.
7. Enter the object or model type names. All types that you can use are displayed during input. Types that have already been assigned to other items are not shown.
8. Click an entry. The type is added.
9. Add further types, if necessary.
10. Optional: If you want to specify the default symbol, click **Show advanced settings**. Add further default symbols, if necessary.
11. Click **Create**. The item is displayed in the list.
12. Click **← Back**.
13. To test the changed modification set, activate (page 137) it.

As soon as a fact sheet has been configured (page 162), the changes are available to all users of the portal.

The new item is displayed in the Search area.

3.7.1.4.11.2.2 Edit items

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Items**. All items defined in this modification set for groups, models, and objects are displayed. You can use these items in fact sheets and thus define which information is displayed where.
3. Move the mouse pointer to the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit item** page opens.

Identifier, name, type, and ARIS items are shown on the overview page of the **Process** item. In this example these are various model types whose information for the **Process** item is displayed in the portal. They are model types for representing business processes.
5. Click **Edit**. The **Edit item** dialog opens.
6. If required, change the name displayed in the portal in all languages, for example, **Process** to **Business process**.
7. Click **OK**. The changes are applied and the dialog closes.
8. Next to the **ARIS items** box, click **Add**. The **Add ARIS item** dialog opens.
9. Add more items from ARIS. In the **Process** example, you can select model types that have not been used for the **Process** item yet.
10. Click **Add**. The model list is completed and the dialog closes.
11. Click  **Delete** to delete entries.
12. Optional: If you want to specify the default symbol, click **Show advanced settings**. Add further default symbols, if necessary.
13. Click  **Back**.
14. To test the changed modification set, select (page 137) it for publishing.

The changes are available to users in the portal.

3.7.1.4.11.2.3 Add item properties

Item properties determine the information available and displayable for the item in the portal. You can edit custom properties.

You cannot edit the **Classic** and the **Default** configuration set.

You can allow users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges to edit certain properties. This is also possible for properties that have already been defined in the selected template of the modification set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Items**. All items defined in this modification set for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit item** page opens.
5. Click **Properties**. All properties of the item that can be displayed in the portal are listed.
6. Click **+ Create property**. The corresponding dialog opens.
7. Enter the technical name of the new property as an identifier.
8. For each language enter the name of the property that it is to be displayed with in the portal. Always specify the name in English as well, because English is used as the alternative language in the event that a language is missing.
9. In the **Data mapping** box, select the type of ARIS item whose information is to be available. This depends on the type of item for which you are defining the property.
10. For models you can select **Attributes**, **Occurrence contained**, or **Related assigned models**, while you can select **Attributes**, **Related objects**, or **Object to object** for objects. If you select **Attribute** and the attribute type, for example, **Description**, the descriptive texts for objects or models are searched and provided. For **Connected objects**, select connection and object type. This finds all objects associated with an object. **Occurrences contained** provides all objects of a model.
11. Specify the settings described depending on the item type.
12. Click **Create**. The new property is displayed in the table.
13. In order to be able to test the changed property, it must first be assigned to an area in a fact sheet. To test the changed modification set, select it for publishing.

The changes are available to users in the portal.

3.7.1.4.11.2.4 Edit item properties

Item properties determine the information available and displayable for the item in the portal. You can edit the properties.

You cannot edit the **Classic** and the **Default** configuration set.

You can allow users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges to edit certain properties. This is also possible for properties that have already been defined in the selected template of the modification set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Items**. All items defined in this modification set for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit item** page opens.
5. Click **Properties**. All properties of the item that can be displayed in the portal are listed.
6. Move the mouse pointer to the property you want to change, for example, **Process**.
7. Click  **Edit**.
8. For each language enter the name of the property that it is to be displayed with in the portal. Always specify the name in English as well, because English is used as the alternative language in the event that a language is missing.
9. In the **Data mapping** box, select the type of ARIS item whose information is to be available. This depends on the type of item for which you are defining the property.
10. For models you can select **Attributes**, **Occurrence contained**, or **Related assigned models**, while you can select **Attributes**, **Related objects**, or **Object to object** for objects. If you select **Attribute** and the attribute type, for example, **Description**, the descriptive texts for objects or models are searched and provided. For **Connected objects**, select connection and object type. This finds all objects associated with an object. **Occurrences contained** provides all objects of a model.
11. Specify the settings described depending on the item type.
12. Click **OK**.
13. Click  **Back**.
14. In order to be able to test the changed property, it must first be assigned to an area in a fact sheet. To test the changed modification set, select it for publishing.

The changes are available to users in the portal.

3.7.1.4.11.2.5 Allow Connect Viewer users to edit

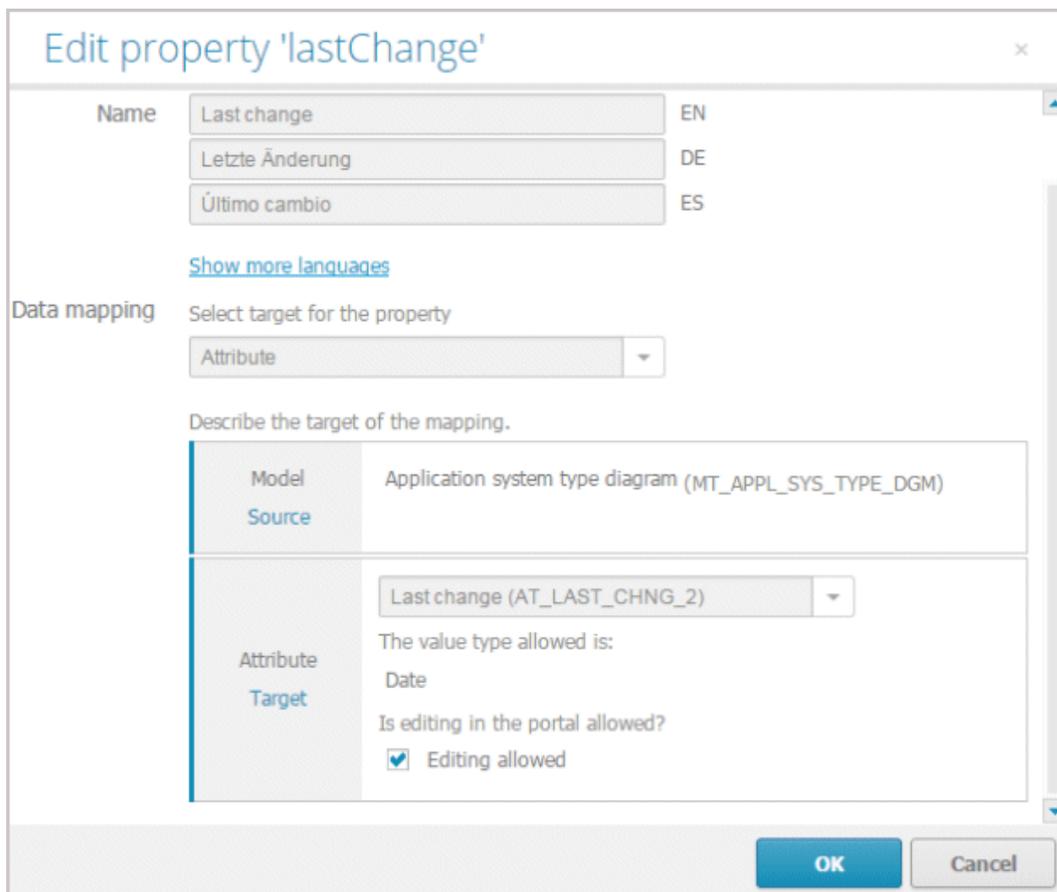
You can allow users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges along with the corresponding access privileges to edit item properties that represent attribute values in the  **Portal**.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Items**. All items defined in this modification set for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Move the mouse pointer to the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit item** page opens.
5. Click **Properties**. All properties of the item that can be displayed in the  **Portal** are listed.
6. Move the mouse pointer to the property you want to edit.
7. Click  **Edit**. The **Edit property** dialog opens.
8. Enable **Editing allowed**.



Edit property 'lastChange'

Name: Last change (EN), Letzte Änderung (DE), Último cambio (ES)

[Show more languages](#)

Data mapping: Select target for the property
Attribute

Describe the target of the mapping.

Model Source	Application system type diagram (MT_APPL_SYS_TYPE_DGM)
Attribute Target	Last change (AT_LAST_CHNG_2) The value type allowed is: Date Is editing in the portal allowed? <input checked="" type="checkbox"/> Editing allowed

OK Cancel

9. Click **OK**.
10. Click  **Back**.

11. To test the changed modification set, activate (page 137) it.

Users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges can edit the item.

3.7.1.4.11.3 Manage Fact sheets

Edit your own modification sets created based on the classic configuration set or the default configuration set.

3.7.1.4.11.3.1 Define layout

For new items (page 155) to be displayed you need to define the position on the overview page where the content is to be shown in the fact sheet.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page. All items available for fact sheets are displayed.
3. Move the mouse pointer over the item you want to change the overview page for, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate sheets are listed.
5. Ensure that an overview page is available. If this is not the case, click **Add** and select **Overview**.
6. Move the mouse pointer over the **Overview** entry.
7. Click  **Edit**. The **Edit subordinate sheet** page opens. The items of the different areas are displayed.
If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is enabled.
8. Select the layout of the page. This enables you to specify how the content of the areas is to be arranged.
9. Click **Add** in the areas and select the property to be displayed in the relevant area.
If a property of the **ItemList** type is displayed in an area, this property can be edited (page 170).
10. Click  **Delete** to delete entries.
11. Click  **Back**.

The new modification set is created and adjusted.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.2 Add fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Click **+ Add fact sheet**. The **Create fact sheet** dialog opens.
4. In the **Source** box, enter the name of the item for which information is to be displayed on this fact sheet. You can use only items that have not yet been assigned to another fact sheet.
5. Click **Create**. The fact sheet is created. It includes an overview page by default. The selected item is added to the list. As long as no more item properties are assigned to this page, only the name of the item is displayed in the title bar. The overview itself is empty.
6. Click **← Back**.

The changes are available to users in the portal. To test the changed modification set, select (page 137) it for publishing.



3.7.1.4.11.3.3 Add fact sheet for a new item

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have created (page 155) a new item.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Click **+ Add fact sheet**. The **Create fact sheet** dialog opens.
4. In the **Source** box, enter the name of new item (page 155) for which information is to be displayed on this fact sheet.
5. Click **Create**. The fact sheet is created. It includes an overview page by default. The selected item is added to the list. As long as no more item properties are assigned to this page, only the name of the item is displayed in the title bar. The overview itself is empty.
6. Click **← Back**.

The changes are available to users in the portal. To test the changed modification set, select (page 137) it for publishing.

3.7.1.4.11.3.4 Change order of fact sheets globally

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Select an item
4. Move the mouse cursor over the fact sheet you want to move.
5. If you want to change the order of a fact sheet, click **▲ Up** or **▼ Down**.
If you want to move a fact sheet to the top, click **▲ Top**.
6. Click **← Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display. If you change the order in a specific fact sheet (page 169), this configuration overwrites the globally defined order of the subordinate fact sheets.

3.7.1.4.11.3.5 Change order of fact sheets for an item

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

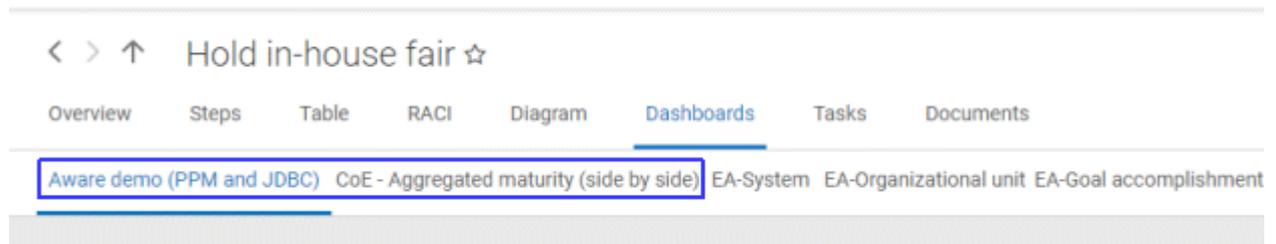
Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click  **Edit** in the **Dashboards** row. Move the mouse cursor over **Dashboards** and click  **Edit**.
6. Move the mouse cursor over the dashboard you want to move.
7. If you want to change the order of a dashboard, click  **Up** or  **Down**.
If you want to move a dashboard to the top, click  **Top**.
8. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display. If you change the order in a specific dashboard, this configuration overwrites the globally defined order of the dashboards. If dashboards are also specified for a component, they are grouped and displayed in the order specified.



3.7.1.4.11.3.6 Delete fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Move the mouse cursor over the fact sheet you want to delete.
3. Click  **Delete**. A confirmation prompt is displayed.
4. Click **Delete**.

The fact sheet and its overview page is deleted.

The changes are available to users in the portal. To test the changed modification set, select (page 137) it for publishing.

3.7.1.4.11.3.7 Edit fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer to the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Add**. The **Add subordinate sheet** dialog opens. All pages you can add are displayed. Typically, the pages **Overview**, **Steps**, **Table**, **RACI**, **Diagram**, **Tasks**, **Documents**, and **Dashboards** of ARIS Aware are offered.
6. Select an entry and click **Add**.
7. Specify the contents to be displayed in the fact sheet.
8. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.1 Customize fonts and colors

You can customize fact sheets, such as **Overview** and **Steps**.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Fact sheets (Overview, Steps)**.
5. Customize the colors and font sizes.
6. Click **Back**.

You have customized the fact sheets of ARIS Connect.

Example

Default **Overview** fact sheet:

The screenshot shows the ARIS Connect interface for a fact sheet titled "Hold in-house fair". The top navigation bar includes "Overview", "Steps", "Table", and "More" tabs, with "Overview" selected. To the right of the tabs are several icons for actions like edit, help, and share. Below the navigation bar, the fact sheet content is displayed. It includes a date "Aug 31, 2017" and "Last change" information. The main content area is divided into sections: "Description" with an information icon and a dashed separator line, and "Activities" with a gear icon and another dashed separator line. The "Activities" section contains a table with columns for Name, Description, Roles, IT systems, and Documents.

Name	Description	Roles	IT systems	Documents
Prepare in-house fair		Head of sales at local dealership Local dealership sales rep		

Custom **Overview** fact sheet:

< > ↑

Hold in-house fair ☆

Edit ▾

Overview
Steps
More ▾

🔍 💡 📄 🔔 🖨 🔗 ⋮ 📁 📄

Aug 31, 2017
Last change

i Description

This process describes how to hold an in-house fair

⚙️ Activities

↓	Name	Description	Roles	IT systems	Documents
	Prepare in-house fair		Head of sales at local dealership Local dealership sales rep		

3.7.1.4.11.3.7.2 Enable/Disable toolbars for a fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens.
5. Click **Toolbars**.
6. Enable/Disable the toolbars to be displayed on the fact sheet.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.3 Add a subordinate sheet to a fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Add**.
6. Select a subordinate sheet from the list.
7. Click **Add**.
8. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.4 Change order of the subordinate sheets

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Move the mouse cursor over a subordinate sheet you want to move.
6. If you want to change the order of a subordinate sheet, click  **Up** or  **Down**.
If you want to move a subordinate sheet to the top, click  **Top**.
7. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display. This configuration overwrites the globally defined order (page 163) of the subordinate fact sheets.

3.7.1.4.11.3.7.5 Remove a subordinate sheet from a fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Move the mouse pointer to the subordinate sheet you want to remove, for example, **Overview**.
6. Click  **Delete**.

7. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.6 Edit a property of ItemList type of the Overview tab

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the row of an item of the **Overview** item, click  **Edit**. If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated, which cannot be changed.
6. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
7. Move the mouse pointer over the relevant item of the **ItemList** type and click  **Edit**.
8. Select a custom layout.

The **Table** option displays the items in a table. The first row in the table displays the item name. You can configure the display of additional properties. These appear as additional rows.

The **List** option displays the items that were previously shown in a table or an embedded page as a simple list. In the overview, all properties except the item name are hidden. If you have selected the **List** option and activated the modification set, you cannot switch back to the table modification set.

9. Click  **Back**.
10. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.7 Edit a property for a single value of the Overview tab

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the row of an item of the **Overview** item, click  **Edit**. If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated, which cannot be changed.
6. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
7. Move the mouse pointer over a property that contains a single value and click  **Edit**. The **Select property template** page is displayed.
8. Enable the **Custom** layout. If you keep the **System** layout, the properties cannot be changed.
9. Select a template from the **Template** list.
10. Optional: Select the label position from the list.
11. Optional: Click **Browse** to select an icon. The icon is displayed in front of the label.
12. Click  **Back**.
13. Click  **Back**.

The preview is displayed in the **Preview** area. For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

To remove the icon from the property, click **Remove**.

3.7.1.4.11.3.7.8 Dashboards

You can specify dashboards for fact sheets.

3.7.1.4.11.3.7.8.1 Add a dashboard to the 'Overview' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Overview** item, click  **Edit**. If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated, which cannot be altered.
6. Scroll to **Dashboards**.
7. Click **Add**. The **Add Dashboard** dialog is displayed.
8. Enter a name. You can enter a name in multiple languages.
9. Select the database in which the dashboard is to be displayed.
10. Select a dashboard.
11. Click **Add**. The dashboard is added to the **Overview** item.
12. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.2 Edit a dashboard of the 'Overview' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Overview** item, click  **Edit**. If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated, which cannot be altered.
6. Scroll to **Dashboards**.
7. Move the mouse cursor over the dashboard you want to edit.
8. Click  **Edit**. The corresponding dialog opens.
9. Make your changes.
10. Click **Update**.
11. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.3 Remove a dashboard from the 'Overview' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.

4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Overview** item, click  **Edit**. If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated, which cannot be altered.
6. Scroll to **Dashboards**.
7. Move the mouse pointer over the dashboard you want to delete.
8. Click  **Delete**. The dashboard is removed from the **Overview** item.
9. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.4 Add a dashboard to the 'Diagram' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Diagram** item, click  **Edit**.
6. Click **Add**.
7. The **Add Dashboard** dialog is displayed.
8. Select a dashboard.
9. Enter a name in the relevant languages.
10. Click **Add**. The dashboard is added to the **Diagram** item.
11. Select the database in which the dashboard is to be displayed.
12. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.5 Edit a dashboard of the 'Diagram' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Diagram** item, click  **Edit**.
6. Move the mouse cursor over the dashboard you want to edit.
7. Click  **Edit**. The corresponding dialog opens.
8. Make your changes.
9. Click **Update**.
10. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.6 Remove a dashboard from the 'Diagram' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Diagram** item, click  **Edit**.

6. Select a dashboard.
7. Click  **Delete**. The dashboard is removed from the **Diagram** item.
8. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.7 Add a dashboard to the 'Dashboard' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

You can add dashboards globally for items.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Dashboards** item, click  **Edit**.
6. Click **Add**. The **Add Dashboard** dialog is displayed.
7. Select a dashboard.
8. Enter a name in the relevant languages.
9. Click **Add**. The dashboard is added to the **Dashboards** item.
10. Select the database in which the dashboard is to be displayed.
11. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.8 Edit a dashboard of the 'Dashboard' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Dashboards** item, click  **Edit**.
6. Move the mouse cursor over the dashboard you want to edit.
7. Click  **Edit**. The corresponding dialog opens.
8. Make you changes.
9. Click **Update**.
10. Click  **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.8.9 Change dashboard order of 'Dashboard item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click  **Edit** in the **Dashboards** row.

6. Move the mouse cursor over the dashboard you want to move.
7. If you want to change the order of a dashboard, click ▲ **Up** or ▼ **Down**.
If you want to move a dashboard to the top, click ▬ **Top**.
8. Click ↶ **Back**.

You have changed the dashboard order. If dashboards are also specified for components, they are grouped and displayed in the order specified.

3.7.1.4.11.3.7.8.10 Remove a dashboard from the 'Dashboard' item

Edit your own modification sets created based on the classic configuration set or the default configuration set.

You cannot edit the **Classic** and the **Default** configuration set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click ✎ **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Dashboards** item, click ✎ **Edit**.
6. Select a dashboard.
7. Click ✕ **Delete**. The dashboard is removed from the **Dashboards** item.
8. Click ↶ **Back**.

For the portal to be displayed with this modification set, you need to select (page 137) the new modification set for display.

3.7.1.4.11.3.7.9 Mini fact sheets

You can specify mini fact sheets globally for fact sheets.

3.7.1.4.11.3.7.9.1 Enable mini fact sheets

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

You can enable mini fact sheet for an object.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Function**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Mini fact sheet**.
6. Enable **Enable mini fact sheets**.
7. Click  **Back**.

You have enabled the mini fact sheet for an item.

3.7.1.4.11.3.7.9.2 Customize display options and properties

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

You can customize the mini fact sheet for objects.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Mini fact sheet**.

6. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
7. Move the mouse pointer over the relevant property and click  **Edit**.
8. Select a custom property template. If you keep the **System** template, the properties cannot be changed.

To add a new property group, click **Add group**. The **Select group property template** page is displayed. Adjust your settings. Click  **Back**.

9. Click  **Back**.

You have customized the mini fact sheet of these objects.

3.7.1.4.11.3.7.9.3 Change property order for mini fact sheets

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

You can change the order of the mini fact sheets for objects.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Mini fact sheet**.
6. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
7. Move the mouse cursor over the property you want to move.
8. If you want to change the order of a property, click  **Up** or  **Down**.
If you want to move a property to the top, click  **Top**.
9. Click  **Back**.

You have changed the order of the mini fact sheets of these objects.

3.7.1.4.11.3.7.9.4 Delete property from mini fact sheet

Edit your own modification sets created based on the classic configuration set or the default configuration set. You cannot edit the **Classic** and the **Default** configuration set.

You can delete a property from a mini fact sheet of an object.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Fact sheets** on the **Define modification set** page.
3. Move the mouse pointer over the item you want to change, for example, **Process**.
4. Click  **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Mini fact sheet**.
6. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
7. Move the mouse cursor over the property you want to delete.
8. Click  **Delete**.
9. Click  **Back**.

You have deleted a property from a mini fact sheets of this object.

3.7.1.4.11.4 Manage hierarchies

Edit your own modification sets created based on the classic configuration set or the default configuration set.

3.7.1.4.11.4.1 Create navigation hierarchy

Define your own navigation options for the portal. You can use hierarchies (page 216) to control how portal users can quickly navigate to relevant information. These hierarchies map the relationships between superior and subordinate item types.

You can define your own hierarchies for each user-defined modification set.

Prerequisite

- You have the **Portal administrator** function privilege.
- If you want to use a root element (page 219), the GUID or the item ID of the root element must be available on the clipboard.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Hierarchies** on the **Define modification set** page.

All hierarchies defined in this modification set for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined modification set was derived, for example, **Processes**, **Organizations**, **IT systems**, or **Groups**. You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.
3. Click **Create**. The corresponding dialog opens.
4. Specify the name for the hierarchy to be displayed in the portal in all languages. This name is shown in the portal as another navigation option. If the name is not specified in a language, it is displayed in English in the portal.
5. Click **Next**. The **Create hierarchy – Specify hierarchy structure** page opens.
6. Click **Select item**. All items that are defined in the modification set are displayed.
7. Select the first item. The item is inserted.
8. Move the mouse pointer over the item and click **+ Add**.
9. Click **Select item/property** and select an entry. The second item must be of the same type as the first item. If it is not, a hierarchy cannot be created. The selected property or the item is made subordinate without space. The name of the property of the subordinate item is shown in parentheses.
10. Add further items in the same manner. The hierarchy is symbolized by indents.
11. Click **Finish** if you do not want to insert a root element (page 219). Otherwise click **Next** to insert a root element.
 - a. Click **Add**. The **Specify root element** dialog opens.

- b. Paste the GUID or item ID from the clipboard.
- c. Click **OK**. The GUID of the item is displayed in the list.
- d. Click **Finish**.

12. Activate (page 184) the hierarchy.

The navigation is available to users in the portal. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.4.2 Edit navigation hierarchy

Use hierarchies to define the navigation in the portal. These hierarchies map the relationships between superior and subordinate items.

You can define your own hierarchies for each user-defined modification set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Hierarchies** on the **Define modification set** page.

All hierarchies defined in this modification set for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined modification set was derived, for example, **Processes**, **Organizations**, **IT systems**, or **Groups**.

You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.

3. To edit a hierarchy, move the mouse pointer over the row for a deactivated hierarchy and click  **Edit**.
4. Change the hierarchy.
5. Click **Finish**.

The changed navigation is available to users in the portal. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.4.3 Enable navigation hierarchy

Use hierarchies to define the navigation in the portal. These hierarchies map the relationships between superior and subordinate items.

You can define your own hierarchies for each user-defined modification set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Hierarchies** on the **Define modification set** page.

All hierarchies defined in this modification set for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined modification set was derived, for example, **Processes**, **Organizations**, **IT systems**, or **Groups**. You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.

3. To display a hierarchy, move the mouse pointer over the row for a deactivated hierarchy and click  **Enable**.

The **Groups** hierarchy from the classic configuration set cannot be combined with any other hierarchy. If the **Groups** hierarchy is activated, all other hierarchies are automatically deactivated. If you activate another hierarchy, the **Groups** hierarchy is automatically hidden.

The changed navigation is available to users in the portal. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.4.4 Disable navigation hierarchy

Use hierarchies to define the navigation in the portal. These hierarchies map the relationships between superior and subordinate items.

You can define your own hierarchies for each user-defined modification set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Hierarchies** on the **Define modification set** page.

All hierarchies defined in this modification set for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined modification set was derived, for example, **Processes**, **Organizations**, **IT systems**, or **Groups**. You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.

3. To disable a hierarchy, move the mouse pointer over the row for an activated hierarchy and click  **Disable**.

The navigation hierarchy is disabled.

3.7.1.4.11.4.5 Delete navigation hierarchy

Use hierarchies to define the navigation in the portal. These hierarchies map the relationships between superior and subordinate items.

You can define your own hierarchies for each user-defined modification set.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Hierarchies** on the **Define modification set** page.

All hierarchies defined in this modification set for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined modification set was derived, for example, **Processes**, **Organizations**, **IT systems**, or **Groups**. You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.

3. To delete a hierarchy, move the mouse pointer over the row for a deactivated hierarchy and click  **Delete**.

The navigation hierarchy is deleted.

3.7.1.4.11.5 Edit components

You can configure global settings for certain components, for example, diagrams or steps for a specific model.

3.7.1.4.11.5.1 Customize 'Dashboard' component

You can configure global settings for dashboards.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Dashboards** row. The **Edit component** page is displayed.
4. Click **Edit** to change the name of the **Dashboard** component. The **Edit component property** dialog opens. Edit the name of the Dashboard component in different languages.
5. Click  **Back**.

You have configured the name of the **Dashboards** component.

3.7.1.4.11.5.1.1 Add dashboard to model

You add dashboards to a specific model.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Dashboards** row. The **Edit component** page is displayed.
4. Click **Add**. The **Add Dashboard** dialog opens. Enter the name of the dashboard in the different languages.
5. Select the database in which the dashboard is to be displayed.
6. Select the location on which the dashboard shall be displayed.

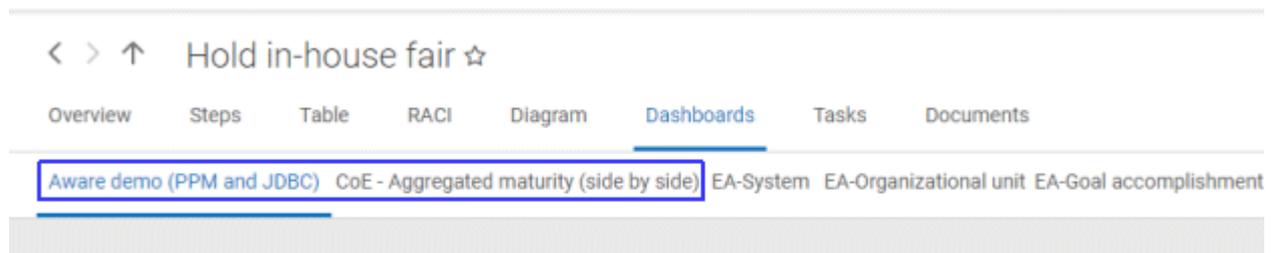
Enter the identifier of the location. The identifier is the part of the URL of the relevant tab of a model and starts with **c** and ends with **-1**.



```
https://myserver/#default/item,c.process.United%20Motor%20Group.dwMbkKdEEd0RTwBQVpRp0g.-1/~EVBbInRhykFyaXNB
```

7. Click **Add**.
8. Click  **Back**.

You have added a dashboard to a specific model. If dashboards are specified globally for this model, they will be displayed as a group and so are the model-specific dashboards.



3.7.1.4.11.5.1.2 Edit dashboard for model

You can add dashboards to the **Dashboard** component.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Dashboards** row. The **Edit component** page is displayed.
4. Click  **Edit** in the dashboard's row. The **Edit Dashboard** dialog opens. Enter the name of the dashboard in the different languages.
5. Select the location on which the dashboard shall be displayed.

Enter the identifier of the location. The identifier is the part of the URL of the relevant tab of a model and starts with **c** and ends with **-1**.

6. 
7. Click **Update**.
8. Click  **Back**.

You have edited a dashboard of the **Dashboards** component.

3.7.1.4.11.5.1.3 Change dashboard order for model

You can add dashboards to the **Dashboard** component.

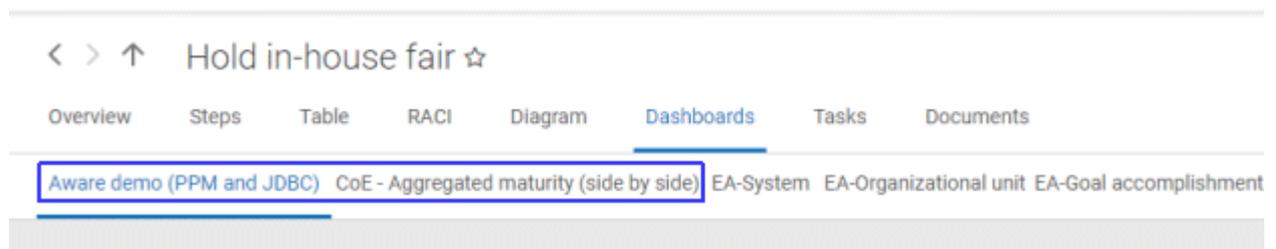
Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Dashboards** row. The **Edit component** page is displayed.
4. Move the mouse cursor over the dashboard you want to move.
5. If you want to change the order of a dashboard, click  **Up** or  **Down**.
If you want to move a dashboard to the top, click  **Top**.
6. Click  **Back**.

You have changed the dashboard order. If dashboards are also specified for fact sheets, they are grouped and displayed in the order specified.



3.7.1.4.11.5.1.4 Delete a dashboard

You can remove dashboards from the **Dashboard** component.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Delete** in the dashboard's row. The dashboard is deleted from the list of dashboards to be displayed.
4. Click  **Back**.

You have deleted a dashboard from the **Dashboards** component.

3.7.1.4.11.5.2 Customize diagrams

You can configure global settings for diagrams.

3.7.1.4.11.5.2.1 Customize display options

You can configure global settings for diagrams.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Diagram** row. The **Edit component** dialog opens.
4. If you want to rename the **Diagram** component, click **Edit** in the **Edit component property** area. The dialog opens.
5. Change the name in the required languages, and click **OK**.
6. Configure the display of diagrams in the **Display options** area.

To begin with, the ARIS Connect default settings are used. As soon as you disable these, you can configure the diagram graphic size and the assignment filter.

You can optionally adjust the representation of a model in the portal to the dimensions of the model, or specify any size for it. For example, if you select **Fit to window**, the zoom factor is selected such that the entire model is displayed. Selecting **Fit width** displays the model so that its full width can be seen.

If you activate the assignment filter, the diagrams show an assignment icon only for objects that have a diagram assigned to them which can also be accessed via the navigation hierarchy. For example, if a user-defined hierarchy includes value-added chains and processes only, the assignment icon is not displayed for functions to which only a model of the Function allocation diagram type is assigned.

To reset the changed component properties and display options to their initial state, click **Restore default settings** and confirm **Restore default settings**.

7. Click  **Back**.

You have customized the display option of the diagram on the **Component** tab.

3.7.1.4.11.5.2.2 Customize the assignment filter

You can configure global settings for diagrams.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Diagram** row. The **Edit component** dialog opens.
4. Scroll to the **Display options** area.
5. If you activate the assignment filter, the diagrams show an assignment icon only for objects that have a diagram assigned to them which can also be accessed via the navigation hierarchy. For example, if a user-defined hierarchy includes value-added chains and processes only, the assignment icon is not displayed for functions to which only a model of the Function allocation diagram type is assigned.

To reset the changed component properties and display options to their initial state, click **Restore default settings** and confirm **Restore default settings**.

6. Click  **Back**.

You have customized the assignment filter of the diagram on the **Component** tab.

3.7.1.4.11.5.2.3 Enable/Disable the change view functionality

You can configure global settings for diagrams.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Diagram** row. The **Edit component** dialog opens.
4. Scroll to the **Display options** area.
5. Configure whether the **Change view** functionality is enabled. To do so enable **Enable view generation**.

To reset the changed component properties and display options to their initial state, click **Restore default settings** and confirm **Restore default settings**.

6. Click  **Back**.

You have enabled/disabled the change view functionality of the diagram on the **Component** tab.

3.7.1.4.11.5.3 Customize extended search component

You can configure the settings for the extended search.

3.7.1.4.11.5.3.1 Add items and properties to filter

You can configure the settings for the extended search.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Extended search** row. The **Edit component** page is displayed.
4. In the **Specify item filter** area, click **Edit**. The corresponding dialog opens.
5. Under **Available filters**, enable the items you want to be displayed in the filter list of the search and click **Add**. To enable all items, click **Add all**. You can enter the first characters in the **Enter a search term** field to reduce the number of items displayed.
6. Click **OK**.
7. In the **Specify property filter** area, click **Edit**. The corresponding dialog opens.
8. Under **Available filters**, enable the properties you want to be displayed in the properties list of the search and click **Add**. To enable all properties, click **Add all**. You can enter the first characters in the **Enter a search term** field to reduce the number of properties displayed.
9. Click **OK**.
10. Click  **Back**.

You have configured the settings for the extended search.

3.7.1.4.11.5.3.2 Change order of filter items and properties

You can change the order of items or properties of the filter for the extended search.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Extended search** row. The **Edit component** page is displayed.
4. In the **Specify item filter** or in the **Specify property filter** area, click **Edit**.
5. If you want to change the order of filter items or properties, click  **Up** or  **Down**.
If you want to move a filter item or a property to the top, click  **Top**.
6. Click  **Back**.

You have changed the order of items or properties of the filter for the extended search.

3.7.1.4.11.5.3.3 Remove items and properties from filter

You can configure the settings for the extended search.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Extended search** row. The **Edit component** page is displayed.
4. In the **Specify item filter** area, click **Edit**. The corresponding dialog opens.
5. Under **Assigned filters**, enable the items you want to be removed from the filter list of the search and click **Remove**. To disable all items, click **Remove all**.
6. Click **OK**.
7. In the **Specify property filter** area, click **Edit**. The corresponding dialog opens.
8. Under **Assigned filters**, enable the properties you want to be removed from the properties list of the search and click **Remove**. To disable all properties, click **Remove all**.
9. Click **OK**.
10. Click  **Back**.

You have configured the settings for the extended search.

3.7.1.4.11.5.4 Customize mini fact sheets

You can configure mini fact sheets for objects globally. All global settings for mini fact sheets can be overwritten for single types by the fact sheet settings (page 179).

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Mini fact sheets** row. The **Mini fact sheets** page is displayed.
4. Configure the display options and the properties.
5. Click  **Back**.

You have configured the mini fact sheets for objects globally .

3.7.1.4.11.5.4.1 Customize whitelist for mini fact sheets

You can specify the items for which mini fact sheets should be displayed globally .

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Mini fact sheets** row. The **Mini fact sheets** page is displayed.
4. Click in the field that contains the items for which mini fact sheets should be displayed. Enter the name of the item you want to add and click **Return**.
5. Click  **Delete** on the item you want to remove.
6. Click  **Back**.

You have customized the whitelist for mini fact sheets globally .

3.7.1.4.11.5.4.2 Customize display options and properties

You can specify the default templates and properties of the mini fact sheets globally .

Prerequisite

- You have the **Portal administrator** function privilege.
- You have specified a whitelist for the mini fact sheet.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Mini fact sheets** row. The **Mini fact sheets** page is displayed.
4. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
5. Move the mouse pointer over the relevant property and click  **Edit**.
6. Select a custom property template. If you keep the **System** template, the properties cannot be changed. The properties displayed belong to item type **Default object**.
7. To add a new property, click **Add**.
To add a new property group, click **Add group**. The **Select group property template** page is displayed.
8. Adjust your settings. Click  **Back**.
9. Click  **Back**.

You have customized the display options and properties globally .

3.7.1.4.11.5.4.3 Change property order for mini fact sheets

You can change the order of the mini fact sheets globally.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Mini fact sheets** row. The **Mini fact sheets** page is displayed.
4. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
5. Move the mouse cursor over the property you want to move.
6. If you want to change the order of a property, click  **Up** or  **Down**.
7. If you want to move a property to the top, click  **Top**.
8. Click  **Back**.

You have changed the order of the mini fact sheets globally.

3.7.1.4.11.5.4.4 Delete property from mini fact sheet

You can delete a mini fact sheet.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Mini fact sheets** row. The **Mini fact sheets** page is displayed.
4. Select a custom layout. If you keep the **System** layout, the properties cannot be changed.
5. Move the mouse cursor over the property you want to delete.
6. Click  **Delete**.
7. Click  **Back**.

You have deleted a mini fact sheet.

3.7.1.4.11.5.5 Customize steps

You can configure global settings for steps.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Steps** row.
4. Click **Details**. The **Edit component** page is displayed. Add or delete properties for processes, functions, and events and define their hierarchy.
5. Optional: Edit the properties of processes, functions, and events.
 - a. Move the mouse pointer over a property that you want to change.
 - b. Click  **Edit**. The **Select property template** page is displayed.
 - c. Enable the **Custom** layout. If you keep the **System** layout, the properties cannot be changed.
 - d. Select a template from the **Template** list.
 - e. Optional: Select the label position from the list.
 - f. Optional: Click **Browse** to select an icon. The icon is displayed in front of the label.
 - g. Click  **Back**.
6. Click  **Back**.

You have configured the steps on the **Component** tab.

3.7.1.4.11.5.5.1 Exclude symbols

You can exclude symbols from the **Steps** fact sheet.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Steps** row.
4. Click **Overview**. The **Excluded symbols** page opens.
5. Click **Add**. The corresponding dialog opens.
6. Enter the first characters of the symbol name and select the symbol.
7. Press **Enter**.
8. Continue with steps six to remove additional symbols from the **Steps** fact sheet.
9. Click **Add**.
10. Click  **Back**.

You have excluded symbols from the **Steps** fact sheet.

3.7.1.4.11.5.5.2 Include excluded symbols again

You can include excluded symbols in the **Steps** fact sheet.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Steps** row.
4. Click **Overview**. The **Excluded symbols** page opens.
5. Move the mouse pointer to the symbol you want to include in the **Steps** fact sheet again and click  **Delete**.
6. Click  **Back**.

You have included symbols in the **Steps** fact sheet again.

3.7.1.4.11.5.5.3 Add group property

You can add a group of independent properties.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Steps** row.
4. Click **Details**. The **Edit component** page is displayed. Add or delete group properties for processes, functions and events, and define their hierarchy.
5. Click **Add group**. The **Edit embedded sheet** page is displayed.
6. Select a template from the **Template** list. You can specify different settings depending on the selected template.
7. Optional: Click **Edit group properties** to specify the group properties. The corresponding dialog opens.
8. Enter a name. You can specify the name in multiple languages.
9. Optional: Select the label position from the list.
10. Optional: Click **Browse** to select an icon. The icon is displayed in front of the label.
11. Click **OK**.
12. Click  **Back**.

You have added a group of independent properties to the steps of a component.

3.7.1.4.11.5.5.4 Change order of the properties

You can change the order of items or properties of the filter for the extended search.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Component** on the **Define modification set** page.
3. Click  **Edit** in the **Steps** row.
4. Click **Details**. The **Edit component** page is displayed.
5. If you want to change the order of the properties, click  **Up** or  **Down**.
6. Click  **Back**.

You have changed the order of items or properties of the filter for the extended search.

3.7.1.4.11.5.5.5 Customize colors for steps

You can customize the text color.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. In the Fact sheets (Overview, Steps) customize the text colors.
5. In the **Steps** section, customize the colors.
6. Click **Save**.

You have changed the text color.

Example

Default colors on **Steps** page:

< > ↑ Hold in-house fair (to-be)

Overview **Steps** Table More ▾

Previous

Click a successor

Current

Date for in-house fair coming up

Start

Next

Prepare in-house fair (to-be)

Customized colors on **Steps** page:

< > ↑ Hold in-house fair (to-be)

Overview **Steps** Table RACI More ▾

Previous

Click a successor

Current

Date for in-house fair coming up

Start 

Next

Prepare in-house fair (to-be)

3.7.1.4.11.6 Edit 'Home'

Customize the start page (**Home**) of the portal.

3.7.1.4.11.6.1 Customize icons and text

You can customize the elements of the **Home** page.

Prerequisite

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

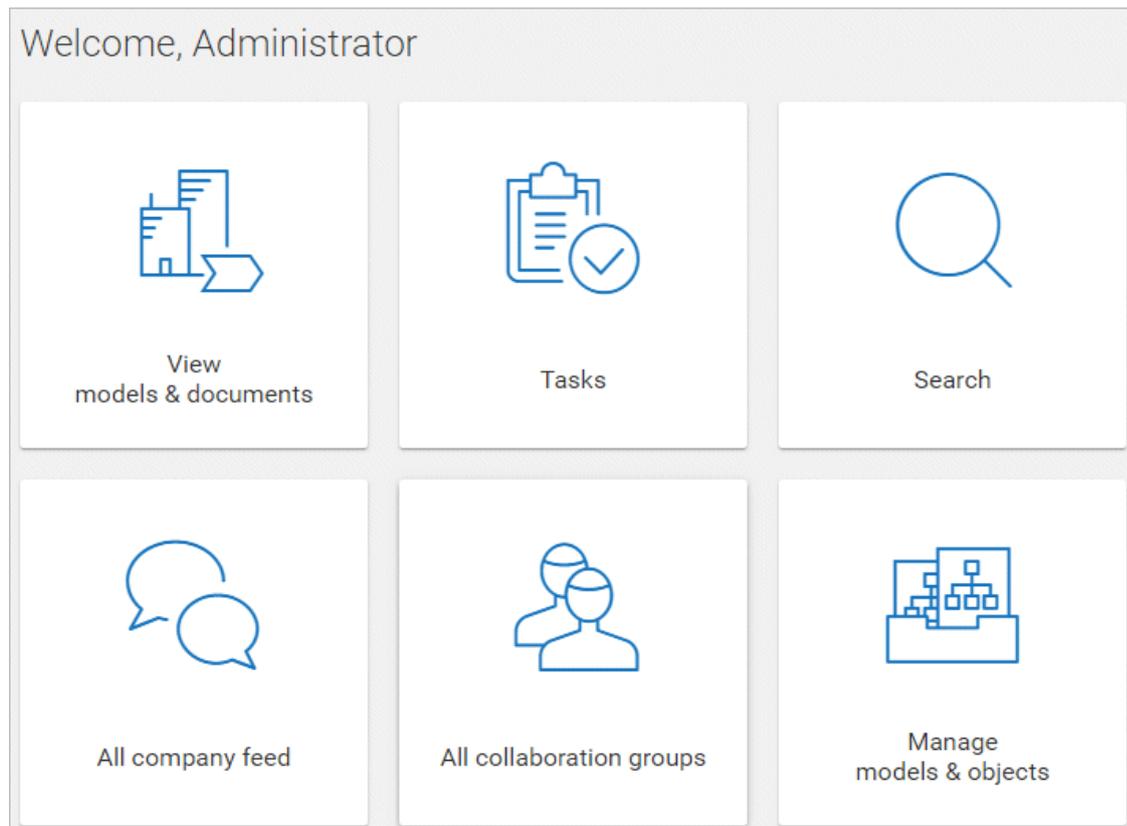
Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **User interface**.
3. Click **Show advanced settings**.
4. Scroll down to **Home elements (Quick start, Contact)**.
5. Customize the background color and the tile size, color, and font color.
6. Click **← Back**.

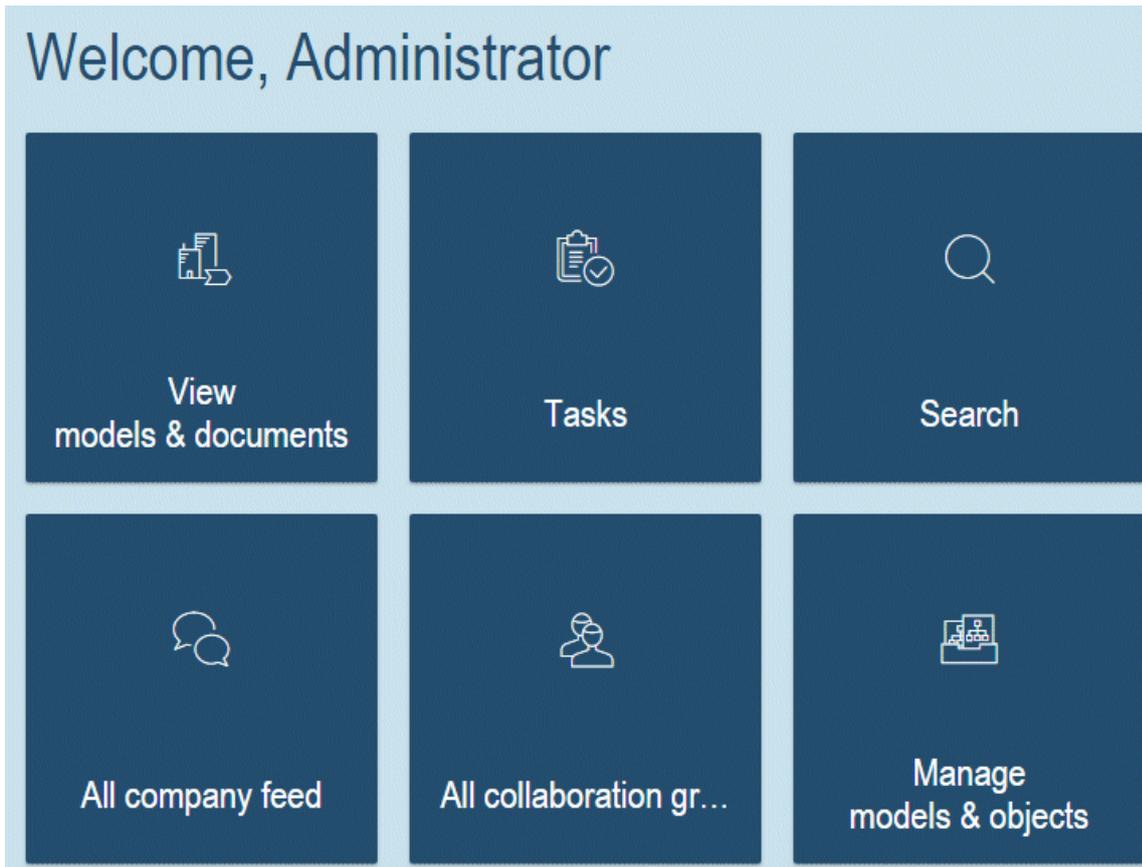
You have customized the **Home** page of ARIS Connect.

Example

Default **Home** page:



Customized **Home** page:



3.7.1.4.11.6.2 Change layout

Define your own layout for the portal. You can select layouts with one, two, or three columns.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
By default, the **System** layout is activated which cannot be altered. The components that are initially displayed in the **Home** view appear below the layout options.
3. Select the relevant layout. You are offered more detailed configuration options depending on the layout you select.
4. Define the size and appearance of the areas. If you specify the size of the areas in percent, all areas of the **Home** view will become smaller when the size of the browser window is reduced. If you specify the size in pixels, only one area may vary. You must explicitly indicate which area this is. The sizes of the other areas can be freely selected.
To begin with, the areas of a user-defined layout are empty.
Click **Add** to select components that are to be displayed on the **Home** page.
5. Click the arrow keys to specify the order of the components.
6. Click **← Back**.

The new layout is available to users in the portal. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.3 Add 'Contacts' component

Define your own layout for the portal. You can add contacts.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Contacts**.
5. Click **Add**.

The contacts are now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.4 Add 'Diagram' component

Define your own layout for the portal. You can configure the appearance of diagrams.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have copied the item identifier (page 205) to the clipboard.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Diagram**.
5. Click **Add**.
6. Click  **Edit** in the **Diagram** row. The **Edit diagram** dialog opens.
7. Specify the name of the diagram in the various languages. You can display more languages.
8. Click **+ Add new start item** to define a model for the **Home** page. The **Add item identifier** dialog opens. Enter an identifier for a model, for example, **c.group.UnitedMotorGroup.SnE94F0CEeMP2v2B6YbX4g**.
9. Double-click **OK**.

The configured diagrams are now displayed on the **Home** page of the database. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.5 Find item identifier

You can find item identifiers for diagrams so that diagrams can be displayed on the ARIS Connect **Home** page.

Procedure

1. Start ARIS Connect.
2. Click  **Portal**.
3. Select the database in which the relevant diagram is stored.
4. Click **Groups**.
5. Navigate to the required diagram and click it. The model is displayed.
6. In the address bar of your browser, select the last part of the URL, immediately after the entry **item/**.
7. Copy the selected text to the clipboard by pressing **Ctrl + C**.

You can use the item identifier of this diagram (page 204) to configure the **Home** page.

Tip

If you want to configure multiple diagrams later, it is recommended to copy the various identifiers into a text file, and then copy them into the configuration from there.

Example



server:1080/#default/item/c.default.UnitedMotorGroup.vyqdYHy4EdwnKQALzQzOTg

3.7.1.4.11.6.6 Add 'Dashboard' component

Define your own layout for the portal. You can configure the appearance of diagrams.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have copied the item identifier (page 205) to the clipboard.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Dashboard**.
5. Click **Add**.
6. Click  **Edit** in the **Dashboard** row.
7. Click **Add**. The **Add Dashboard** dialog is displayed.
8. Enter a name. You can enter a name in multiple languages.
9. Select a dashboard.
10. Select the database in which the dashboard is to be displayed.
11. Click **Add**.
12. Click  **Back**.

The configured dashboards are now displayed on the **Home** page of the database. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.7 Add 'My content' component

Define your own layout for the portal. You can create a **My content** area.

In the **System** default configuration, information is displayed in the **My content** area regarding the processes in which a function that is connected to a role or via a function allocation diagram is modeled. The user currently logged in must have been specified in this role in the **User/User group association** attribute.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **My content**.
5. Click **Add**.

The **My content** item is now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.8 Add 'Recent changes' component

Define your own layout for the portal. You can create a **Recent changes** area. You can also define another name for this area. Moreover, the languages, the number of changes displayed, and a time interval for changes can also be configured.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Recent changes**.
5. Click **Add**.
6. Click  **Edit** in the **Recent changes** row. The **Edit recent changes** dialog opens. Configure the name, the languages, the number of changes displayed, and a time interval for changes.
7. Click **OK**.

The recent changes are now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.9 Add and configure 'Quick start' component

Define your own layout for the portal. You can configure an **App gallery** area, in which you provide references to apps.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Quick start**.
5. Click **Add**.
6. Click  **Edit** in the **Quick start** row. The **Edit 'Quick start'** dialog opens.
7. Enter a name for the gallery in the various languages.
8. Click **Browse** to select a background image for the app gallery. The background image must not be bigger than 256 KB.

9. By default, all preconfigured apps are already in the app gallery and the **Add** button is disabled. Move the mouse pointer to the app you want to delete and click **X Delete**. You can make a deleted app accessible in the app gallery again.
10. Click **Add** if you want to display a preconfigured app you had removed before. Click **New** to add a new app.
11. Change the order of the apps by clicking the up or down arrow.
12. Click **OK**.

The configured apps are now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.10 Add new app to 'Quick start'

Define your own layout for the portal. You can configure an **App gallery** area, in which you provide references to apps.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Quick start**.
5. Click **Add**.
6. Click  **Edit** in the **Quick start** row. The **Edit 'Quick start'** dialog opens.
7. Enter a name for the gallery in the various languages.
8. Click **New** to add a new app. The **Add app** dialog opens.
9. Enter the name in the various languages.
10. Enter the URL under which the app can be found. Enter the entire URL in the form **http://<server>:<port>/<app path>**.
11. Enable **In a new tab** if the app is to be displayed on a new tab in the browser.
12. Select a symbol for the app.
13. Double-click **OK**.
14. Change the order of the apps by clicking the arrow keys.

The configured apps are now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.11 Add external web page

Define your own layout for the **Home** page of the portal. You can add an external web page, for example, your company's home page.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **IFrame**.
5. Click **Add**.
6. Click  **Edit** in the **IFrame** row. The **Edit IFrame** dialog opens.
7. Enter the name in the various languages.
8. Enter the entire IFrame URL in the form **http://<server>:<port>/<web page>**.
9. Click **OK**.

The configured IFrame item is now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.12 Add 'My activities' component

Define your own layout for the portal. You can add an overview of your activities.

Prerequisite

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

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **My activities**.
5. Click **Add**.

The **My activities** component is now displayed on the **Home** page. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.13 Edit a component of the 'Home' tab

Define your own layout for the portal. You can configure the appearance of diagrams.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have copied the item identifier (page 205) to the clipboard.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Move the mouse pointer over the component you want to edit. If a component can be edited, the  **Edit** icon is displayed.
4. Click  **Edit**. The corresponding dialog opens.
5. Make your changes.
6. Click **OK**.

The changed components are now displayed on the **Home** page of the database. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.6.14 Edit the dashboard component of the 'Home' tab

Define your own layout for the portal. You can configure the appearance of diagrams.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have copied the item identifier (page 205) to the clipboard.

Procedure

1. Open a user-defined modification set for editing. (page 138)
2. Click **Home** on the **Define modification set** page.
3. Move the mouse pointer over the dashboard component you want to edit.
4. Click  **Edit**.
5. Make your changes.
6. Click **OK**.

The changed dashboard components are now displayed on the **Home** page of the database. To test the changed modification set, activate (page 137) it.

3.7.1.4.11.7 Manage plugins

As a portal administrator, you customize the plugins. Portal administrators select the configuration set to show portal data. Hierarchies determine the way you are able to navigate through the data.

By default, ARIS Connect provides the classic configuration set and the default configuration set. If you want to use plugins in the portal, you need extended configuration sets with plugins enabled that you cannot configure in ARIS Administration, please contact your local Software AG sales organization (<http://www.softwareag.com>).

3.7.1.4.11.7.1 Activate a plugin

You can activate a plugin predefined in a configuration set.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have a customized configuration that allows plugins.
- You have created a customized modification (page 134) set based on the customized configuration set that allows plugins.

Procedure

1. Open a user-defined modification set that allows plugins for editing. (page 138)
2. Click **Plugins** on the **Define modification set** page.
3. Click  **Activate**.

The plugin is active. The configuration set (page 131) defines the view in which the plugin is displayed.

3.7.1.4.11.7.2 Disable a plugin

You can activate a plugin predefined in a configuration set.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have a customized configuration that allows plugins.
- You have created a customized modification (page 134) set based on the customized configuration set that allows plugins.

Procedure

1. Open a user-defined modification set that allows plugins for editing. (page 138)
2. Click **Plugins** on the **Define modification set** page.
3. Click  **Deactivate**.

The plugin is disabled.

3.7.1.4.11.8 Delete modification set

Delete modification sets that are no longer needed.

Prerequisite

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

Warning

The configurations of deleted modification sets will be lost.

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available configuration and modification sets are displayed. The current configuration or modification set is marked.
4. Move the mouse pointer over the relevant modification set.
5. Click  **Delete**.

The configurations of deleted modification sets will be lost.

6. Click **Delete** to confirm.

The modification set is deleted.

3.7.1.4.12 Valuable information

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

3.7.1.4.12.1 What to consider with customized configuration sets?

Configuration sets are based on XML files and allow a comprehensive customization of ARIS Connect.

By default, ARIS Connect provides the classic configuration set and the default configuration set.

Advanced configuration changes require the use of XML configuration. Please contact Software AG (<https://empower.softwareag.com/>) for a customization request or participate in the **742-xx ARIS Connect Portal Configuration training** (<https://knowledge.softwareag.com/course/view.php?id=16>). Please note that customization and training services are not covered by the standard Software AG software maintenance agreement. Configuration changes can only be performed by Software AG if you request and agree to them. Errors in XML configuration may have serious impact. You may not be able to start ARIS Connect again.

3.7.1.4.12.2 What are the special features in terms of languages?

You can select all languages (page 143) that ARIS supports. When a user selects a language, they specify which interface, method, and database language is used. Ideally, these are available in the selected language. If a language is not available, the procedure is as follows.

INTERFACE LANGUAGE IS NOT AVAILABLE IN SELECTED LANGUAGE

Available interface languages are installed.

If you have selected the language **Quechua (Bolivia)** and this language is not available as the interface language, the interface items, for example, the links, are displayed in English.

METHOD LANGUAGE IS NOT AVAILABLE IN SELECTED LANGUAGE

The interface language is used.

For example, if you have selected the language **Quechua (Bolivia)** and this language is not available, model, object, and attribute names are displayed in English if you have selected English as the interface language.

DATABASE LANGUAGE IS NOT AVAILABLE IN SELECTED LANGUAGE

The alternative language for the database is used.

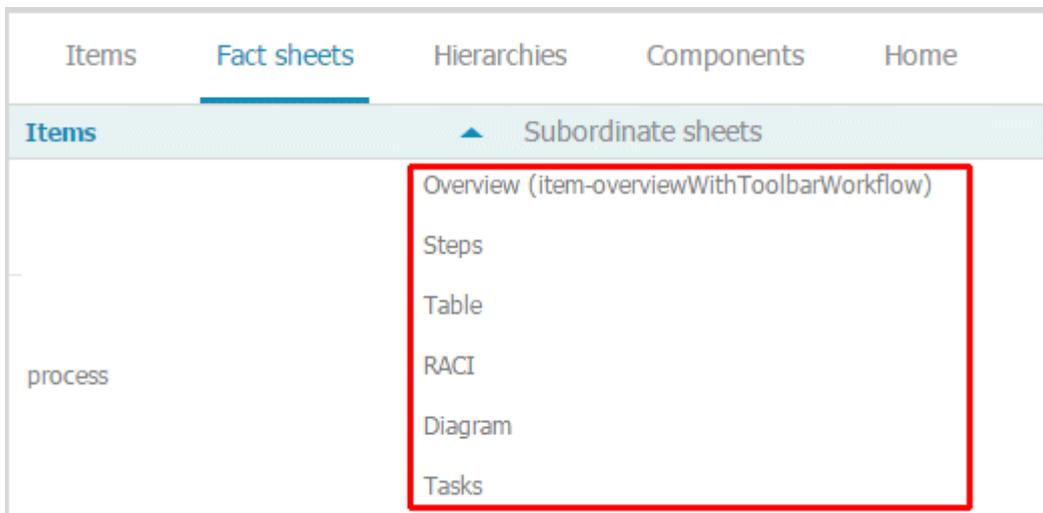
For example, if you have selected the language **Quechua (Bolivia)** and this language is not available, all entries you specify for attributes are added in the English database language if you have selected English as the alternative language. In ARIS Connect Designer, for example, the current database language is displayed after the model name using a language code.

3.7.1.4.12.3 What can be configured in fact sheets?

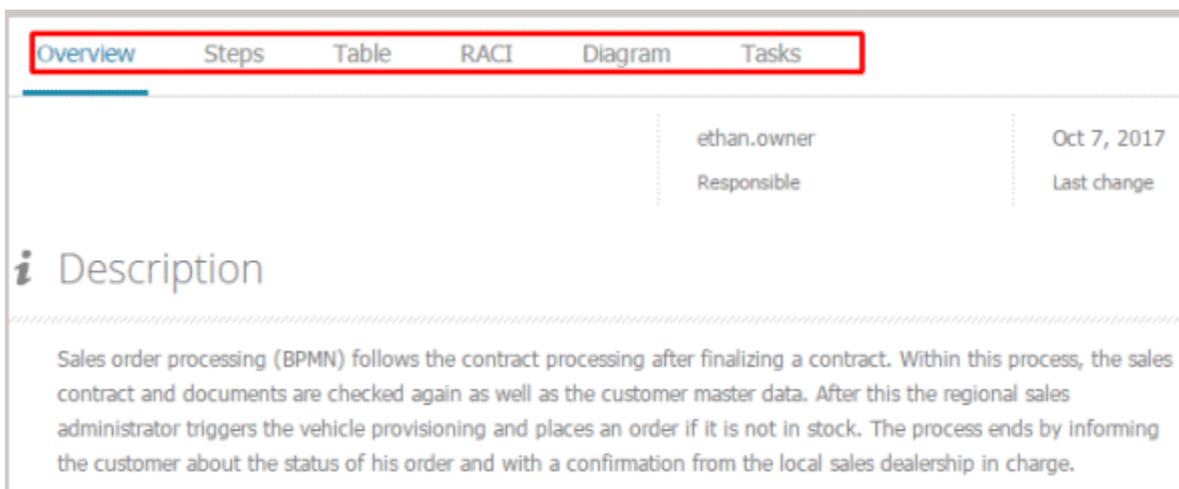
Using fact sheets, you configure how the pages are displayed that open when you click a process in the navigation. The fact sheet for a process includes the subordinate pages you defined in the fact sheet configuration (page 162).

Example

The subordinate pages shown are configured for a process:

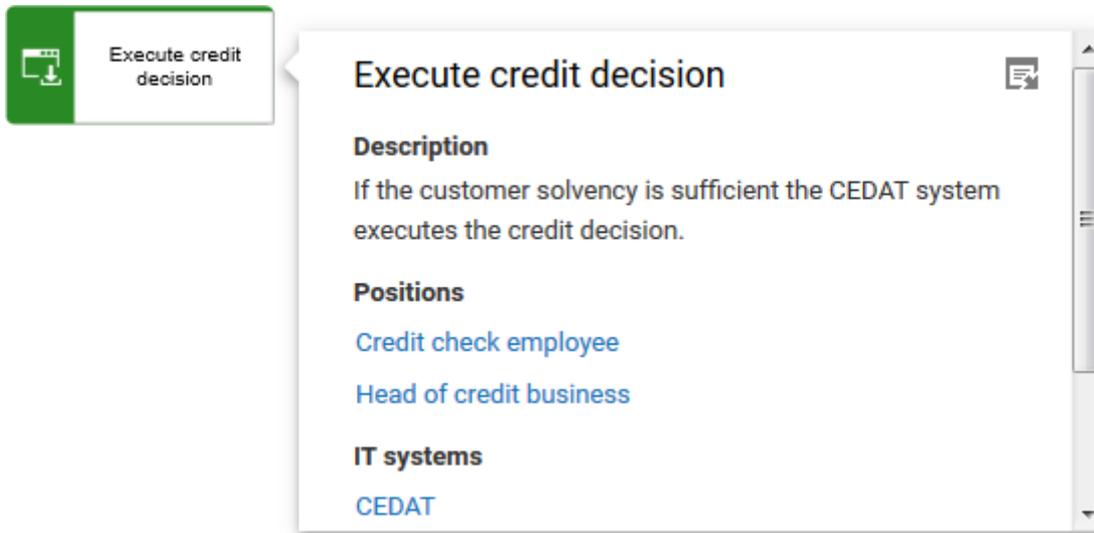


The result of configuring the fact sheet for a process looks like this:



3.7.1.4.12.4 What are mini fact sheets?

You can enable and customize mini fact sheets for objects. If you hover over an object on the **Diagram** fact sheet, they are displayed.



3.7.1.4.12.5 What property templates exist?

There are four different templates for properties:

- Text (value_meta_text)
This template is used for attribute values that consists of text.
- E-Mail (value_meta_email)
This template is used for attribute values that consists of text.
- Link (value_meta_link)
This template is used for attribute values that are links.
- Image (value_meta_image)
This template is used for attribute values that are images or links to images.

You can configure a label and/or an icon for each template can. The icon is displayed in front of the label.

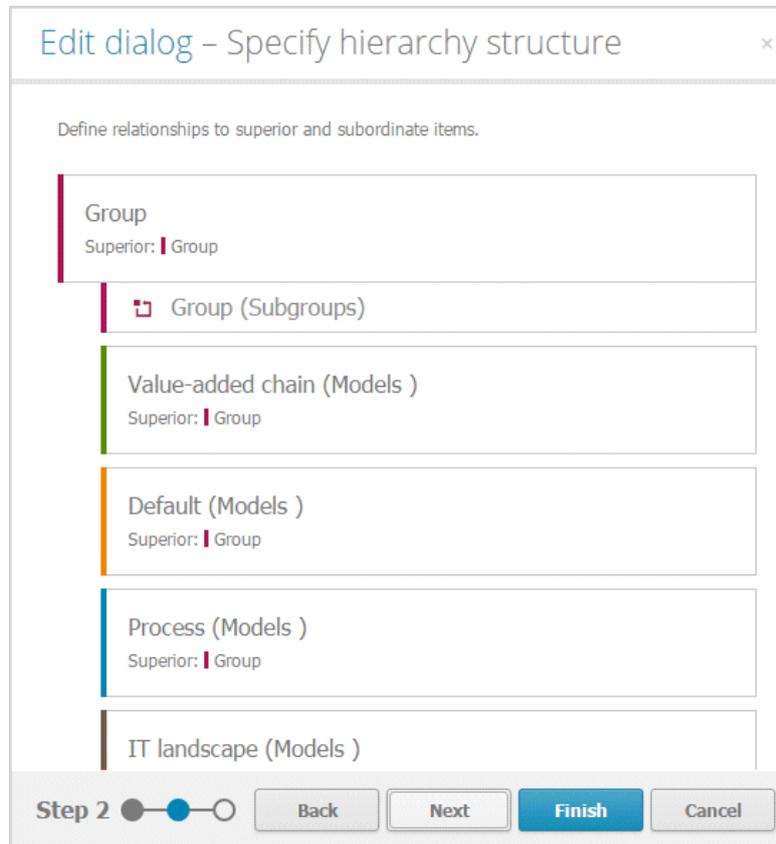
3.7.1.4.12.6 What does the navigation hierarchy define?

Using the navigation hierarchy, you define the navigation options for the portal. The example shows the configuration of the hierarchy for a group.

The second item must be of the same type as the first item. If it is not, a hierarchy cannot be created. Items of the same type are arranged without space.

Example

Subgroups and processes are configured for the group:



The screenshot shows a dialog box titled "Edit dialog - Specify hierarchy structure". The main content area is titled "Define relationships to superior and subordinate items." and contains a list of items:

- Group
Superior: | Group
- Group (Subgroups)
- Value-added chain (Models)
Superior: | Group
- Default (Models)
Superior: | Group
- Process (Models)
Superior: | Group
- IT landscape (Models)

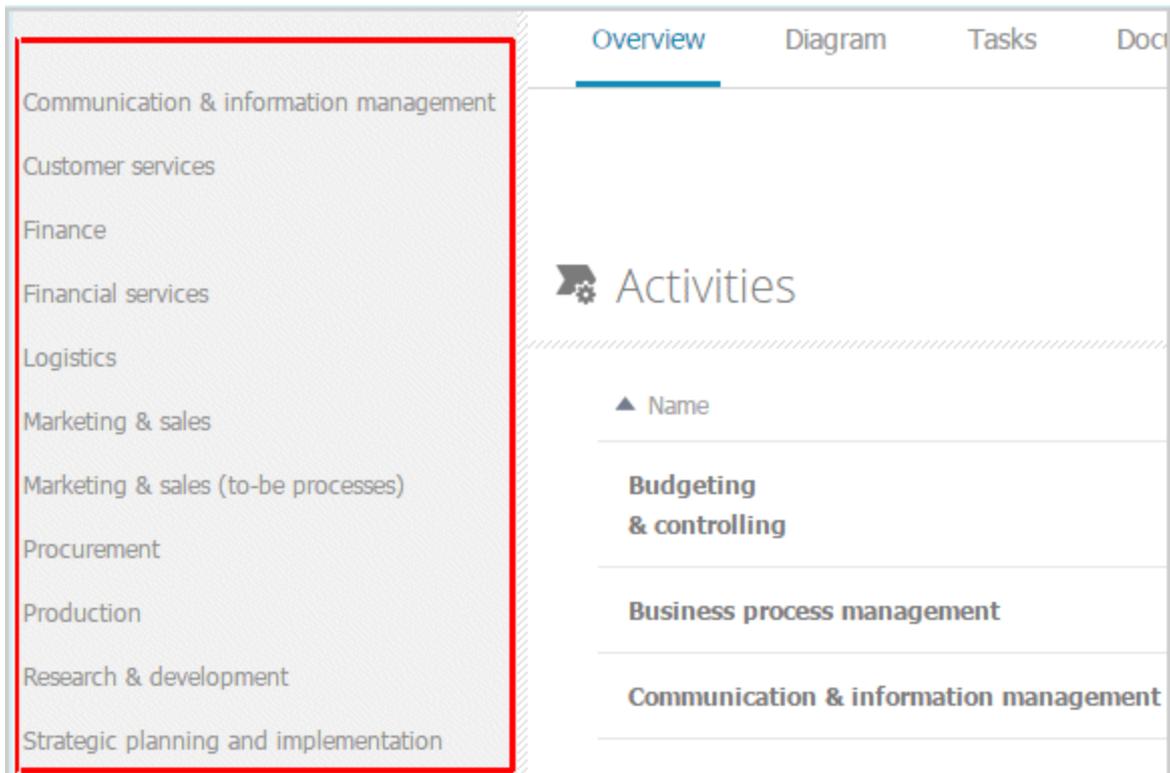
At the bottom of the dialog, there is a progress indicator showing "Step 2" with three circles (the second is filled), and four buttons: "Back", "Next", "Finish" (highlighted in blue), and "Cancel".

The result looks like this in the portal:

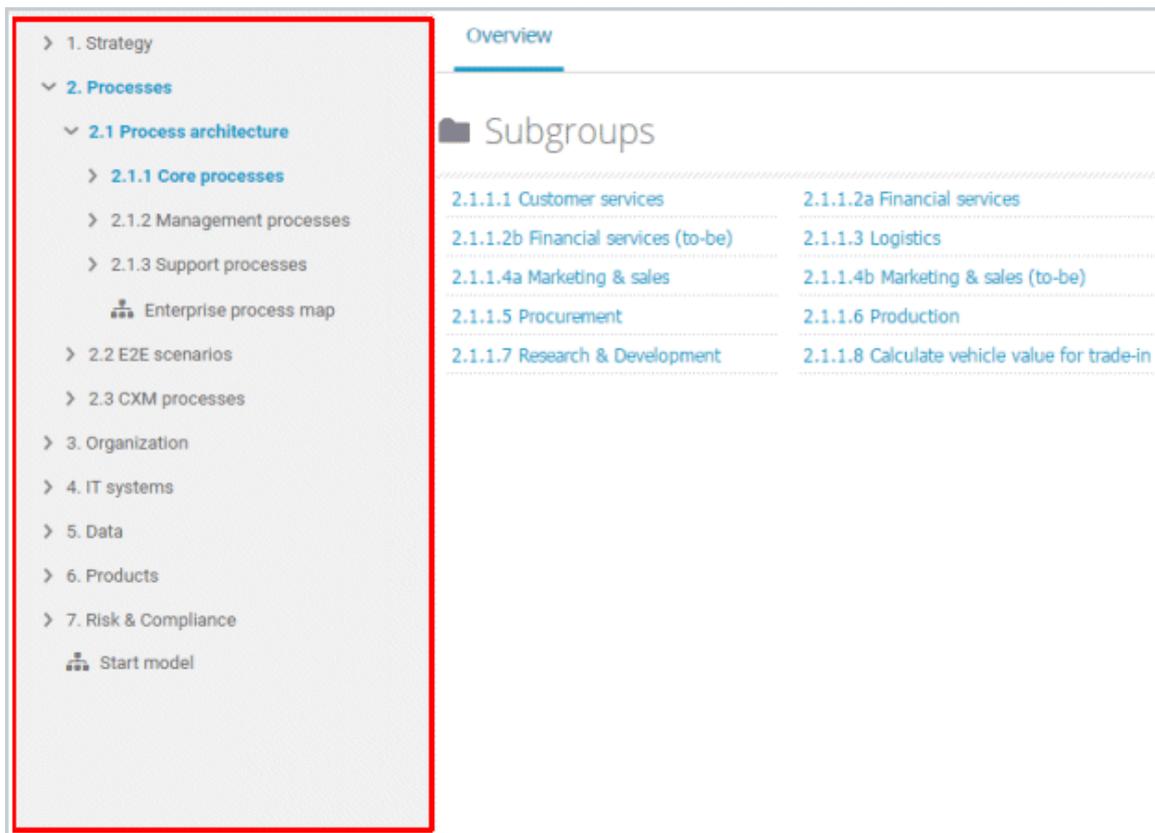
The screenshot displays the ARIS Connect Administrator System portal. The top navigation bar includes the ARIS Connect logo, a Portal icon, a user profile icon, a document icon, a search icon, and the text 'Administrator System' with a dropdown arrow. Below the navigation bar, there are links for 'Home', 'Groups', and 'Glossary'. The main content area is titled 'Main group' and features a sidebar on the left with a list of categories: 1. Strategy, 2. Processes, 3. Organization, 4. IT systems, 5. Data, 6. Products, and 7. Risk & Compliance. At the bottom of the sidebar is a 'Start model' link with a folder icon. The main content area has tabs for 'Overview' (selected) and 'More...'. Below the tabs is a 'Subgroups' section with a folder icon and a list of subgroups: 1. Strategy, 2. Processes, 3. Organization, 4. IT systems, 5. Data, 6. Products, and 7. Risk & Compliance. At the bottom of the main content area is a 'Models' section with a folder icon and a 'Start model' link.

3.7.1.4.12.7 What to remember regarding hierarchies?

Hierarchies define the way in which portal users receive relevant information. Hierarchies that are based on the **default** template have only one level.



Hierarchies that are based on the **classic** template have multiple levels, and you can expand and collapse groups.



From a technical perspective, a hierarchy always has a tree structure and is level-based. A level can be made up of models, objects, or groups. It may contain a superior item and multiple subordinate items. In contrast, a level can have multiple subordinate items.

You can use multiple hierarchy definitions in a hierarchy configuration. For example, you can specify the following hierarchy definitions in a configuration:

Navigation in process models (value-added chain diagrams, EPCs, and function allocation diagrams), navigation in the organization (organizational charts, organizational units, roles, and groups), and navigation in the IT systems within an organization.

3.7.1.4.12.8 What is a hierarchy root element?

A root element is the model or object that is used as the top-level element in the hierarchy (page 182) you have defined. This element is displayed when you open the hierarchy in the portal.

If you want to use a specific item from an ARIS database as the top-level hierarchy element, for example, a specific model or object, this must be defined as the root element. You require the GUID, which you can copy from the Properties dialog for the model or object in ARIS Architect, for example.

3.7.1.4.12.9 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 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 if you do not enter a numerical value.

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

3.7.1.4.12.10 What are plugins?

A plugin is a software extension or an optional module that adds functionality to ARIS Connect. Plugins cannot run without the main software they are integrated in.

If you want to use plugins in the portal, you need extended configuration sets with plugins enabled that you cannot configure in ARIS Administration, please contact your local Software AG sales organization (<http://www.softwareag.com>).

Plugins used together with ARIS Connect must be written in Java Script and must have a valid signature. This signature is generated by Software AG and must be copied to the server.

3.7.1.4.12.11 What states exist for plugins?

A plugin can have the following states:

- Active
The plugin can be used.
- Disabled
The plugin was manually disabled.
- Development
Either the plugin has no signature yet, or an incorrect signature was applied less than two weeks ago and needs to be adjusted.
- Invalid
Either the plugin has no signature yet, or an incorrect signature was applied more than two weeks ago and can no longer be adjusted.

3.7.2 Set up user management

You can customize general settings of your system's user management.

3.7.2.1 Export configuration

You can export configurations in order to import them into any tenant or installation and use them there. Only changed properties will be exported. Also, cross-tenant properties will not be exported as they cannot be changed using the graphical user interface.

Prerequisite

- You have the **Technical configuration administrator** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click  **User management**.
5. Click  **Export current configuration as a file**.

You can save the configuration file at the relevant location for further use.

3.7.2.2 Import configuration

You can import configurations, which were, for example, exported from a different tenant, into any tenant or installation and use them there.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click  **User management**.
5. Click  **Import configuration file**.

The **Import configuration file** dialog opens. Navigate to the location where the configuration file is stored and import it. The new configuration is active immediately and no system restart is required.

3.7.2.3 Configure user for impersonation

Impersonation enables a user to assume another user account. The user can then perform operations that are actually only permitted for the other account. This configuration must be set for each tenant.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Log in to User Management.
Click the link that was provided to you or that you have saved as a bookmark in your browser, for example, **http://myServer:1080/#myTenant/adminUsers**. The **Log in** dialog opens.
2. Enter the name of the infrastructure tenant in the  **Tenant** field, for example, **master**.
3. Enter your user name and your password.
4. Click the user for which you want to allow impersonation.
5. Click **Privileges**. The list of function privileges is displayed.
6. Click the user for which you want to allow impersonation.
7. Activate the **Impersonation** function privilege.
8. Log out.
9. Log in (page 14) to ARIS Connect.
10. Click the arrow next to your user name, and select **Administration**.
11. Click  **Configuration**.
12. Click  **User management**.
13. Click the arrow next to **Users**.
14. Click **General**.
15. Click  **Edit**.
16. Click in the **Impersonation target users** field.
17. Enter the users for which you want to allow impersonation as a comma-separated list.

Warning

If the ARIS server was updated, make sure to reenter the user names for all operational tenants in the **Impersonation target users** field again.

18. Click  **Save**.

You have allowed users to use impersonation.

3.7.2.4 Customize infrastructure

You can customize general settings of your system infrastructure, for example, format of e-mail in HTML.

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click **Infrastructure**. To configure further settings, click a configuration category (page 250).
6. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.
8. Click  **Save**.

You have customized your system configuration.

3.7.2.5 Customize Kerberos settings

Kerberos is a computer network authentication protocol that works on the basis of tickets to allow nodes communicating over a non-secure network to prove their identity to one another in a secure manner.

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **Kerberos**.
6. Click a configuration category (page 254).
7. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.6 Upload Kerberos configuration files

You can upload the Kerberos configuration file or the key table.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **Kerberos**. The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.
6. Activate the **General** configuration category.
7. To upload the key table file, click  **Upload** under the **Key table** field. To upload the configuration file, click  **Upload** under the **Configuration file** field. The dialog for uploading a file opens.
8. Select the relevant file.

You have uploaded a configuration file.

3.7.2.7 Add LDAP server

LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

You can use multiple LDAP servers with ARIS.

The migration to multiple LDAP servers is irreversible. Any existing LDAP data needs to be deleted manually before the migration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **LDAP**.
6. Click **General settings**.
7. Click  **Edit**.
8. Enable **Activate LDAP**.
9. Optional: Enable **Activate multiple LDAP integration**.
10. Click  **Save**.
11. Click  **Add**. The **Add LDAP server** dialog opens.
12. Enter the following (page 257):
 - ID of the LDAP server
 - Display name of the LDAP server
 - LDAP server URL
 - LDAP server fallback URL
 - User name of the user who has access to the LDAP content
 - Password of this user
 - Specify whether or not SSL should be used and in which mode
 - Specify whether or not host names and certificates should be verified
 - Specify the connection timeout
13. Specify the read timeout
14. Click  **Save**.

You have added an LDAP server.

If you want to specify more than one LDAP server, proceed with step 10 of the procedure steps mentioned above.

3.7.2.8 Test connection to an LDAP server

LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

You can use multiple LDAP servers with ARIS.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **LDAP**.
6. Select the relevant LDAP server.
7. Click **Connection**.
8. Click  **Test connection**.

A message is displayed, whether or not the connection to the LDAP server specified is valid.

3.7.2.9 Edit connection to an LDAP server

LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

You can use multiple LDAP servers with ARIS.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **LDAP**.
6. Select the relevant LDAP server.
7. Click **Connection**.
8. Click  **Edit**.
9. Enter the following (page 257):
 - ID of the LDAP server
 - Display name of the LDAP server
 - LDAP server URL

- LDAP server fallback URL
- User name of the user who has access to the LDAP content
- Password of this user
- Specify whether or not SSL should be used and in which mode
- Specify whether or not host names and certificates should be verified
- Specify the connection timeout
- Specify the read timeout

10. Click  **Save**.

You have edited an LDAP server connection.

3.7.2.10 Upload LDAP truststore file

You can upload the truststore file.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **LDAP**.
6. Click **General settings**.
7. Click **Truststore**.
8. Click  **Upload**. The **Truststore** dialog opens.
9. Select the relevant file.

You have uploaded a truststore file

3.7.2.11 Customize LDAP settings

LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **LDAP**.
6. Click a configuration category (page 257).
7. Select the relevant LDAP server.
8. Click a configuration category (page 257).
9. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

10. Adjust your settings.
11. Click  **Save**.

You have customized your system configuration.

3.7.2.12 Customize ARIS for LDAP server operations

You can configure ARIS for LDAP server operations.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click  **User management**.
5. Click the arrow next to **LDAP**.
6. Click **General settings**.
7. Click  **Edit**.
8. Enable **Activate LDAP**.
9. If you want to upload a configuration, ensure that you have disabled pop-up blockers in the browser.
Click **Truststore**.
10. Click  **Upload**. The **Truststore** dialog opens.
11. Select the relevant LDAP server.
12. Configure the URL for the LDAP system. Click **Connection**.
13. Enter an ID, a name, and the URL in the **Server URL** field, for example:
`ldap://hggc.mycompany.com:3168`.
14. Configure the path to the backup system in the **Server URL (fallback)** field. This backup system takes over automatically if the LDAP server cannot be reached via its primary URL.
15. Click **Behavior**.
16. Enter the Path to the user group in the **Group search paths** field.
17. Enter the Path to the users in the **User search paths** field.

To enable the function of following referrals of users to other directories, enter **follow** in the **Referral** field.

To disable the above behavior, enter **ignore** in the **Referral** field.

If you leave this entry blank, referrals are not followed.

Optional: To ensure that the import of LDAP users is carried out despite any errors that might occur, for example, if names are redundant, click **Global settings > Advanced settings** and enable **Skip errors**.

Please note that system performance is significantly deteriorated if you enable this option.

You have configured ARIS for LDAP server operations.

3.7.2.12.1 Configure secure communication

You can encrypt the communication between ARIS and the LDAP server.

To do so, you have two mutually exclusive options:

- **STARTTLS**

This transforms a connection that was originally untrusted into an encrypted connection without using a specific port.

- **SSL**

The connection between ARIS and the LDAP server is established using a specific port.

Prerequisite

- The LDAP server has a valid SSL certificate and LDAPS is activated.
- ARIS Administration trusts the LDAP server (the SSL certificate of the LDAP server or the certification authority is stored in the JRE database of trustworthy certificates).

STARTTLS

You can use STARTTLS to configure encrypted communication between ARIS and the LDAP server.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click  **User management**.
5. Click the arrow next to **LDAP**.
6. Select the relevant LDAP server.
7. Click **Connection**.
8. Click  **Edit**.
9. Configure the URL for the LDAP system. To do so, enter the URL as in the **Server URL** field, for example:
`ldap://hggc.mycompany.com:3168.`
10. Configure the path to the backup system in the **Server URL (fallback)** field. This backup system takes over automatically if the LDAP server cannot be reached via its primary URL.
11. Enable **Use SSL**.
12. Select **STARTTLS** from the **SSL mode** list.
13. ARIS must trust the LDAP server used. Therefore, we recommend that you use the LDAP server with a certificate signed by a public certification authority. If your certificate is signed by a public certification authority and stored in the list of trustworthy certificates of your JRE, you do not need to configure anything else.
14. Upload LDAP truststore file (page 230).

SSL

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click  **User management**.
5. Click the arrow next to **LDAP**.
6. Select the relevant LDAP server.
7. Click **Connection**.
8. Click  **Edit**.
9. Configure the URL for the LDAP system. To do so, enter the URL as in the **Server URL** field, for example:
`ldap://hggc.mycompany.com:3168.`
10. Configure the path to the backup system in the **Server URL (fallback)** field. This backup system takes over automatically if the LDAP server cannot be reached via its primary URL.
11. Enable **Use SSL**.
12. Select **SSL** from the **SSL mode** list.
13. ARIS must trust the LDAP server used. Therefore, we recommend that you use the LDAP server with a certificate signed by a public certification authority. If your certificate is signed by a public certification authority and stored in the list of trustworthy certificates of your JRE, you do not need to configure anything else.
14. Upload LDAP truststore file (page 230)

3.7.2.12.2 Allow login for LDAP users only

To allow only LDAP users to log in to ARIS Architect and My tasks, you need to configure the system accordingly.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click  **User management**.
5. Click the arrow next to **LDAP**.
6. Click the arrow next to **General settings**.
7. Click **Advanced settings**.
8. Enable **Prevent login of manually created users**.

Only LDAP users and the following users can log in: **system, superuser, arisservice, and guest**.

3.7.2.12.3 Configure single sign-on

If you are using Microsoft® Active Directory Domain Services, you can configure SSO (single sign-on). This allows users to work with all ARIS components as soon as they are logged in to the domain. Separate login to ARIS components is not required.

Please contact your LDAP administrator for this.

Prerequisite

Server

- Users who want to use SSO must have a valid Microsoft® Active Directory Domain Services user login.
- This user is available in ARIS Administration.
- ARIS Administration authenticates against LDAP.
- Microsoft® Active Directory Domain Services supports Kerberos-based authentication (default) and the service principal name of the ARIS Server is entered in the following format: **HTTP/<hostname>**, for example, **HTTP/mypc01.my.domain.com**.

Client

- The client computers and servers are connected to the same Microsoft® Active Directory Domain Services.
- The browser has been configured accordingly.

3.7.2.12.3.1 Use Kerberos

Kerberos is a network authentication, allowing nodes to communicate using an invisible network and to securely make their identity known to each other. Kerberos is the recommended method for user authentication in Microsoft® Windows networks. In addition, it is widely used with Linux operating systems and is designed for use with all major platforms.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **User management**.
5. Click the arrow next to **Kerberos**.
6. Activate the **General** configuration category.

If you do not have a Kerberos configuration file, take the **kbr5.conf** from your installation media under **Add-ons\Kerberos**. Name it, for example, **krb5.conf**, add the following lines, and adjust the configuration to meet your requirements.

```
[libdefaults]
default_tgs_etypes = des-cbc-md5 des-cbc-crc des3-cbc-sha1 aes128-cts
aes128-cts-hmac-sha1-96 aes256-cts aes256-cts-hmac-sha1-96 rc4-hmac
arcfour-hmac arcfour-hmac-md5
default_tkt_etypes = des-cbc-md5 des-cbc-crc des3-cbc-sha1 aes128-cts
aes128-cts-hmac-sha1-96 aes256-cts aes256-cts-hmac-sha1-96 rc4-hmac
arcfour-hmac arcfour-hmac-md5
permitted_etypes = des-cbc-md5 des-cbc-crc des3-cbc-sha1 aes128-cts
aes128-cts-hmac-sha1-96 aes256-cts aes256-cts-hmac-sha1-96 rc4-hmac
arcfour-hmac arcfour-hmac-md5
```

7. To upload the configuration file, click  **Upload** under the **Configuration file** field.
8. Click  **Edit**.
9. Enable **Use Kerberos**.
10. In the **Principal** field, enter the technical user name given by the administrator.
If the Service Principal Name in the keytab is, for example, **mypc01@MY.DOMAIN.COM**, the values of the property **com.company.aris.umc.kerberos.servicePrincipalName** must contain the Service Principal Name exactly as specified in the keytab file.
11. In the **Realm** field, configure the realm for the Kerberos service. Enter the fully qualified domain name in uppercase letters.
Example: **MYDOMAIN.COM**.
12. In the **KDC** field, configure the fully qualified name of the KDC to be used.
13. **Optional:**
 - a. Click **Advanced settings**.
 - b. Enable **Debug output**.

The debug output of the program that the user wishes to log into is saved in the file **system.out** of the respective program. For user management, for example, this is

located in the directory **<ARIS installation directory>/work_umcadmin_m/base/logs**.

You have configured SSO using Kerberos in ARIS Administration.

You can use Kerberos with multiple LDAP systems (page 307).

CLIENT CONFIGURATION

Configure the browser settings to allow SSO. SSO has been tested with the following browsers:

- Microsoft® Internet Explorer® (version 11 or higher)
- Mozilla Firefox®

Prerequisite

- You have the **Technical configuration administrator** function privilege.
- SSO must be configured for the servers.
- The browser used supports a Kerberos-based authentication.

You need to empty the Kerberos ticket cache of each client first, in order to avoid obsolete tickets if Microsoft® Active Directory Domain Services were changed. Delete the Kerberos ticket cache by executing the command **klist.exe purge**. If the purge program is not available on the client computer, you can also simply log off the client computer from the domain and log in again.

MICROSOFT® INTERNET EXPLORER®

Microsoft® Internet Explorer® supports Kerberos authentication only if the ARIS Server is part of your local intranet.

Procedure

1. Start Microsoft® Internet Explorer®.
2. Click **Tools > Internet Options**.
3. Activate the **Security** tab and click **Local Intranet**.
4. Click **Sites**, and select **Advanced**.
5. Add the URL of the ARIS Server that was configured for SSO. Add the DNS host name and the IP address of the ARIS Server.
6. Optional: Disable the **Require server verification (https:) for all sites in this zone** check box.
7. Click **Close**, and select **OK**.
8. Click **Custom level** and make sure that no user-defined settings affect your new settings.
9. Find the **User Authentication** section. Verify whether the **Automatic logon only in Intranet zone** option is enabled.
10. Click **OK**.
11. Close and restart Microsoft® Internet Explorer®.

MOZILLA FIREFOX®

In Mozilla Firefox®, you can define trustworthy sites using the computer name, IP address, or a combination of both. You can use wildcards.

Procedure

1. Start Mozilla Firefox®.
2. Enter **about:config** in the address box and press **Enter**. Confirm a message, if required.
3. Enter **network.negotiate** in the **Search** box and press **Enter**, if required.
4. Double-click **network.negotiate-auth.trusted-uris**.
5. Enter the computer name or the IP address of the ARIS Server that you configured for SSO, and click **OK**.
6. Close and restart Mozilla Firefox®.

If you prefer to use an encryption stronger than AES 128bit and this is allowed in your country, replace the JCE Policy file of the JDK of your ARIS Server with the Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files 6 (<http://www.oracle.com/technetwork/java/javase/downloads/index.html>). This allows unlimited key length.

If you cannot replace the Policy files, but still want to use SSO, you need to apply a procedure allowed by the JDK for encrypting Kerberos tickets, for example, AES 128bit.

3.7.2.12.3.2 Use SAML

SAML (**S**ecurity **A**ssertion **M**arkup **L**anguage) is an XML framework for exchanging authentication and authorization information. SAML provides functions to describe and transfer security-related information.

Prerequisite

- The SAML identity provider supports the HTTP POST binding as specified by the SAML 2.0 specification.
- You have the **Technical configuration administrator** function privilege.
- If you use multiple LDAP systems, the user names must be unambiguous through all LDAP systems. Otherwise no SSO is possible.
- SSO must be configured for the servers.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **User management**.
5. Click the arrow next to **SAML**.
6. Click **General**.
7. Click  **Edit**.
8. Enable **Use SAML**.
9. Enter the ID of the identity provider in the **Identity provider ID** field.
10. Enter the ID of the service provider in the **Service provider ID** field.
11. Enter the end point of the identity provider that is used for single sign-on in the **Single sign-on URL** field.
12. Enter the end point of the identity provider that is used for single log-out in in the **Single logout URL** field.

You have configured SSO using SAML in ARIS Administration. If you use multiple LDAP systems (page 307), the user names must be unambiguous through all LDAP systems. Otherwise no SSO is possible.

You can use SAML with multiple LDAP systems (page 307).

3.7.2.13 Delete LDAP server

LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

Prerequisite

- You have the **Technical configuration administrator** function privilege.
- Your system is configured to allow multiple LDAP servers.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **LDAP**.
6. Select the relevant LDAP server.
7. Click **Connection**.
8. Click  **Delete**.

You have deleted an LDAP server.

3.7.2.14 Customize user-defined notifications

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Variables (page 277) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body.

Prerequisite

- You have the **Technical configuration administrator** function privilege.
- You have uploaded (page 242) the relevant templates for user-defined notifications.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **User-defined notifications**.
6. Click a configuration category (page 266).
7. Click  **Edit**.
8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.14.1 Upload templates for notifications

You can upload the templates for user-defined notifications.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **User-defined notifications**.
6. Click a category.
7. Click  **Upload**. The dialog for uploading a file opens.
8. Click **Select file**. Select the relevant file.
9. Click **Upload**. A confirmation prompt is displayed.
10. Click **Close**.

You have uploaded a template for notifications.

3.7.2.14.2 Customize default HTML templates for notifications

You can customize the templates for user-defined notifications. Variables (page 277) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **User-defined notifications**.
6. Click a category.
7. Click  **Upload**. The corresponding dialog opens.
8. Enable **Advanced template configuration**.
9. Select **Default**.
10. Adjust your settings.
11. If you want to preview the HTML template, click **Preview**. An e-mail is sent to your user and you can check the template you are customizing. If you want to exchange the logo, make sure that the logo is saved on the server to grant access whenever e-mails are automatically sent.
12. Click **Save**.

You have customized the default HTML e-mail template.

3.7.2.14.3 Customize HTML templates for multiple locales

You can customize the templates for user-defined notifications. Variables (page 277) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **User-defined notifications**.
6. Click a category.
7. Click  **Upload**. The corresponding dialog opens.
8. Enable **Advanced template configuration**.
9. Select a locale.
10. Adjust your settings.
11. If you want to preview the HTML template, click **Preview**. An e-mail is sent to your user and you can check the template you are customizing. If you want to exchange the logo, make sure that the logo is saved on the server to grant access whenever e-mails are automatically sent.
12. Click **Save**.

You have customized the HTML e-mail template for a locale. If an e-mail is sent to a user and a notification language is specified for this user, the corresponding HTML template is now used for this language.

3.7.2.15 Customize password policy

You can customize the password policies such as length or strength of a password depending on the use of special characters, numbers, etc.

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **Password policy**.
6. Click a configuration category (page 278).
7. Click  **Edit**.
8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.16 Customize SAML

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration. ARIS supports SAML 2.0.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **SAML**.
6. Click a configuration category (page 281).
7. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.16.1 Upload keystore file

You can upload the keystore file.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **SAML**.
6. Click **Keystore**.
7. Click  **Upload**. The dialog for uploading a file opens.
8. Select the relevant file.

You have uploaded a keystore file.

3.7.2.16.2 Upload truststore file

You can upload the truststore file.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **SAML**.
6. Click **Truststore**.
7. Click  **Upload**. The dialog for uploading a file opens.
8. Select the relevant file.

You have uploaded a truststore file

3.7.2.17 Customize security settings

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **Security**.
6. Click a configuration category (page 290).
7. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.18 Customize SMTP settings

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **SMTP**.
6. Click a configuration category (page 298).
7. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.19 Customize user settings

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Activate **User Management**.
5. Click the arrow next to **Users**.
6. Click a configuration category (page 302).
7. Click  **Edit**.
8. Adjust your settings.
9. Click  **Save**.

You have customized your system configuration.

3.7.2.20 Valuable information

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

3.7.2.20.1 What is impersonation?

Users manage tenants on behalf of the user **superuser**. This requires the creation of these users in the user management for the infrastructure tenant, for example, master (page 224). To use impersonation, users require the **Impersonation** function privilege in the infrastructure tenant.

For Tenant Management, they also require the **User administrator, Tenant administrator**, and **Technical configuration administrator** function privileges.

In all other operational tenants, for example, **default**, the user **superuser** must be defined as the target for impersonation. Impersonation enables users to back up tenants in which they do not exist as a user.

To back up and restore the data, the **superuser** user requires the following function privileges in all operational tenants:

- Analysis administrator
- ARCM administrator
- Collaboration administrator
- Database administrator
- Dashboard administrator
- Document administrator
- License administrator
- Portal administrator
- Process Governance administrator
- Server administrator
- Technical configuration administrator
- User administrator

3.7.2.20.2 What infrastructure properties are available?

You can customize your system infrastructure (page 225) as required.

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure umcadmin_<size of your installation, s, m, or l> JAVA-D<property name>=<"<value>"
```

Example

```
reconfigure umcadmin_m JAVA-Dcom.aris.umc.loadbalancer.url="https://myserver.com"
```

Key	Description	Valid input	Example
com.aris.umc.version	<p>Build number</p> <p>Build number of ARIS Administration. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	String	10.0.4-SNAPSHOT
com.aris.umc.loadbalancer.url	<p>Load balancer URL</p> <p>Specifies the URL of the load balancer. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>		
com.aris.umc.notification.useHttpLinks	<p>E-mails with HTTP URLs only</p> <p>Specifies whether or not the HTTP protocol is used instead of the HTTPS protocol in e-mails.</p>	true, false.	

HTTP CLIENT

Key	Description	Valid input	Example
com.aris.umc.client.connect.timeout	<p>Connection timeout (in milliseconds)</p> <p>Specifies the duration after which a client's connection attempt is canceled. This is defined in milliseconds. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	
com.aris.umc.client.idle.timeout	<p>Idle timeout (in milliseconds)</p> <p>Specifies the wait time timeout of the ARIS Administration REST client. This is defined in milliseconds.</p>	Integer > 0	
com.aris.umc.client.read.timeout	<p>Read timeout (in milliseconds)</p> <p>Specifies the wait time timeout of the REST client for read access. This is defined in milliseconds.</p>	Integer > 0	
com.aris.umc.client.connections.max	<p>Maximum connections (total)</p> <p>Specifies the maximum number of connections that may be established simultaneously. If additional connections are to be established, they are refused.</p>	Integer > 0	
com.aris.umc.client.connections.perhost	<p>Maximum connections (per host)</p> <p>Specifies the maximum number of connections that may be established simultaneously per host. If additional connections are to be established, they are refused.</p>	Integer > 0	
com.aris.umc.client.retry.max	<p>Number of retries</p> <p>Specifies the maximum number of retries.</p>	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.ssl.host.verification.active	Host name verification Specifies whether the verification of the SSL host name is activated. Verification is enabled by default.	true, false	

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.remote.clients	Allowed remote clients Comma-separated list of client IPs that uses the remote interface of ARIS Administration.	String	
com.aris.umc.config.cache.ttl	Configuration cache lifetime Specifies the lifetime of the configuration cache in seconds. The configuration is reloaded after the time set here. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	Integer > 0	
com.aris.umc.config.encrypted	Encrypted properties Specifies a comma-separated list of encrypted property keys.	List of strings	com.softwareag.aris.umc.ldap.service.pwd
com.aris.umc.jaas.login.context	JAAS login context Specifies the login name for the JAAS context. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	String	UMC-DB

Key	Description	Valid input	Example
com.aris.umc.basicauth.tenant	<p>Default tenant</p> <p>Specifies that the default tenant is used for authentication. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	String	
com.aris.umc.infrastructure.tenant	<p>Infrastructure tenant</p> <p>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. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>		

3.7.2.20.3 What Kerberos properties are available?

You can configure Kerberos (page 226) as required.

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure umcadmin_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure umcadmin_m JAVA-Dcom.aris.umc.loadbalancer.url="https://myserver.com"
```

GENERAL

Key	Description	Valid input	Example
com.aris.umc.kerberos.active	Use Kerberos Specifies whether a Kerberos-based login is allowed.	true, false	
com.aris.umc.kerberos.kdc	KDC Specifies the fully qualified name of the central Key Distribution Center (KDC) . This is usually the fully qualified host name of the LDAP server.	String	mykdc.mydomain.com
com.aris.umc.kerberos.realm	Realm Specifies the realm of Kerberos tickets. Fully qualified domain name in uppercase letters.	String	MY.CORP.SOFTWAREA G.COM
com.aris.umc.kerberos.servicePrincipalName	Principal Specifies the name of the technical user used for verifying Kerberos tickets. If Kerberos is used, each user, computer or service provided by a server must be defined as a principal.	String	MyLogin

Key	Description	Valid input	Example
com.aris.umc.kerberos.keyTab	<p>Key table</p> <p>Specifies the location of the keytab file that is used for Kerberos tickets.</p> <p>The file can be uploaded directly.</p>	String	C:/safePlace/krb-umc.keytab
com.aris.umc.kerberos.config	<p>Configuration file</p> <p>Storage location of the configuration file for Kerberos.</p> <p>The file can be uploaded directly.</p>	String	./config/Kerberos/krb5.conf

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.kerberos.debug	<p>Debug output</p> <p>Specifies whether debug output is allowed for Kerberos operations.</p>	true, false	
com.aris.umc.kerberos.allowLocalUsers	<p>Allow local users</p> <p>Specifies whether the LDAP connection is mandatory for Kerberos-based login. If this option is enabled, Kerberos is used for the login of local users also.</p>	true, false	
com.aris.umc.kerberos.validateuser	<p>Ignore realm from service ticket</p> <p>Specifies whether or not the realm defined for the user principal name provided in the Kerberos ticket is to be ignored. The default value is false.</p>	true, false	

Key	Description	Valid input	Example
com.aris.umc.kerberos.tenant	Default tenant Specifies the default tenant for a Kerberos-based login. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	true, false	

3.7.2.20.4 What LDAP properties are available?

You can customize LDAP (page 231) as required.

GENERAL SETTINGS

Key	Description	Valid input	Example
com.aris.umc.ldap.active	Activate LDAP Specifies whether or not the LDAP integration is enabled.	true, false	
com.aris.umc.ldap.multi.active	Activate multiple LDAP integration Specifies whether or not integration of multiple LDAP servers is to be activated. The default value is false .	true, false	
com.aris.umc.ldap.connection.count	Configured LDAP server count Displays the number of LDAP servers allowed.	Integer	2

TRUSTSTORE

Key	Description	Valid input	Example
com.aris.umc.ldap.ssl.truststore.location	Truststore Specifies where to look for the truststore.	String	
com.aris.umc.ldap.ssl.truststore.password	Password Specifies the truststore password.	String	
com.aris.umc.ldap.ssl.truststore.type	Type Specifies the truststore type to be used.	String	

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.ldap.debug	Debug output Specifies whether or not debug information for LDAP operations are output.	true, false	false
com.aris.umc.ldap.group.import.parent.enabled	Import superior group Specifies whether the superior group is to be imported automatically when the group is imported.	true, false	false
com.aris.umc.ldap.user.importOnLogin	Import user at login Specifies whether an LDAP user is to be imported automatically during the login attempt.	true, false	false
com.aris.umc.ldap.sync.user.importGroups	Import user groups when synchronizing Specifies whether additional user groups are to be imported during user synchronization.	true, false	false
com.aris.umc.ldap.attribute.memberOf.resolveOnFirstLogin	Update group associations at login Specifies whether the memberOf attribute is read (true) or not (false). If the value of the property is true , the memberOf attribute is read and the referenced groups are automatically imported. The import of the groups occurs when a user from the group logs in for the first time.	true, false	
com.aris.umc.ldap.attributes.paging.enabled	Use attribute value pagination Specifies whether a page break is to be inserted if the server-side limit for valid values is exceeded for attributes, for example, if more than 1,500 attribute values exist.	true, false	

Key	Description	Valid input	Example
com.aris.umc.ldap.auth.only	<p>Prevent login of manually created users</p> <p>Specifies that only LDAP users may log in. This does not apply to the arisservice, guest, superuser, and system users.</p>	true, false	
com.aris.umc.ldap.entity.cache.size	<p>Cache size</p> <p>Specifies the maximum number of LDAP entities that are cached during an import.</p>	Integer > 0	3500
com.aris.umc.ldap.connection.current.timeout	<p>Pool wait time (in milliseconds)</p> <p>Specifies the maximum amount of time in milliseconds that a connection request may take if the maximum number of connections to the LDAP server was exceeded.</p>	Integer > 0	
com.aris.umc.ldap.connection.pool.size	<p>Pool size</p> <p>Specifies the maximum number of connections that are ready for reuse in a pool. The connection that was used last is discarded when the pool is full.</p>	Integer > 0	
com.aris.umc.ldap.connection.pool.timeout	<p>Pool time (in milliseconds)</p> <p>Specifies the maximum amount of time that a connection remains in a pool. The connection is removed from the pool at the latest after this period of time. This is defined in milliseconds.</p>	Integer > 0	
com.aris.umc.ldap.sync.skipOnFault	<p>Skip errors</p> <p>Specifies whether the LDAP import ignores users or user groups for which errors occurred without showing an error message.</p>	true (without message), false (with error message)	

Key	Description	Valid input	Example
com.aris.umc.ldap.sync.members.searchBottomUp	Use bottom-up method Specifies whether the bottom-up method (memberOf attribute) or the top-down method (hasMember attribute) is applied when associating users to user groups.	true, false	false
com.aris.umc.ldap.sync.useDnAsGuid	Use DN as GUID Specifies that the fully qualified name (distinguished name) is used as GUID.	true, false	false

INDIVIDUAL LDAP SERVER

You can specify the properties of each individual LDAP server.

CONNECTION

Key	Description	Valid input	Example
com.aris.umc.ldap.connection.id plus the ID defined.	ID Specifies the unique ID of this specific LDAP connection.	String	
com.aris.umc.ldap.connection.name plus the ID defined.	Name Specifies the name of this specific LDAP connection.	String	
com.aris.umc.ldap.url	Server URL Specifies the URL of the LDAP server.	String	
com.aris.umc.ldap.backup.url	Server URL (fallback) Specifies the fallback URL of the LDAP server. This URL is only used if the server cannot be reached via its primary URL.	String	

Key	Description	Valid input	Example
com.aris.umc.ldap.service.user	User name Specifies the user name of the LDAP user.	String	arisldapservice
com.aris.umc.ldap.service.pwd	Password Specifies the password of the LDAP user.	String	
com.aris.umc.ldap.ssl	Use SSL Specifies if SSL is to be used.	true, false	
com.aris.umc.ldap.ssl.mode	SSL mode Specifies the SSL mode (page 233).	String	STARTTTLS
com.aris.umc.ldap.ssl.host.verification.active	Verify host names Specifies if an SSL host is to be verified.	true, false	
com.aris.umc.ldap.ssl.certificate.verification.active	Verify certificates Specifies whether an SSL certificate is to be verified.	true, false	
com.aris.umc.ldap.connection.current	Simultaneous connections Specifies the maximum number of simultaneous connections to the same LDAP server. If additional connections are to be established, they are refused.	Integer > 0	
com.aris.umc.ldap.timeout	Connection timeout (in milliseconds) Specifies the duration after which the attempt to connect to the LDAP server is canceled. This is defined in milliseconds.	Integer > 0	
com.aris.umc.ldap.read.timeout	Read timeout (in milliseconds) Specifies the maximum amount of time that read access may take. This is defined in milliseconds.	Integer > 0	

ATTRIBUTE MAPPINGS

Key	Description	Valid input	Example
com.aris.umc.ldap.attribute.objectclass	objectClass Specifies the attribute that contains the object class.	String	objectClass
com.aris.umc.ldap.attribute.distinguishedname	DN Specifies the fully qualified name (distinguished name).	String	distinguishedName
com.aris.umc.ldap.attribute.guid	GUID Specifies the LDAP GUID.	String	Object GUID

GROUP ATTRIBUTE MAPPINGS

Key	Description	Valid input	Example
com.aris.umc.ldap.attribute.group.name	Name Specifies the group name.	String	Group name
com.aris.umc.ldap.attribute.hasmember	hasMember Specifies the attribute that references the members of a group.	String	hasMember
com.aris.umc.ldap.group.attributes.userdefined	User-defined Specifies a comma-separated list of LDAP attributes that are to be imported as user-defined attributes of a user group.	String	Description, operating system

USER ATTRIBUTE MAPPINGS

Key	Description	Valid input	Example
com.aris.umc.ldap.attribute.user.name	Name Specifies the user name of a user.	String	Fragment

Key	Description	Valid input	Example
com.aris.umc.ldap.attribute.user.firstname	First name Specifies the first name of a user.	String	John
com.aris.umc.ldap.attribute.user.lastname	Last name Specifies the last name of a user.	String	Smith
com.aris.umc.ldap.attribute.user.email	E-mail address Specifies the e-mail address of a user.	String	john.smith@softwareag.com
com.aris.umc.ldap.attribute.user.phone	Telephone number Specifies the telephone number of a user.	String	+491234567
com.aris.umc.ldap.attribute.user.picture	Picture Specifies the picture of a user.	Location of an image	
com.aris.umc.ldap.attribute.memberof	memberOf Specifies the attribute that references the groups of a user.	String	memberOf
com.aris.umc.ldap.user.attributes.userdefined	User-defined Specifies a comma-separated list of LDAP attributes that are to be imported as user-defined attributes of a user.	String	Description, operating system

BEHAVIOR

Key	Description	Valid input	Example
com.aris.umc.ldap.group.objectclass	Group object class Object class of the LDAP groups.	String	Group

Key	Description	Valid input	Example
com.aris.umc.ldap.user.objectclasses	User object class Specifies the object class of the LDAP user.	String	Organizational unit
com.aris.umc.ldap.searchpath	Search paths Specifies a semicolon-separated list of all LDAP search paths.	String	OU\=stadt\,OU\=location\ OU\=employees\,DC\=my\,DC\=corp\ DC\=company\,DC\=com
com.aris.umc.ldap.group.searchpath	Group search paths Specifies a semicolon-separated list of all LDAP search paths for user groups. Overwrites the list of general search paths.	String	OU\=distribution lists\,DC\=my,DC\=corp\,DC\=company\,DC\=com
com.aris.umc.ldap.user.searchpath	User search paths Specifies a semicolon-separated list of LDAP search paths for users. Overwrites the list of general search paths.	String	OU\=employees\,DC\=my\,DC\=corp\ DC\=company\,DC\=com
com.aris.umc.ldap.filter.group	Group search filter Specifies the query filter for LDAP groups.	String	(&(objectClass=role)(name=y*))
com.aris.umc.ldap.filter.user	User search filter Specifies the query filter for LDAP users.	String	(&(sAMAccountName=*))
com.aris.umc.ldap.recursion.depth	Recursion depth Specifies the recursion depth that is to be used for nested groups and users.	1 means one level, 0 means all	1

Key	Description	Valid input	Example
com.aris.umc.ldap.pagesize	Page size Specifies the maximum number of entries that are loaded in a single LDAP query.	Integer > 0	
com.aris.umc.ldap.referral	Referrals Defines how referrals to other LDAP systems are processed.	follow means that the referral is automatically	ignore

3.7.2.20.5 What properties are available for user-defined notifications?

You can customize the user-defined notifications (page 241) as required.

Variables (page 277) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body.

USERS

Key	Description	Valid input	Example
com.aris.umc.notification.userCreated.message	Notify about creation Specifies whether users are to be notified after they have been created.	true, false	
com.aris.umc.notification.userCreated.subject	User created - Subject Subject of the notification that is sent when a user has been created.	String	
com.aris.umc.notification.userCreated.message	User created - Message Specifies the text of the notification that is sent when a user has been created.	String	
com.aris.umc.notification.userCreated.template	User created - HTML template Specifies the HTML template used for the notification that is sent when users are notified that they have been created. The template must have been uploaded previously.		
com.aris.umc.notification.userDisabled.enabled	Notify about deactivation Specifies whether users are to be notified after they have been deactivated.	true, false	

Key	Description	Valid input	Example
com.aris.umc.notification.userDisabled.subject	User deactivated - Subject Specifies the subject of the notification that is sent when a user has been deactivated.	String	
com.aris.umc.notification.userDisabled.message	User deactivated - Message Specifies the text of the notification that is sent when a user has been deactivated.	String	
com.aris.umc.notification.userDisabled.template	User deactivated - HTML template Specifies the HTML template used for the notification that is sent when users are notified that they have been deactivated. The template must have been uploaded previously.		
com.aris.umc.notification.userEnabled.enabled	Notify about activation Specifies whether users are to be notified after they have been activated.	true, false	
com.aris.umc.notification.userEnabled.subject	User activated - Subject Specifies the subject of the notification that is sent when a user has been activated.	String	
com.aris.umc.notification.userEnabled.message	User activated - Message Specifies the text of the notification that is sent when a user has been activated.	String	
com.aris.umc.notification.userEnabled.template	User activated - HTML template Specifies the HTML template used for the notification that is sent when users are notified that they have been activated. The template must have been uploaded previously.	String	

PASSWORDS

Key	Description	Valid input	Example
com.aris.umc.notification.passwordChanged.enabled	<p>Notify about password change</p> <p>Specifies whether users are to be notified after their password has been changed.</p>	true, false	
com.aris.umc.notification.passwordChanged.subject	<p>Password change - Subject</p> <p>Specifies the subject of the notification that is sent when a password has been changed.</p>	String	
com.aris.umc.notification.passwordChanged.message	<p>Password change - Message</p> <p>Specifies the text of the notification that is sent when a password has been changed.</p>	String	
com.aris.umc.notification.passwordChanged.template	<p>Password change - HTML template</p> <p>Specifies the HTML template used for the notification that is sent when a user is to be notified about a password change. The template must have been uploaded previously.</p>		
com.aris.umc.notification.passwordReset.enabled	<p>Notify about password reset</p> <p>Specifies whether users are to be notified after their password has been reset.</p>	true, false	
com.aris.umc.notification.passwordReset.subject	<p>Password reset - Subject</p> <p>Specifies the subject of the notification that is sent when a password has been reset.</p>	String	

Key	Description	Valid input	Example
com.aris.umc.notification.passwordReset.message	Password reset - Message Specifies the text of the notification that is sent when a password has been reset.	String	
com.aris.umc.notification.passwordReset.template	Password reset - HTML template Specifies the HTML template used for the notification that is sent when a user is to be notified about a password reset. The template must have been uploaded previously.		
com.aris.umc.notification.passwordResetRequested.enabled	Notify about password reset request Specifies that users are to be notified if they have requested a password reset.	true, false	
com.aris.umc.notification.passwordResetRequested.subject	Password reset request - Subject Specifies the subject of the notification that is sent when a user has requested a password reset.	String	
com.aris.umc.notification.passwordResetRequested.message	Password reset request - Message Specifies the text of the notification that is sent when a user has requested a password reset.	String	
com.aris.umc.notification.passwordResetRequested.template	Password reset request - HTML template Specifies the HTML template used for the notification that is sent when a user has requested a password reset. The template must have been uploaded previously.		

LICENSES

Key	Description	Valid input	Example
com.aris.umc.notification.licenseExpired.enabled	Notify about license expiration Specifies whether administrators with the License management privilege are to be notified when a license has expired.	true, false	true
com.aris.umc.notification.licenseExpired.subject	License has expired - Subject Specifies the subject of the notification that is sent when a license has expired.	String	
com.aris.umc.notification.licenseExpired.message	License has expired - Message Specifies the text of the notification that is sent when a license has expired.	String	
com.aris.umc.notification.licenseExpired.template	License has expired - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license has expired. The template must have been uploaded previously.		
com.aris.umc.notification.licenseExpiring.enabled	Notify before license expiration Specifies whether administrators with the License management privilege are to be notified when a license is about to expire.	true, false	true
com.aris.umc.notification.licenseExpiring.threshold	Days before expiration Specifies how many days before license expiration a notification is sent.	Integer > 0	14

Key	Description	Valid input	Example
com.aris.umc.notification.licenseExpiring.subject	<p>License will expire soon - Subject</p> <p>Specifies the subject of the notification that is sent when a license is about to expire.</p>	String	
com.aris.umc.notification.licenseExpiring.message	<p>License will expire soon - Message</p> <p>Specifies the text of the notification that is sent when a license is about to expire.</p>	String	
com.aris.umc.notification.licenseExpiring.template	<p>License will expire soon - HTML template</p> <p>Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license will soon expire. The template must have been uploaded previously.</p>		
com.aris.umc.notification.licenseSeatsConsumed.enabled	<p>Notify about license exhaustion</p> <p>Specifies whether administrators with the License management privilege are to be notified when the total number of logins allowed for the license is reached.</p>	true, false	true
com.aris.umc.notification.licenseSeatsConsumed.threshold	<p>Remaining license seats</p> <p>Defines how many license seats are allowed to be left before a notification is sent to inform users about the upcoming expiration of a license.</p> <p>In the case of named licenses, a notification is sent as soon as only the specified number of licenses are left from the total number of licenses available.</p> <p>In the case of concurrent licenses, a notification is sent as soon as only the specified number of logins are left.</p>	Integer > 0	5

Key	Description	Valid input	Example
com.aris.umc.notification.licenseSeatsConsumed.subject	License exhaustion - Subject Specifies the subject of the notification that is sent when the total number of logins allowed for the license is reached.	String	
com.aris.umc.notification.licenseSeatsConsumed.message	License exhaustion - Message Specifies the text of the notification that is sent when a license has expired.	String	
com.aris.umc.notification.licenseSeatsConsumed.template	License exhaustion - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license will soon expire. The template must have been uploaded previously.		

TENANTS

Key	Description	Valid input	Example
com.aris.umc.notification.tenantDeleted.enabled	Notify about deletion Specifies whether a notification is sent if a tenant was deleted.	true, false	true
com.aris.umc.notification.tenantDeleted.sendToAll.enabled	Notify all users about deletion Specifies whether a notification is to be sent to all users.	true, false	true
com.aris.umc.notification.tenantDeleted.subject	Tenant deleted - Subject Specifies the subject of the notification that is sent if a tenant was deleted.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.tenantDeleted.message	Tenant deleted - Message Specifies the text of the notification that is sent if a tenant was deleted.	String	
com.aris.umc.notification.tenantDeleted.template	Tenant deleted - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been deleted. The template must have been uploaded previously.		
com.aris.umc.notification.tenantDisabled.enabled	Notify about deactivation Specifies whether a notification is sent if a tenant was deactivated.	true, false	true
com.aris.umc.notification.tenantDisabled.sendToAll.enabled	Notify all users about deactivation Specifies whether a notification is sent to all users if a tenant was deactivated.	true, false	true
com.aris.umc.notification.tenantDisabled.subject	Tenant deactivated - Subject Specifies the subject of the notification that is sent if a tenant was deactivated.	String	
com.aris.umc.notification.tenantDisabled.enabled	Tenant deactivated - Message Specifies the text of the notification that is sent if a tenant was deactivated.	String	
com.aris.umc.notification.tenantDisabled.template	Tenant deactivated - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been deactivated. The template must have been uploaded previously.		

Key	Description	Valid input	Example
com.aris.umc.notification.tenantEnabled.enabled	Notify about activation Specifies whether a notification is sent if a tenant was activated.	true, false	true
com.aris.umc.notification.tenantEnabled.sendToAll.enabled	Notify all users about activation Specifies whether a notification is sent to all users if a tenant was activated.	true, false	true
com.aris.umc.notification.tenantEnabled.subject	Tenant activated - Subject Specifies the subject of the notification that is sent if a tenant was activated.	String	
com.aris.umc.notification.tenantEnabled.message	Tenant activated - Message Specifies the text of the notification that is sent if a tenant was activated.	String	
com.aris.umc.notification.tenantEnabled.template	Tenant activated - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been activated. The template must have been uploaded previously.		

MULTI-FACTOR AUTHENTICATION

Key	Description	Valid input	Example
com.aris.umc.notification.otpRequested.enabled	Notify about one-time password request Specifies whether users are to be notified if they have requested a one-time password.	true, false	
com.aris.umc.notification.otpRequested.subject	One-time password request - Subject Subject of the notification that is sent when a user has requested a one-time password.	String	
com.aris.umc.notification.otpRequested.message	One-time password request - Message Text of the notification that is sent when a user has requested a one-time password.	String	
com.aris.umc.notification.otpRequested.template	One-time password request - HTML template Specifies the HTML template used for the notification that is sent when a user has requested a one-time password. The template must have been uploaded previously.		
com.aris.umc.notification.otpSecretChanged.enabled	Notify about token secret change Specifies whether users are to be notified if their token secret has been changed.	true, false	
com.aris.umc.notification.otpSecretChanged.subject	Token secret change - Subject Subject of the notification that is sent when the token secret has been changed by a user.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.otpSecretChanged.message	Token secret change - Message Text of the notification that is sent when the token secret has been changed by a user.	String	
com.aris.umc.notification.otpSecretChanged.template	Token secret change - HTML template Specifies the HTML template used for the notification that is sent when a user has changed the token secret. The template must have been uploaded previously.		

OAUTH

Key	Description	Valid input	Example
com.aris.umc.notification.signupCompleted.enabled	Notify about signup Specifies whether administrators are to be notified if a new user has signed up.	true, false	
com.aris.umc.notification.signupCompleted.subject	Signup complete - Subject Subject of the notification that is sent when a new user has signed up.	String	
com.aris.umc.notification.signupCompleted.message	Signup complete - Message Text of the notification that is sent when a new user has signed up.	String	
com.aris.umc.notification.signupCompleted.template	Signup complete - HTML template Specifies the HTML template used for the notification that is sent when a new user has signed up. The template must have been uploaded previously.		

3.7.2.20.6 What variables can be used for user-defined notifications?

Variables (page 277) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body. The following variables are supported:

TEXT NOTIFICATIONS:

- @tenant.name - Name of the tenant the user belongs to
- @user.login - Login of a user receiving notifications
- @user.givenName - First name of a user receiving notifications
- @user.lastName - Last name of a user receiving notifications
- @user.password - (New) password of a user receiving notifications

The following variables are supported for license-related events:

- @license.serial - Serial number of a license
- @license.productName - Name of a licensed product
- @license.expiry - Expiration date of a licensed product in the format YYYY-MM-DD

HTML NOTIFICATION

- \${tenant.name} - Name of the tenant the user belongs to
- \${user.login} - Login of a user receiving notifications
- \${user.givenName} - First name of a user receiving notifications
- \${user.lastName} - Last name of a user receiving notifications
- \${user.password} - (New) password of a user receiving notifications

The following variables are supported for license-related events:

- \${license.serial} - Serial number of a license
- \${license.productName} - Name of a licensed product
- \${license.expiry} - Expiration date of a licensed product in the format YYYY-MM-DD

3.7.2.20.7 What properties are available for password policies?

You can customize your password policies (page 245) as required.

GENERAL

Key	Description	Valid input	Example
com.aris.umc.password.length.min	Minimum length Specifies the minimum length of a password.	Integer > 0	
com.aris.umc.password.length.max	Maximum length Specifies the maximum length of a password.	0 < Integer < 47	
com.aris.umc.password.characters.lowercase.min	Minimum number of lowercase letters Specifies the minimum number of lowercase letters in a password.	Integer > 0	
com.aris.umc.password.characters.uppercase.allowed	Allow uppercase letters Specifies whether uppercase letters are allowed in a password.	true, false	
com.aris.umc.password.characters.uppercase.min	Minimum number of uppercase letters Specifies the minimum number of uppercase letters in a password.	Integer > 0	
com.aris.umc.password.characters.numeric.allowed	Allow numbers Specifies whether numbers are allowed in a password.	true, false	
com.aris.umc.password.characters.numeric.min	Minimum number of numbers Specifies the minimum number of numbers that must be contained in a password.	Integer > 0	
com.aris.umc.password.characters.special.allowed	Allow special characters Specifies whether special characters are allowed in a password.	true, false	

Key	Description	Valid input	Example
com.aris.umc.password.characters.special.min	Minimum number of special characters Specifies the minimum number of special characters in a password.	Integer > 0	
com.aris.umc.password.characters.special.set	Special characters Specifies which characters are special characters.	String	*\$-+?&=!%{}/ _

EXPIRING PASSWORDS

Key	Description	Valid input	Example
com.aris.umc.password.expiry.active	Activate expiring passwords Specifies whether passwords are set to be valid only for a specific amount of time. This is defined for a single tenant. Once the password has expired, the user is directed to a Web site enabling the password to be changed. Thereafter, the user is redirected to the application.	true, false	
com.aris.umc.password.expiry.days	Password lifetime Specifies the period of time in days after which a password expires. This is defined for a single tenant.	Integer > 0	

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.password.change.forceAfterReset	Force change after reset Specifies whether a user must change the password if it was reset (and sent via e-mail). This is defined for a single tenant.	true, false	
com.aris.umc.password.change.forceDifference	Force different password Specifies whether the new password must differ from the old one. This is defined for a single tenant.	true, false	
com.aris.umc.password.change.forceOnFirstLogin	Force change before first login Specifies whether a user must change the password upon first login. This is defined for a single tenant.	true, false	
com.aris.umc.password.reset.confirmation.active	Activate reset confirmation Specifies whether a user must confirm a password reset.	true, false	
com.aris.umc.password.reset.confirmation.ttl	Link lifetime Specifies the time in minutes during which a user can click the link sent by e-mail in order to confirm the password.	Integer > 0	30

3.7.2.20.8 What SAML properties are available?

You can configure SAML (page 246) as required.

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure umcadmin_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure umcadmin_m JAVA-Dcom.aris.umc.loadbalancer.url="https://myserver.com"
```

GENERAL

Key	Description	Valid input	Example
com.aris.umc.saml.active	Use SAML Specifies whether an SAML-based login is allowed.	true, false	false
com.aris.umc.saml.binding	Binding Specifies the binding used for sending authentication requests to the identity provider. Defines how the redirecting of the authentication is performed. The options are Redirect or POST .		POST
com.aris.umc.saml.identity.provider.id	Identity provider ID Specifies the ID of the identity provider.	String	
com.aris.umc.saml.service.provider.id	Service provider ID Specifies the ID of the service provider.	String	

Key	Description	Valid input	Example
com.aris.umc.saml.identity.provider.sso.url	<p>Single sign-on URL</p> <p>Specifies the end point of the identity provider that is used for single sign-on.</p>		
com.aris.umc.saml.identity.provider.logout.url	<p>Single logout URL</p> <p>Specifies the end point of the identity provider that is used for single log-out.</p>		

SIGNATURE

Key	Description	Valid input	Example
com.aris.umc.saml.signature.assertion.active	<p>Enforce signing of assertions</p> <p>Enforces that SAML assertions must be signed. If set, all assertions received by the application must be signed. Assertions sent by the application are signed.</p>	true, false	false
com.aris.umc.saml.signature.request.active	<p>Enforce signing of requests</p> <p>Enforces that the SAML authentication requests must be signed. If set, all requests received by the application must be signed. Requests sent by the application are signed.</p>	true, false	false

Key	Description	Valid input	Example
com.aris.umc.saml.signature.response.active	Enforce signing of responses Enforces that the SAML response must be signed. If set, all responses received by the application must be signed. Responses sent by the application are signed.	true, false	false
com.aris.umc.saml.signature.metadata.active	Enforce signing of metadata Enforces that the SAML metadata must be signed. If set, the service provider metadata file provided by the application is signed.	true, false	false
com.aris.umc.saml.signature.algorithm	Signature algorithm Specifies the algorithm for the signature. The algorithm can be selected from the list.	String	

KEYSTORE

Key	Description	Valid input	Example
com.aris.umc.saml.keystore.location	Keystore Specifies the location of the keystore file used for validating SAML assertions. The keystore must have been uploaded previously.		
com.aris.umc.saml.keystore.alias	Alias Specifies the alias name that is used to access the keystore.	String	
com.aris.umc.saml.keystore.password	Password Specifies the password that is used to access the keystore.	String	
com.aris.umc.saml.keystore.type	Type Specifies the type of the keystore to be used. The keystore type can be selected from a list.	String	JKB

TRUSTSTORE

Key	Description	Valid input	Example
com.aris.umc.saml.truststore.location	Truststore Specifies the location of the truststore file used for validating SAML assertions. The truststore must have been uploaded previously.		
com.aris.umc.saml.truststore.alias	Alias Specifies the alias to be used for accessing the truststore.	String	
com.aris.umc.saml.truststore.password	Password Specifies the password to be used for accessing the truststore.	String	
com.aris.umc.saml.truststore.type	Type Specifies the type of the truststore.	String	JKB

USER ATTRIBUTES

Key	Description	Valid input	Example
com.aris.umc.saml.attribute.firstname	First name Specifies the attribute name to be used for reading first names from a SAML assertion.	String	John
com.aris.umc.saml.attribute.lastname	Last name Specifies the attribute name to be used for reading last names from a SAML assertion.	String	Doe
com.aris.umc.saml.attribute.email	E-mail address Specifies the attribute name to be used for reading e-mail addresses from a SAML assertion.	String	jd@company.com
com.aris.umc.saml.attribute.phone	Telephone number Specifies the attribute name to be used for reading phone numbers from a SAML assertion.	Integer	01234567
com.aris.umc.saml.attribute.memberof	Member of Attribute that references the groups of a user.	String	Main group
com.aris.umc.saml.attribute.userdefined	User-defined Comma-separated list of attributes to be imported as user-defined attributes of the user.		

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.saml.login.mode.dn.active	Login using DN Specifies whether login is to be tried using the fully qualified name instead of the user name.	true, false	
com.aris.umc.saml.login.mode.keyword.active	Decompose DN Specifies whether the fully qualified name is to be decomposed.	true, false	
com.aris.umc.saml.login.mode.keyword.name	Keyword Specifies which part of the fully qualified name is to be used for login.	true, false	
com.aris.umc.saml.auth.context.classes.refs	Authentication context classes Specifies the authentication context classes to request, meaning which strength of the authentication is defined. For example, you specify that users must use Kerberos if you define Microsoft® Windows as the Authentication context class and the Authentication context comparison as exact .	String	
com.aris.umc.saml.auth.context.comparison	Authentication context comparison Specifies the authentication context comparison to request, meaning you specify whether other authentication procedures are allowed or not. For example, you specify that users must use Kerberos if you define Microsoft® Windows as the Authentication context class and the Authentication context comparison as exact .	String	
com.aris.umc.saml.auth.nameid.format	NameID format Specifies in which format the user ID is transferred to ARIS Administration.	String	

Key	Description	Valid input	Example
com.aris.umc.saml.login.users.create	<p>Automatically create user</p> <p>Defines whether or not the user specified in the SAML assertion should be created automatically if the user does not already exist. The default value is false. The following restrictions apply to automatically created users:</p> <ul style="list-style-type: none"> ▪ The Login attribute is set to the name specified in the assertion. ▪ The distinguished name attribute is set to the name specified in the assertion (only if the name is in an appropriate format). ▪ A manual login is not possible if the password and e-mail attributes are not maintained. 	true, false	false
com.aris.umc.saml.assertion.timeoffset	<p>Clock skew (in seconds)</p> <p>Specifies the time offset between identity provider and service provider in seconds. Assertions are accepted if they are received within the permitted time frame.</p>		60
com.aris.umc.saml.assertion.ttl	<p>Assertion lifetime (in seconds)</p> <p>Specifies the maximum lifetime of a SAML assertion in seconds.</p>		10
com.aris.umc.saml.service.provider.assertion.consumer.url.override	<p>Assertion consumer service URL</p> <p>Specifies that the Assertion Consumer Service URL used in SAML authentication requests can be overwritten. The URL must be specified in the format of http(s)://hostname/umc/rest/saml/itsso. If no specification is made, the URL is derived from the HTTP request.</p>		

Key	Description	Valid input	Example
com.aris.umc.saml.tenant	<p>Default tenant</p> <p>Specifies the default tenant that is to be used for the SAML-based login.</p> <p>Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	String	default

3.7.2.20.9 What security properties are available?

You can customize the security settings (page 247) as required.

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure umcadmin_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure umcadmin_m JAVA-Dcom.aris.umc.loadbalancer.url="https://myserver.com"
```

ACCOUNT LOCKOUT

Key	Description	Valid input	Example
com.aris.umc.authentication.lock.enabled	Lock users after failed login attempts Specifies whether a user login is temporarily locked when a user causes too many failed logins. The default value is false .	true, false	
com.aris.umc.authentication.lock.counter.limit	Attempt limit Specifies the number of failed login attempts that are allowed before user login is locked.	Integer > 0	
com.aris.umc.authentication.lock.timeout	Lockout duration (in seconds) Specifies how long a user login is temporarily locked when a user causes too many failed logins. This is defined in seconds.	Integer > 0	
com.aris.umc.authentication.lock.counter.ttl	Lock counter duration (in seconds) Time that must elapse before the number of failed login attempts is reset. This is defined in seconds.	Integer > 0	

USER SESSIONS

Key	Description	Valid input	Example
com.aris.umc.session.renewal.cache.size	<p>Session cache size</p> <p>Specifies how many session IDs are saved in the session renewal cache. When the cache is full, the least recently used sessions are removed. This is defined in seconds. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	
com.aris.umc.session.renewal.cache.ttl	<p>Session cache lifetime (in seconds)</p> <p>Specifies the maximum duration in seconds that a renewed session remains in the session renewal cache. A session can be renewed at the earliest after this period of time. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	
com.aris.umc.session.identifier.generator	<p>Session ID generator</p> <p>Specifies the random number generator used for generating session IDs.</p>	String	
com.aris.umc.session.identifier.length.min	<p>Minimum length of session ID (in bytes)</p> <p>Specifies the minimum length of a session ID in bytes. For security reasons this value should not be less than 32.</p>	Integer > 0	
com.aris.umc.session.identifier.length.max	<p>Maximum length of session ID (in bytes)</p> <p>Specifies the maximum length of a session ID in bytes.</p>	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.session.concurrent.max	<p>Maximum concurrent sessions</p> <p>Specifies the maximum number of concurrent sessions that can be active for a single user. This does not apply to the arisservice and superuser users.</p>	Integer > 0	

MULTI-FACTOR AUTHENTICATION

Key	Description	Valid input	Example
com.aris.umc.authentication.multiFactor.active	<p>Use multi-factor authentication</p> <p>Specifies whether multi-factor authentication is required. The default value is false. You can use the multi-factor authentication only in API Portal and ARIS Cloud.</p>	true, false	
com.aris.umc.authentication.multiFactor.clockSkew	<p>Clock skew intervals</p> <p>Specifies the clock skew in number of intervals. One-time passwords (OTPs) that are within the valid range [currentTimeStep - clock_skew, currentTimeStep + clock_skew] are permitted. This is defined in milliseconds. You can use the multi-factor authentication only in API Portal and ARIS Cloud.</p>	Integer > 0	
com.aris.umc.authentication.multiFactor.excludedUsers	<p>Excluded users</p> <p>Specifies a comma-separated list of users for whom the multi-factor authentication is not required. You can use the multi-factor authentication only in API Portal and ARIS Cloud.</p>	String	

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.audit.enabled	<p>Generate user statistics</p> <p>Activates the user statistics. The default value is false. If you specify this as true, the following properties for distinct user statistics are enabled as default:</p> <ul style="list-style-type: none"> ▪ Log authentication ▪ Log changes to configuration ▪ Log changes to licenses/privileges ▪ Log changes to users/user groups ▪ You can disable/enable the properties mentioned above. 	true, false	false
com.aris.umc.audit.log.auth.enabled	<p>Log authentication</p> <p>Enables authentication logging. The default value is true but this property is only enabled when Generate user statistics is specified as true. The following user statistics are logged and can be exported (page 53):</p> <ul style="list-style-type: none"> ▪ Login failed ▪ Login successful ▪ Logged out ▪ Logged out by administrator 	true, false	true

Key	Description	Valid input	Example
com.aris.umc.audit.log.conf.enabled	<p>Log changes to configuration</p> <p>Enables logging of changes to the configuration. The default is allowed (default value true). The following user statistics are logged and can be exported (page 53):</p> <ul style="list-style-type: none">▪ Organizational chart deleted▪ Organizational chart updated▪ One-time password requested▪ Password changed▪ Password reset▪ Password transferred between users▪ Profile picture deleted▪ Profile picture imported▪ Privilege assigned▪ Privilege assignment removed▪ Configuration option changed▪ Configuration file deleted▪ Configuration file imported▪ Data backup imported▪ Tenant created▪ Tenant deleted▪ Tenant updated	true, false	true

Key	Description	Valid input	Example
com.aris.umc.audit.log.license.privilege.enabled	<p>Log changes to licenses/privileges</p> <p>Enables logging of changes to licenses or privileges. The default is allowed (default value true). The following user statistics are logged and can be exported (page 53):</p> <ul style="list-style-type: none">▪ License deleted▪ License imported▪ License consumed▪ License released▪ Violation of user group license limit▪ Violation of user license limit▪ Replace license file for tenant	true, false	true

Key	Description	Valid input	Example
com.aris.umc.audit.log.user.group.enabled	<p>Log changes to users/user groups</p> <p>Enables logging of changes to users or user groups. The default is allowed (default value true). The following user statistics are logged and can be exported (page 53):</p> <ul style="list-style-type: none"> ▪ User created ▪ User deleted ▪ Escalation manager assignment removed ▪ User group created ▪ User group deleted ▪ Group assigned to group ▪ Group unassigned from group ▪ User group updated ▪ LDAP data imported ▪ Synchronized with LDAP 	true, false	true
com.aris.umc.authentication.sso.only	<p>Force SSO</p> <p>Specifies that only an SSO login is allowed. The default value is false.</p>	true, false	false
com.aris.umc.authentication.sso.for.downloadclient.only	<p>Force SSO for ARIS Download Client</p> <p>If this option is enabled, a user must be logged in to the portal to be able to start ARIS Download Client. The default value is false.</p>	true, false	false
com.aris.umc.authentication.delay.min	<p>Minimum authentication delay (in milliseconds)</p> <p>Specifies the minimum delay that is added at each login. This is defined in milliseconds.</p>	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.authentication.delay.max	Maximum authentication delay (in milliseconds) Specifies the maximum delay that is added at each login. This is defined in milliseconds.	Integer > 0	
com.aris.umc.otp.active	Use OTPs Specifies whether or not the generation of one-time passwords (OTPs) is allowed.	true, false	
com.aris.umc.otp.ttl	Lifetime (in seconds) Specifies the lifetime of a one-time password (OTP) in seconds. Passwords become invalid after this time period at the latest.		
com.aris.umc.license.distribution.handling	License pools at user group-level Specifies that license pools are assigned at the user group level (page 45). If this option is enabled, licenses must not be assigned to users directly, but are to be assigned via user groups only.	true, false	false

3.7.2.20.10 What SMTP properties are available?

You can configure SMTP (page 248) as required.

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure umcadmin_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure umcadmin_m JAVA-Dcom.aris.umc.loadbalancer.url="https://myserver.com"
```

CONNECTION

Key	Description	Valid input	Example
com.aris.umc.notification.smtp.host	<p>Host name</p> <p>Specifies the host name or IP address of the SMTP server.</p> <p>Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	String	localsmtp.my.corp.softwareag.com
com.aris.umc.notification.smtp.port	<p>Port</p> <p>Specifies the port for the SMTP server.</p>	Integer greater than or equal to 0, but less than or equal to 65535	
com.aris.umc.notification.sender	<p>Sender address</p> <p>Specifies the sender address for notifications. This must be a valid e-mail address.</p>	String	

Key	Description	Valid input	Example
com.aris.umc.notification.type	E-mail format Specifies the default type used for sending notifications.	String	
com.aris.umc.notification.language	Default language Specifies the default language in which notifications are sent. If this property is not defined, the server operating system language is used. If a user prefers a different locale, this locale is given preference. Otherwise, the global settings are considered.	en	
com.aris.umc.notification.smtp.authentication	Use authentication Specifies whether authentication to the SMTP server is to be used.	true, false	
com.aris.umc.notification.smtp.userName	User name Specifies the user name that is used for authentication.	String	
com.aris.umc.notification.smtp.password	Password Specifies the password that is used for authentication to the SMTP server.	String	smtppassword
com.aris.umc.notification.smtp.ssl	Use SSL Specifies whether TLS is to be used for the connection to the SMTP server.	true, false	false

Key	Description	Valid input	Example
com.aris.umc.notification.smtp.ssl.mode	<p>SSL mode</p> <p>Specifies the method to be used for a trusted connection. STARTTLS or SSL can be used. STARTTLS transforms a connection that was originally untrusted into an encrypted connection without requiring a specific port for the trusted connection. SSL establishes a trusted connection with a dedicated port immediately.</p>	STARTTLS, SSL	STARTTLS
com.aris.umc.notification.smtp.timeout	<p>Connection timeout (in milliseconds)</p> <p>Specifies the duration after which the attempt to connect to the SMTP server is canceled. This is defined in milliseconds.</p>	Integer > 0	

ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.umc.notification.debug	<p>Debug output</p> <p>Activates debugging output.</p>	true, false	
com.aris.umc.notification.smtp.retry.count	<p>Number of retries</p> <p>Specifies the number of retries for sending notifications.</p>	Integer > 0	
com.aris.umc.notification.smtp.retry.sleep.min	<p>Minimum wait time (in milliseconds)</p> <p>Specifies the minimum wait time between the retries. This is defined in milliseconds.</p>	Integer > 0	
com.aris.umc.notification.smtp.retry.sleep.max	<p>Maximum wait time (in milliseconds)</p> <p>Specifies the maximum wait time between the retries. This is defined in milliseconds.</p>	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.notification.smtp.sendrate	<p>Send rate (per second)</p> <p>Specifies the maximum number of messages sent per second. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	
com.aris.umc.notification.smtp.replyto	<p>Reply-to addresses</p> <p>Specifies a comma-separated list of reply-to addresses.</p>		
com.aris.umc.notification.threads	<p>Number of threads</p> <p>Specifies the maximum number of threads that are used for sending notifications. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	
com.aris.umc.notification.queue	<p>Maximum queue length</p> <p>Specifies the maximum number of notifications allowed in a send queue. If the send queue is too full, all subsequent notifications are refused. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	

3.7.2.20.11 What user settings properties are available?

You can customize the configuration for users (page 248) as required.

GENERAL

Key	Description	Valid input	Example
com.aris.umc.users.email.required	E-mail address required Specifies whether the E-mail address box must be specified for a user.	true, false	
com.aris.umc.users.email.validation.active	Validate e-mail address Specifies whether a check is performed when entering the e-mail address of a user to determine whether the e-mail address is valid.	true, false	
com.aris.umc.users.name.length.max	Maximum login name length Specifies the maximum length of the login names.	Integer > 0	
com.aris.umc.collaboration.picture.size.max	Maximum picture size (in bytes) Specifies the maximum size of a profile picture in bytes. The default setting is 1048576 bytes.	Integer > 0	1048576
com.aris.umc.session.system.ttl	Initial session duration (in minutes) Specifies the initial duration of a system user session in minutes.	Integer > 0	
com.aris.umc.session.system.ttl.max	Maximum session duration (in minutes) Specifies the maximum duration of a system user session in minutes.	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.impersonation.targets	Impersonation target users Specifies the users for which you want to allow impersonation (page 249).	String	
com.aris.umc.default.group	Default user group name Specifies an existing user group as default user group to which all users created afterwards will be assigned.	String	
com.aris.umc.chart.display.technicalUsers.enabled	Display technical users Specifies whether or not user statistics and charts are also displayed for technical users such as system , arisservice , superuser , and guest .	true, false	

ARISSERVICE

Key	Description	Valid input	Example
com.aris.umc.users.service.create	Generate, if not available Specifies whether the user arisservice is generated at startup, if not yet available.	true, false	
com.aris.umc.users.service.name	User name Specifies the login name of the user arisservice .	String	
com.aris.umc.users.service.email	E-mail address Specifies the e-mail address of the user arisservice .	String	

Key	Description	Valid input	Example
com.aris.umc.users.service.password	Initial password Specifies the initial password of the user arisservice .	String	

GUEST

Key	Description	Valid input	Example
com.aris.umc.users.guest.create	Generate, if not available Specifies whether the user guest is generated at startup, if not yet available.	true, false	
com.aris.umc.users.guest.name	User name Specifies the login name of the user guest .	String	
com.aris.umc.users.guest.email	E-mail address Specifies the e-mail address of the user guest .	String	
com.aris.umc.users.guest.password	Initial password Specifies the initial password of the user guest .	String	
com.aris.umc.users.guest.allow.auto.login	Automatically log in visitors Specifies that visitors are automatically logged in as a guest when accessing the ARIS Connect portal.	Integer > 0 true, false	

SUPERUSER

Key	Description	Valid input	Example
com.aris.umc.users.admin.name	User name Specifies the login name of the administrator in ARIS Administration.	String	
com.aris.umc.users.admin.email	E-mail address Specifies the e-mail address of the administrator.	String	
com.aris.umc.users.admin.password	Initial password Specifies the initial password of the administrator in ARIS Administration.	String	

SYSTEM

Key	Description	Valid input	Example
com.aris.umc.users.system.create	Generate, if not available Specifies whether the user system is generated at startup, if not yet available.	true, false	
com.aris.umc.users.system.name	User name Specifies the login name of the user system .	String	
com.aris.umc.users.system.email	E-mail address Specifies the e-mail address of the user system .	String	
com.aris.umc.users.system.password	Initial password Specifies the initial password of the user system .	String	
com.aris.umc.session.system.ttl	Initial session duration (in minutes) Specifies the initial life span of the system user session in minutes.	Integer > 0	
com.aris.umc.system.session.ttl.max	Maximum session duration (in minutes) Specifies the maximum life span of the system user session in minutes.	Integer > 0	

3.7.2.20.12 What is the default user group?

You can configure (page 248) a default user group in the ARIS Administration. This group must exist in the ARIS Administration. A user is automatically assigned to this default user group whenever a user is created.

All local users who were created after specifying a default user group are automatically assigned to this group.

You can specify an LDAP user group as default user group. All LDAP users in the LDAP group are assigned to this group.

Hidden users such as, for example, arisservice, are never assigned to the default user group.

3.7.2.20.13 What to consider using multiple LDAP servers?

KERBEROS

Even if you have configured multiple LDAP systems, you can use only one LDAP server with Kerberos authentication.

When using multiple LDAP systems, the **Ignore realm from service ticket** property under **Kerberos -> Advanced Settings** must be enabled.

SAML

If a user is created during login using SAML, the user name will not have any prefix and is assigned to the default user group. This user is not mapped to any LDAP server.

SINGLE SIGN-ON

If users have the same login ID in different LDAP servers, the Single sign-on (page 236) login fails. Users have to enter their passwords manually instead.

3.7.3 Set up Document storage

You can customize general settings of ARIS document storage.

3.7.3.1 Export configuration

You can export configurations in order to import them into any tenant or installation and use them there.

Prerequisite

- You have the **Technical configuration administrator** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click  **Export current configuration as a file**.

You can save the configuration file of ARIS document storage at the relevant location for further use.

3.7.3.2 Import configuration

You can import configurations, which were, for example, exported from a different tenant, into any tenant or installation and use them there.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click  **Import configuration file**.

The **Import configuration file** dialog opens. Navigate to the location where the configuration file is stored and import it. The new configuration is active immediately and no system restart is required.

3.7.3.3 Customize infrastructure settings

You can customize the infrastructure for your document storage, for example, the path for mobile uploads.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click **Infrastructure**. To configure advanced settings, click the arrow next to **Infrastructure** and click **Advanced settings**.
6. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.
8. Click  **Save**.

You have customized your document storage configuration (page 314).

3.7.3.4 Add third-party document management system

You can configure a third-party document management system.

The system available is Microsoft® SharePoint 2013. Please contact your local Software AG sales organization (<http://www.softwareag.com>) for other third-party document management systems.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click the arrow next to **Document management system**.
6. Click **General settings**.
7. Click  **Edit**.

8. Enable **Use third-party document management system**.
9. Optional: If you want to use more than one third-party document management system, enable **Support for multiple document management systems**.
10. Click  **Save**.
11. Click  **Add**. The **Add document management system server** dialog opens.
12. Enter the following (page 319):
 - the server ID
 - the display name of the server
 - the type of the third-party document management system
 - the server URL
 - the user name of the user allowed to access the third-party document management system content
 - the password of this user
 - the path to the root folder
 - the site collection
13. Click **Save**.

You have added a third-party document management system.

If you want to specify more than one third-party document management system, proceed with step 12 of the procedure steps mentioned above.

3.7.3.5 Test connection to a third-party document management system

You can test the connection to a third-party document management system.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click the arrow next to the relevant document management system.
6. Click **Connection**.
7. Click  **Test connection**.

A message is displayed, whether or not the connection to a third-party document management system server specified is valid.

3.7.3.6 Edit document management system

The system available is Microsoft® SharePoint 2013. Please contact your local Software AG sales organization (<http://www.softwareag.com>) for other third-party document management systems.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click the arrow next to **Document management system**.
6. Click the arrow next to the relevant document management system.
7. Click a configuration category (page 319).
8. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

9. Adjust your settings.
10. Click  **Save**.

You have customized your document storage configuration.

3.7.3.7 Delete third-party document management system

The system available is Microsoft® SharePoint 2013. Please contact your local Software AG sales organization (<http://www.softwareag.com>) for other third-party document management systems.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click the arrow next to **Document management system**.
6. Click the arrow next to the relevant document management system.
7. Click **Connection**.
8. Click  **Delete**. The **Confirmation** dialog opens.
9. Click **OK**.

You have deleted a third-party document management system.

3.7.3.8 Customize quota and restrictions

You can configure the quota and restrictions for your document storage.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click **Quota and restrictions**.
6. Click  **Edit**.
7. Adjust your settings.
8. Click  **Save**.

You have configured the quota and restrictions (page 330) for your document storage.

3.7.3.9 Configure full-text search

You can display the settings for the full-text search (page 331) in your document storage.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click **Full-text search**.
6. Click  **Edit**.
7. Adjust your settings.
8. Click  **Save**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

3.7.3.10 Configure WebDAV

You can display the WebDAV settings (page 334) in your document storage.

Prerequisite

You have the **Technical configuration administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Click <user name> and select **Administration**.
3. Click  **Configuration**.
4. Click **Document storage**.
5. Click **WebDAV**.
6. Click  **Edit**.
7. Adjust your settings.
8. Click  **Save**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

3.7.3.11 Valuable information

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

3.7.3.11.1 What infrastructure properties are available?

You can configure the infrastructure (page 309) for your document storage.

Properties that are highlighted as cross-tenant properties () can only be changed using ARIS Cloud Controller Command-line Tool (ACC). To change these settings enter the following:

```
reconfigure adsadmin_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure adsadmin_m JAVA-Dcom.aris.ads.thumbnails.queue.size="40"
```

Key	Description	Valid input	Example
com.aris.ads.filesystem.active	<p>Enable use of network share</p> <p>Specifies whether a network share or a local directory is used for storing document content. If enabled, only metadata is stored in the ARIS document storage database. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	false, true	
com.aris.ads.filesystem.path	<p>Path to the file share</p> <p>Path to a network share or a local directory where the document content is stored. If enabled, in distributed systems, all ARIS document storage instances must have access in the same way to this share or local directory. You must enter the network share in the</p>		

Key	Description	Valid input	Example
	<p>following form: \\<servername>\<directory>, for example, \\myServer\data. If you leave the preconfigured path, all data is stored in the local file system under <ARIS installation directory>\server\bin\work\work_adsadmin_m\data. You can use an absolute path to the local file system as well, for example, C:\docdata. The default is allowed (default value true).</p> <p>Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>		
com.aris.ads.audit.enabled	<p>Generate usage statistics</p> <p>Enables the generation of usage statistics. The default is allowed (default value true).</p>	true, false	
com.aris.ads.anonymous.access.allowed	<p>Allow anonymous access by link</p> <p>Specifies that API Portal allows users to anonymously access all documents by the corresponding document link. The default is allowed (default value true). Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	true, false	
com.aris.ads.link.display.document.inline	<p>Display document content in the browser</p> <p>Specifies whether the content of a document is displayed in the browser by default. If displaying the content in the browser is not possible or the option is disabled, the document is downloaded.</p>	true, false	

Key	Description	Valid input	Example
com.aris.ads.thumbnails.size	<p>Thumbnail width (in pixels)</p> <p>If the picture width is smaller than the thumbnail width specified, no thumbnail is displayed for this picture. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	160
com.aris.ads.thumbnails.thread.count	<p>Maximum number of parallel scaling threads</p> <p>Specifies the maximum number of parallel threads for scaling document thumbnails.</p>	Integer > 0	
com.aris.ads.mobile.upload.path	<p>Folder for ARIS API uploads</p> <p>Specifies the path where to store files uploaded from mobile devices.</p>	Folder	/mobileuploads
com.aris.ads.migration.skip	<p>Skip migration</p> <p>Specifies that data migration is to be skipped when the application is started for the first time after an update. The default value is false. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	true, false	
com.aris.ads.ignore.invalid.dms.config	<p>Do not validate configuration</p> <p>Specifies that the migration process ignores corrupt document management system configurations. The default value is false. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	true, false	

Key	Description	Valid input	Example
com.aris.ads.page.size	<p>Page size (default)</p> <p>Number of items that are retrieved by a single query. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	2500
com.aris.ads.page.size.max	<p>Page size (max)</p> <p>Maximum number of items that can be retrieved by a single query. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	5000
com.aris.ads.mobile.upload.path	<p>Read timeout (in milliseconds)</p> <p>Specifies the read timeout in milliseconds.</p>	Integer > 0	
com.aris.ads.dao.statistics.enabled	<p>Collect database statistics</p> <p>Collects statistics (for example, on query execution times) for all database queries. The default is allowed (default value true). Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	true, false	
com.aris.ads.config.cache.ttl	<p>Configuration cache lifetime (in seconds)</p> <p>Specifies the time to live (TTL) for internal caches in seconds. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	
com.aris.ads.config.encrypted	<p>Encrypted properties</p>	List	

Key	Description	Valid input	Example
	Specifies a comma-separated list of encrypted property keys.		
com.aris.ads.version	Build version This ARIS document storage version is currently installed. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	Number	11.0.1.123456

3.7.3.11.2 What document management system properties are available?

You can configure a third-party document management system (page 311).

The system available is Microsoft® SharePoint 2013. Please contact your local Software AG sales organization (<http://www.softwareag.com>) for other third-party document management systems.

GENERAL

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.active	Use third-party document management system Specifies whether or not a third-party document management system can be used.	true, false	
com.idsscheer.aris.ads.dms.multiple.active	Support for multiple document management systems Specifies whether or not more than one third-party document management system can be used.	true, false	
com.idsscheer.aris.ads.dms.configuration count	Number of configured document management system servers Displays the number of third-party document management systems configured. If you add an additional document management system server, the count is increased by one.	Integer	2

► Infrastructure	
▼ Document management system	
General settings	
▼ Document management system s...	Use third-party document management system <input checked="" type="checkbox"/>
Connection	Support for multiple document management systems <input checked="" type="checkbox"/>
Document attribute mappings	Number of configured document management system servers <input type="text" value="3"/>
Folder attribute mappings	

CONNECTION

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.connection.id	ID Specifies the ID of the third-party documents management system.	String	
com.idsscheer.aris.ads.dms.display.name	Name Specifies the name of the third-party document management system.	String	
com.idsscheer.aris.ads.dms.type	Type Specifies which third-party document management system is to be used, for example, Microsoft® SharePoint 2013.	SP2013, SP2016	SP2013
com.idsscheer.aris.ads.dms.url	Server URL Specifies the URL of the server on which the third-party document management system is installed.	URL	
com.idsscheer.aris.ads.dms.user	User name Specifies the user that is granted access to the third-party document management system.	String	

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.password	Password Specifies the password for accessing a third-party document management system.	String	
com.idsscheer.aris.ads.dms.root	Root folder Specifies the name under which access to a third-party document management system is granted.	String	
com.idsscheer.aris.ads.dms.site.collection	Site collection Specifies a Microsoft® SharePoint site collection or a subsite containing the document library.	Comma-separated list	

► Infrastructure

▼ Document management system

 General settings

 ▼ Document management system s...

Connection

 Document attribute mappings

 Folder attribute mappings

► Quota and restrictions

► Search

► WebDAV

ID	<input type="text" value="SPID1"/>
Name	<input type="text"/>
Type	<input type="text" value="SP2013"/>
Server URL	<input type="text" value="http://sbrbluebird03"/>
User name	<input type="text" value="Bluebird"/>
Password	<input type="password" value="*****"/>
Root folder	<input type="text" value="DocLibAds"/>
Site collection	<input type="text"/>

DOCUMENT ATTRIBUTE MAPPINGS

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.document.name	Name Specifies the field to be mapped as the name.	String	FileLeafeRef
com.idsscheer.aris.ads.dms.document.path	Path Specifies the field to be mapped as the path.	String	FileDirRef
com.idsscheer.aris.ads.dms.document.title	Title Specifies the field to be mapped as the title.	String	Title
com.idsscheer.aris.ads.dms.document.id	Identifier Specifies the field to be mapped as the identifier.	String	ID
com.idsscheer.aris.ads.dms.document.size	Size Specifies the field to be mapped as the size.	String	FileSizeDisplay
com.idsscheer.aris.ads.dms.document.owner	Owner Specifies a document owner in the third-party document management system.	String	Owner
com.idsscheer.aris.ads.dms.document.creator	Creator Specifies a document creator for a folder of a third-party document management system.	String	Author
com.idsscheer.aris.ads.dms.document.created	Created Specifies the field to be mapped as the creation date.	String	Created
com.idsscheer.aris.ads.dms.document.updated	Updated Specifies the field to be mapped as the creation date.	String	Modified

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.document.description	Description Specifies the description field for a document in the third-party document management system.	String	
com.idsscheer.aris.ads.dms.tags.holder	Tags Specifies a third-party document management system property containing the tags of the document (metadata).	Comma-separated list	
com.idsscheer.aris.ads.dms.userdefined	Additional fields Comma-separated list of additional fields to be mapped.	Comma-separated list	
com.idsscheer.aris.ads.dms.search.fields	Search fields Specifies a comma-separated list of strings that contains the names of the fields used to search for documents in a repository of a third-party document management system. The assistance of an administrator knowing which fields were configured is required.	Comma-separated list	FileLeafRef, Title

▶ Infrastructure	
▼ Document management system	
General settings	
▼ Document management system s...	
Connection	
Document attribute mappings	
Folder attribute mappings	
▶ Quota and restrictions	
▶ Search	
▶ WebDAV	
	Name <input type="text" value="FileLeafRef"/>
	Path <input type="text" value="FileDirRef"/>
	Title <input type="text" value="Title"/>
	Identifier <input type="text" value="Id"/>
	Size <input type="text" value="FileSizeDisplay"/>
	Owner <input type="text" value="Owner"/>
	Creator <input type="text" value="Author"/>
	Created <input type="text" value="Created"/>
	Updated <input type="text" value="Modified"/>
	Description <input type="text" value="Description0"/>
	Tags <input type="text" value="Keywords"/>
	Additional fields <input type="text"/>
	Search fields <input type="text" value="FileLeafRef,Title"/>

FOLDER ATTRIBUTE MAPPINGS

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.folder.name	Name Specifies the field to be mapped as the name.	String	FileLeafeRef
com.idsscheer.aris.ads.dms.folder.path	Path Specifies the field to be mapped as the path.	String	FileDirRef
com.idsscheer.aris.ads.dms.folder.id	Identifier Specifies the field to be mapped as the identifier.	String	ID
com.idsscheer.aris.ads.dms.folder.creator	Creator Specifies a folder creator for a folder of a third-party document management system.	String	Author

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.folder.created	Created Specifies the field to be mapped as the creation date.	String	Created
com.idsscheer.aris.ads.dms.folder.updated	Updated Specifies the field to be mapped as the creation date.	String	Modified
com.idsscheer.aris.ads.dms.folder.userdefined	Additional fields Comma-separated list of additional fields to be mapped.	Comma-separated list	

▶ Infrastructure	
▼ Document management system	
General settings	
▼ Document management system s...	
Connection	
Document attribute mappings	
Folder attribute mappings	
▶ Quota and restrictions	
▶ Search	
▶ WebDAV	

Name	<input type="text" value="FileLeafRef"/>
Path	<input type="text" value="FileDirRef"/>
Identifier	<input type="text" value="Id"/>
Creator	<input type="text" value="Author"/>
Created	<input type="text" value="Created"/>
Updated	<input type="text" value="Modified"/>
Additional fields	<input type="text"/>

3.7.3.11.3 What properties are available for quota and restrictions?

You can configure the quota and restrictions (page 312) for your document storage.

Key	Description	Valid input	Example
com.aris.ads.config.max.filesize	Maximum file size (in kilobytes) Specifies the maximum allowed size (in kilobytes) for file uploads.	Integer > 0	0
com.aris.ads.config.storage.quota.limit	Quota limit (in kilobytes) Specifies the maximum total size (in kilobytes) of the document storage available to a tenant.	Integer > 0	0
com.aris.ads.config.storage.quota.usage	Quota usage (in kilobytes) Amount of storage already used (in kilobytes) by uploaded documents.	Integer > 0	9678
com.aris.ads.config.supported.filetypes.filter.active	Restrict file extensions Enables or disables the file extension filter. The default is not enabled (default value false).		
com.aris.ads.config.supported.filetypes.filter	Valid file extensions Specifies a comma-separated list of allowed file extensions.	String	jpeg,jpg,png,gif,pdf,doc,docx,ppt,pptx,pps,ppsx,odt,xls,xlsx
com.aris.ads.config.supported.mimetypes.filter.active	Restrict file extensions Enables or disables the file type (MIME type) filter. The default is not enabled (default value false).	true, false	false
com.aris.ads.config.supported.mimetypes.filter	Allowed file types Specifies the list of allowed file types (MIME types).	String	text/plain,text/pdf

3.7.3.11.4 What properties for the full-text search are available?

You can display (page 313) the settings for the full-text search in your document storage.

Properties that are highlighted as cross-tenant properties (🔒) can only be changed using ARIS Cloud Controller Command-line Tool (ACC). To change these settings enter the following:

```
reconfigure adsadmin_<size of your installation, s, m, or l> JAVA-D<property name>=<value>
```

Example

```
reconfigure adsadmin_m JAVA-Dcom.aris.ads.thumbnails.queue.size="40"
```

Key	Description	Valid input	Example
com.aris.ads.thumbnails.queue.size	<p>Maximum size of thumbnail scaling queue</p> <p>Specifies the maximum size of the queue for creating document thumbnail images. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	50
com.aris.ads.ignoresearch.enabled	<p>Exclude marked items from search</p> <p>Specifies that a folder or document is to be excluded from the search operation. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual. The default value is false.</p>	True, False	False
com.aris.ads.ignoresearch.thread.count	<p>Maximum number of threads for items to be excluded from search</p> <p>Specifies the maximum number of parallel threads for scaling down items to be excluded from the search operation.</p>	Integer > 0	3

Key	Description	Valid input	Example
com.aris.ads.ignoresearch.queue.size	<p>Maximum size of the queue for items to be excluded from search</p> <p>Specifies the maximum size of the queue for folders or documents to be excluded from the search operation.</p>	Integer > 0	50
com.aris.ads.search.restriction.byrole	<p>Enable search restriction</p> <p>Enables or disables whether or not only the last approved version of a document is displayed for users with the ARIS Connect Viewer or ARIS Connect Designer license privilege.</p> <p>Approved means that the document has the metadata status approved. For a user with the ARIS Connect Designer license privilege, two links are displayed additionally, one to open the document and one to display the document details.</p> <p>The default value is false.</p>	True, False	False
com.idsscheer.aris.ads.search.elastic.document.maxsize.kb	<p>Maximum document size (in kilobytes)</p> <p>Specifies the maximum document size in Elasticsearch. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	2000
com.idsscheer.aris.ads.search.elastic.parser.memory.threshold.kb	<p>Storage limit (in kilobytes)</p> <p>Specifies the storage limit for the Elasticsearch parser. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Integer > 0	500
com.idsscheer.aris.ads.search.elastic	<p>Maximum number of parallel threads</p>	Integer > 0	10

Key	Description	Valid input	Example
tic.parser.thread.count	Specifies the maximum number of threads for parallel processing when indexing documents. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .		
com.idsscheer.aris.ads.search.elastic.parser.queue.size	Maximum queue size Specifies the maximum size of the queue for indexing documents. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	Integer > 0	10
com.aris.ads.search.term.consolidation.threshold	Threshold for word consolidation Number of recurrent words the application collects before performing an in-memory word consolidation.	Integer > 0	10000
com.aris.ads.search.parser.alwaysembedded	Use in-memory parsing for all documents Specifies that in-memory parsing is to be used for all documents regardless of their file size. The default value is false . Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	True, False	

3.7.3.11.5 What WebDAV properties are available?

You can display the WebDAV settings (page 313) in your document storage.

Key	Description	Valid input	Example
com.softwareag.ads.webdav.repository	Repository Specifies the name of the repository for which WebDAV is to be available. There can only ever be one repository per tenant.	String	apg
com.softwareag.ads.webdav.tenant	Tenant Specifies the tenant for which a WebDAV mapping exists. Please note that when you use multiple LDAP servers (page 228), WebDAV works for local users only.	String	default

3.7.4 Set up Process Governance

You can customize general settings of Process Governance.

3.7.4.1 Export configuration

You can export configurations in order to import them into any tenant or installation and use them there.

Prerequisite

- You have the **Process Governance administrator** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click  **Export current configuration as a file**.

You can save the configuration file of Process Governance at the relevant location for further use.

3.7.4.2 Import configuration

You can import configurations, which were, for example, exported from a different tenant, into any tenant or installation and use them there.

Prerequisite

- You have the **Process Governance administrator** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click  **Import configuration file**.

The **Import configuration file** dialog opens. Navigate to the location where the configuration file is stored and import it. The new configuration is active immediately and no system restart is required.

3.7.4.3 Customize infrastructure settings

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Process Governance administrator** function privilege.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click **Infrastructure**.
5. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

6. Adjust your settings (page 339).
7. Click  **Save**.

You have customized your system configuration.

3.7.4.4 Customize Publishing

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Process Governance administrator** function privilege.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click **Publishing**.
5. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

6. Adjust your settings (page 344).
7. Click  **Save**.

You have customized your system configuration.

3.7.4.5 Customize Reporting

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Process Governance administrator** function privilege.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click **Reporting**.
5. Click  **Edit**.
6. Adjust your settings (page 345).
7. Click  **Save**.

You have customized your system configuration.

3.7.4.6 Customize workflow policies

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Process Governance administrator** function privilege.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click **Workflow policies**.
5. Click  **Edit**.
6. Adjust your settings (page 346).
7. Click  **Save**.

You have customized your system configuration.

3.7.4.7 Customize pools

You can customize your system configuration as required. You carry out this part of the configuration in ARIS Administration.

Prerequisite

You have the **Process Governance administrator** function privilege.

Procedure

1. Click <user name> and select **Administration**.
2. Click  **Configuration**.
3. Click **Process Governance**.
4. Click **Pools**.
5. Click  **Edit**.

The **Cross-tenant** symbol  indicates that the settings made apply to all tenants on this server and cannot be changed.

6. Adjust your settings (page 348).
7. Click  **Save**.

You have customized your system configuration.

3.7.4.8 Set up sending notifications to Process Governance administrators

You can specify that Process Governance administrators receive e-mail notifications if problems occur during process execution for users modeled in an organizational chart relevant to Process Governance.

Prerequisite

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

Procedure

1. Assign the relevant users Process Governance administrator privileges.
2. Also, specify (page 30) the **E-mail address** attribute for the Process Governance administrators.

The Process Governance administrators will automatically receive an e-mail if problems occur during process execution, for example, if an error occurs during execution of an automated task or if the recipient of an e-mail message has not been entered as a user.

3.7.4.9 Valuable information

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

3.7.4.9.1 What infrastructure properties are available?

You can configure your Process Governance the infrastructure (page 336).

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure apg_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure apg_m JAVA-Dcom.idsscheer.age.activity.ws.call.timeout="https://myserver.com"
```

This is where you find an overview of keys and value pairs:

Key	Description	Valid input	Example
com.idsscheer.age.config.encrypted	Encrypted properties Specifies the configuration properties with encrypted values in a comma-separated list.	String	
com.idsscheer.age.activity.ws.call.timeout	Web service read timeout Specifies the timeout for read access to a Web service in milliseconds.	43200000	Number > 0

Key	Description	Valid input	Example
com.idsscheer.age.log.dblogger.severity	<p>Log level</p> <p>Specifies the log level relevant for logging messages in a log file. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>		Number > 0
com.idsscheer.age.log.monitoring.output.path	<p>Log file output path</p> <p>Specifies the output path for the system monitoring log files. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	Path on a server	
com.idsscheer.age.query.maxResults	<p>Maximum query result size</p> <p>Specifies the maximum number of items that are to be returned by a single query. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>		
com.idsscheer.age.xe.maxExecution	<p>Maximum execution time</p> <p>Specifies the maximum execution time in milliseconds for activities that support a timeout. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.</p>	43200000	Number > 0
com.idsscheer.age.autodeploy.archive	<p>Archive folder</p> <p>Specifies the location of the folder used for archiving automatically generated processes. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer</p>		

Key	Description	Valid input	Example
	to ARIS Cloud Controller (ACC) Command-line Tool manual .		
com.idsscheer.age.autodeploy.model	Input folder Specifies the location of the folder used for storing automatically generated processes. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .		
com.aris.age.email.fail.instance.on.error	Stop process instance if notification fails Specifies that running a process instance should fail if a notification cannot be successfully sent. The default is allowed (default value true).	true, false	true
com.aris.age.email.simulate.only	Simulate notifications Specifies that notifications are not to be sent to their recipients. The default value is false .	true, false	false
com.idsscheer.age.version	Build number Process Governance build number. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .		
com.idsscheer.age.node.assignment.strategy	Node assignment strategy Indicates the node assignment strategy that is currently active. The default value is TENANT_BASED. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool	TENANT_BASED, PROCESS_INSTANCE_BASED	TENANT_BASED

Key	Description	Valid input	Example
	manual. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.		
com.idsscheer.retry.failed.instances.on.restart	Restart failed process instances Specifies that a failed activity of an executable process instance is restarted with the same data if the system is available again. The default value is false .	true, false	false
com.idsscheer.age.automatic.nodes.rebalance	Redistribute process instances using the PROCESS_INSTANCE_BASED node assignment strategy Specifies that process instances are to be automatically redistributed across all active Process Governance nodes every time a new Process Governance node is added to the ARIS environment. The default is allowed (default value true). Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual.	true, false	true
com.idsscheer.age.batch.processing.size	Batch processing size Specifies the number of process instances to be processed by the engine. Instances move to QUEUED state if the current processing instances count exceeds the configured value. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual. The default value is 1000.	Integer > 0	

Key	Description	Valid input	Example
com.idsscheer.age.priority.queue.size	Priority queue size Specifies the size of the priority queue. The priority queue contains the instances that are to be run with high priority. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual . The default value is 100.	Integer > 0	

3.7.4.9.2 What Publishing properties are available?

You can configure Process Governance Publishing (page 336).

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure apg_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure apg_m JAVA-Dcom.idsscheer.age.activity.ws.call.timeout="https://myserver.com"
```

This is where you find an overview of keys and value pairs:

Key	Description	Valid input	Example
com.idsscheer.age.serviceenabling.staticExport.exportToDisk	<p>Export to server hard drive</p> <p>Specifies that a static export is to be saved on a hard drive of the server. This works only in a non-distributed scenario in which everything is installed on a single server.</p> <p>If this value is set to false, the export is saved as a ZIP file to ARIS document storage and a link is generated.</p>	true, false; the default value is true.	true
com.idsscheer.age.serviceenabling.staticExport.exportDir	<p>Static export directory</p> <p>Specifies the directory for the static export.</p>	<Installation directory>/server/bin/work/work_apg_m/base/webapps/aris/apgstatic	D:/ARIS9.5/server/bin/work/work_apg_m/base/webapps/aris/apgstatic
com.idsscheer.age.serviceenabling.staticExport.wsServer	<p>Static export link template</p> <p>Specifies the template for the link to a static export that is generated via Web service. Cross-tenant property that can only be changed</p>	http://Process Governance_	http://Process Governance_server/aris/apgstatic/234ekmfh

Key	Description	Valid input	Example
	using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	server/aris/a pgstatic/<GU ID>	kdsau4w58

3.7.4.9.3 What Reporting properties are available?

You can configure Process Governance Reporting (page 337). This is where you find an overview of keys and value pairs:

Key	Description	Valid input	Example
com.idsscheer.age.serviceenabling .scriptrunner.defaultLanguage	Default method language Specifies the default method language for the ARIS services.	en_US	en_US, de_DE
com.idsscheer.age.serviceenabling .allowed.document.directory.paths	Allowed document directory paths Restricts the directory paths that are allowed for storing or uploading documents to the server (whitelist). If no path is specified, all paths are allowed.	Path	C:\documentpath1,c:\ documentpath2,C:\do cumentpath3

3.7.4.9.4 What properties are available for workflow policies?

You can configure the workflow policies (page 337) for Process Governance.

Key	Description	Valid input	Example
com.idsscheer.age.days.workingdays.enabled	Exclude weekend Specifies whether only work days are to be considered in an escalation.	true, false	
com.idsscheer.age.days.off	Weekend days Specifies which days of the week represent the weekend in a five-day week. The week starts on Sunday (day 1) and ends on Saturday (day 7).	String	1,7 Weekends Saturday and Sunday.
com.idsscheer.age.days.publicholidays	Public holidays Specifies the public holidays. The format is DD.MM., for example, 01.01.,24.12.	Date	01.01,07.01,08.03,...
com.idsscheer.age.e.signature.enabled	E-signature (double authentication) Specifies whether or not reentering the password is necessary when completing tasks.	true, false	false
com.idsscheer.age.reminder.notification.time	Reminder notification threshold Specifies when a reminder notification is to be sent when X% of the amount of time that is expected to elapse until the due date have already been consumed. The default value is 75 %.	Number > 0	75
com.idsscheer.age.substitution.notification.enabled	Notify when a substitute is activated Specifies whether or not a notification is sent when a substitute is configured for My tasks.	true, false	false

Key	Description	Valid input	Example
com.idsscheer.age.taskList.delegation.enabled	Allow task delegation Specifies whether or not delegation of tasks to other users (Delegate/Substitution) is allowed.	true, false	true
com.idsscheer.age.taskList.startTaskConfirmation.enabled	Confirm start of task execution Specifies centrally for all users whether or not the confirmation dialog is displayed when a task is started in My tasks for the first time.	true, false	true

3.7.4.9.5 What properties are available for pools?

You can configure thread pools (page 338) for Process Governance.

Properties that are highlighted as cross-tenant properties can only be changes using ARIS Cloud Controller Command-line Tool. To change these settings enter the following:

```
reconfigure apg_<size of your installation, s, m, or l> JAVA-D<property name>="<value>"
```

Example

```
reconfigure apg_m JAVA-Dcom.idsscheer.age.activity.ws.call.timeout="https://myserver.com"
```

This is where you find an overview of keys and value pairs:

Key	Description	Valid input	Example
com.idsscheer.age.job.service.threadsNumber	<p>Pool size of job service threads</p> <p>Specifies the number of threads to be used by the job service. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual. The default value is 8.</p>	Integer > 0	8
com.idsscheer.age.simulation.instanceExecutorsPool.size	<p>Simulation pool size</p> <p>Specifies the size of the pool containing simulated process instances. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual. The default value is 5.</p>	Integer > 0	5
com.idsscheer.age.xe.dispatch.workersPool.size	<p>Pool size of dispatch worker threads</p> <p>Specifies the pool size for dispatch worker threads. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual. The default value is 10.</p>	Integer > 0	10

Key	Description	Valid input	Example
com.idsscheer.age.xe.webservice.j obs.pool.size	Pool size of web service worker threads Specifies the pool size for web service worker threads. The default value is 15. Cross-tenant property that can only be changed using ARIS Cloud Controller. For further information, refer to ARIS Cloud Controller (ACC) Command-line Tool manual .	Integer > 0	15

3.7.5 Set up Collaboration

You can customize general settings of Collaboration.

3.7.5.1 Customize Collaboration

You can customize Collaboration.

Prerequisite

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

Procedure

1. Click  **Configuration**.
2. Click **Collaboration**.
3. Click a configuration category (page 352).
4. Click  **Edit property** in the row of the property you want to configure.

If Collaboration is deactivated, the properties are also deactivated and cannot be edited.

You have configured Collaboration.

3.7.5.2 Refresh list of published databases

You can refresh the list of published databases.

Prerequisite

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

Procedure

1. Click  **Configuration**.
2. Click **Collaboration**. If Collaboration is deactivated, the properties are also deactivated and cannot be edited.
3. Click **Configure database**.
4. Click  **Refresh database list**.

You have refreshed the list of published databases..

3.7.5.3 Manually synchronize database

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 the automatic following is activated in Collaboration), this user can see 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.

You can synchronize a database manually at any time.

Prerequisite

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

Procedure

1. Click  **Configuration**.
2. Click **Collaboration**. If Collaboration is deactivated, the properties are also deactivated and cannot be edited.
3. Click **Configure database**.
4. Move the mouse cursor in the row of the database you want to synchronize.
5. Click  **Refresh database list**.

You have refreshed the content of a database for Collaboration.

3.7.5.4 What properties are available for Collaboration?

The following can be customized in Collaboration.

GENERAL SETTINGS

Key	Description	Valid input	Example
collaboration.optionsPage.enableECP	Activate Collaboration Activates Collaboration. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowCreationOfGroups	Create groups Specifies whether or not creating groups in Collaboration is allowed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowCreationOfFilters	Create filters Specifies whether or not creating filters in Collaboration is allowed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.enableLikeButton	Enable Like button Specifies whether or not the Like button is displayed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowCommenting	Create comments Specifies whether or not comments on content are allowed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowSharing	Share content Specifies whether or not sharing of content is allowed. The default is allowed (default value true).	true, false	true

Key	Description	Valid input	Example
collaboration.optionsPage.allowBookmarks	Create bookmarks Specifies whether or not creating bookmarks is allowed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowTags	Create tags Specifies whether or not creating tags is allowed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowFlags	Flag activities Specifies whether or not flagging content is allowed. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowTagFilterInMainStream	Allow tag filtering (My feed) Specifies whether or not filtering using tags is allowed on the Collaboration start page.	true, false	true
collaboration.optionsPage.allowTagFilterInFullStream	Allow tag filtering (Portal) Specifies whether or not filtering using tags is allowed in the My activities area. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.allowTagFilterInCommentStream	Allow tag filtering (My portal feeds) Specifies whether or not filtering using tags is allowed in the portal. The default is allowed (default value true).	true, false	true
collaboration.optionsPage.filterPrivateFeeds	Public access to portal feeds Specifies whether posts to model feeds are visible only if a user is following the model feed or is a member of a group that is following the model feed. The default is allowed (default value true).	true, false	true

Key	Description	Valid input	Example
collaboration.optionsPage.tagsCloudSearchOperator	<p>Use search operator 'OR' instead of 'AND'</p> <p>Specifies whether or not filtering using tags is allowed in  My feed. If an additional tag is activated, more entries are displayed in the list. The default is allowed (default value true).</p>	true, false	true
collaboration.optionsPage.enableAttachment	<p>Enable attachments</p> <p>Specifies whether or not documents from ARIS document storage can be accessed as new attachments for activities.</p>	true, false	true
collaboration.optionsPage.exportActivitiesAsZipFileInstantly	<p>Export activities as ZIP file instantly</p> <p>Specifies whether activities are exported as a ZIP file instantly or whether the ZIP file will be stored in ARIS document storage and you can download it later.</p>	true, false	true
collaboration.optionsPage.autoFollowGroup	<p>Automatically follow groups</p> <p>Specifies whether or not users are automatically followers of groups they have posted to or whose content they have commented on. The default value is false.</p>	true, false	true
collaboration.optionsPage.autoFollowUser	<p>Automatically follow users</p> <p>Specifies whether or not users are automatically followers of users they have posted to or whose content they have commented on. The default value is false.</p>	true, false	true
collaboration.optionsPage.autoFollowModel	<p>Automatically follow models</p> <p>Specifies whether or not users are automatically followers of models they have posted to or whose content they have commented on. The default value is false.</p>	true, false	true

CONFIGURE USER GROUP

Key	Description	Valid input	Example
enableAllUserGroups	Enable all user groups Enables the function based on which all ARIS user groups are displayed when users are posting in Collaboration.	true, false	false
userGroupsToHaveOwnFeedInCollaboration	Configure visibility of user groups in the collaboration Enables the function based on which a single ARIS user group is displayed when users are posting in Collaboration.	true, false	false

CONFIGURE DATABASE

Key	Description	Valid input	Example
Database	<p>Synchronize daily at</p> <p>Enables that the database is synchronized at a certain time every day if Automatically follow users/Automatically follow groups/Automatically follow models is enabled.</p> <p>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 the automatic following is activated in Collaboration), this user can see 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.</p> <p>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 following this model (Unfollow).</p>	time	

4 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.

4.1 Basics

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

4.1.1 Select language

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

Procedure

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

The language is changed.

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

4.1.2 Edit your user account

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

Procedure

1. Click **<user name> > User settings**. If the Browser window is scaled-down, click  **User icon > User settings** instead. The user data (details) is displayed.
2. Click  **Edit** to change the e-mail address, telephone number, etc. Some entries cannot be changed, such as the user name.
3. Click **Save**.
4. Click  **Change picture** to change or delete your picture. The corresponding dialog opens.
5. 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.

4.1.3 Change password

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

Procedure

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

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

4.1.4 Switch your profile

You can switch between profiles (page 64) 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.

4.1.5 Start quick search

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

Procedure

1. If more than one database is provided, select the database (page 411) your search is to be based on.
2. Click in the  **Search** box.
3. Enter the relevant term.



A list with first results (page 1044) is shown as you enter the term. As you complete the term, the list will be updated.

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

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

4.1.6 Open the search area

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

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.

You have opened the **Search** area (page 1034) and you can restrict the result to the items you want to find by using the search context and filters (page 1038).

4.1.7 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 380).

4.1.8 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>**.
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.

4.1.9 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>**.
2. Click **Administration**.

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

4.1.10 Open information window

You can view information about ARIS Connect.

Procedure

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

Information about ARIS Connect will be displayed.

4.1.11 Log out of ARIS Connect

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

Procedure

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

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

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

4.1.12 Available ARIS Connect keyboard shortcuts

The following keyboard shortcuts are available to control the program.

ARIS Connect in general (page 366)

Keyboard shortcuts for Collaboration (page 367)

PORTAL

Portal in general (page 368)

Quick start page (page 370)

Quick search (page 371)

Database selection (page 373)

Hierarchies (page 375)

List views (page 369)

Comment bar (page 374)

Matrix model (page 552)

ARIS CONNECT DESIGNER

Model tab (page 376)

Select attribute dialog (page 789)

Collaboration bar (page 375)

Modeling table (page 945)

Matrix model (page 984)

4.1.13 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.

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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.

4.1.14 Valuable information

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

4.1.14.1 What profiles include which content?

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

Profile name	Views and functionalities
CoE member	The Overview fact sheet is displayed when a model is selected in the  Portal .
Contributor	The Steps fact sheet is displayed when a model is selected in the  Portal . If the Steps fact sheet is not available, the Overview fact sheet is displayed.
Designer	The Diagram fact sheet is displayed when a model is selected in the  Portal .
Manager/Owner	The Dashboards fact sheet is displayed when a model is selected in the  Portal .
Viewer	<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.

4.1.14.2 What licenses are available in ARIS Connect?

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

DESIGNER

- The **ARIS Connect Designer** license gives users access to the entire repository. They can access models, documents, and dashboards and feeds. In the **Models & Object** area, for example, users can create, edit, and delete models in databases.
- The **ARIS Connect Designer** license can be extended with the **ARIS Aware** license. The **ARIS Aware** license allows users to view configured dashboards (page 1054) for which they have view rights. The users can view the dashboards, for example, in the Dashboards fact sheet.

VIEWER

- The **ARIS Connect Viewer** license enables users to view models in databases. This means that these users use databases for review and information purposes.
- The **ARIS Connect Viewer** license can be extended with the **ARIS Aware** license. The **ARIS Aware** license allows users to view configured dashboards (page 1054) for which they have view rights. The users can view the dashboards, for example, in the Dashboards fact sheet.
- The **Contribution** license is an additional license to users using an **ARIS Connect Viewer** license. If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you can change values of specific items (page 564), create new or reuse existing items (page 557), as well as delete items (page 559) in the  **Portal**.

4.1.14.3 Keyboard shortcuts generally available

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

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

4.1.14.4 Keyboard shortcuts for Collaboration

The following shortcuts are available in Collaboration (page 707).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
End	Moves to the lower entries if they cannot be displayed completely due to the window size or the screen resolution.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
Home	Moves to the upper entries if they cannot be displayed completely due to the window size or the screen resolution.
Tab	<ul style="list-style-type: none"> ▪ Highlights the next control or input field. ▪ Jumps from the Comment box to the  Tag,  Link, and  File symbols that you can use to attach tags, links, or files to your comment. It also jumps to the other input fields and to the Post button.
Shift + Tab	Highlights the previous control or input field.
Right arrow/ Left arrow	Moves the cursor through the text in input fields.
Up arrow/ Down arrow	Selects the previous/next item in lists.
Enter	<p>Opens the attachment fields and places the cursor in the input field if the Tag or Link symbol is selected. Opens the Select document dialog when the File symbol is selected.</p> <ul style="list-style-type: none"> ▪ Posts the comment when the Post button is selected. ▪ Executes the highlighted button. ▪ Opens the dialog/the selection list of the highlighted item.
Ctrl + Enter	Posts a comment when the Post button is active.

4.1.14.5 Keyboard shortcuts for the portal

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

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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

4.1.14.6 Keyboard shortcuts for list views

Elements are listed in list views. List views are, for example, areas such as My favorites, My activities, Recent changes, and Catalog (page 704).

Shows the current activities you are following in Collaboration (page 707) or in the portal (page 710).

Provides direct access to saved filter criteria (Seite 415) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 446).

The following shortcuts are available for these areas.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Down arrow	Moves the entries down one entry if they cannot be displayed completely due to the window size or the screen resolution.
End	When in focus: Moves to the lower entries if the contents cannot be displayed completely due to the window size or the screen resolution.
Enter	Sorts the table entries column by column in descending or ascending order if the column name is selected. Glossary and Catalog: Displays and hides the Choose items starting with the same letter and opens and closes the filter for the catalog (page 705).
F5	Updates the current view.
Home	When in focus: Moves to the upper entries if the contents cannot be displayed completely due to the window size or the screen resolution.
Left arrow	Moves the entries to the left if they cannot be displayed completely due to the window size or the screen resolution.
Page down	When in focus: Moves to the lower entries if they cannot be displayed completely due to the window size or the screen resolution.
Page up	When in focus: Moves to the upper entries if they cannot be displayed completely due to the window size or the screen resolution.
Right arrow	Moves the entries to the right if they cannot be displayed completely due to the window size or the screen resolution.
Up arrow	Moves the entries up one entry if they cannot be displayed completely due to the window size or the screen resolution.

4.1.14.7 Keyboard shortcuts for the Quick start page

The following shortcuts are available for the Quick start page (page 421).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Alt + Down arrow Alt + Up arrow	Activates the area of the tiles (page 421) for navigation.
Down arrow	If the main area has the focus: Moves the tiles (page 421) up if they cannot be displayed completely due to the window size or the screen resolution.
End	Moves to the lower tiles (page 421) if they cannot be displayed completely due to the window size or the screen resolution.
F5	Updates the current view.
Home	Moves to the upper tiles (page 421) if they cannot be displayed completely due to the window size or the screen resolution.
Page down	Displays in the visible area as many of the next tiles (page 421) as possible if they cannot be displayed completely due to the window size or the screen resolution.
Page up	Displays in the visible area as many of the previous tiles (page 421) as possible if they cannot be displayed completely due to the window size or the screen resolution.
Shift + Tab	Jumps from the selected to the next left tiles (page 421).
Space	Activates the Quick start page if the focus is on  Quick start .
Tab	Jumps from the selected to the next right tiles (page 421).
Up arrow	If the main area has the focus: Moves the tiles (page 421) down if they cannot be displayed completely due to the window size or the screen resolution.

4.1.14.8 Keyboard shortcuts for the quick search

The following shortcuts are available for the quick search (page 359).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Arrow down	Selects the next entry of the result list downwards. If the last entry is selected, press the Arrow down key to select the first entry of the list.
Arrow right	Jumps to the selected entry, for example, to the fact sheets of a model in the portal, or opens the Open dialog, for example, to download a document from ARIS document storage.
Arrow up	Selects the next entry of the result list upwards. If the first entry is selected, press the Arrow up key to select the last entry of the list.
Enter	Opens the Search area (page 1034) if no entry is selected or jumps to the selected entry.

4.1.14.9 Keyboard shortcuts for the search

The following shortcuts are available for the search (page 1036).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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

4.1.14.10 Keyboard shortcuts for the database selection

The following shortcuts are available for the database selection (page 411).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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

4.1.14.11 Keyboard shortcuts for the Comment bar

The following shortcuts are available in the Comment bar (page 452) when the cursor is in the **Comment** field.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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

4.1.14.12 Keyboard shortcuts for hierarchies

The following shortcuts are available for hierarchies, such as the Groups hierarchy (page 382) in the Classic view (page 379).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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

4.1.14.13 Keyboard shortcuts for the Collaboration bar

The following shortcuts are available in the Collaboration bar when the cursor is in the **Comment** field.

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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

4.1.14.14 Keyboard shortcuts for ARIS Connect Designer

The following shortcuts are available in ARIS Connect Designer (page 750).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Alt	Temporarily switches off Guided Modeling and grid (page 825) when you drag items.
Alt + down arrow	Moves selected objects down four grid lines.
Alt + F4	Closes the web browser. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Alt + left arrow	Moves selected objects four grid lines to the left.
Alt + - (minus)	Inserts an optional hyphen (page 827) at the cursor position in a text.
Alt + right arrow	Moves selected objects four grid lines to the right.
Alt + up arrow	Moves selected objects up four grid lines.
Backspace	Removes selected object symbols or deletes selected items, such as free-form text and graphic objects.
Ctrl + A	Selects all items.
Ctrl + C	Copies selected items to the clipboard. This enables you to paste copied items from the clipboard into models/diagrams and into other Windows programs.
Ctrl + down arrow	Moves selected items downwards by increments of one pixel.
Ctrl + End	Displays the bottom right pane of the modeling area.
Ctrl + Enter	Inserts a line break for text attributes, such as free-form texts, object names, etc.
Ctrl + F	Opens the Find bar.
Ctrl + F4	Closes the model tab. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Ctrl + Home	Displays the upper left pane of the modeling area.
Ctrl + left arrow	Moves selected items to the left by increments of one pixel.
Ctrl + Page down	Switches to the next web browser tab from left to right if your web browser supports changing tabs using the keyboard.
Ctrl + Page up	Switches to the next web browser tab from right to left if your web browser supports changing tabs using the keyboard.

Shortcut	Action
Ctrl + right arrow	Moves selected items to the right by increments of one pixel.
Ctrl + S	Saves your changes.
Ctrl + Shift + V	Inserts a definition copy of an object if an object is in the clipboard.
Ctrl + up arrow	Moves selected items upwards by increments of one pixel.
Ctrl + V	Pastes the content of the clipboard, if this is content that can be placed in the modeling area. If an object is in the clipboard, an occurrence copy of the object is inserted.
Ctrl + X	Cuts selected items and copies them to the clipboard.
Ctrl + Y	Redoes editing steps that were undone.
Ctrl + Z	Undoes preceding editing steps.
Del	Removes selected object symbols or deletes selected items, such as free-form text and graphic objects.
Down arrow	Moves the modeling area contents up (the contents of the modeling area that are further down will be displayed).
Enter	Ends the input.
ESC	Removes selections and closes dialogs. Closing dialogs with the ESC key is the same as clicking Cancel .
F2	Selects the selected text attribute of an element or the object name of a selected object for editing.
F3	Opens the Find bar. When the find bar is open, pressing the F3 key jumps to the next occurrence of the searched term.
F5	Updates the current view based on the database changes.
F11	Turns full screen mode on or off if your web browser supports full screen.
Left arrow	Moves the modeling area contents to the right (the contents of the modeling area that are further left will be displayed).
- (minus)	Reduces the display of the model content by 10%.
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
+ (plus)	Enlarges the display of the model content by 10%.
Right arrow	Moves the modeling area contents to the left (the contents of the modeling area that are further right will be displayed).

Shortcut	Action
Shift	Keeps the shapes of a circle and a square (page 885) when you place and scale the graphic objects Circle/Elipse and Square/Rectangle .
Shift + Page down	Moves the contents of the modeling area page by page to the right (the contents of the modeling area that are further left will be displayed).
Shift + Page up	Moves the contents of the modeling area page by page to the left (the contents of the modeling area that are further right will be displayed).
Up arrow	Moves the modeling area contents down (the contents of the modeling area that are further up will be displayed).

4.2 Work in the portal



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

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

Depending on your role, the view, and the published databases your administrator selected, the function and content of the portal may vary. In the following, the functions of the Classic view (page 419) and the Default view (page 420) are described.

4.2.1 Views

The portal shows specific information for each user. Different views display information in different ways. By default, ARIS comes with two different views. The Classic view (page 419) and the Default view (page 420). These views are defined in configuration sets that cannot be changed. However, administrators can define multiple modification sets based on these templates.

4.2.1.1 Classic view

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

- Home (page 380)
- Groups (page 382)

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 440) 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 438) and activate them as content filters (page 441) to further restrict this content.

4.2.1.1.1 Home

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

There are several editing areas available:



QUICK START ([PAGE 421](#))



MY CONTENT

Opens the **My content** area (page 436) 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 415) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 446).



MY ACTIVITIES

Shows the current activities you are following in Collaboration (page 707) or in the portal (page 710).



DASHBOARDS

Opens the **Dashboards** area where you can access various dashboards sorted in categories such as Portal usage (page 607).



MY TASKS

Opens My tasks where you can edit your tasks (page 455).



MY GRC TASKS

Shows an overview of your current tasks from ARIS Risk & Compliance Manager (page 482) 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** function privileges. If you have any requests regarding the privileges of your user account, you can get in touch with these ARIS Connect users.

4.2.1.1.2 Groups

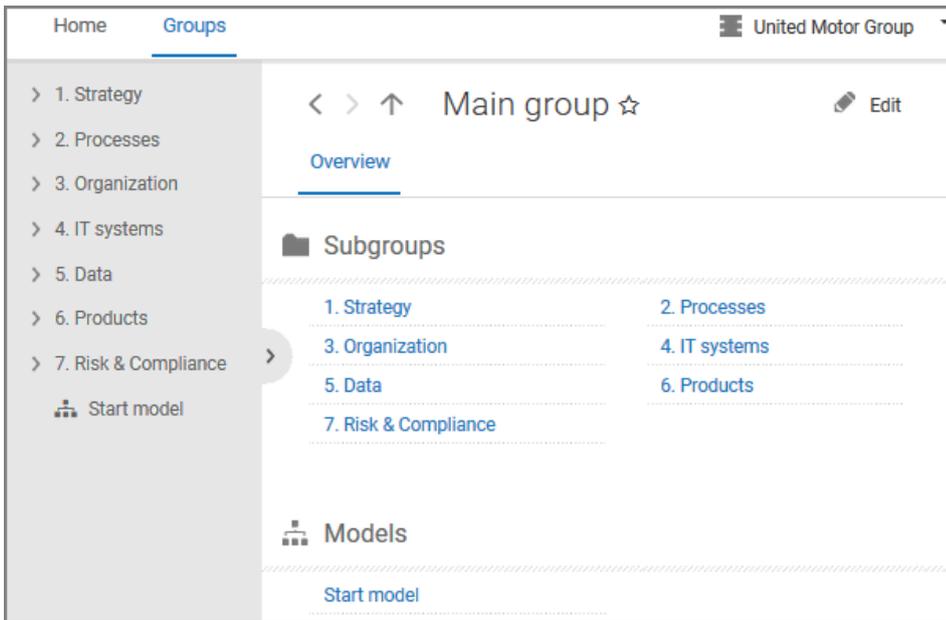
Use the tree to navigate to the entire contents of the portal you selected.

Depending on the license, the contents selected and the model type, different functions and fact sheets (page 1055) are available.

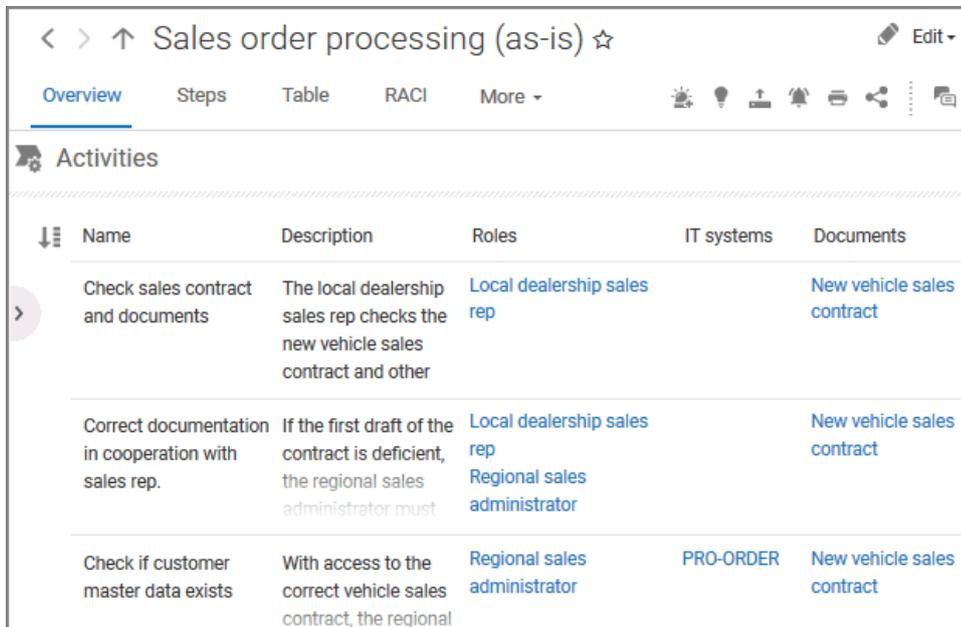
FACT SHEETS OF ARIS MODELS

OVERVIEW

Gives an overview of the item selected, for example, displays variant relationships (page 1064) of the selected item or the content of a selected group.



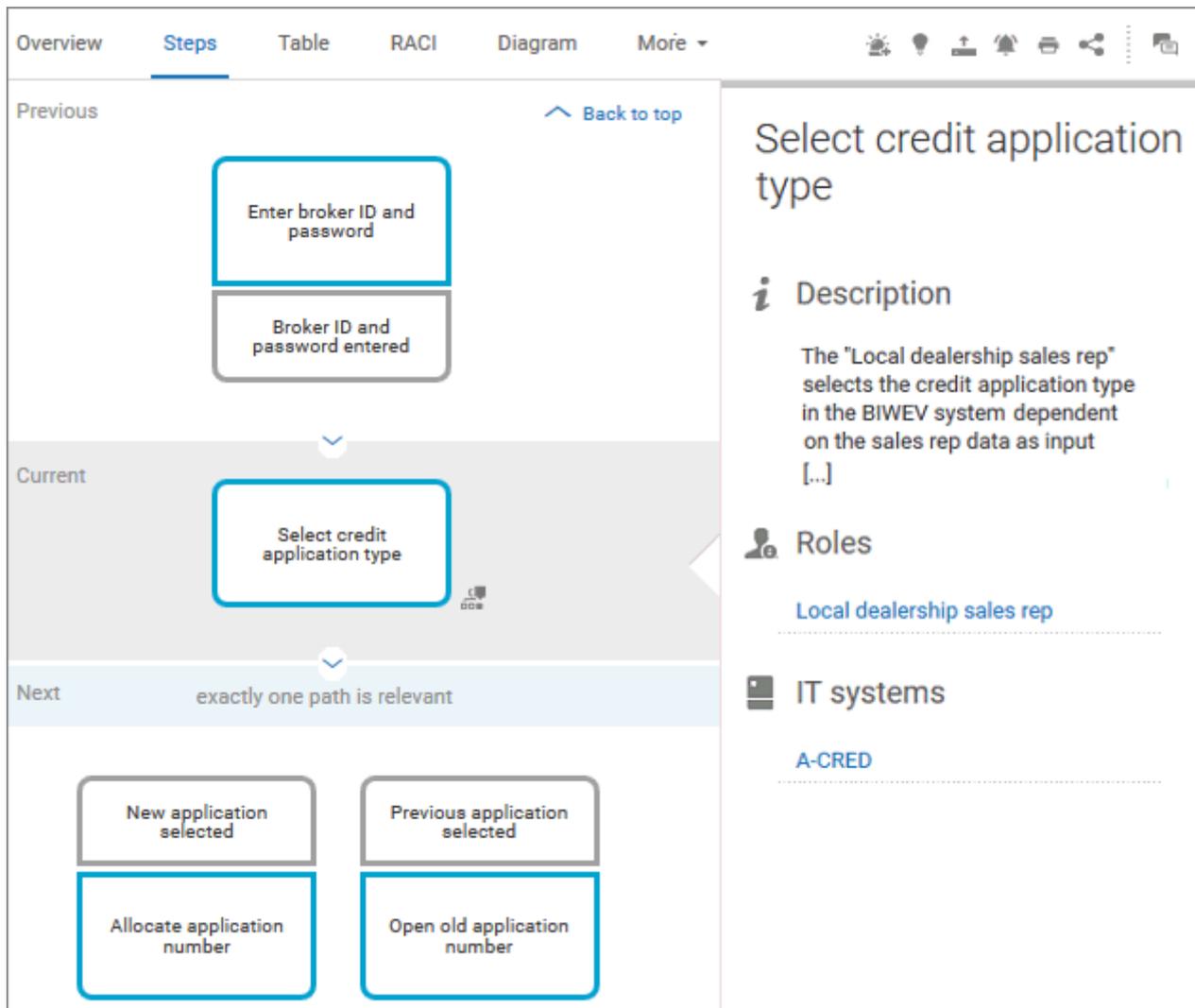
If you have selected a model, additional headings are shown depending on the context.



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

STEPS

Transparently displays all steps of a process (EPC) (page 414). 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 417) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 416).

The following information is provided for operators:

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

TABLE

Shows the functions that the process of type **EPC** and **BPMN** contains, as well as the roles assigned to them. In the tables, you can add columns (page 546) and remove added columns (page 546) again.

Functions	Roles
Call order data	Financial assistant
Check customer data	Financial assistant
Change customer data	Financial assistant
Check order data	Financial assistant Financial clerk
Change order data	Financial clerk
Transfer data to invoice	Financial clerk
Allow discount	Accountant Financial assistant

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

You can open a matrix (page 547) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Functions	Roles		
	Financial assistant	Financial clerk	Accountant
Call order data	<input checked="" type="checkbox"/>		
Check customer data	<input checked="" type="checkbox"/>		
Change customer data	<input checked="" type="checkbox"/>		
Check order data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Change order data		<input checked="" type="checkbox"/>	
Transfer data to invoice		<input checked="" type="checkbox"/>	
Allow discount	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

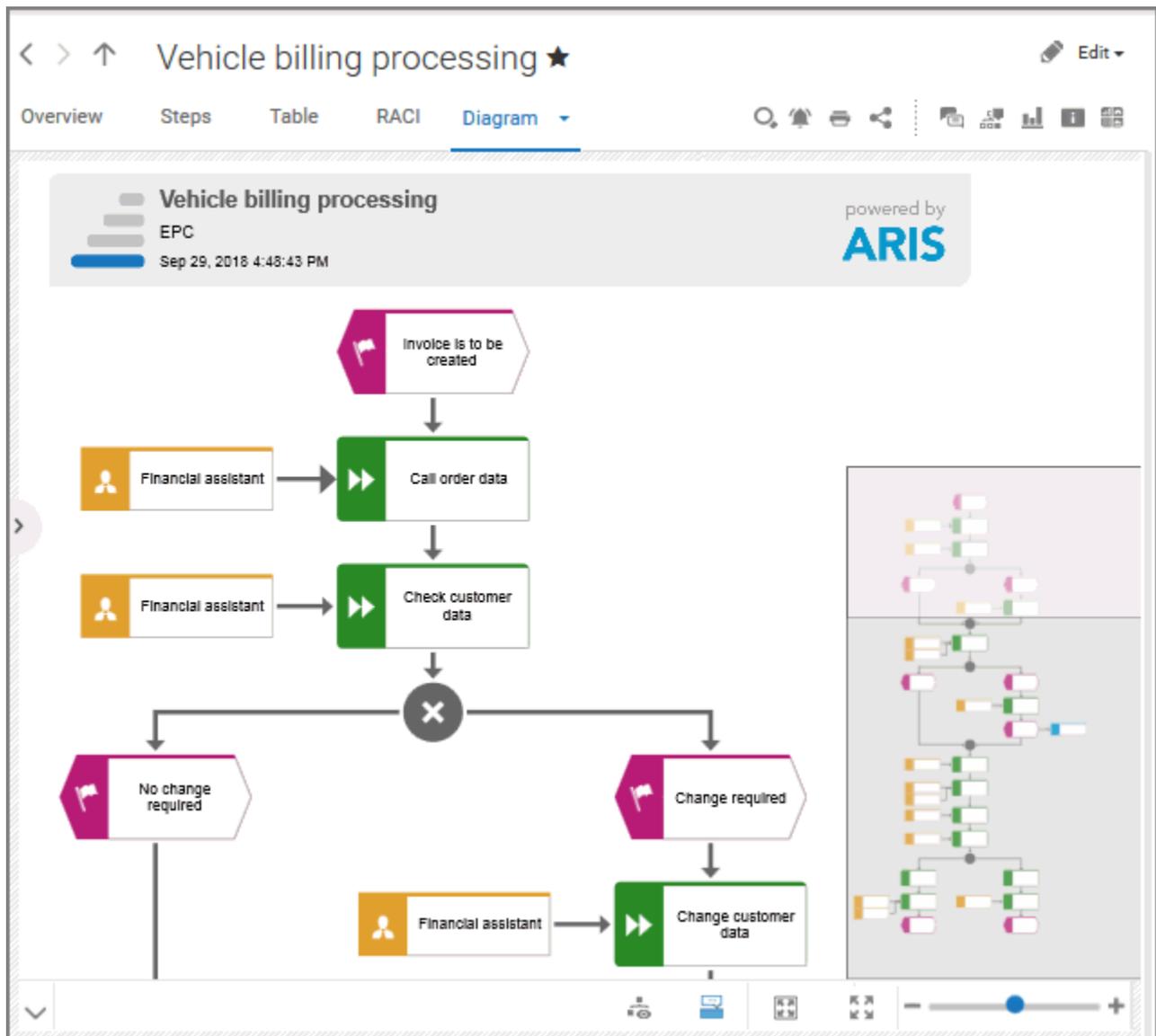
RACI

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 573). You can sort the functions (page 548) of matrices.

Overview Steps RACI ▾			
↓ Functions ▾	Financial assistant	Financial clerk	Accountant
Call order data	R A C I	R A C I	R A C I
Check customer data	R A C I	R A C I	R A C I
Change customer data	R A C I	R A C I	R A C I
Check order data	R A C I	R A C I	R A C I

DIAGRAM

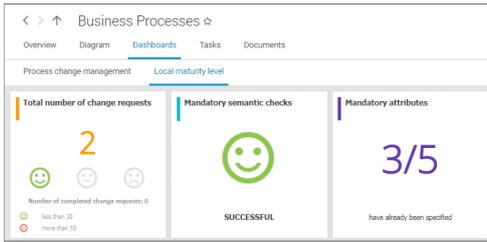
Graphically displays the diagram in Model Viewer. Depending on the diagram type, different functions are available.



You can find model items (page 512) (🔍) in the diagram. Click **i Properties** to show the properties of a model or a model item. (page 515) You can highlight objects in the diagram (page 516) (👉) that meet a defined condition. In addition, you can open assigned models (page 517) (📄). You can change the view of the diagram (page 519) (🔍) to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 513).

DASHBOARDS

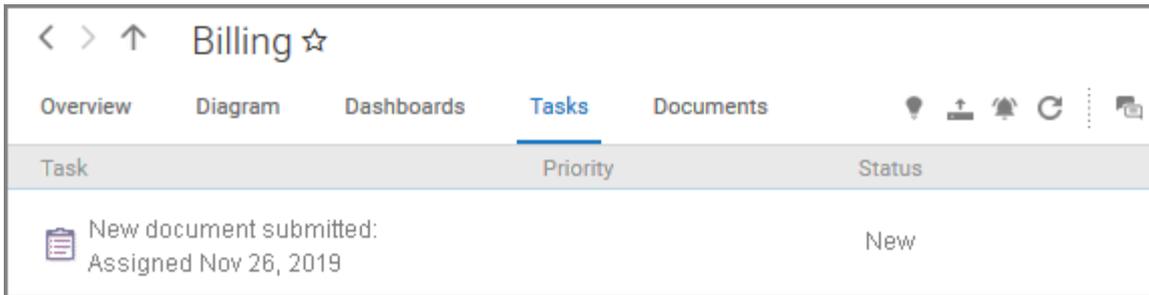
Shows the dashboards available for the selected diagram.



The **Dashboard** fact sheet is shown to users who have the **ARIS Aware** license (page 65).

TASKS

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks (page 360).



EXECUTABLES

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

Overview	Steps	Table	RACI	Diagram	Tasks	Transactions
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 693) the  executable automatically via the default server in each row displaying a Transaction code. Click the  arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.

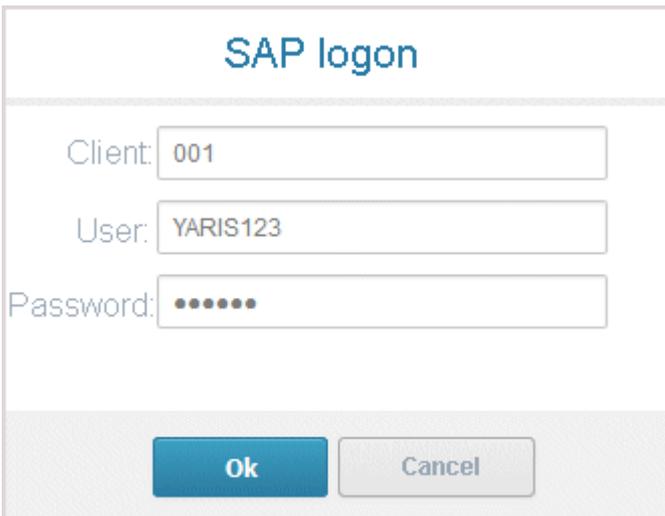
16 A08 Solution Manager 7.1

18 S04 Solution Manager 7.2

SAP URL

Logon data [Reset data](#)

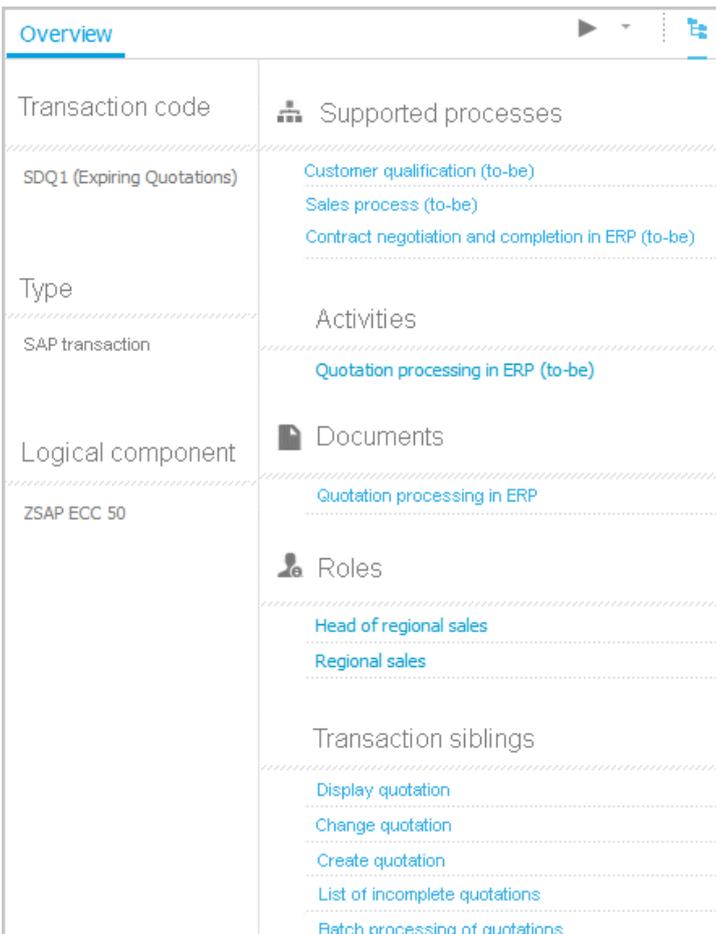
To start the executable, click an SAP Server or a URL. The Login dialog opens.



The image shows a dialog box titled "SAP logon". It contains three input fields: "Client:" with the value "001", "User:" with the value "YARIS123", and "Password:" with six dots. At the bottom, there are two buttons: "Ok" (highlighted in blue) and "Cancel".

Log on to the SAP system in the current language and the executable starts. The login remains valid until you log out of the portal or enter different login data (page 695). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you click an executable on the **Executables** page, such as **SDQ1**, its fact sheet (page 1055) including detailed information is displayed. If documents are available, you will be able to download (page 694) them.



The image shows a fact sheet for the transaction code "SDQ1 (Expiring Quotations)". The sheet is divided into several sections:

- Transaction code:** SDQ1 (Expiring Quotations)
- Type:** SAP transaction
- Logical component:** ZSAP ECC 50
- Supported processes:**
 - Customer qualification (to-be)
 - Sales process (to-be)
 - Contract negotiation and completion in ERP (to-be)
- Activities:**
 - Quotation processing in ERP (to-be)
- Documents:**
 - 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 Documents			
⏪ ⏩ ⏴ ⏵ 1-1 of 1 ⏴ ⏵ ⏪ ⏩			
Name	Owner	Last update	Related to
Modeling conventions	John Designer	2019-11-26, 10:25.38	🔗 Vehicle billing processing

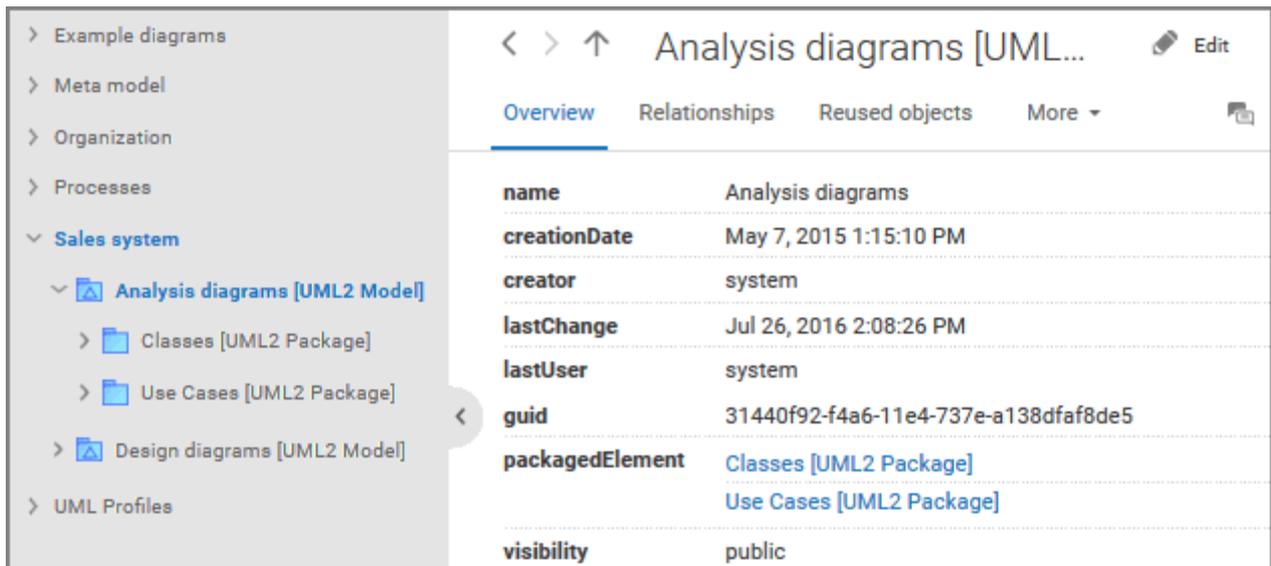
FACT SHEETS OF UML ELEMENTS

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.

Home Groups		United Motor Group	
<ul style="list-style-type: none"> Example diagrams <ul style="list-style-type: none"> 2 UML basics [UML2 Package] 4 UML-Mapping into ARIS [UM ...] Meta model Sales system 6. Products 7. Risk & Compliance 	< > ↑ 2 UML basics [UML2 Package] Edit		
	Overview Relationships Reused objects More		
	name	2 UML basics	
	creationDate	Apr 30, 2015 3:43:53 PM	
	creator	system	
	lastChange	Jul 10, 2015 1:47:24 PM	
	lastUser	system	
	guid	f0aedd01-ef3e-11e4-737e-a138dfaf8de5	
	packagedElement	2.2 Diagram types [UML2 Package] Specific features [UML2 Package]	
	visibility	public	

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



Analysis diagrams [UML2 Model]	
name	Analysis diagrams
creationDate	May 7, 2015 1:15:10 PM
creator	system
lastChange	Jul 26, 2016 2:08:26 PM
lastUser	system
guid	31440f92-f4a6-11e4-737e-a138dfaf8de5
packagedElement	Classes [UML2 Package] Use Cases [UML2 Package]
visibility	public

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.

4.2.1.2 Default view

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

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

- Home (page 380)
- Processes (page 396)
- Organization (page 407)
- IT systems (page 408)

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 440) 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 438) and activate them as content filters (page 441) to further restrict this content.

4.2.1.2.1 Home

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

There are several editing areas available:



QUICK START (PAGE 421)



MY CONTENT

Opens the **My content** area (page 436) 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 415) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 446).

 **MY ACTIVITIES**

Shows the current activities you are following in Collaboration (page 707) or in the portal (page 710).

 **DASHBOARDS**

Opens the **Dashboards** area where you can access various dashboards sorted in categories such as Portal usage (page 607).

 **MY TASKS**

Opens My tasks where you can edit your tasks (page 455).

 **MY GRC TASKS**

Shows an overview of your current tasks from ARIS Risk & Compliance Manager (page 482) 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** function privileges. If you have any requests regarding the privileges of your user account, you can get in touch with these ARIS Connect users.

4.2.1.2.2 Processes

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

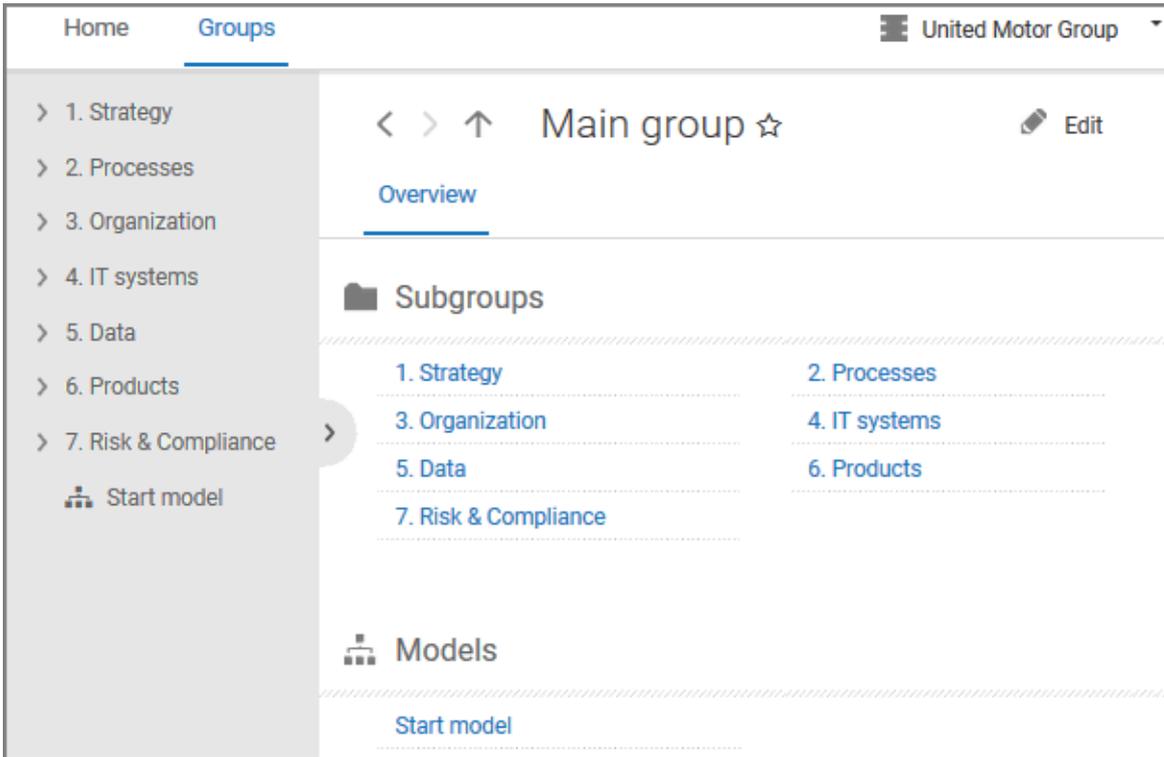
The screenshot displays the 'Customer service process' overview page. The navigation menu on the left includes categories like 'Communication & information...', 'Customer services', 'Car rental', 'Complaint management', 'Customer service process', 'Garage process', 'Marketing & sales', 'Marketing & sales (to-be)', 'Production', 'Research & development', 'Spare parts & accessories', 'Warranty process', 'Finance', 'Financial services', 'Human resource management', 'Logistics', 'Marketing & sales', and 'Marketing & sales (to-be)'. The main content area shows the 'Customer service process' title with an 'Edit' button and tabs for 'Overview', 'Diagram', 'Dashboards', and 'More'. The 'Overview' tab is active, showing the last change date as 'Sep 29, 2020'. The 'Description' section states 'Customer services process consists of:' followed by a list of activities: 'Contact customer', 'Determine requirements', and 'Make appointment'. The 'Activities' section contains a table with the following data:

Name	Description	Subordinate value-added chains	Subordinate business processes
Customer service process		Customer service process	
Contact customer			
Determine requirements			

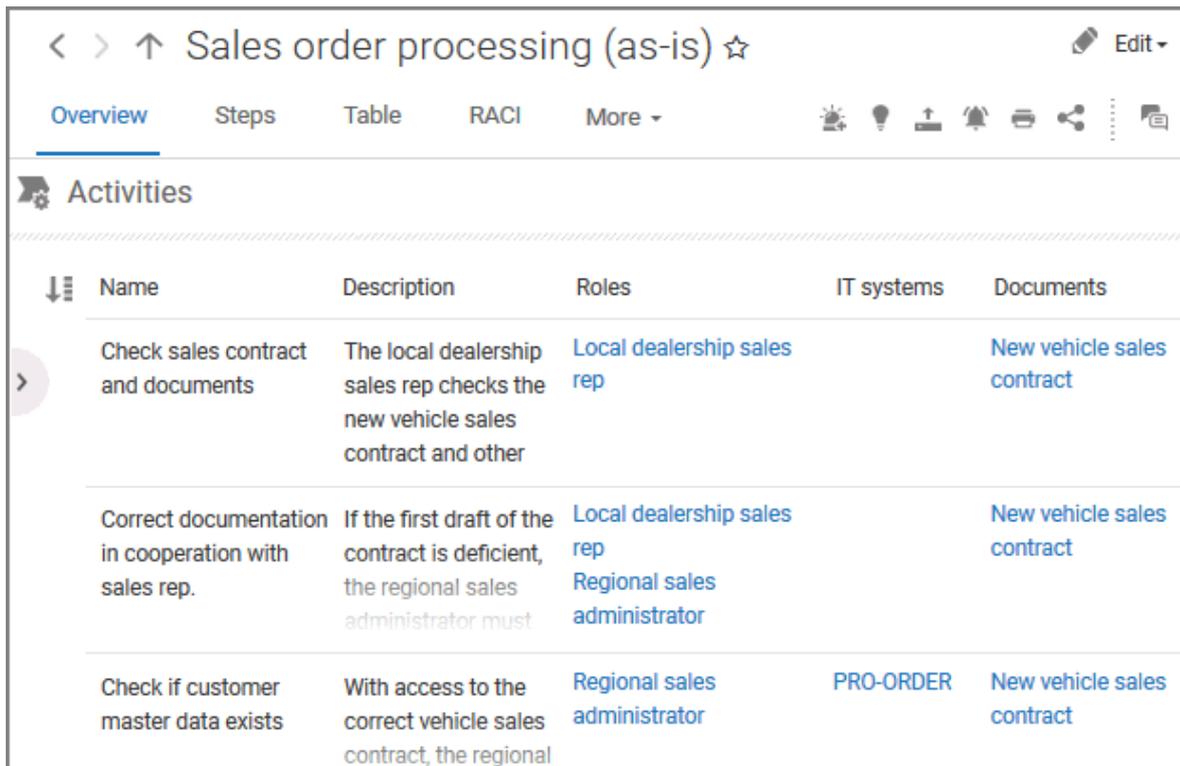
Depending on the installed components, the content selected, and the type of a diagram, different fact sheets (page 1055) and functions are available.

OVERVIEW

Gives an overview of the item selected, for example, displays variant relationships (page 1064) of the selected item or the content of a selected group.



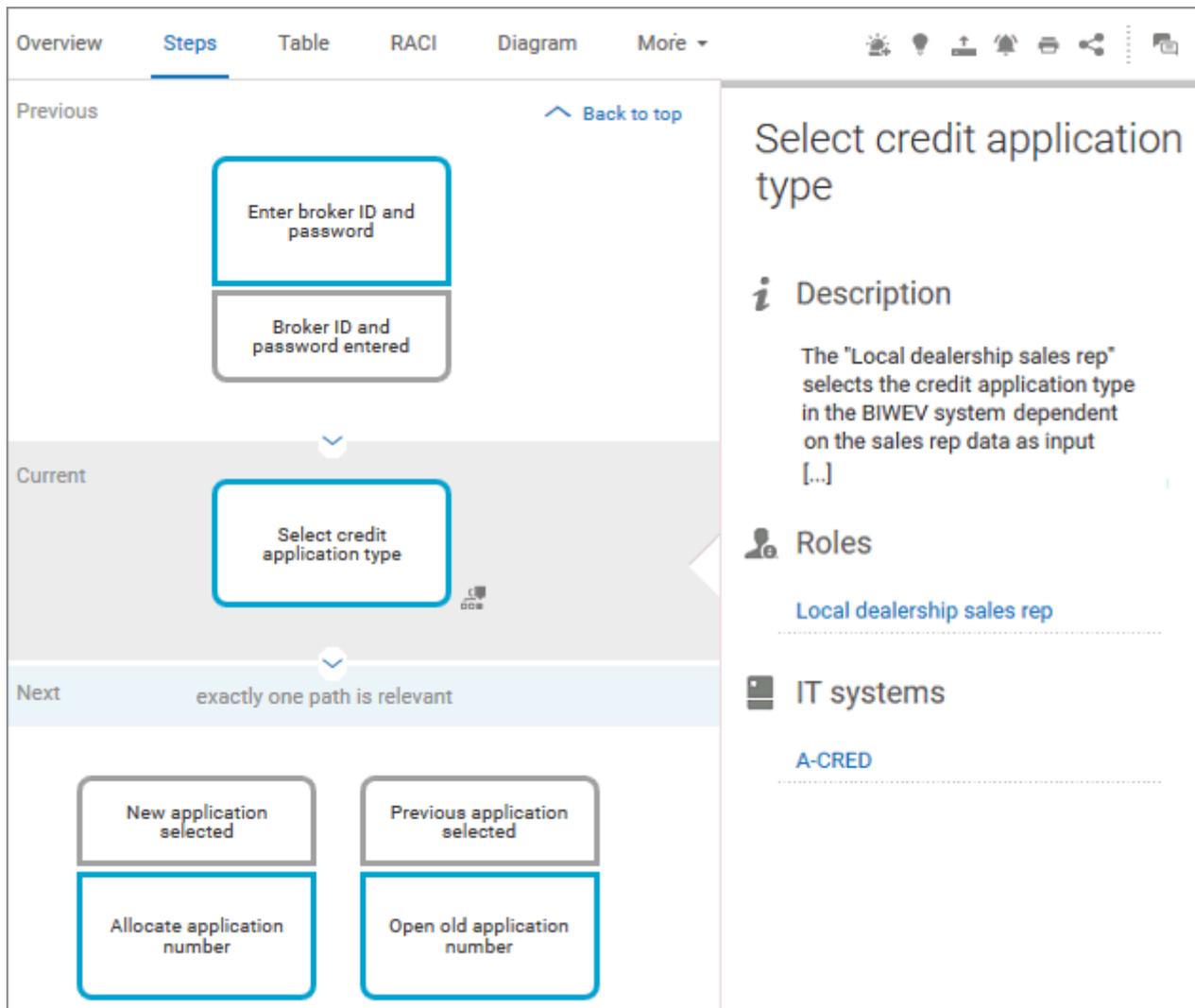
If you have selected a model, additional headings are shown depending on the context.



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

STEPS

Transparently displays all steps of a process (EPC) (page 414). 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 417) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 416).

The following information is provided for operators:

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

TABLE

Shows the functions that the process of type **EPC** and **BPMN** contains, as well as the roles assigned to them. In the tables, you can add columns (page 546) and remove added columns (page 546) again.

Functions	Roles
Call order data	Financial assistant
Check customer data	Financial assistant
Change customer data	Financial assistant
Check order data	Financial assistant Financial clerk
Change order data	Financial clerk
Transfer data to invoice	Financial clerk
Allow discount	Accountant Financial assistant

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

You can open a matrix (page 547) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Functions	Roles		
	Financial assistant	Financial clerk	Accountant
Call order data	<input checked="" type="checkbox"/>		
Check customer data	<input checked="" type="checkbox"/>		
Change customer data	<input checked="" type="checkbox"/>		
Check order data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Change order data		<input checked="" type="checkbox"/>	
Transfer data to invoice		<input checked="" type="checkbox"/>	
Allow discount	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

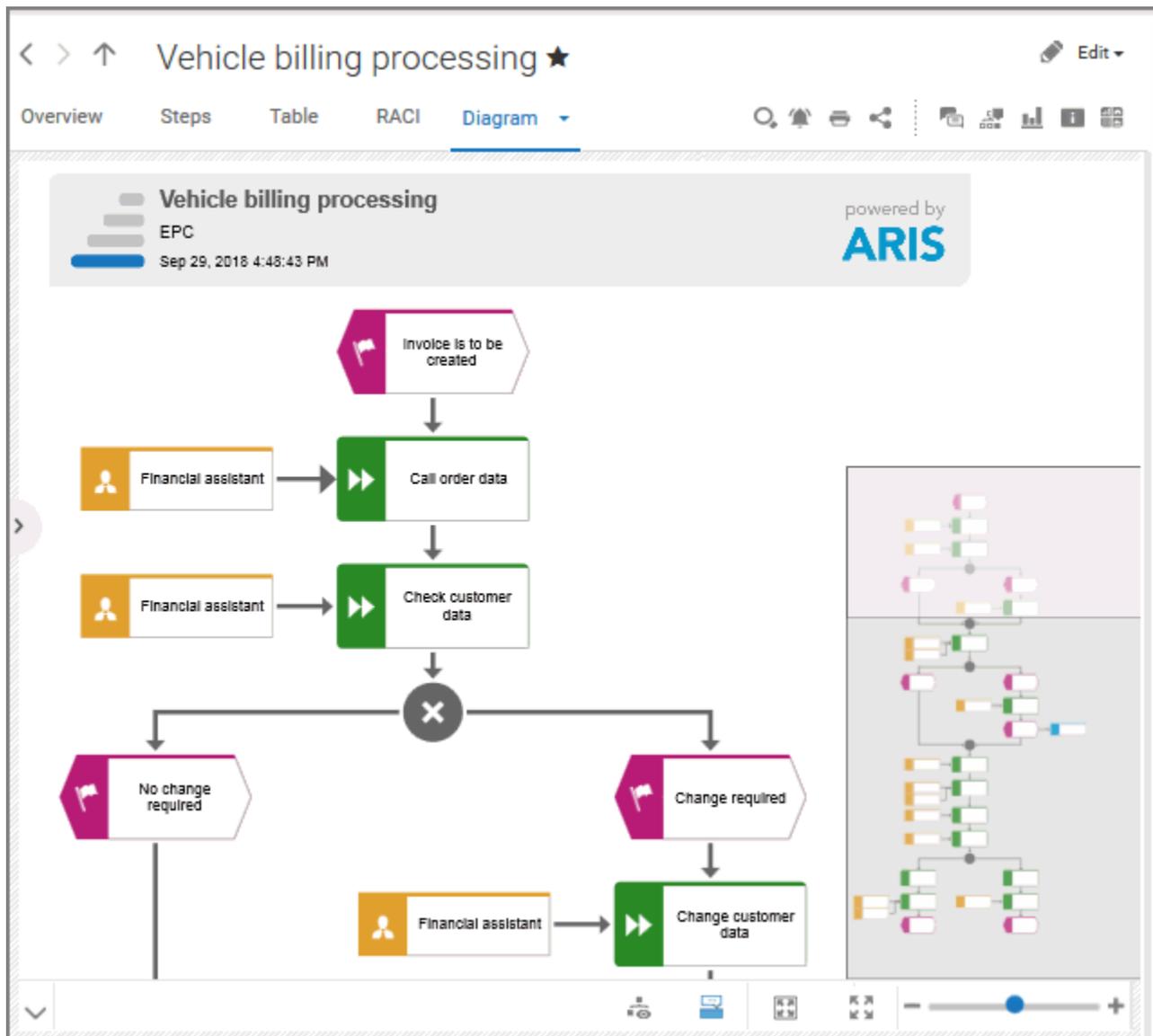
RACI

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 573). You can sort the functions (page 548) of matrices.

Overview Steps RACI ▾			
↓ Functions ▾	Financial assistant	Financial clerk	Accountant
Call order data	R A C I	R A C I	R A C I
Check customer data	R A C I	R A C I	R A C I
Change customer data	R A C I	R A C I	R A C I
Check order data	R A C I	R A C I	R A C I

DIAGRAM

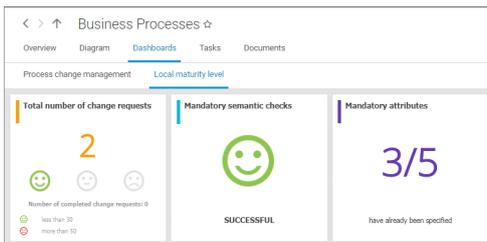
Graphically displays the diagram in Model Viewer. Depending on the diagram type, different functions are available.



You can find model items (page 512) () in the diagram. Click  **Properties** to show the properties of a model or a model item. (page 515) You can highlight objects in the diagram (page 516) () that meet a defined condition. In addition, you can open assigned models (page 517) (). You can change the view of the diagram (page 519) () to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 513).

DASHBOARDS

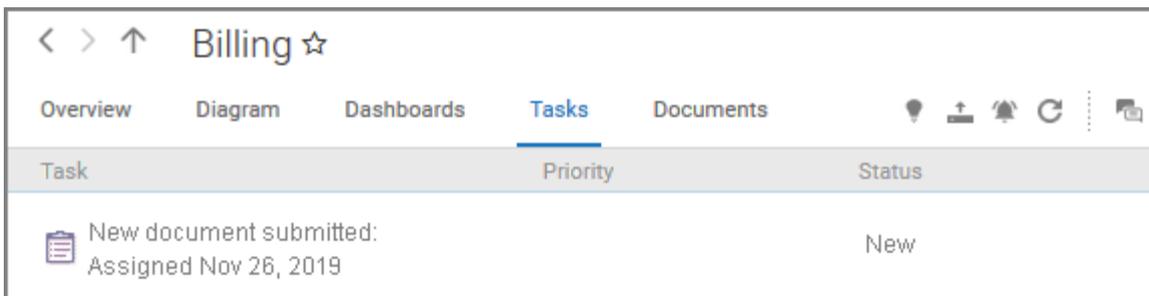
Shows the dashboards available for the selected diagram.



The **Dashboard** fact sheet is shown to users who have the **ARIS Aware** license (page 65).

TASKS

Shows your tasks created by mini workflows or Process Governance processes. For editing, selected tasks are opened in My tasks (page 360).



EXECUTABLES

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

Overview	Steps	Table	RACI	Diagram	Tasks	Transactions
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 693) the  executable automatically via the default server in each row displaying a Transaction code. Click the  arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.

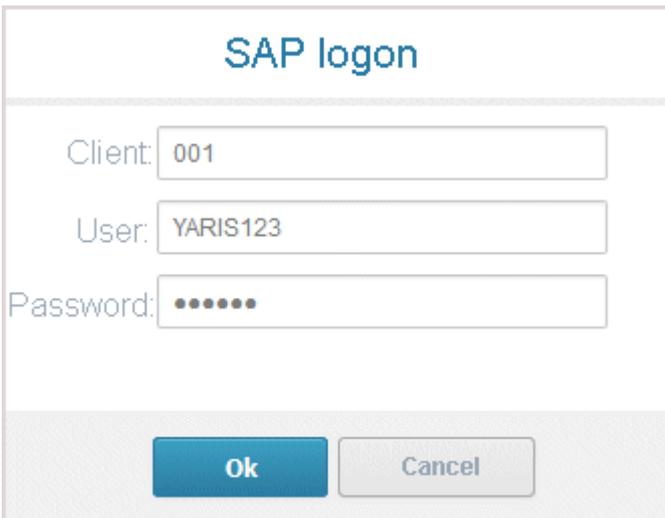
16 A08 Solution Manager 7.1

18 S04 Solution Manager 7.2

SAP URL

Logon data [Reset data](#)

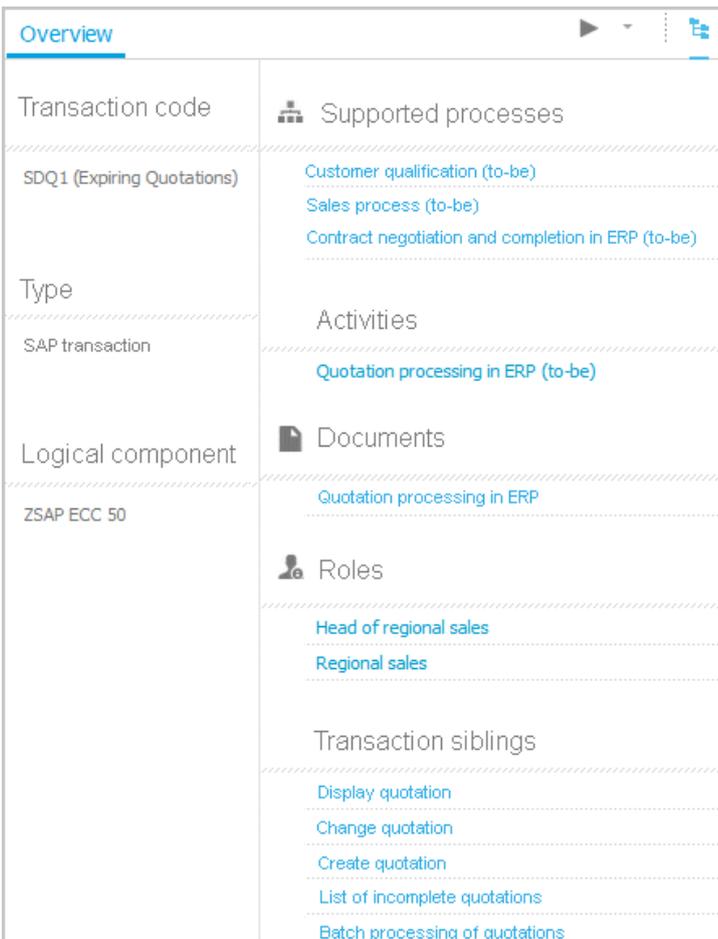
To start the executable, click an SAP Server or a URL. The Login dialog opens.



The image shows a dialog box titled "SAP logon". It contains three input fields: "Client:" with the value "001", "User:" with the value "YARIS123", and "Password:" with six dots. At the bottom, there are two buttons: "Ok" (highlighted in blue) and "Cancel".

Log on to the SAP system in the current language and the executable starts. The login remains valid until you log out of the portal or enter different login data (page 695). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you click an executable on the **Executables** page, such as **SDQ1**, its fact sheet (page 1055) including detailed information is displayed. If documents are available, you will be able to download (page 694) them.



The image shows a fact sheet for the executable "SDQ1 (Expiring Quotations)". The left sidebar contains the following information:

- Transaction code: SDQ1 (Expiring Quotations)
- Type: SAP transaction
- Logical component: ZSAP ECC 50

The main content area is divided into several sections:

- Supported processes:**
 - Customer qualification (to-be)
 - Sales process (to-be)
 - Contract negotiation and completion in ERP (to-be)
- Activities:**
 - Quotation processing in ERP (to-be)
- Documents:**
 - 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.

Name	Owner	Last update	Related to
Modeling conventions	John Designer	2019-11-26, 10:25.38	 Vehicle billing processing

ARIS video tutorial

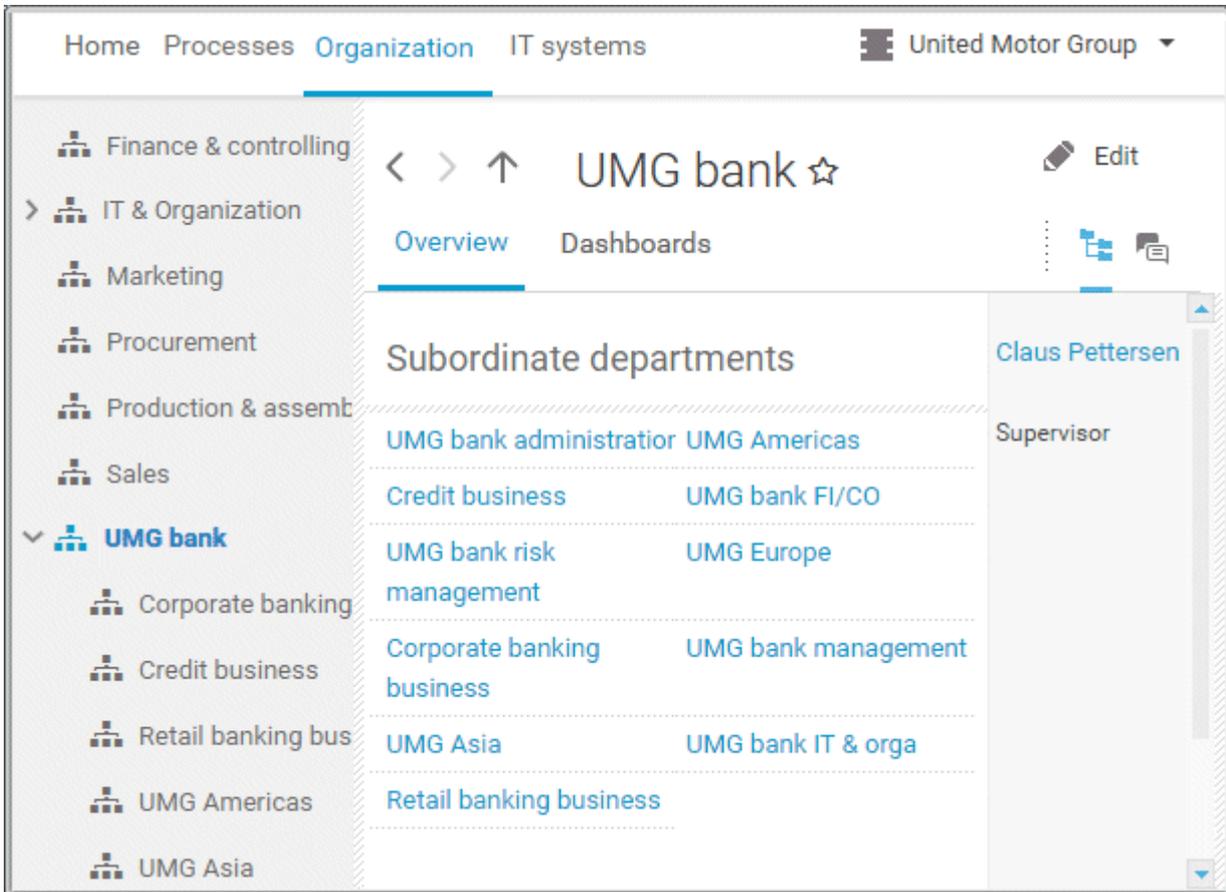
ARIS Connect - Process improvement

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

4.2.1.2.3 Organization

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

The Overview gives you access to the relevant information. For example, if you click a supported process, the process information (page 396) is displayed. IT information (page 408) is available when clicking a system in use.



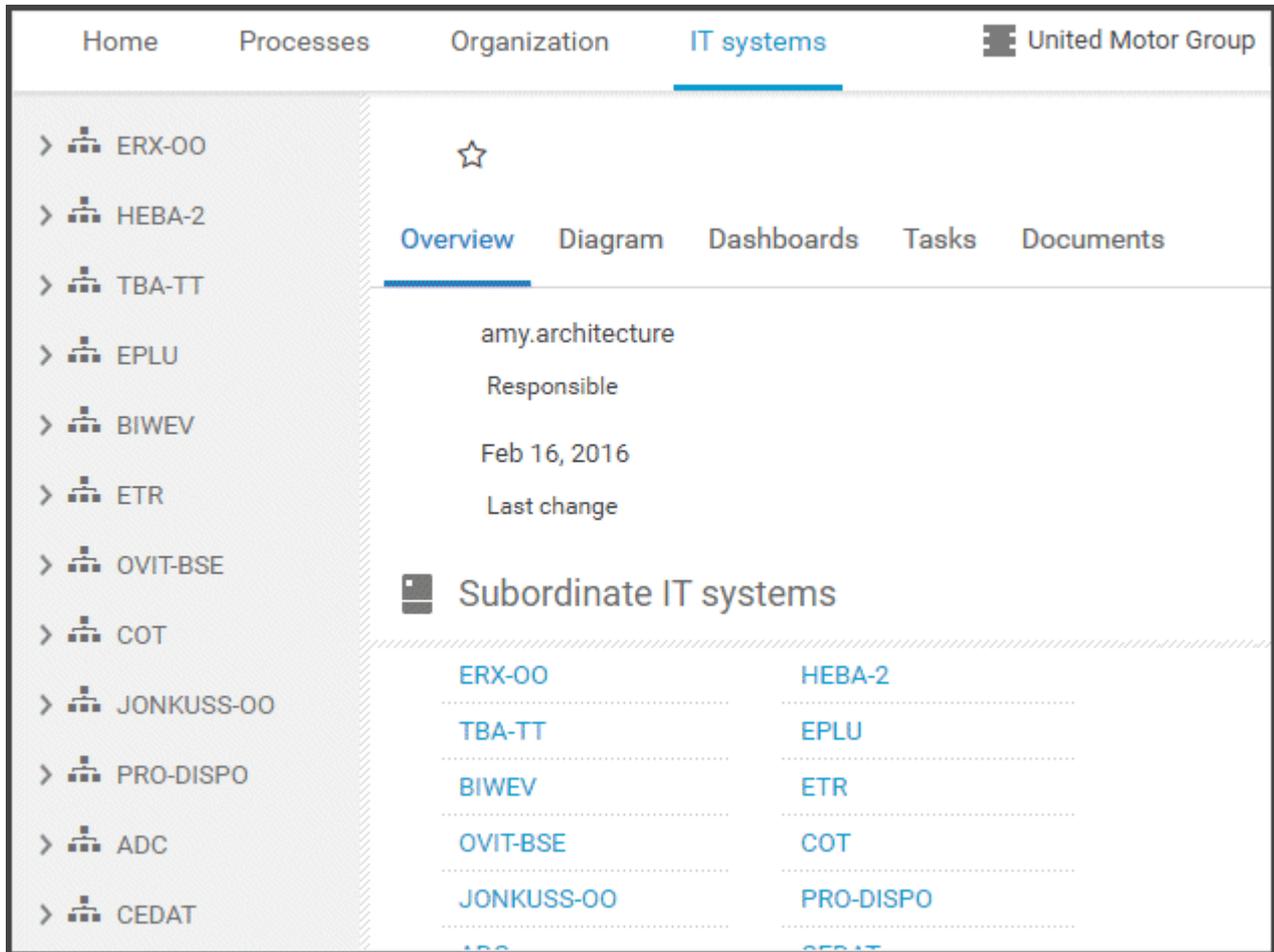
4.2.1.2.4 IT systems

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

Depending on the contents selected, different functions are available.

OVERVIEW

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



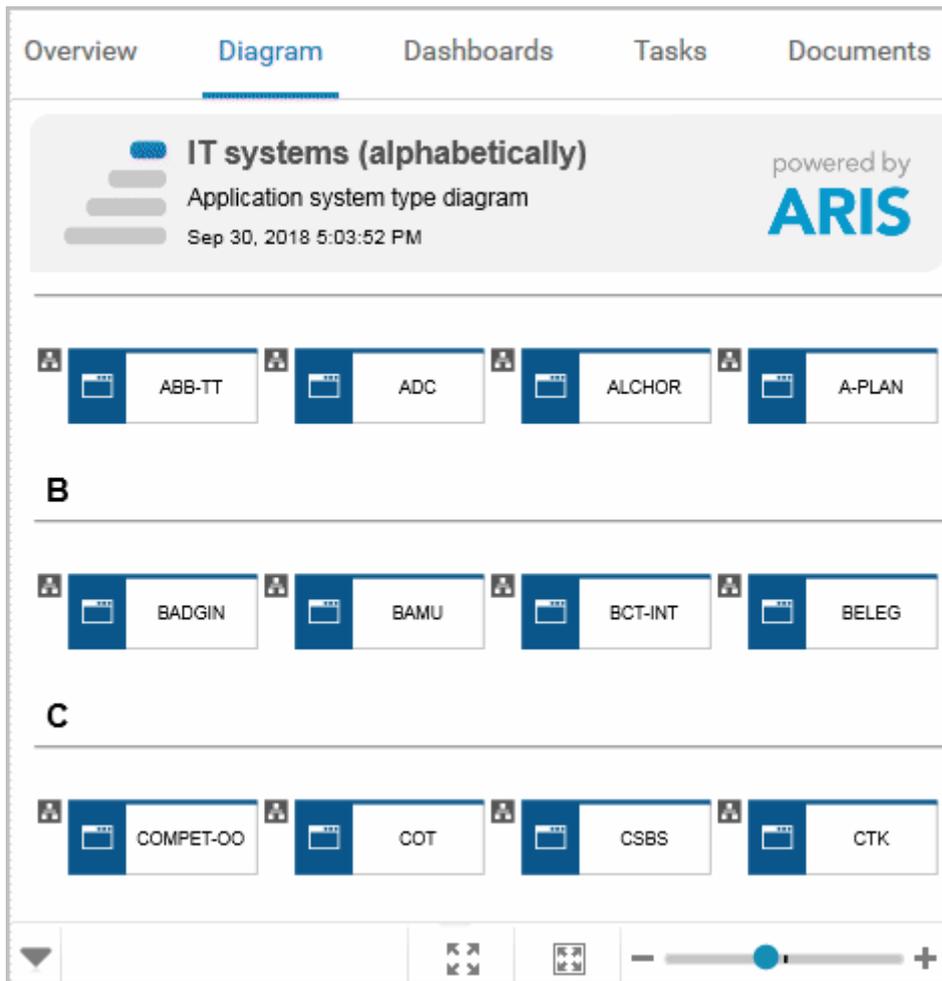
DIAGRAM

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

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

Click **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.



The screenshot shows the ARIS application system type diagram interface. At the top, there are navigation tabs: Overview, Diagram (selected), Dashboards, Tasks, and Documents. Below the tabs, there is a header section with the text "IT systems (alphabetically)", "Application system type diagram", and "Sep 30, 2018 5:03:52 PM". To the right of this header is the ARIS logo with the text "powered by".

The main content area displays a list of IT systems, grouped by letter. Each system is represented by a small icon and a label:

- A**: ABB-TT, ADC, ALCHOR, A-PLAN
- B**: BADGIN, BAMU, BCT-INT, BELEG
- C**: COMPET-OO, COT, CSBS, CTK

At the bottom of the interface, there is a toolbar with a dropdown arrow, a refresh icon, a search icon, and a zoom slider.

TASKS

Lists the tasks for the logged in user regarding the selected item. For editing, selected tasks are opened in My tasks (page 360).

DOCUMENTS

Lists the documents connected to the selected item.

IT SYSTEM FACT SHEETS

If you click an IT system in the Explorer tree, the IT system fact sheets provide you with important information at a glance. There are fact sheets (page 1055) like **Process architecture**, **Information architecture**, or **IT infrastructure**.

The screenshot displays the 'IT systems' section of the United Motor Group interface. The left sidebar lists various IT systems, with 'A-PLAN' selected. The main content area shows the 'A-PLAN' fact sheet, which includes a description, a table of properties, and a list of responsible persons.

Description

A-Plan is part of the application system class marketing&sales. It is a tool to process orders for CKD shipments.

Properties

Name	A-PLAN
Short description	Order processing for CKD shipments
Manufacturer	Proprietary system
Standardization status	Non-standard
Warranty until	May 1, 2017
Number of internal users	Up to 10000
Number of external users	0
Criticality	Normal
Availability	99.6 percent

Persons responsible

Peter Brown

Department responsible

EMEA sales support

4.2.1.3 Navigate

The following describes the navigation features.

4.2.1.3.1 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

3. 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.



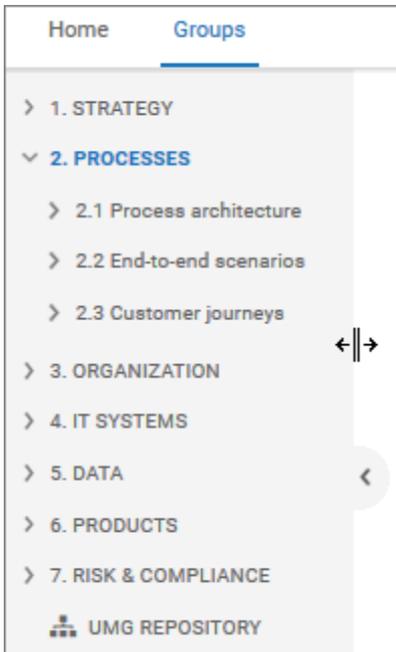
4. Click the name of the database you want to use.

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 1034), it is performed based on the current database.

4.2.1.3.2 Navigate in the portal

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

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

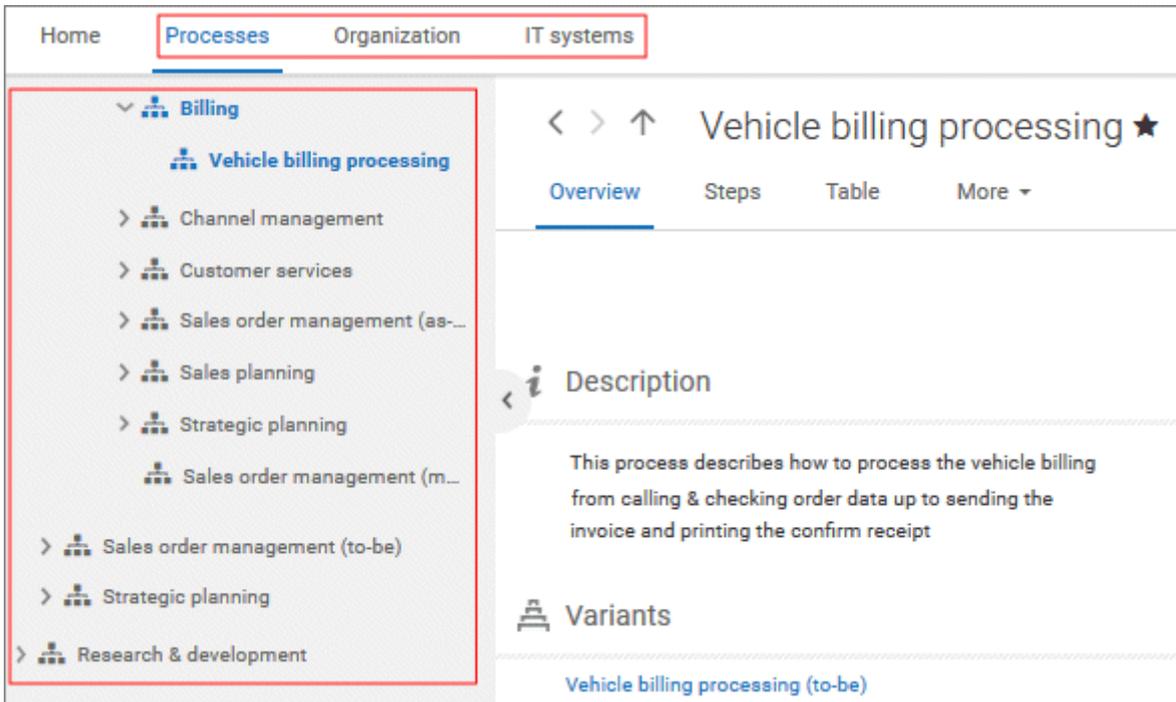


You can select a model, for example, **UMG REPOSITORY**, expand groups, for example, **2. PROCESSES**, and access to the group content. You can change the size of the **Groups** tree by clicking on the bar border and moving it to the right or left.

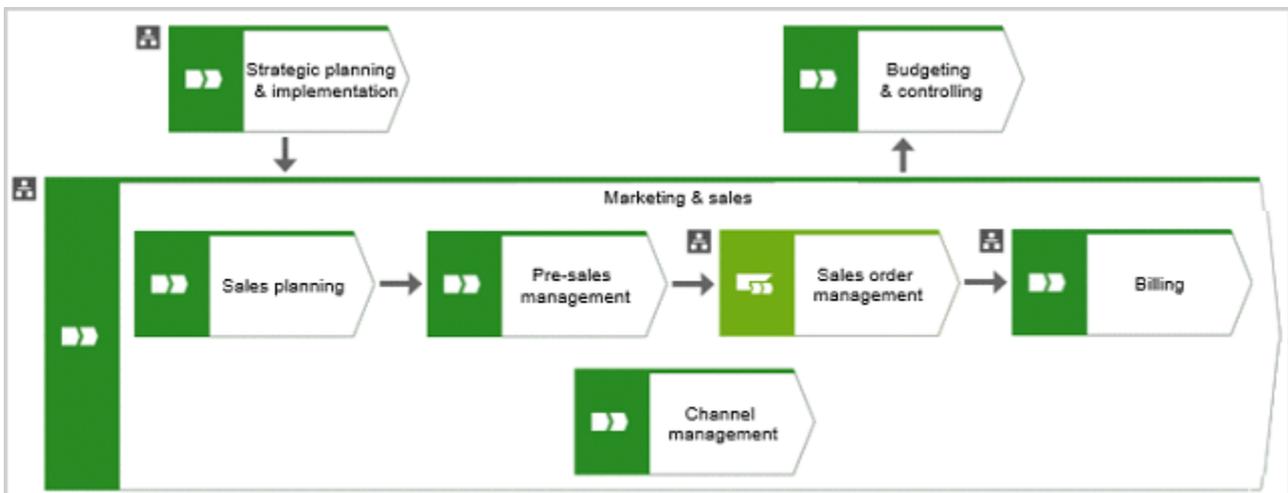
And you can hide the **Groups** tree by clicking the right arrow and show it again by clicking on the left arrow.



In the following example for the **Default** view, the **Processes**, **Organization**, and **IT systems** hierarchies are defined. In the following example, the **Processes** hierarchy is activated where users have access to all processes of the current database. The fact sheets (page 1055) 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 517) by clicking an object's  assignment icon, or by double-clicking an object with the  assignment icon.



4.2.1.3.3 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Select a process model. You are offered the fact sheets of the process model.
3. Click the **Steps** (page 426) fact sheet. The first event of the process is shown at the top. It has no predecessor, therefore no object is placed in this field. Below, the event's successor is output. To the right, the attributes are shown.
4. Click the successor. The event as a predecessor is moved to the field above, the succeeding object is placed in the middle, and its successors are visible in the lower field. The attributes of this object are now visible.

If event and function precede or succeed each other, they are displayed together.

You navigate through a process step by step.

4.2.1.3.4 Navigate using a Process interface

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Select a process model that contains an object of **Process interface** type to which the other process model is assigned (page 916).
3. Click the **Steps** (page 426) fact sheet.
4. Navigate to the process interface and click it.

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

4.2.1.3.5 Navigate using fact sheet buttons

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Select the groups and models whose content you want to edit. The fact sheets of the selected item are displayed.
3. Click through the relevant fact sheets (page 1055) and complete your tasks. Click on the relevant fact sheets one after the other and complete your tasks.
4. Click **< Back** to browse previously displayed fact sheets and hierarchy levels in backward direction.
5. Click **> Forward** to browse previously displayed fact sheets and hierarchy levels in forward direction.
6. Click **↑ Go up in hierarchy** to navigate to a parent folder or process.

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

4.2.1.3.6 Filter using My Favorites

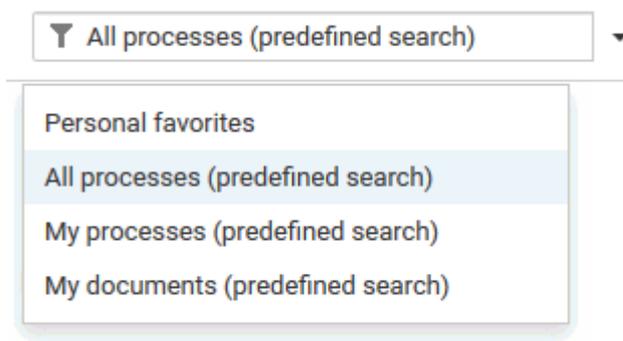
In the portal, you have direct access to all saved filter settings (page 447). The filters output the content of the selected database, while the personal favorites (page 446) of all published databases are listed and can be accessed.

Procedure

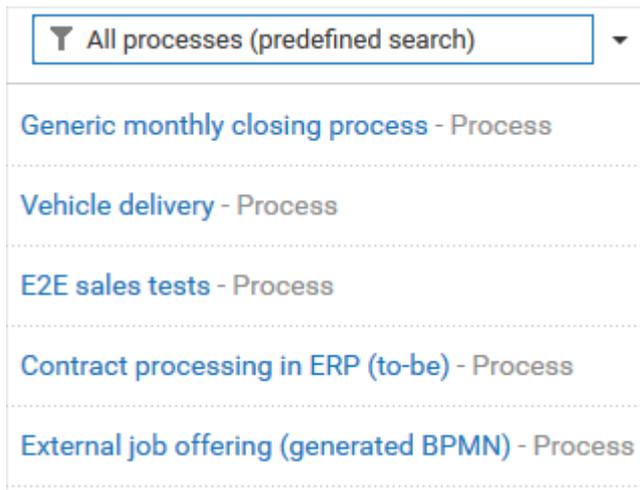
1. If you have access to more than one database, select the database you want to work with.
2. Click **★ My favorites** in **Home** (page 380)

Provides direct access to saved filter criteria (Seite 415) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 446).

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



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



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

- Click the page numbers to display the content of the corresponding pages.
- 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.

4.2.1.3.7 Switch from Steps to Diagram

For models of type **EPC**, you can switch from the **Steps** fact sheet to the **Diagram (page 430)** fact sheet where the current object symbol is selected.

Procedure

- Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
- Navigate to the group where the relevant model is stored.
- Select the model. The fact sheets (page 1055) are shown.
- Activate the **Steps (page 426)** fact sheet and navigate to the relevant step.
- 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.

4.2.1.3.8 Switch from Diagram to Steps

For models of type **EPC**, you can switch from the **Diagram** (page 430) fact sheet to the **Steps** (page 426) fact sheet where the current object symbol is selected.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
5. Select the object symbol of the structurally relevant object (page 1061) that you want to select in the **Steps** fact sheet.
6. Activate the **Steps** fact sheet.

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

4.2.1.3.9 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Steps (page 426)** 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.

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

You can use process interfaces to navigate (page 414) from one process model of the **EPC** type to another. To do so, you must assign the corresponding process to the process interface (page 916).

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**.



4.2.1.4 Valuable information

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

4.2.1.4.1 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 419) and the Default view (page 420). These views are defined in configuration sets that cannot be changed. However, administrators can define multiple modification sets based on these templates.

4.2.1.4.2 What is the structure of the Classic view?

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

- Home (page 380)
- Groups (page 382)

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 440) 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 438) and activate them as content filters (page 441) to further restrict this content.

4.2.1.4.3 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, you have access to, this view shows all content relevant to you in a clear structure:

- Home (page 380)
- Processes (page 396)
- Organization (page 407)
- IT systems (page 408)

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 440) 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 438) and activate them as content filters (page 441) to further restrict this content.

4.2.1.4.4 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 453) and **Comment** (page 452), 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 489). Click  **Submit change request** to send change requests to the process manager (page 580).

4.2.1.4.5 Which tiles are available?

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



VIEW MODELS & DOCUMENTS



MY TASKS

Opens My tasks where you can edit your tasks (page 455).



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  **My feed** area of the  **Collaboration** (page 707) where you have access to your own feed.



ALL COMPANY FEED

Opens the  All company feed (page 709) area of the  **Collaboration** (page 707).



ALL COLLABORATION GROUPS

Activates the  **Find groups** area of the  **Collaboration** (page 707) where you can find new groups (page 709).



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.



USER SETTINGS

Opens your user settings page where you can edit your data or add a picture of yourself.



ADMINISTRATION

Opens the **Configuration** area where you can manage the current ARIS Connect system.



USER ADMINISTRATION

Opens the **Users** area of the  User Management in ARIS Administration where you can administrate the users for the current server.



LICENSE ADMINISTRATION

Opens the  **Licenses** area in ARIS Administration where you can administrate the licenses for the current server.



PROCESS ADMINISTRATION

Opens the  **Process administration** area in ARIS Administration where you can administrate automated processes.

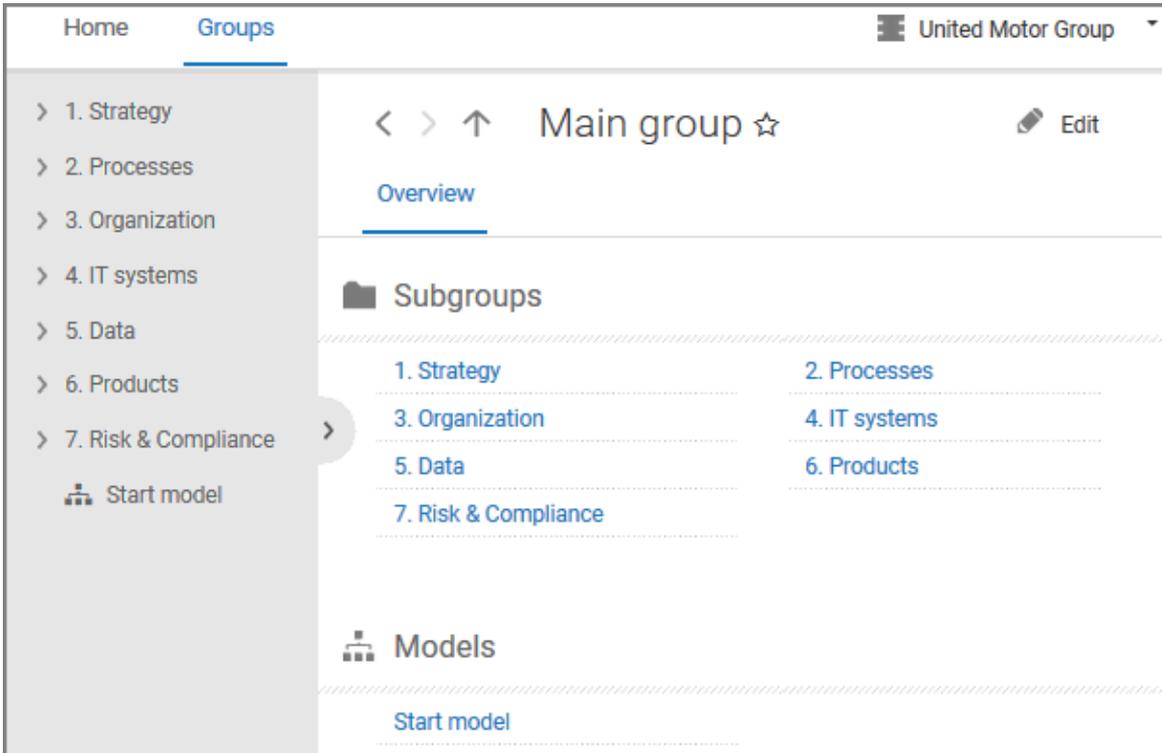


COLLABORATION ADMINISTRATION

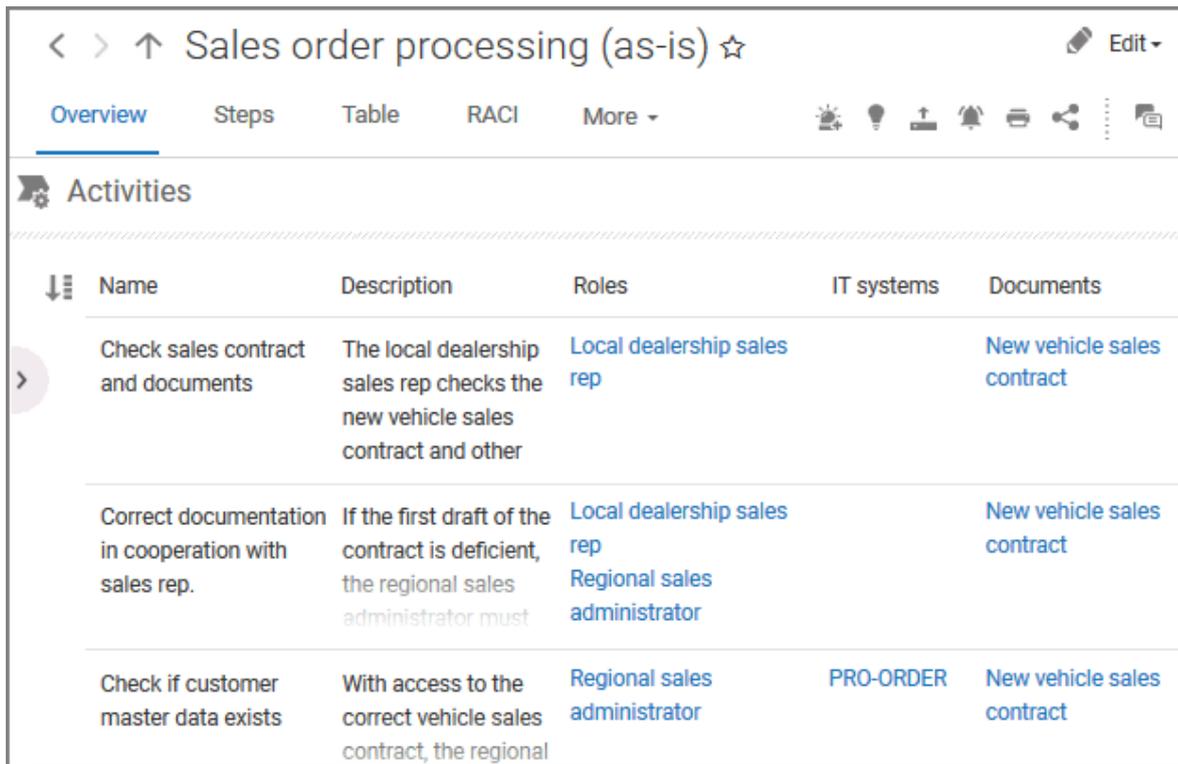
Opens the **Check flagged activities** page of the **Administration** area of the  **Collaboration** (page 707) where you can decide whether content is appropriate or not.

4.2.1.4.6 What is the Overview fact sheet for?

Gives an overview of the item selected, for example, displays variant relationships (page 1064) 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.

4.2.1.4.7 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 419).
- The database with UML content you are using has been assigned a filter (page 798) 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 by an administrator. It is therefore available in the  **Portal**.
- You have logged in as a user with the **UML Viewer** function privilege.

4.2.1.4.8 Where is UML content displayed?

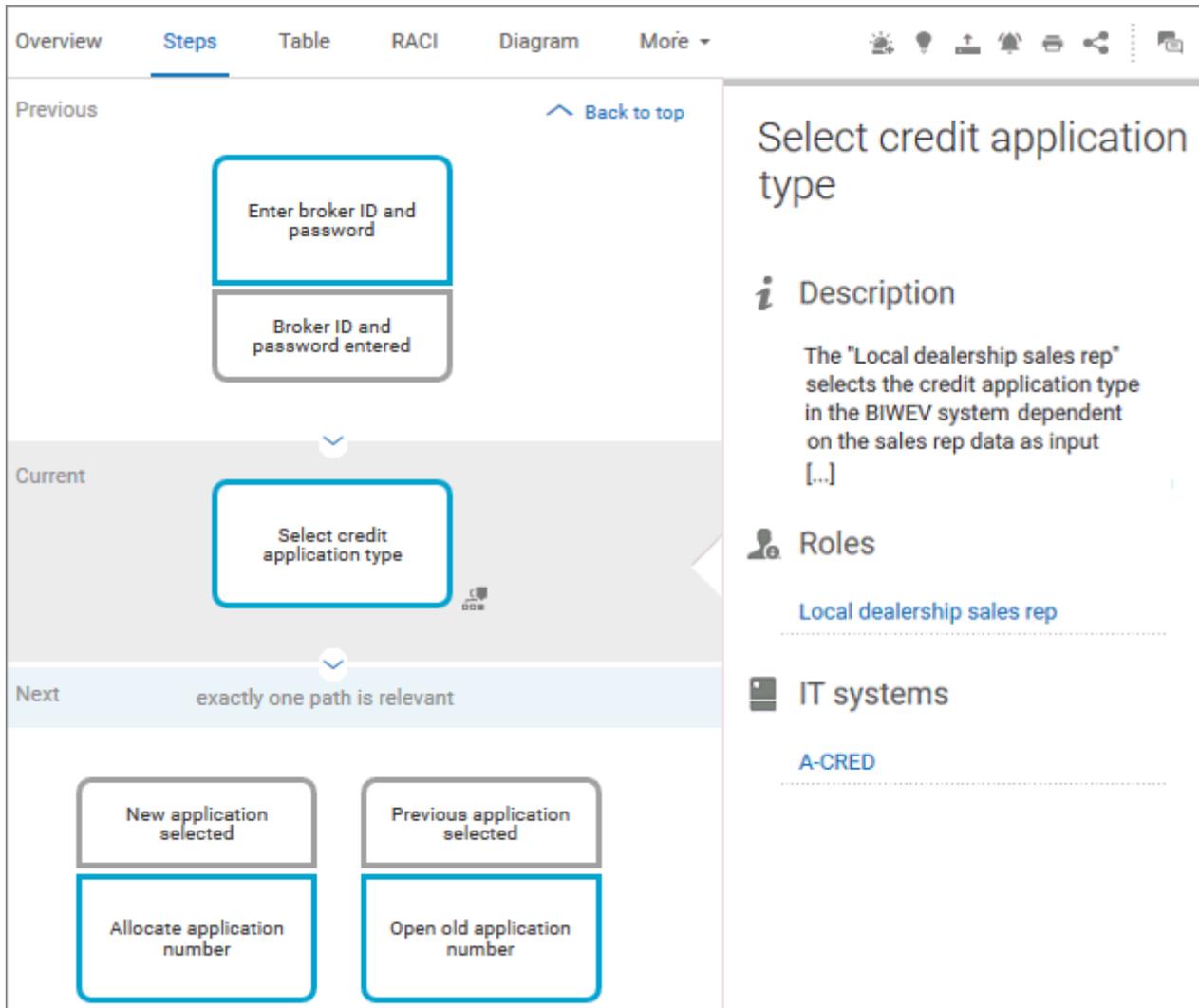
UML content is displayed in the same way as other ARIS content. You can use the groups (page 382) to navigate in the database.

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.

4.2.1.4.9 What is the Steps fact sheet for?

Transparently displays all steps of a process (EPC) (page 414). 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 417) and you can easily navigate between the **Steps** and the **Diagram** fact sheet (page 416).

The following information is provided for operators:

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

4.2.1.4.10 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 546) and remove added columns (page 546) again.

Overview	Steps	Table ▾					
↓ Functions		Roles					
Call order data	Financial assistant						
Check customer data	Financial assistant						
Change customer data	Financial assistant						
Check order data	Financial assistant Financial clerk						
Change order data	Financial clerk						
Transfer data to invoice	Financial clerk						
Allow discount	Accountant Financial assistant						

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

You can open a matrix (page 547) based on the **Table** fact sheet to clearly display the interrelations between the individual roles and functions.

Overview	Steps	Table	RACI	More ▾					
↓ Functions		Roles							
		Financial assistant	Financial clerk	Accountant					
Call order data	<input checked="" type="checkbox"/>								
Check customer data	<input checked="" type="checkbox"/>								
Change customer data	<input checked="" type="checkbox"/>								
Check order data	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>						
Change order data			<input checked="" type="checkbox"/>						
Transfer data to invoice			<input checked="" type="checkbox"/>						
Allow discount	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>					

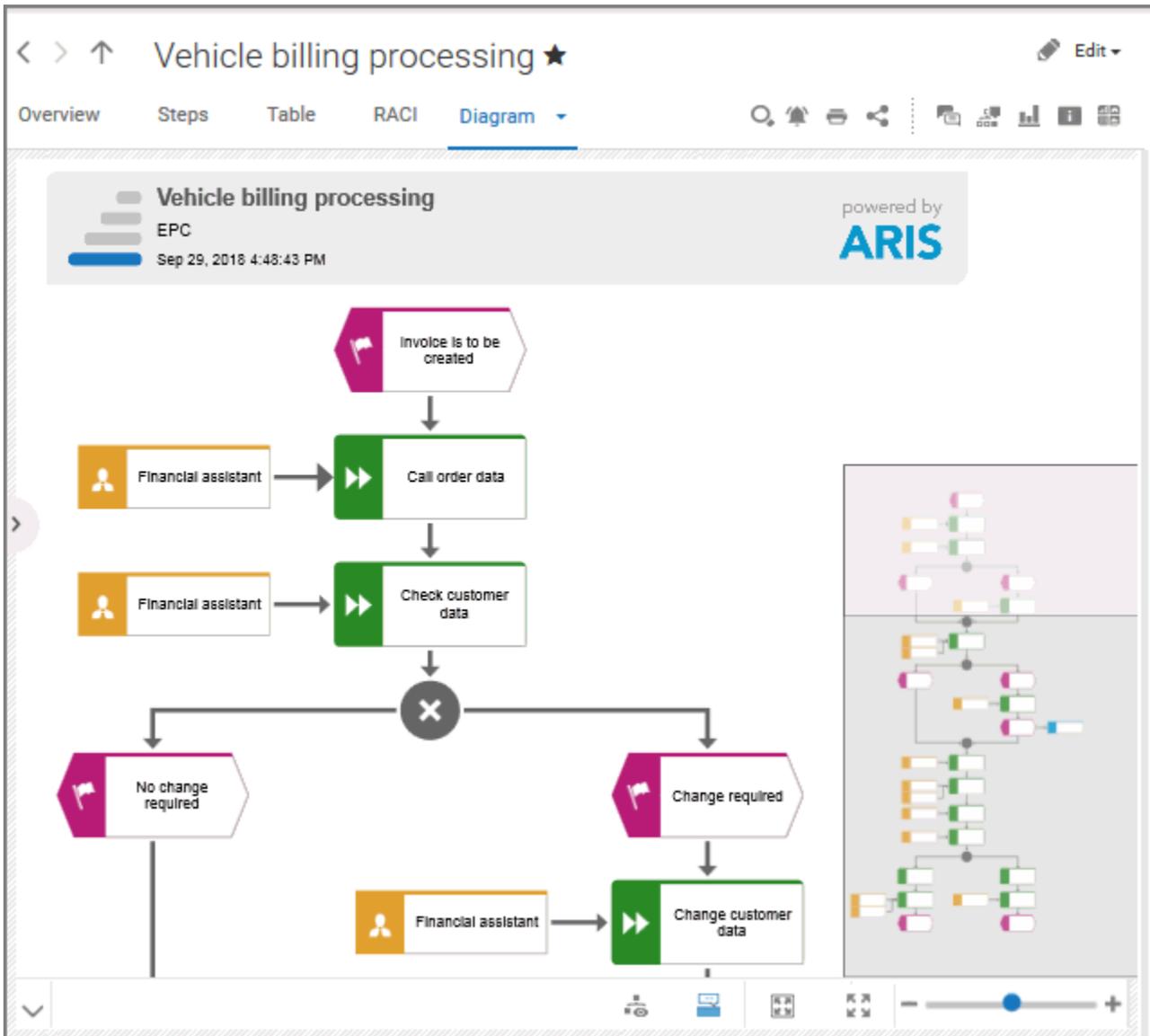
4.2.1.4.11 What is the RACI fact sheet for?

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 573). You can sort the functions (page 548) of matrices.

Overview Steps RACI ▾			
↓ Functions ▾	Financial assistant	Financial clerk	Accountant
Call order data	R A C I	R A C I	R A C I
Check customer data	R A C I	R A C I	R A C I
Change customer data	R A C I	R A C I	R A C I
Check order data	R A C I	R A C I	R A C I

4.2.1.4.12 What is the Diagram fact sheet for?

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

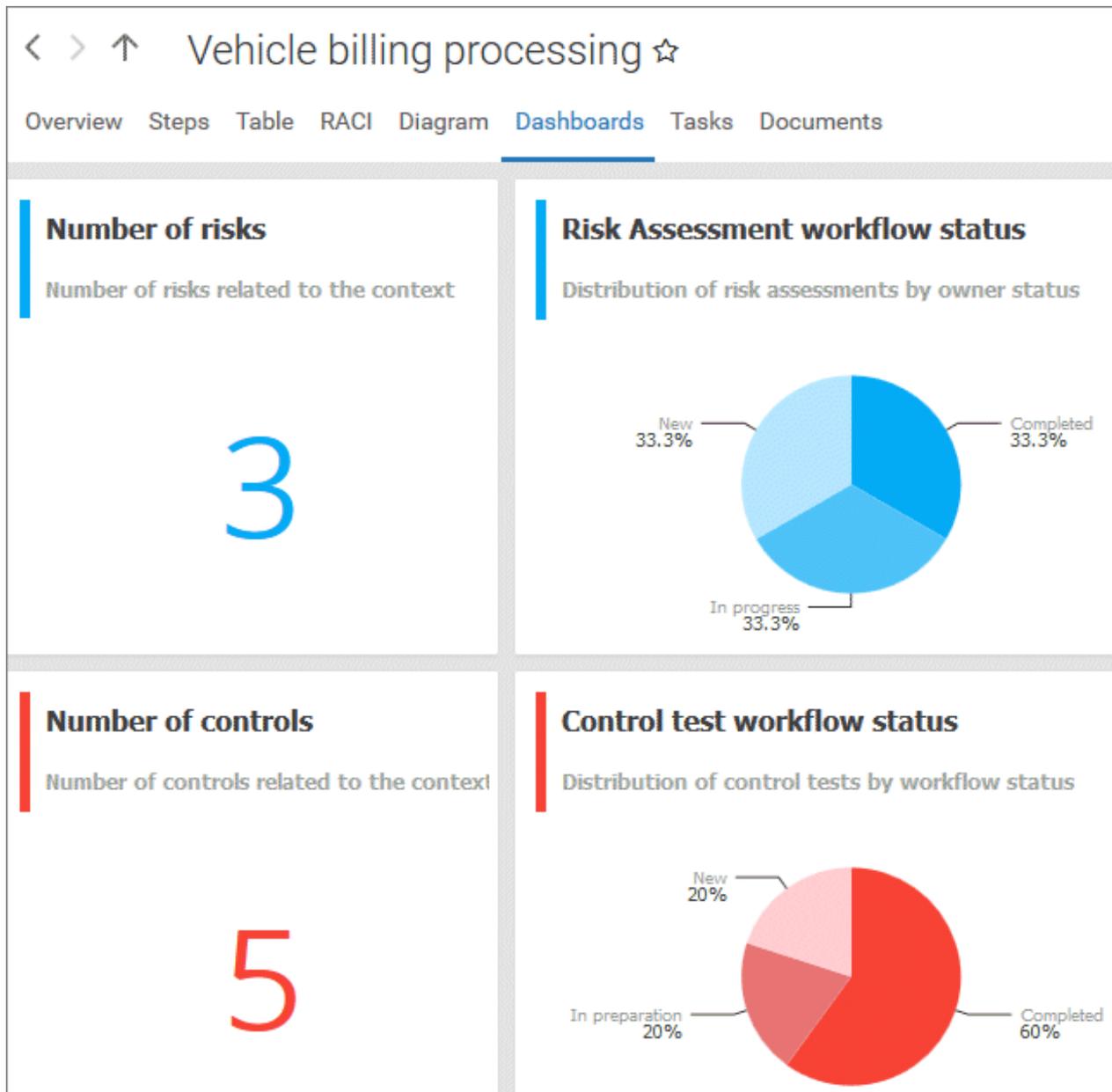


You can find model items (page 512) () in the diagram. Click  **Properties** to show the properties of a model or a model item. (page 515) You can highlight objects in the diagram (page 516) () that meet a defined condition. In addition, you can open assigned models (page 517) (). You can change the view of the diagram (page 519) () to show the aspects you want to focus on. Using the functions of the view bar you can change the size of appearance (page 513).

4.2.1.4.13 What is the Dashboards fact sheet for?

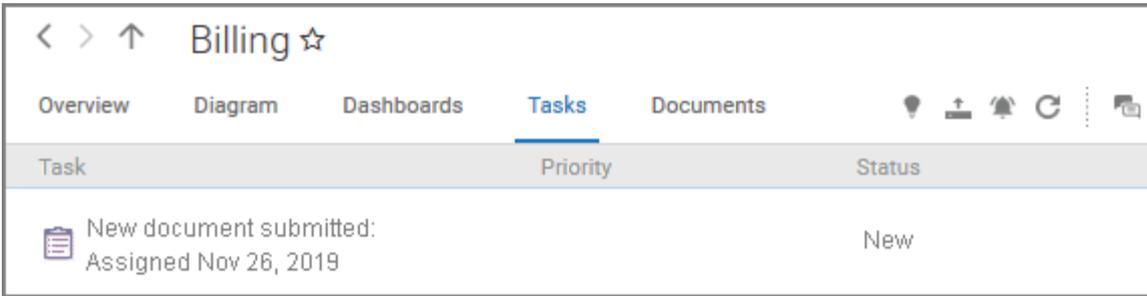
The **Dashboards** fact sheet shows dashboards available for the selected diagram. It is shown to users who have the **ARIS Aware** license (page 65).

Dashboards visualize database internal and database external information. Information can be, for example, runtime information, performance data, and analysis data.



4.2.1.4.14 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 360).



4.2.1.4.15 What is the Executables fact sheet for?

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

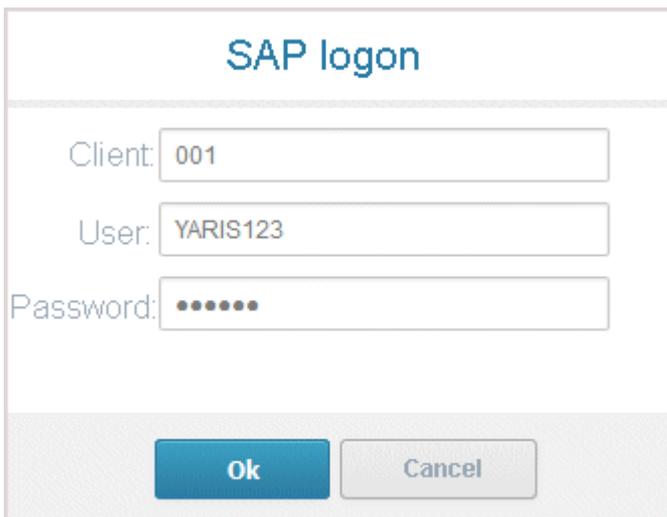
Overview	Steps	Table	RACI	Diagram	Tasks	Transactions
Transaction code	Name	Supports			Type	
	Create contract	Contract negotiation and completion in ERP Create contract			SAP transaction	
	Periodic billing	Contract negotiation and completion in ERP			SAP transaction	
	Display contract	Contract negotiation 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 693) the ► executable automatically via the default server in each row displaying a Transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.



16 A08 Solution Manager 7.1
18 S04 Solution Manager 7.2
SAP URL
Logon data Reset data

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



SAP logon

Client: 001
User: YARIS123
Password: ●●●●●●

Ok Cancel

Log on to the SAP system in the current language and the executable starts. The login remains valid until you log out of the portal or enter different login data (page 695). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you click an executable on the **Executables** page, such as **SDQ1**, its fact sheet (page 1055) including detailed information is displayed. If documents are available, you will be able to download (page 694) 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

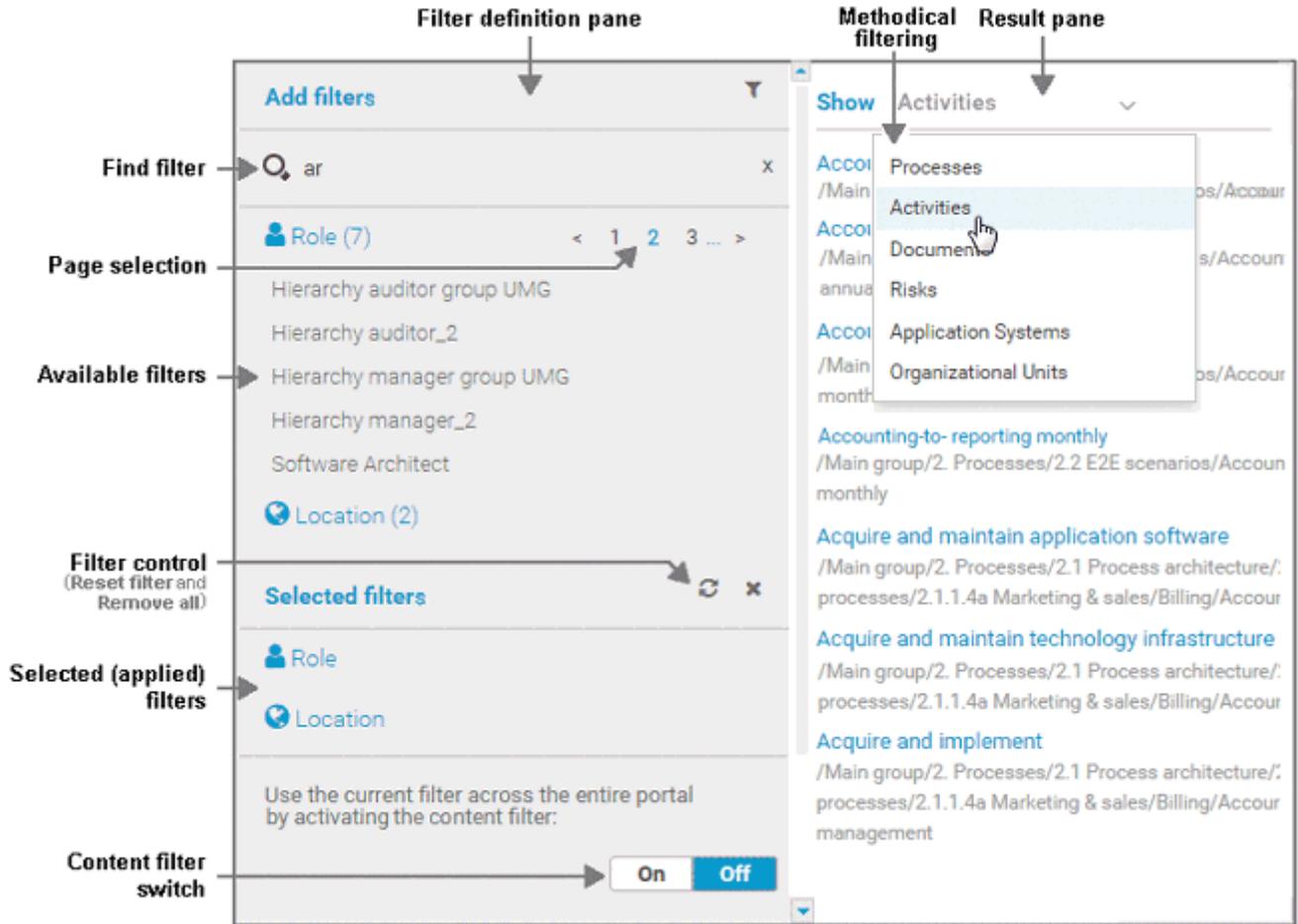
4.2.1.4.16 What is the Documents fact sheet for?

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.

Name	Owner	Last update	Related to
Modeling conventions	John Designer	2019-11-26, 10:25.38	 Vehicle billing processing

4.2.1.4.17 What is the structure of the My content area?

If the administrator provides at least one database you have access to, the **My content** area is available. It provides a filter definition pane and a result pane. In the definition pane, you can define filters, refresh the filter result, delete filter definitions, turn on and turn off the defined filters. In the result pane, you can focus on specific aspects. 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 438) or a number of filters (page 439) 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 442) and selected filters can be reset (page 442), 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 440).

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 442) by role assignment.

4.2.2 Use filters

You can define content filters (page 438) 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 440) to your user in models and the portal has been configured for the use of role filters.

4.2.2.1 Open My content to manage filters

You can manage your filters in the **My content** (page 436) area.

Procedure

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

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

4.2.2.2 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.

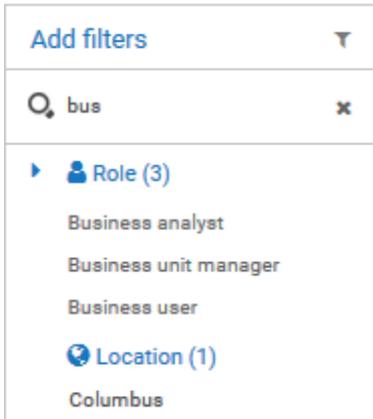
The filter is moved from the category of the **Add filters** section to the appropriate category of the **Selected filters** section and the content of the result pane is adjusted.

4.2.2.3 Add a number of filters

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

Procedure

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



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

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

4.2.2.4 Assign roles for the use of content filters

You can define content filters (page 444) using role assignment. In this case, these filters are added to the role filters under **Selected filters** of the **My content** (page 436) 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
3. In the navigation, select a diagram containing an occurrence of the relevant role, for example, **Regional sales department specialist**. The fact sheets (page 1055) 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 867) 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 441) the content filters, information is restricted (page 444) according to the role.

4.2.2.5 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 438), add a number of filters (page 439), remove filters (page 442), or reset filter (page 442).
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.



4.2.2.6 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.

4.2.2.7 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.

4.2.2.8 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 440).

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.

4.2.2.9 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.

4.2.2.10 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 440).

Procedure

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

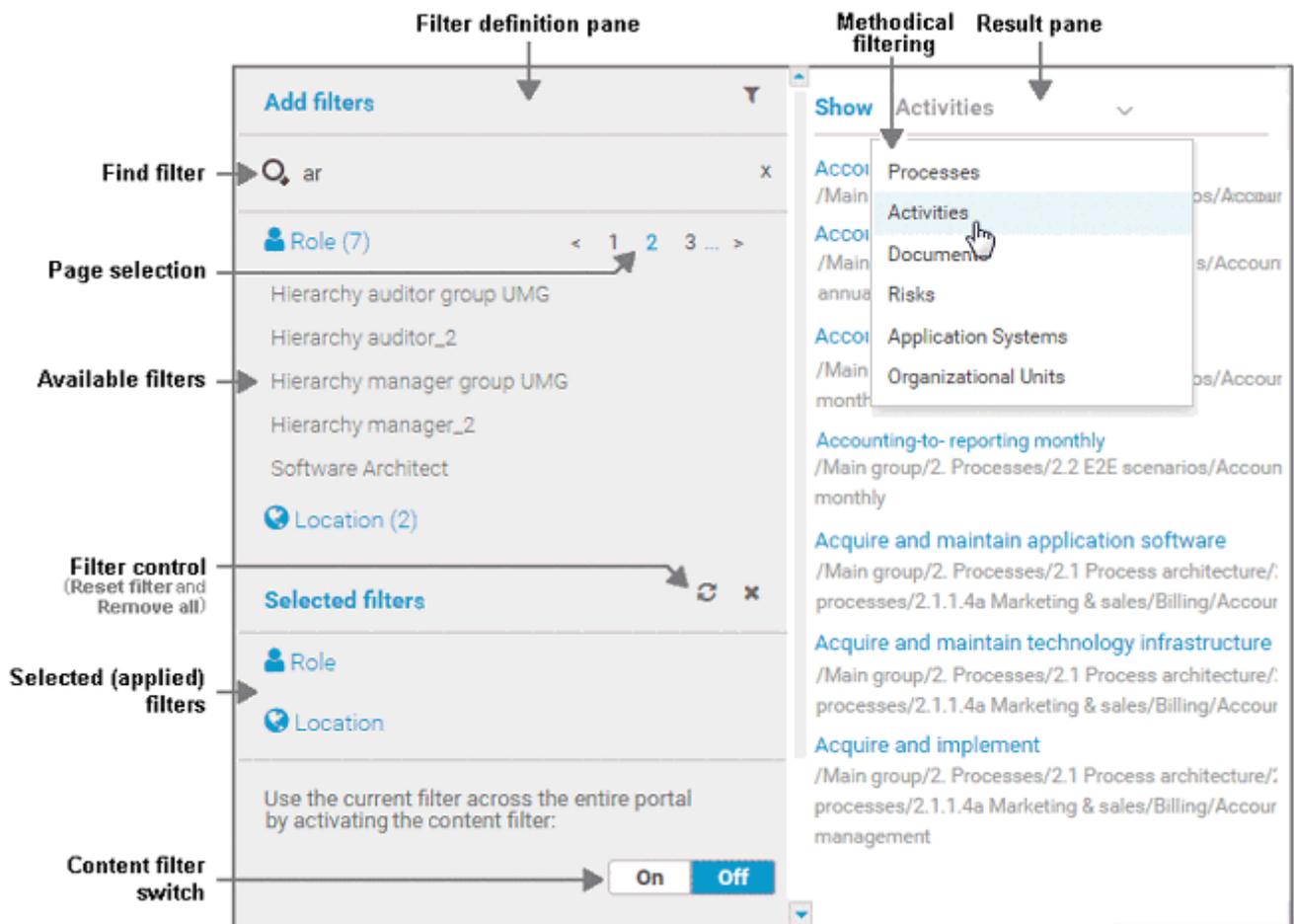
All filters including the filters assigned by role assignment are removed and the content of the result pane is adjusted.

4.2.2.11 Valuable information

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

4.2.2.11.1 What is the structure of the My content area?

If the administrator provides at least one database you have access to, the **My content** area is available. It provides a filter definition pane and a result pane. In the definition pane, you can define filters, refresh the filter result, delete filter definitions, turn on and turn off the defined filters. In the result pane, you can focus on specific aspects. 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 438) or a number of filters (page 439) 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 442) and selected filters can be reset (page 442), 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 440).

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 442) by role assignment.

4.2.2.11.2 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 438) and activate them as content filters (page 441) to further restrict this content. Content filters are available only if roles are assigned (page 440) 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?

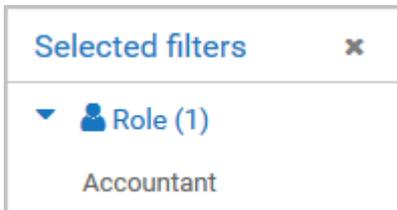
Filtered according to the selected role:

- All steps of the **Steps** fact sheet are displayed if you view processes step by step (page 414), but the detailed information about the satellites is filtered.
- Tables (page 428)
- Fact sheets (page 1055)
- RACI matrices (page 573)
- Search (page 1034)
- Navigation (Groups (page 382) or Processes (page 396))

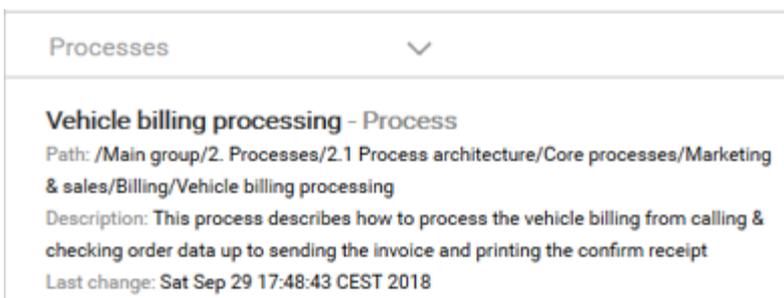
4.2.2.11.3 What is role-based highlighting?

In **My content** (page 436), you can select a role filter to restrict the contents of a database to those items in which the role is involved.

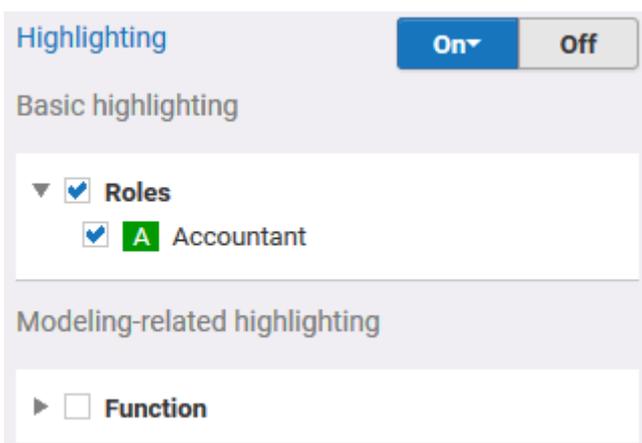
You can, for example, restrict the contents of the database **United Motor Group** to the role **Accountant**.



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



If you open the fact sheet **Diagram fact (page 430)** and switch on the highlighting (page 516), the default highlighting is set to highlight the role **Accountant**.



You can activate the check boxes for additional roles and/or functions for highlighting (page 545). In this case, the highlighting switches to **User defined**.

4.2.3 Use favorites

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

In the **Search** area, you can save filter settings (page 447) and single database items as favorites (page 446). While you can define (page 447) and access the filter settings (page 449) in the Search area (page 1036), you can access personal favorites and favorites based on filter settings in the Favorites area (page 415) of the portal.

4.2.3.1 Open My favorites

You can open your the  **My favorites** area to access to the your personal (page 446) and the predefined favorites.

Procedure

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

You opened the  **My favorites** area.

4.2.3.2 Save a model or group as a personal favorite

You can save a model as a favorite to access it quickly from the  **My Favorites** area (page 446) 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 447).

4.2.3.3 Remove a personal favorite

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

Procedure

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

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

4.2.3.4 Save search settings as a favorite

In the **Search** area (page 1045), you can save your search settings. Thus, you can search the content based on specific settings at any time.

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.
3. Select the filter criteria (page 1038) to define your search.
4. Click  **Save search query as a favorite**. The corresponding dialog opens.
5. Enter a name.
6. Click **OK**.

The search settings are saved in the  **My Favorites** area. You can filter the content based on these settings (page 449) at any time from various devices.

4.2.3.5 Filter using My Favorites

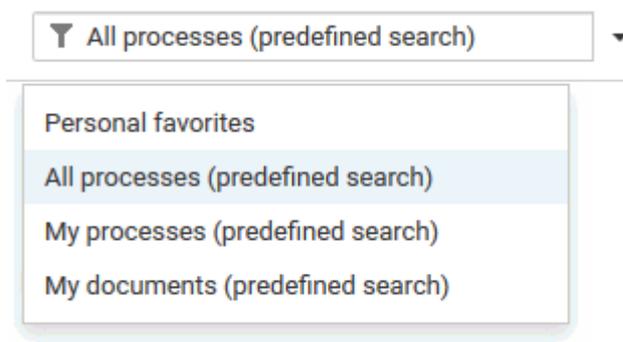
In the portal, you have direct access to all saved filter settings (page 447). The filters output the content of the selected database, while the personal favorites (page 446) of all published databases are listed and can be accessed.

Procedure

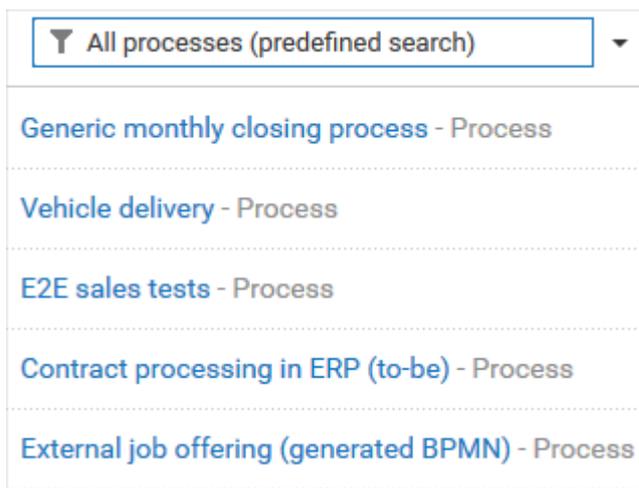
1. If you have access to more than one database, select the database you want to work with.
2. Click  **My favorites** in **Home** (page 380)

Provides direct access to saved filter criteria (Seite 415) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 446).

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



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



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

5. Click the page numbers to display the content of the corresponding pages.
6. 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.

4.2.3.6 Use a favorite in the Search area

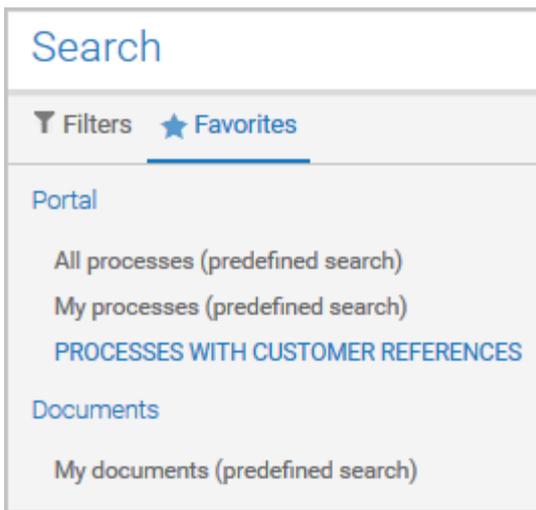
In the **Search** area (page 1045), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.
3. Click ★ **Favorites** in the **Filters** bar.



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

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

4.2.3.7 Use an own favorite setting in the My Favorites area

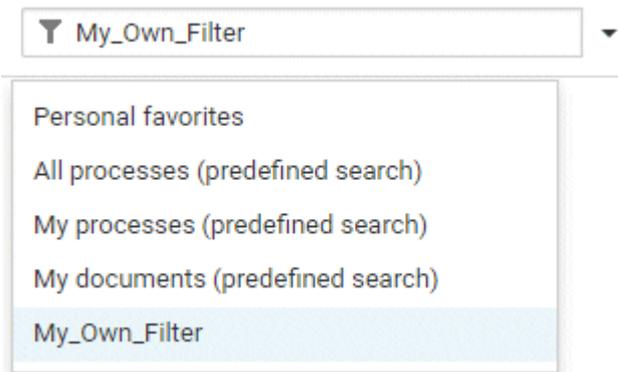
In the **Search** area you can define a filter setting that is used in the **Search** area and in the **My Favorites** area to filter the content based on your own filter criteria.

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.
3. Select the filter criteria (page 1038) to define your search.
4. Click ☆ **Save search query as a favorite**. The corresponding dialog opens.
5. Enter a name.
6. Click **OK**. The search settings are saved in the ☆ **Favorites** area. In the **Search** area, you can filter the content based on these settings at any time from various devices.
7. Click 🏠 **Portal**.
8. Click ☆ **My favorites**.
9. Click the ▼ **down arrow** of the **Filter selection** field.



10. Click your own filter setting.

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

4.2.3.8 Delete a favorite setting

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

Procedure

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

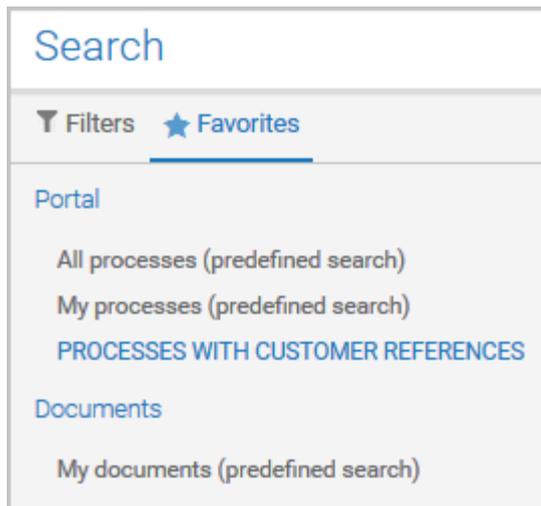


2. Click **★ Favorites**.
3. Move the mouse pointer over the filter to be deleted. For user-defined filters, a **Delete** button is displayed to the right of the filter name.
4. Click **Delete**.

The filter setting is deleted.

4.2.3.9 How are favorites structured in the search?

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



4.2.4 Collaborate

The following describes the collaboration features.

4.2.4.1 Comment on portal content

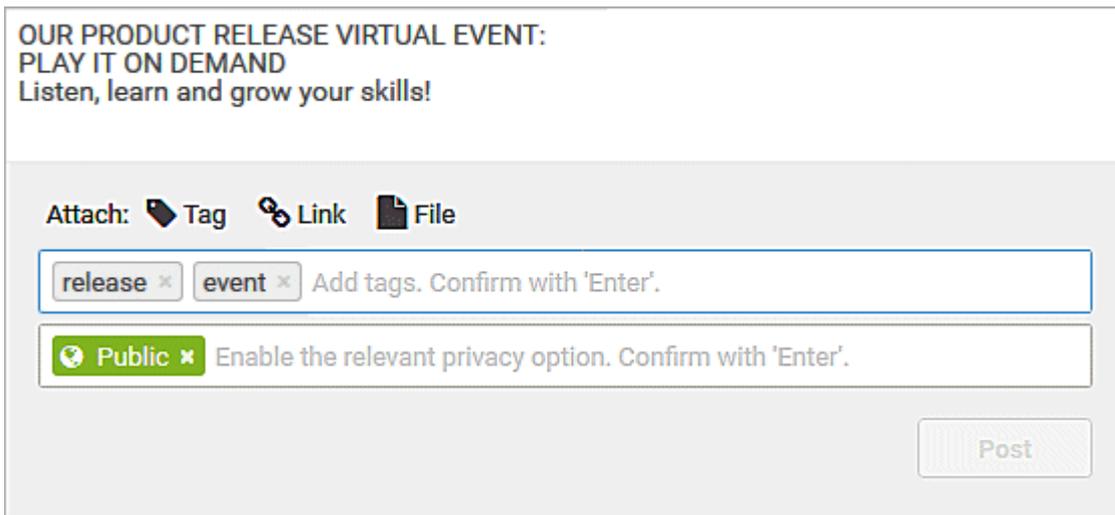
Add comments to models and post information that could be of interest to your colleagues.

Prerequisite

You have the required access privilege (page 729) in ARIS Architect.

Procedure

1. Navigate to a process.
2. Click  **Comment** 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 728) 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.



OUR PRODUCT RELEASE VIRTUAL EVENT:
PLAY IT ON DEMAND
Listen, learn and grow your skills!

Attach:  Tag  Link  File

release × event × Add tags. Confirm with 'Enter'.

 Public × Enable the relevant privacy option. Confirm with 'Enter'.

Post

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.

4.2.4.2 Follow processes in the portal

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

Procedure

1. Navigate to a process.
2. Click  **Comment** in the 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**.

4.2.4.3 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Click the model.
6. Click  **Comment** in the bar panel if the bar is not activated yet.
7. Enter your comment in the box provided.
8. Click  **Tag**.

9. Enter the words to be used as keywords (page 728) 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.

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Listen, learn and grow your skills!

Attach: Tag Link File

release × event × Add tags. Confirm with 'Enter'.

Public × Enable the relevant privacy option. Confirm with 'Enter'.

Post

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

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

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

4.2.5 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 460) to limit the list. Initially, the tasks to be edited are displayed (status **New** and **Overdue**). If you want to display all tasks, change the filter.

-  **Tracking**

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

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

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

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

4.2.5.1 Open My tasks

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

Prerequisite

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

Procedure

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

4.2.5.2 Tasks

4.2.5.2.1 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 460) 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. 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 126) that corresponds to how it was completed.

Tip

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

4.2.5.2.2 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.

4.2.5.2.3 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.

4.2.5.2.4 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 460) 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**.

4.2.5.2.5 Display tasks in read-only mode

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

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

Procedure

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

The task opens in read-only mode.

4.2.5.2.6 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.

4.2.5.2.7 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 126) of the task is **New**. To find out if another user is already editing a task, display (page 460) the **Current editor** column in your list ( **Select columns**).

Prerequisite

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

Procedure

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

You can specify only one substitution period for all substitutions.

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

9. Click **OK**.

The options selected for the substitute are applied. Your new tasks are passed on in accordance with these options and their status (page 126) 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.

4.2.5.2.8 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 460) 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 name, first name, or last name, and click **Find**. If hits exist for the current search, the results are displayed.
4. To select a group or user, select the relevant element. If you select a group, you also need to select a user.
5. 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 126) **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.

4.2.5.2.9 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.

4.2.5.2.10 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.

4.2.5.2.11 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 460) the **Current editor** column in your list (🔧 **Select columns**).

Prerequisite

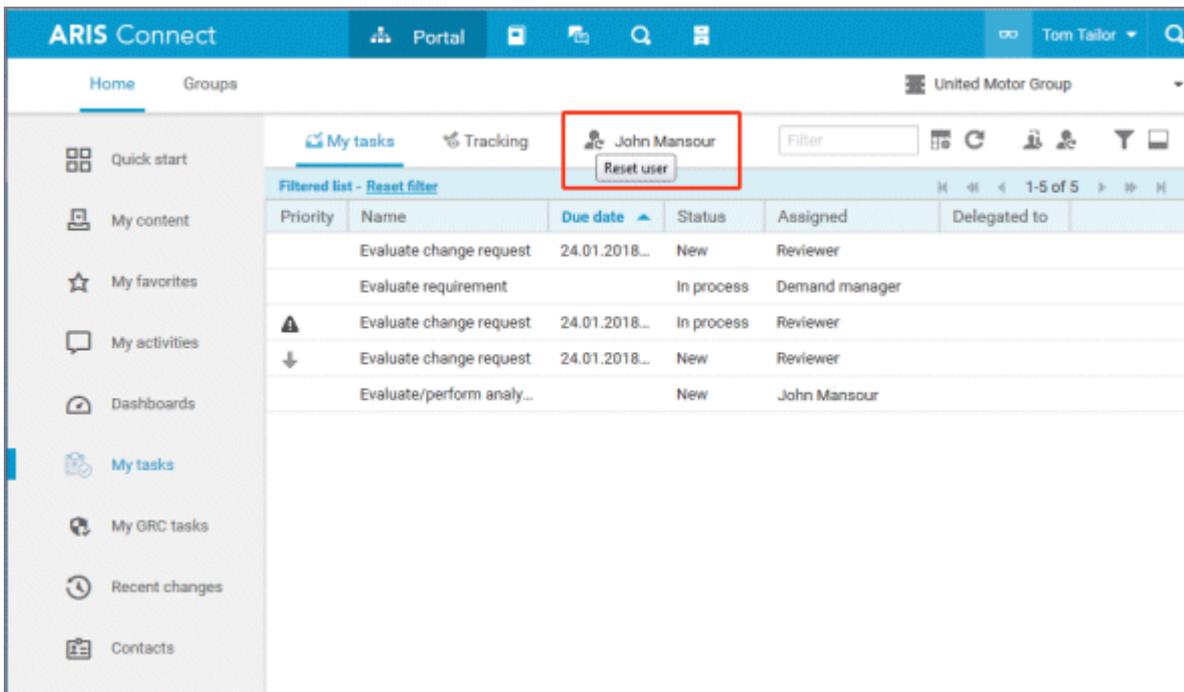
You have the Process Governance administrator function privilege.

Procedure

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

The tasks of the selected user are displayed. Instead of this user, you can now edit (page 456), delegate (page 459) (**Delegate to me** button), or pass on tasks. To return to your user, click **Reset user**. Statistics data in the form of charts for human tasks are available in ARIS Connect under **ARIS Administration > Charts > Governance > Human tasks**.

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 user information 'Tom Taylor'. The main content area is titled 'United Motor Group' and displays a 'My tasks' list. The list is filtered for 'John Mansour' and includes a 'Reset user' button. The table below shows the task list:

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	

4.2.5.2.12 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.

4.2.5.2.13 Valuable information

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

4.2.5.2.13.1 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 126). The status filter is always applied to all tasks.

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

4.2.5.2.13.2 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 457).
- **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 456).
- **Delegated**

Editing of the task was passed on permanently (page 459) 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.

4.2.5.2.13.3 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.

4.2.5.2.13.4 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.

4.2.5.2.13.5 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 460) 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 126) 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 459) these tasks. Tasks can only be delegated if their status (page 126) is **New** or **In process**. These tasks are then displayed in your task list with the status **Delegated**.

4.2.5.2.13.6 How can user accounts be deleted and anonymized?

Users can only be deleted in ARIS Administration. To anonymize Process Governance users according to GDPR (page 1056), use **ARIS Process Governance Command-Line Tool**. For detailed information, refer to the **ARIS Process Governance Command-Line Tool** manual. After anonymization, users and their activities are shown with **Anonymized user** instead of with the user name.

AUTOMATION DATA FLOWS

The Process Governance services can write user specific data to attributes. These attribute values can be anonymized with the help of customized reports in order to meet the requirements of the General Data Protection Regulation (GDPR (page 1056)). Please contact your local Software AG sales organization (<http://www.softwareag.com>).

4.2.5.3 Documents

4.2.5.3.1 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 467) the modified document and move it to ARIS document storage.

4.2.5.3.2 Upload document

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

Procedure

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

The document is uploaded.

4.2.5.3.3 Check out document

You can download (page 474) 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.

4.2.5.3.4 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.

4.2.5.3.5 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.

4.2.5.3.6 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.

4.2.5.3.7 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.

Document details	Versions	Relations	History
File name:	<input type="text" value="Customer acquisition.pdf"/>		
Path:	<input type="text" value="ARIS document storage/biks/"/>		
Title:	<input type="text" value="Customer acquisition"/>		
Current version:	<input type="text" value="1.0.0"/>		
Revision:	<input type="text" value="1"/>		
Status:	<input type="text" value="New"/>		
ID:	<input type="text" value="58c2f9d9-7bbf-4ae9-8d3a-eb4429e162e2"/>		
File size:	<input type="text" value="35.4 KB"/>		
Owner:	<input type="text" value="system"/>		
Locked by:	<input type="text"/>		
Created by:	<input type="text" value="system"/>		
Created on:	<input type="text" value="2019.02.20, 12:48:47"/>		
Description:	<input type="text" value="A model that describes the process of customer acquisition"/>		
List of tags:	<input type="text" value="acquisition customer epc model"/>		
Link:	Customer acquisition.pdf		
Dashboard data link:	<input type="text" value="/documents/data/portal/biks/Customer acquisition.pdf?tenantId=default"/>		
	<input type="button" value="Copy to clipboard"/>		

4.2.5.3.8 Edit document properties

You can edit the properties of a document.

Prerequisite

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

Procedure

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

You have edited the properties of the document.

4.2.5.3.9 Select document owner or responsible

You can edit the properties of a document.

Prerequisite

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

Procedure

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

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

You can select the person responsible for the document.

4.2.5.3.10 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**.

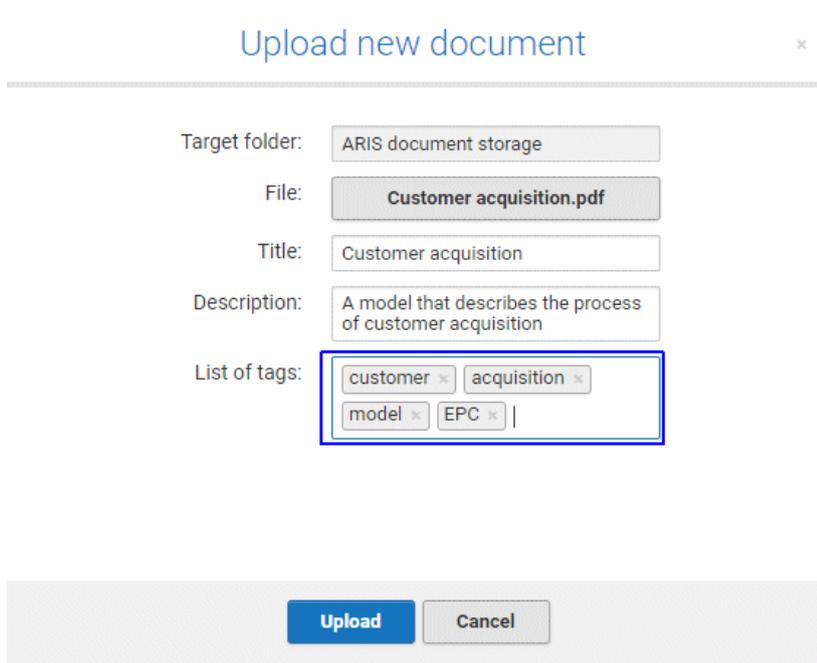
The document is saved permanently in ARIS document storage until it is deleted.

4.2.5.3.11 Valuable information

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

4.2.5.3.11.1 Tags

Tags (page 1063) are used to provide additional data of documents. When you upload a document, you can add tags.



The screenshot shows a dialog box titled "Upload new document" with a close button (x) in the top right corner. The dialog contains the following fields and values:

- Target folder: ARIS document storage
- File: Customer acquisition.pdf
- Title: Customer acquisition
- Description: A model that describes the process of customer acquisition
- List of tags: customer x, acquisition x, model x, EPC x |

At the bottom of the dialog, there are two buttons: "Upload" (highlighted in blue) and "Cancel".

The tags are also displayed when opening the document details (page 469).

4.2.5.3.11.2 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 467) to ARIS document storage to become permanent documents.

4.2.5.3.11.3 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.

4.2.5.3.11.4 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.

4.2.5.4 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.

4.2.5.5 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.

4.2.5.6 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.

4.2.5.7 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.

4.2.5.8 '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.

4.2.5.9 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 (i)

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 **New**, **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 473) 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.

4.2.5.10 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 **New, 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.

4.2.5.11 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.

4.2.5.12 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.

4.2.5.13 '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.

4.2.5.14 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 473) 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.

4.2.5.15 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.

4.2.6 Compliance

The following describes the compliance features.

4.2.6.1 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

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

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

4.2.6.2 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.

4.2.6.3 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 482) the risk assessment in ARIS Risk & Compliance Manager, click  **Open in ARIS Risk & Compliance Manager**.

4.2.6.4 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 displayed in ARIS Risk & Compliance Manager.
4. Edit the mandatory fields.
 - a. Enter the **Name** for the issue.

- b. Enter the **Description** of the issue.
 - c. Enter a description of the **Remediation measure**.
 - d. Enter the date by which the issue is to be remediated (**Remediation planned before**) (becomes a mandatory field as soon as the **Release** creator status is selected).
 - e. Assign an **Issue owner** and an **Issue reviewer** (becomes a mandatory field as soon as the **Release** creator status is selected).
5. Edit the optional fields.
- a. Enable **Financial details** to display the attributes for categorizing financial incidents.
 1. Select the **Business line level 2**. Level 1 is set automatically as a result.
 2. Select the **Incident type level 2**. Level 1 is set automatically as a result.
 3. Select the **Incident cause classification level 2**. Level 1 is set automatically as a result.
 4. Specify the expected loss.
 5. Select a currency. If a currency is specified at the system or environment, it is displayed here automatically, but can be changed.
 - b. To describe the incident in greater detail, add reference **documents**.
 - c. Insert a remark.
 - d. Use **Assignments** to assign the hierarchy elements that can be affected by the incident.
6. Assign an issue owner/issue reviewer.
- a. In the Issue owner or Issue reviewer row, click  **Create assignment**. The list of assignable users opens.
 - b. Click  **Create assignment** in the row of the relevant user. The list closes.
 - c. Click  **Save**.
7. Click  **Save**.
8. Click **OK**.

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

4.2.6.5 Create incident in ARIS Risk & Compliance Manager

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

Prerequisite

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

Procedure

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

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

4.2.7 Use models

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

4.2.7.1 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 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 421)** 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 793) 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 798) and opens in a new tab (page 800).

4.2.7.2 Edit models

You can edit models in ARIS Connect.

Prerequisite

- You have 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
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 (page 800).
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the model.

4.2.7.3 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 556). 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the items and change the relevant attributes (page 556). Depending on the attributes, various editing options (page 567) are available.
5. Click  **Inform owner of change**. The **Inform of change** dialog opens.
6. Insert a change description
7. Click **Submit**. The **Information** dialog opens.

8. Enable the **Do not show this message again** check box if you do not want to be informed again by the dialog when executing the mini workflow more than once during the current session.
9. Click **OK**.

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

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

4.2.7.4 Print graphic as PDF

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) 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.

4.2.7.5 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Click the model you want to send to another user.
6. Click  **Share** >  **Share model**. The corresponding dialog opens.
7. Select the user you want to share the model with.
8. Enable **Send copy to me** to receive a copy of the message, if required.
9. You can also enter a subject and a comment.
10. Click **Send**.

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

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

4.2.7.6 Copy view code

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Click the model you want to send to another user.
6. Activate the **Overview**, **Steps**, or **Diagram** view.
7. Click  **Share**.
8. Under **</> Copy current view code**, click  **Copy to clipboard**.

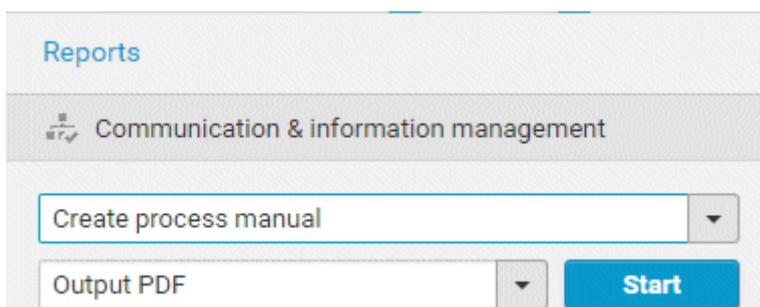
The view code is copied to the clipboard. If you insert the view code as html in a wiki page, the connection to ARIS Connect is established and the view is loaded.

4.2.7.7 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.

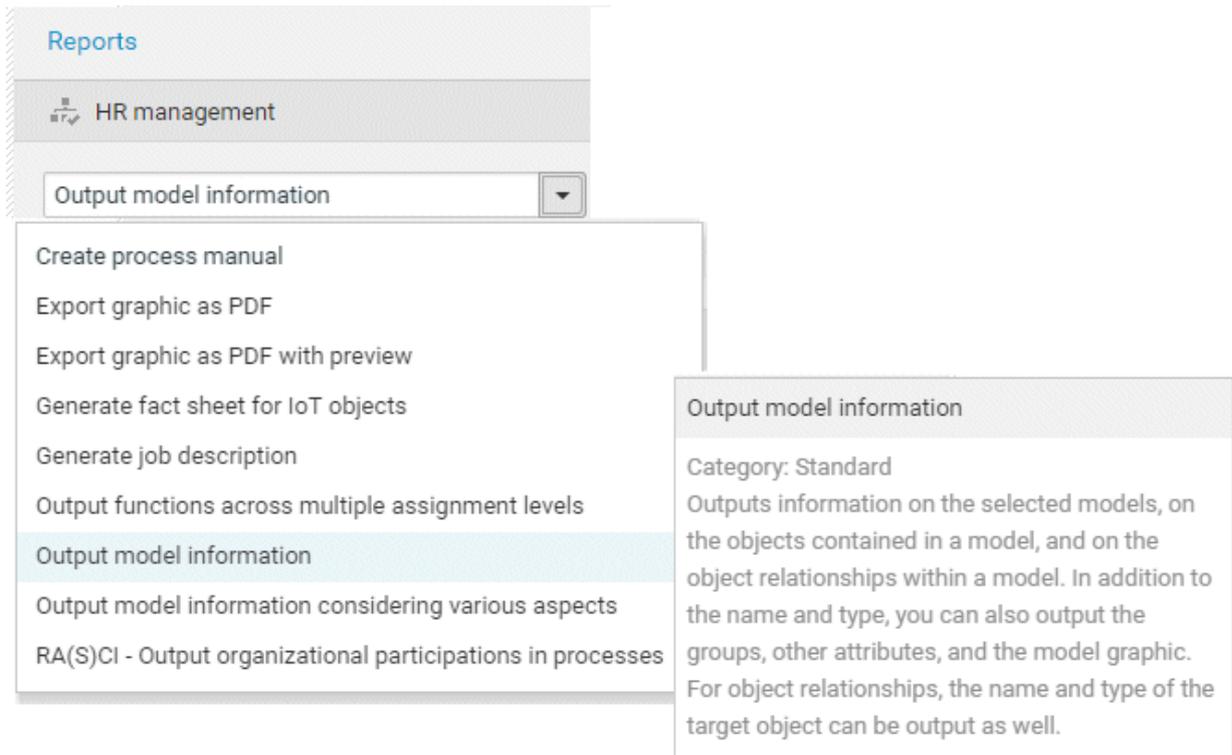
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
3. Navigate (page 412) to the relevant group.
4. Select the model for which you want to create a report.
5. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
6. Click  **Reports**. The **Reports** bar opens showing the name of the item for which the report is to be generated.

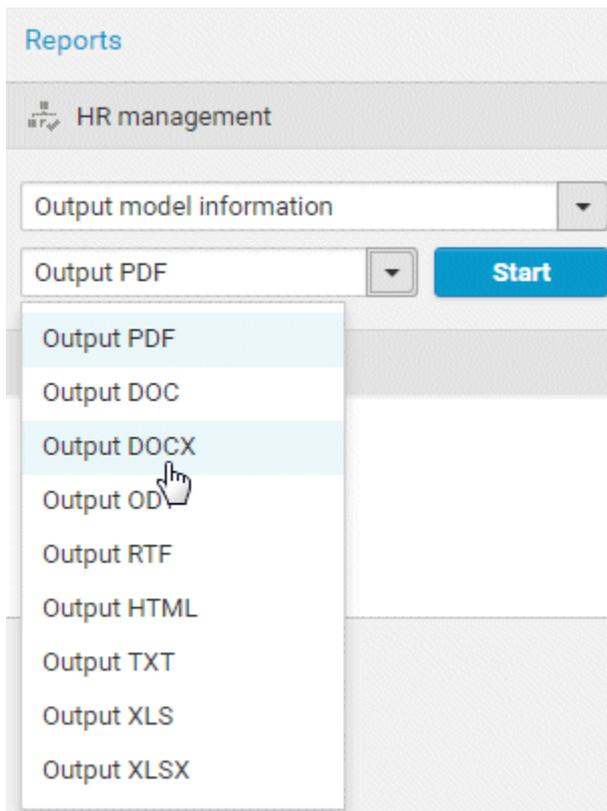


All reports you can start for this diagram are displayed.

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

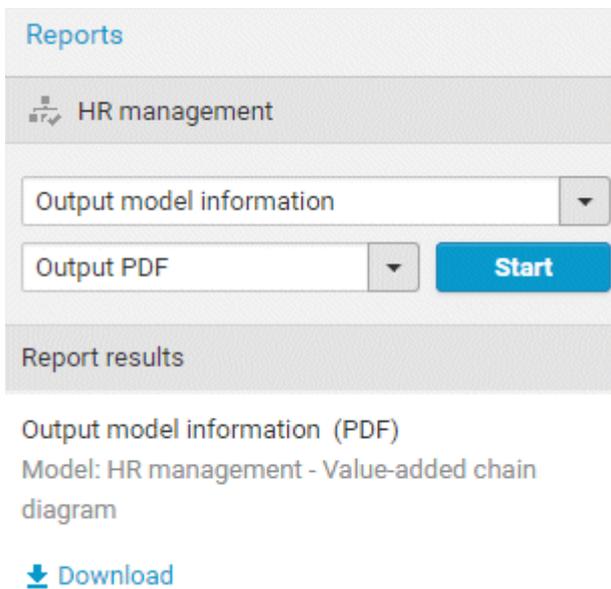


- Select the output format (page 511), for example, **Output DOCX**.



- Click **Start**.

11. 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.
12. After the report is complete, the report is shown in the **Report results** link list for downloading, and a dialog opens.
13. Click **Download result** if you want to download the report immediately.
14. 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.

4.2.7.7.1 Valuable information

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

4.2.7.7.1.1 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.

4.2.7.7.1.1.1 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.

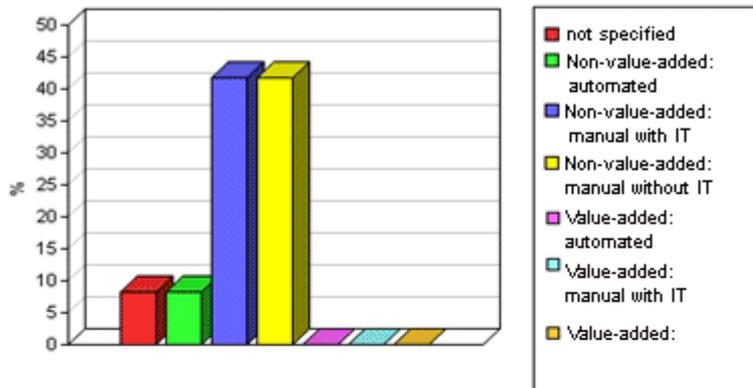
The following example is based on an analysis of the **Purchase order processing (actual)** and **Purchase order processing (target)** models. The **Assessment of value added** attribute is evaluated separately for each model. In this case, one worksheet is output with a table and one with charts.

TABLE

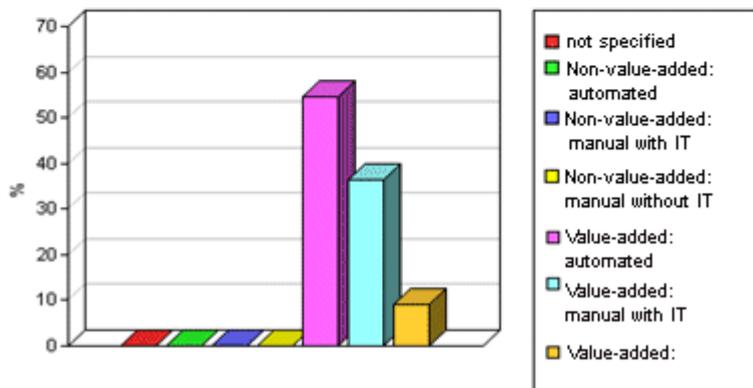
Analysis: Evaluate assessment of value added				
Created 5/25/09 11:21 AM				
Server: horus.me.corp.ids-scheer.com				
Database: DemoDB-United Motors Group				
User: system				
File: Report0.xls				
Analyze classification				
Models:				
1.) United Motors Group\2. Processes\Process Architecture\Core 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

4.2.7.7.1.1.2 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 have enough space to accommodate the entire family for holiday trips.</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 **Family** Customer segment is shown, because the **Lukas Andrews** Persona occurs in a Customer segmentation map and this **Persona** object is related to the **Family** Customer segment object.



CONTEXT

Object of **Persona** type

OUTPUT FORMAT

- DOC
- DOCX
- RTF
- ODT
- PDF

4.2.7.7.1.1.3 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

4.2.7.7.1.1.4 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

4.2.7.7.1.1.5 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

4.2.7.7.1.1.6 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

4.2.7.7.1.1.7 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

4.2.7.7.1.1.8 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

4.2.7.7.1.1.9 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

4.2.7.7.1.1.10 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

4.2.7.7.1.1.11 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

4.2.7.7.1.1.12 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

4.2.7.7.1.1.13 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.
- **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.
- **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

4.2.7.7.1.1.14 EPC-to-BPMN transformation

USE

Transforms a model of type **EPC** into a BPMN diagram. If the report is run from a context containing multiple models of type **EPC**, a report with detailed transformation results is generated for each of the models.

CONTEXT

Groups, Models

OUTPUT FORMAT

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

4.2.7.7.1.2 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

4.2.7.8 Model Viewer

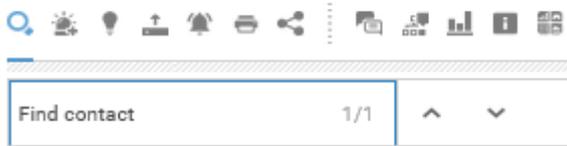
The following describes the use of the Model Viewer.

4.2.7.8.1 Find in model

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
5. Click  **Find in model**. The input field opens.
6. Enter the term contained in the name of the model items you want to find. The first number indicates the item selected in the diagram and the second number the total number of items found.



7. Click **×** **Delete** to delete the contents of the input field and enter another term.
8. Click **▼** **Next** to highlight the next model item found.
9. Click **▲** **Previous** to highlight the previous model item found.

You have found the required model items.

4.2.7.8.2 Use the view bar

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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 519) of process models.
10. On the left, click the ▼ arrow down to hide the view bar.
11. On the left, click ▲ arrow up to view the view bar again.

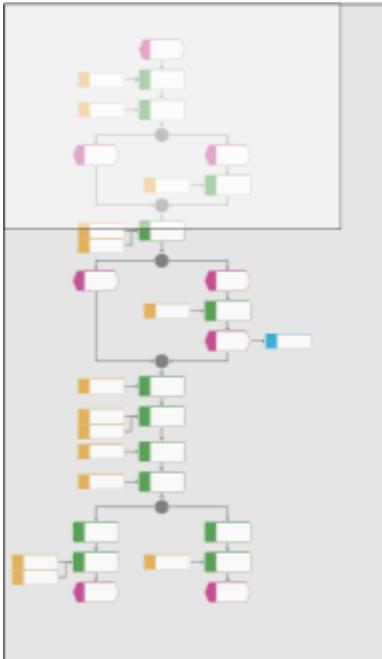
You have used the view bar to adjust the Model Viewer.

4.2.7.8.3 Navigate using the Model Viewer

You can navigate to different areas of a model.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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 513), 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.

4.2.7.8.4 Show properties

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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
Time of generation	Jul 17, 2018 11:17:17 AM
Creator	w.becker
Status	Released
Last change	Sep 29, 2020 5:48:52 PM
Type	Organizational chart
Last user	system
Person responsible	peter.process

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.

4.2.7.8.5 Switch highlighting on

You can highlight model items to focus on aspects to be monitored (page 539). This example illustrates highlighting of a process model in the default view (page 394).

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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.

- ▼ **Roles**
 - A** Accountant
 - F** Financial assistant
 - F6** Financial clerk

The model items that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch the highlighting off (page 532).

4.2.7.8.6 Open assignment

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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.

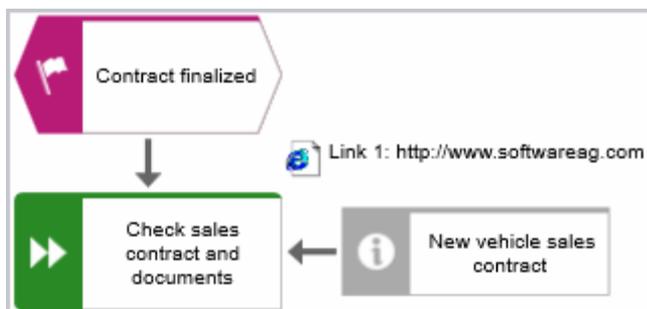
If only one diagram is assigned, it is opened directly. If more than one diagram is assigned, they are offered for selection in a dialog.

4.2.7.8.7 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram** fact sheet. The diagram is displayed in the Model Viewer together with all placed link attributes.



5. Click the relevant link attribute.

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

4.2.7.8.8 Print the graphic of the current model

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) 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.

4.2.7.8.9 Change view

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

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
5. Click  **Change view**. The view options (page 521) 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 521) to change the view of the model. Based on the options, the model view is adjusted.
7. To close the **Change view** bar, click in the modeling area.

As long as the view options are active, the  **Change view** icon is colored in red and the selected view is indicated. You can reset the changed view (page 519).

4.2.7.8.10 Reset a changed view

In the Model Viewer, you can determine that models are displayed according to criteria you have selected (page 519). 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 521) are collapsed.
2. Click  **Reset to default** to the right of the title **Views**.
3. To close the **Change view** bar, click in the modeling area.

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

4.2.7.8.11 Switch on the mini fact sheet display

In the Model Viewer, you can switch on the mini fact sheet display to display mini fact sheets for objects (page 528) you move the mouse pointer over or select.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
4. At the bottom, click  **Show mini fact sheets.**  **Show mini fact sheet** is colored and the Message **Mini fact sheets activated** is displayed.

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

4.2.7.8.12 Show Mini fact sheets

In the Model Viewer, you can display mini fact sheets for selected objects (page 528) if you have turned on the display of mini fact sheets (page 520).

Procedure

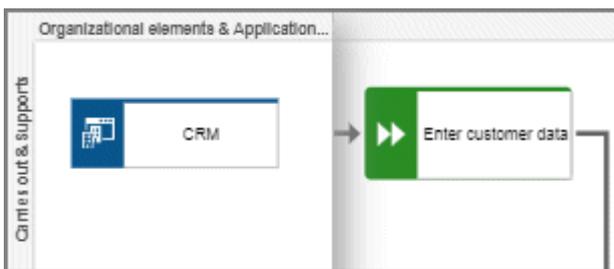
1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
 2. Navigate to the group where the relevant model is stored.
 3. Move the mouse pointer over an object or click an object.
If you move the mouse pointer over an object, the mini fact sheet is displayed as long as the mouse pointer remains on the object.
If you click an object, the mini fact sheet is displayed until you click in the modeling area.
- The mini fact sheet is displayed. Among other things, you can copy text content to the clipboard,  go to the **Overview** fact sheet of the object, or jump to the **Overview** fact sheet of an object whose link is placed in the fact sheet.

4.2.7.8.13 Valuable information

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

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

The first row or column of a swimlane model remains visible even if the model content is moved (page 514). 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.



4.2.7.8.13.2 Which view options are available?

You can change the view (page 519) of all model types. For every model type at least the layout options **Horizontal** and **Vertical** are available.

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

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

VIEWS

RESET TO DEFAULT (↺)

Turns off all previous view settings and displays the model in its originally layout, in other words, how it is actually modeled. All model items, structurally relevant objects (page 1061) and satellites (page 1061), are shown.

LEAN

Displays only the structurally relevant objects (page 1061) of a model. Satellites (page 1061) 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 1061), all objects of the following types are displayed.

- Internal person
- External person
- Position
- Role

IT SYSTEM VIEW

Besides the structurally relevant objects (page 1061), 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 526) across model boundaries by arranging the structurally relevant objects (page 1061) of the process from left to right and the satellites (page 1061) above and below them.

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

DETAILS

SELECT/DESELECT ALL

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

ROLES

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

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

PERSONS

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

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

POSITIONS

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

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

DOCUMENTS

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

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

IT SYSTEMS

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

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

CAPABILITIES

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

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

RISKS

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

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

KPI INSTANCES

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

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

GROUP BY

ROLES

Opens the list of connections by which roles can be linked to functions. Enable an option button to group the model items by roles according to the connection you have selected. The previously selected grouping is deactivated. The model items are grouped in a swimlane model (page 1057).

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

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



POSITIONS

Opens the list of connections by which positions can be linked to functions. Enable an option button to group the model items by positions according to the connection you have selected. The previously selected grouping is deactivated. The model items are grouped in a swimlane model (page 1057).

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

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



OTHERS

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

The model is restructured in a swimlane model (page 1057). The previously selected grouping is deactivated. The model items are grouped in a swimlane model (page 1057).

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**.



4.2.7.8.13.3 How can comprehensive processes be modeled?

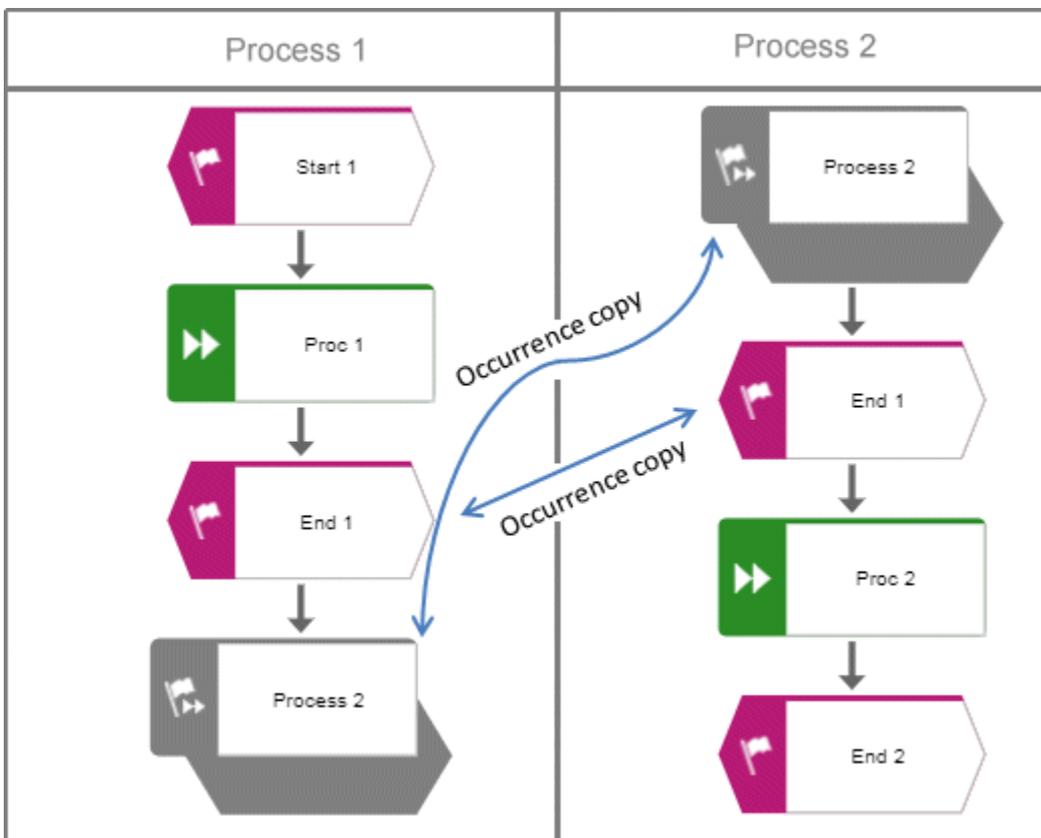
You can use the **Change view** functionality (page 519) in the **Diagram** (page 430) fact sheet to show different views (page 521) on diagrams. This also allows you to choose the model-spanning Extended process view, which displays models that are connected by process interfaces.

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

PROCESS INTERFACE OCCURRENCE COPY

- Use an occurrence copy (page 1059) of the end event of the first model as start event of the second model.
- In the first model, place a process interface below the end event.
- Copy the process interface of the first model and place its occurrence copy in the second model above the start event.

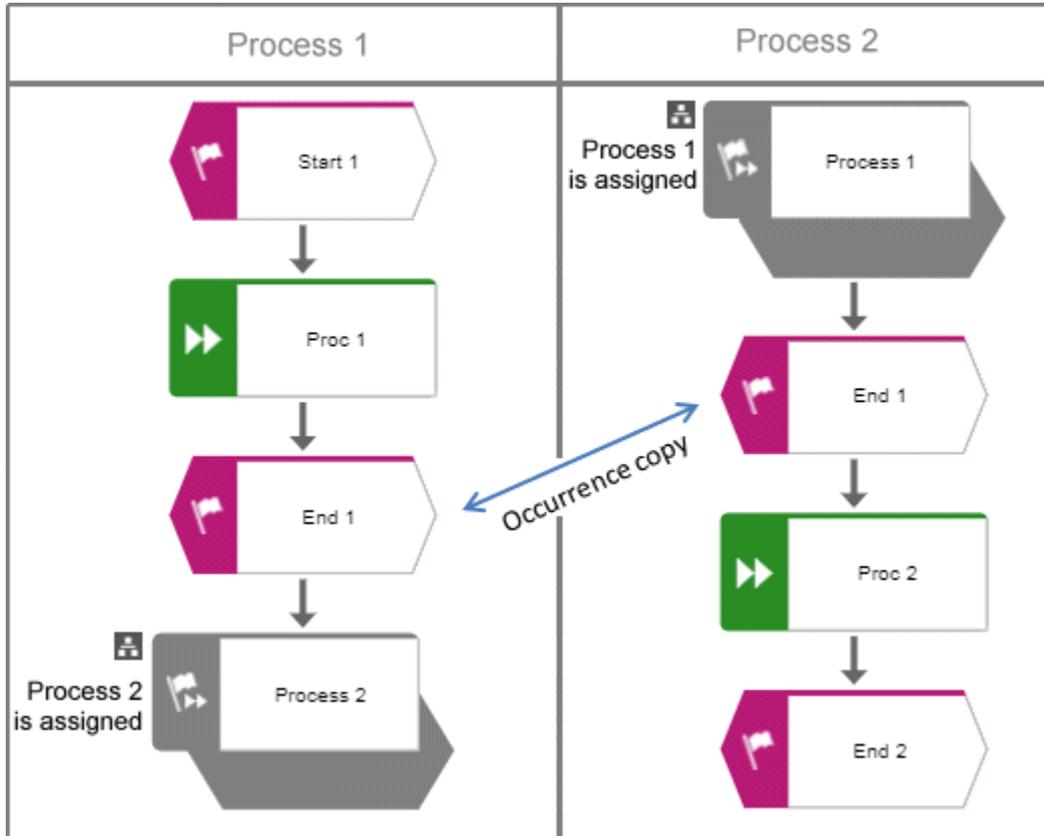
The following graphic shows the connection scheme of the models.



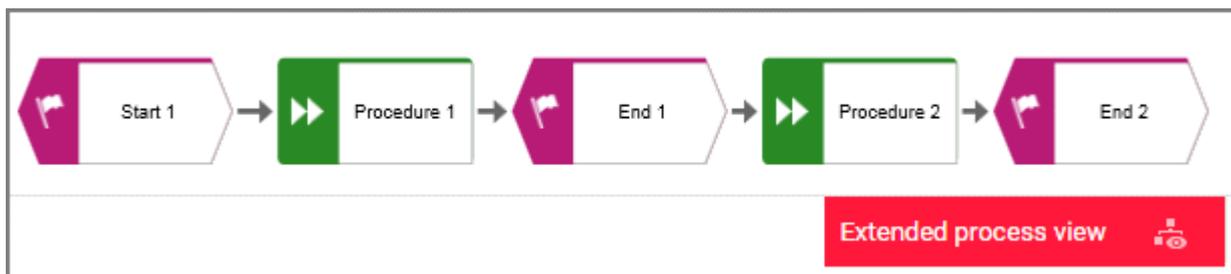
PROCESS INTERFACES WITH ASSIGNED MODELS

- Use an occurrence copy (page 1059) of the end event of the first model as start event of the second model.
- In the first model, place a process interface below the end event and assign the second model (page 1050) 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.

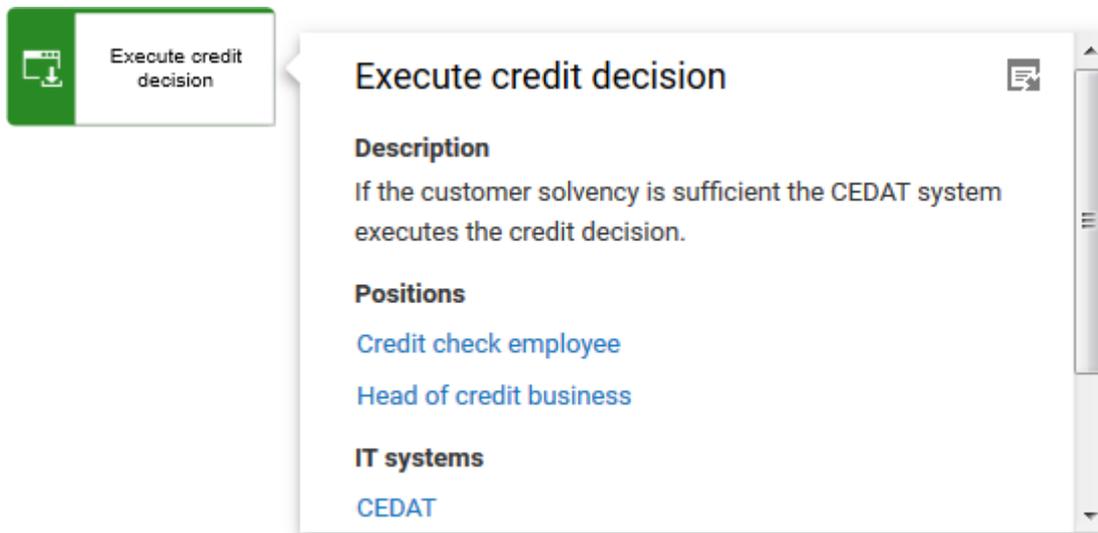


If the **Extended process view** is activated for one of the two models, the following cross-model process is displayed.



4.2.7.8.13.4 For which object types are mini fact sheets displayed?

In the default configuration of the Classic (page 379) and Default (page 394) view, you can display mini fact sheets (page 520). Among other things, you can copy text content to the clipboard,  go to the **Overview** fact sheet of the object, or jump to the **Overview** fact sheet of an object whose link is placed in the fact sheet.



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

APPLICATION SYSTEM TYPE

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

DATA OBJECTS

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

- Name
- Description
- Links (clickable)
- Assignments

FUNCTION

The same attributes are displayed as for functions in the **Steps** (page 426) fact sheet.

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

PERSON, POSITION, ROLE

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

RISK

- Name
- Description
- Probability
- Assessment frequency
- Assignments

4.2.7.9 Highlight model items

You can highlight model items to focus on aspects to be monitored (page 539).

4.2.7.9.1 Switch highlighting on

You can highlight model items to focus on aspects to be monitored (page 539). This example illustrates highlighting of a process model in the default view (page 394).

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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.

- ▼ **Roles**
 - A** Accountant
 - F** Financial assistant
 - F6** Financial clerk

The model items that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch the highlighting off (page 532).

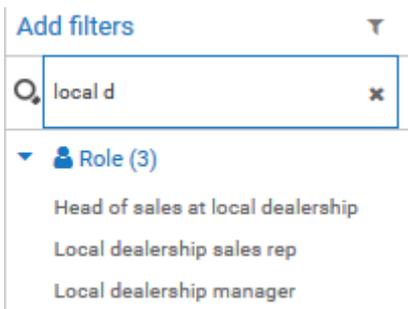
4.2.7.9.2 Switch between default and user-defined highlighting

You can highlight model items to focus on aspects to be monitored (page 539). If you use a view in which the user-defined highlighting is configured, you can switch between default and the user-defined highlighting for process models.

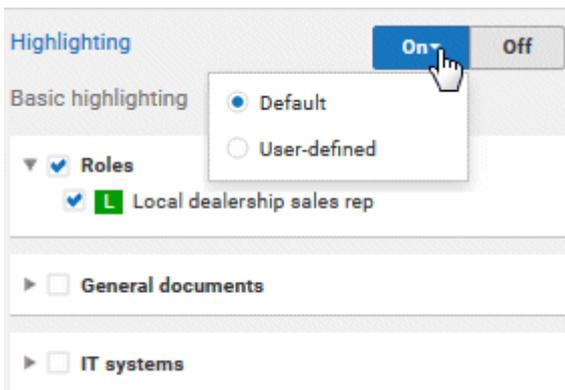
This example illustrates the user-defined highlighting with the **United Motor Group** database.

Procedure

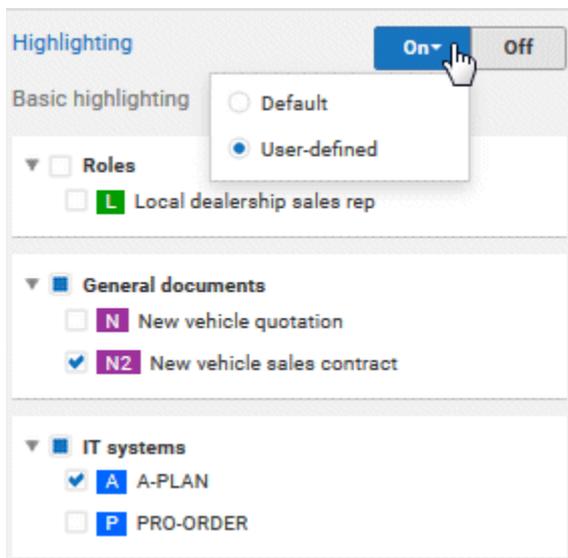
1. Select the **United Motor Group** database (page 411).
2. Click **My content**.
3. In the **Type to find a role or location** field enter **local d**. Among others, the **Local dealership sales rep** role is listed.



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



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



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

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

The model items that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch the highlighting off (page 532).

4.2.7.9.3 Switch highlighting off

If you have switched highlighting on (page 516), 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** 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.

4.2.7.9.4 Highlight the happy and/or exception path

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

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

Prerequisites

The highlighting for the happy path (page 534) and/or exception path (page 535) is defined for the model you have selected.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
5. Click  **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Open the **Process paths** category and enable the **HP** check box to highlight the happy path (page 542).
8. Open the **Process paths** category and enable the **EX1** check box to highlight the exception path (page 543).
9. Enable the check box of the **Process paths** category to highlight both the happy path and the exception path (page 544).

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

4.2.7.9.5 Highlight IT systems, general documents, roles

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

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

Prerequisite

The relevant objects are inserted (page 540) in the selected model.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
5. Click  **Highlighting**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Activate the check box of the **IT systems** category to highlight Application system objects (page 545) contained in the model.
8. Activate the check box of the **General documents** category to highlight Information carrier objects (page 545) such as **Document**, **Bar code**, and **Folder** contained in the model.
9. Activate the check box of the **Roles** category to highlight Role objects together with connected functions (page 545) contained in the model.

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

4.2.7.9.6 Define the happy path

You can define in a model which path is the best way to perform a process. This path will be highlighted (page 542) if you highlight the happy path **HP** of the category **Process paths**.

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

Prerequisite

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

Procedure

1. Open the relevant model (page 800) for editing.
2. For each connection that connects the objects of the respective model path, enter the value **HAPPY_PATH** in uppercase for the **Remark/Example** attribute.
3. Save your model (page 839).

The happy path for highlighting is defined.

4.2.7.9.7 Define the exception path

You can define in a model which path is the exceptional case to perform a process. This path will be highlighted (page 543) if you highlight the exception path **Ex1** of the category **Process paths**. This description is based on the standard configuration. Please note that your system may be configured differently, so that different attributes and values are relevant.

Prerequisite

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

Procedure

1. Open the relevant model (page 800) for editing.
2. For each connection that connects the objects of the respective model path, enter the value **EXCEPTION_1** in uppercase for the **Remark/Example** attribute.
3. Save your model (page 839).

The exception path for highlighting is defined.

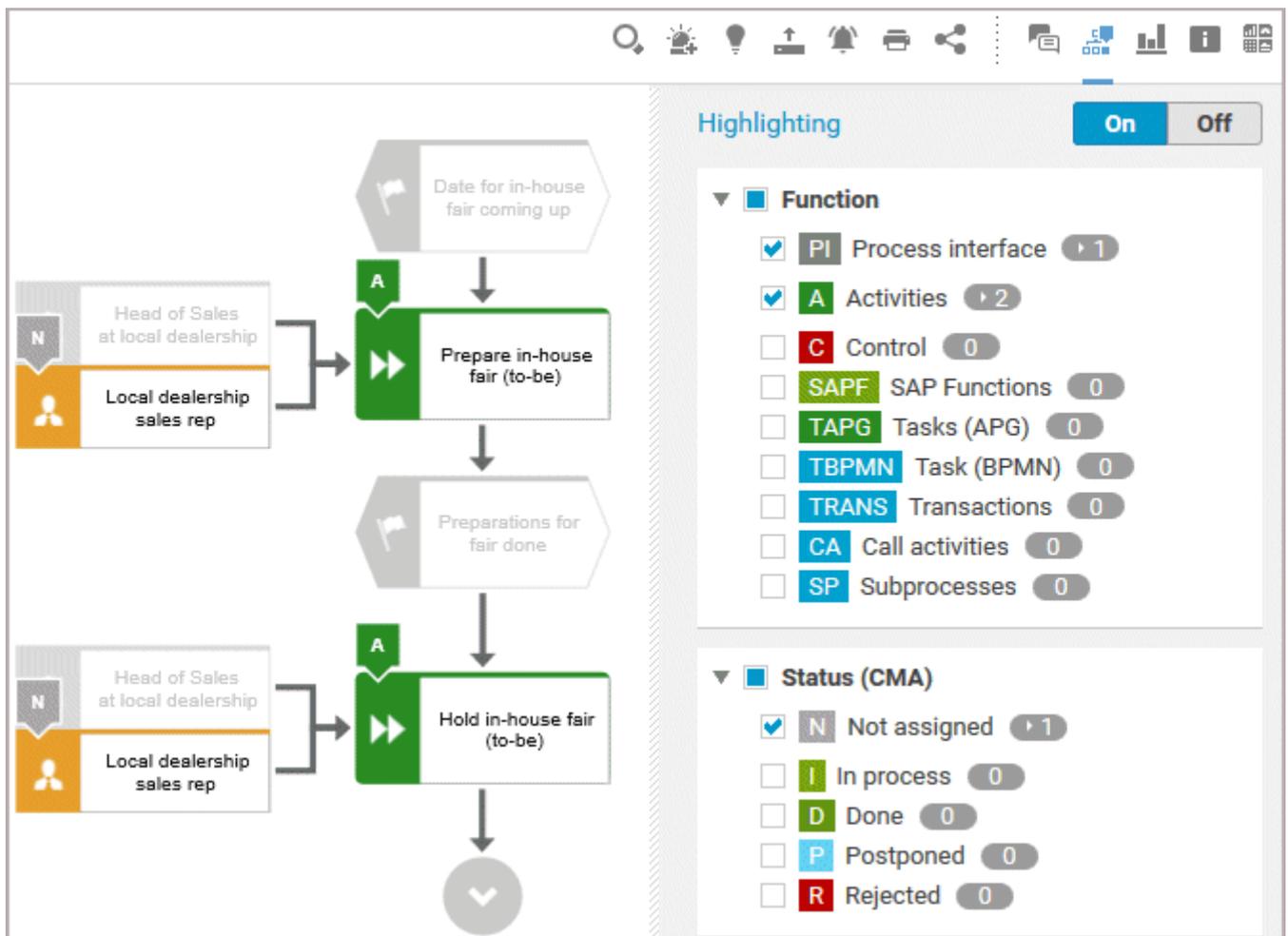
4.2.7.9.8 Valuable information

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

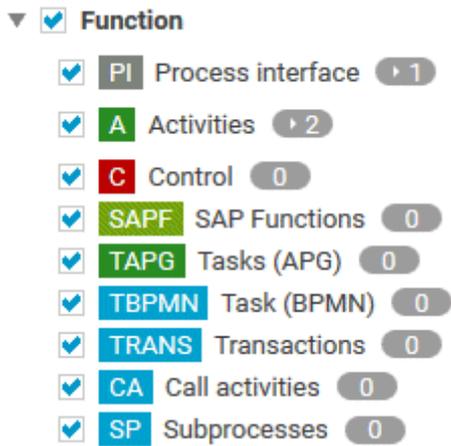
4.2.7.9.8.1 What is highlighting?

Highlighting is the visual emphasis of model content. If you have switched highlighting on (page 516), model items are colored and marked by criterion indicators based on the criteria you selected.

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



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

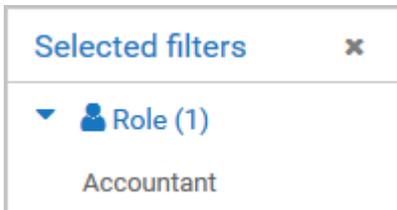


Every criterion has a criterion indicator that is shown in the model if the criterion is activated. Activities, for example, have the criterion indicator **A**. In the **Highlighting** bar, the number of occurrences is displayed behind the criteria. In the image above, activities occur twice (criterion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

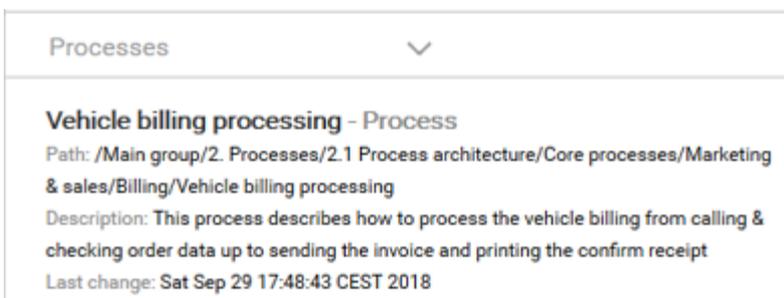
4.2.7.9.8.2 What is role-based highlighting?

In **My content** (page 436), you can select a role filter to restrict the contents of a database to those items in which the role is involved.

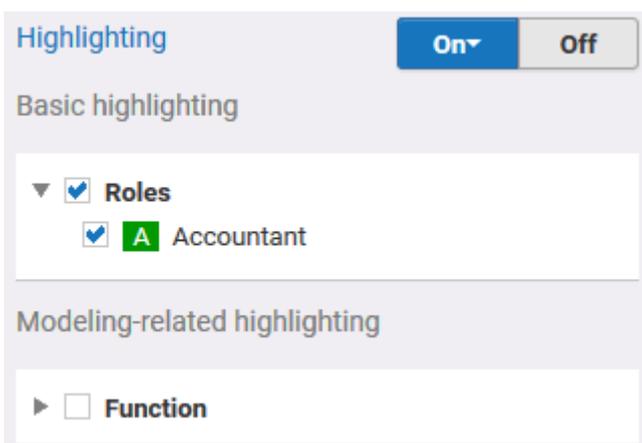
You can, for example, restrict the contents of the database **United Motor Group** to the role **Accountant**.



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



If you open the fact sheet **Diagram fact (page 430)** and switch on the highlighting (page 516), the default highlighting is set to highlight the role **Accountant**.



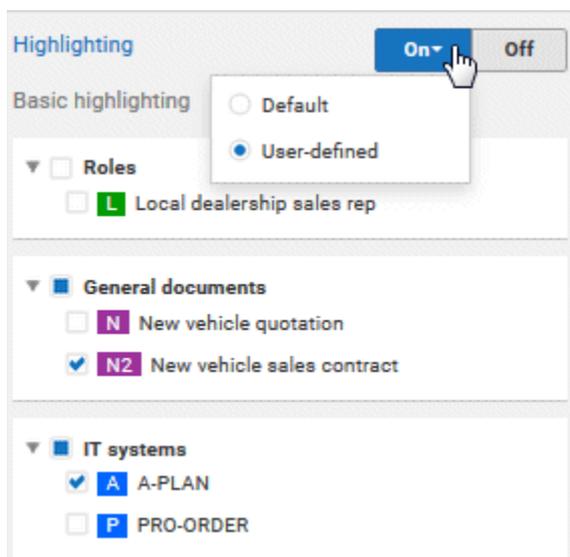
You can activate the check boxes for additional roles and/or functions for highlighting (page 545). In this case, the highlighting switches to **User defined**.

4.2.7.9.8.3 What is default and what user-defined highlighting?

When default highlighting is configured or filter-based highlighting is enabled and defined, a menu is added to the **On** button to switch between standard and user-defined highlighting.

- Default highlighting: The activated criteria are predefined criteria of the configuration or the activated filter (page 531). These criteria are automatically disabled when a user selects other criteria.
- User-defined: Selection by the user. This state is automatically activated after a user selects criteria. The user selection is saved and recalled.

If you use a view in which the user-defined highlighting is configured, you can select own criteria to be highlighted. Then you can switch between default and user-defined highlighting (page 531).



If default highlighting is not configured, the **On** button has no menu.

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

4.2.7.9.8.4 Which models, items, and values are relevant for highlighting?

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

HAPPY PATH AND EXCEPTION PATH

You can use the following model types to define and highlight the happy path and the exception path (page 533):

- EPC
- EPC (column display)
- EPC (horizontal table display)
- EPC (instance)
- EPC (material flow)
- EPC (row display)
- EPC (table display)
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram

The value for the happy path is HAPPY_PATH, the values for the exception paths are EXCEPTION_1 to EXCEPTION_4. Values are case-sensitive, so that only correctly written values are considered for the highlighting.

IT SYSTEMS AND INFORMATION CARRIERS

You can highlight items of the It systems and General documents categories (page 545) in the following models.

All objects of type **Application system**, **Application system type**, **IT software**, and **IT system** are grouped under the **IT systems** category.

All objects of type **Information carrier**, such as **Document**, **Bar code**, **Folder**, and **Letter**, are grouped under the **General document** category.

- EPC
- EPC (column display)
- EPC (horizontal table display)
- EPC (instance)

- EPC (material flow)
- EPC (row display)
- EPC (table display)

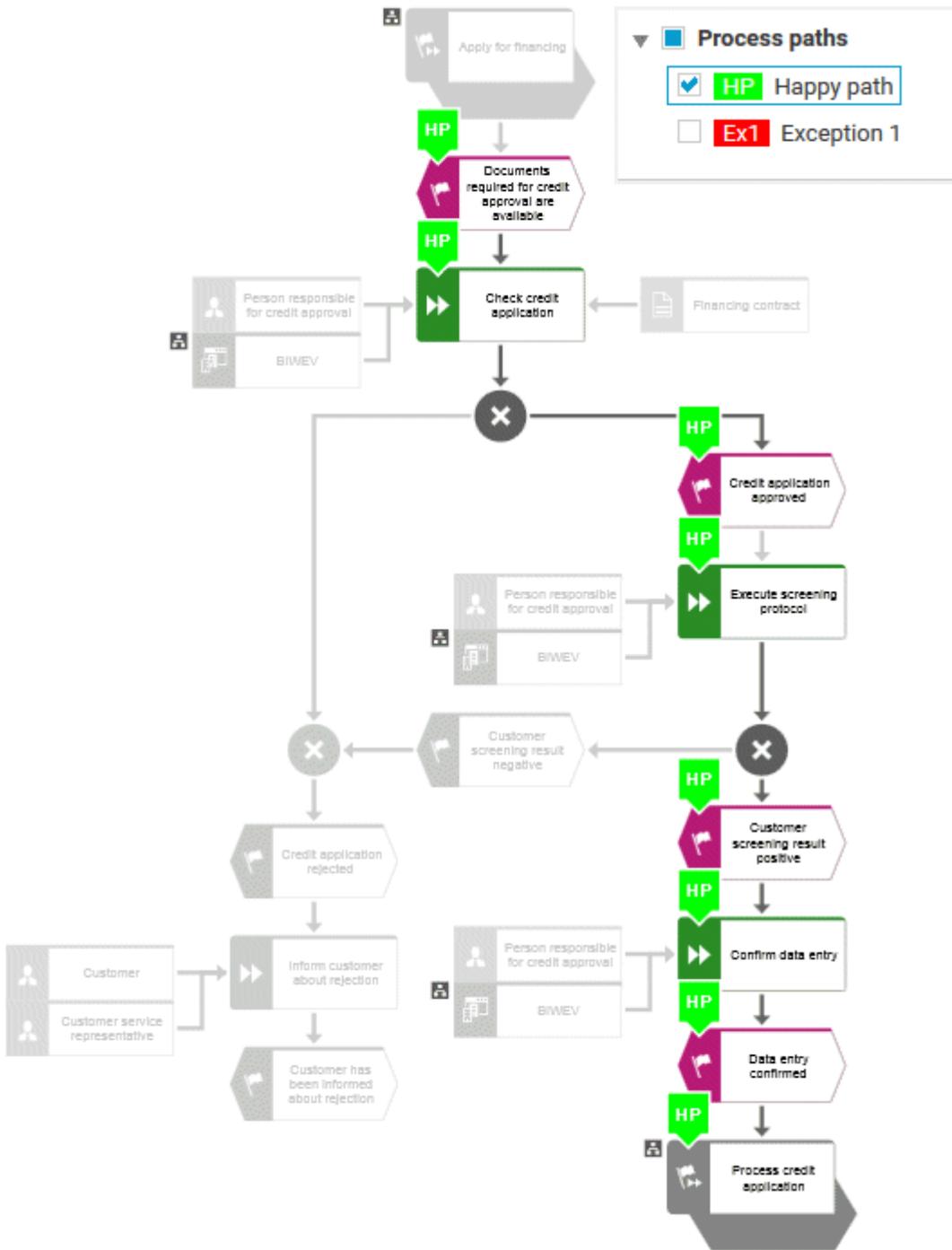
ROLES AND FUNCTIONS

You can highlight roles (page 545) in the following models. When you highlight a role, the executed function and the connection between the two objects are highlighted in addition to the role. If the role is assigned in an assigned Function allocation diagram (FAD) and is not visible in the current model, only the connected function is highlighted.

- EPC
- EPC (column display)
- EPC (horizontal table display)
- EPC (instance)
- EPC (material flow)
- EPC (row display)
- EPC (table display)
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram

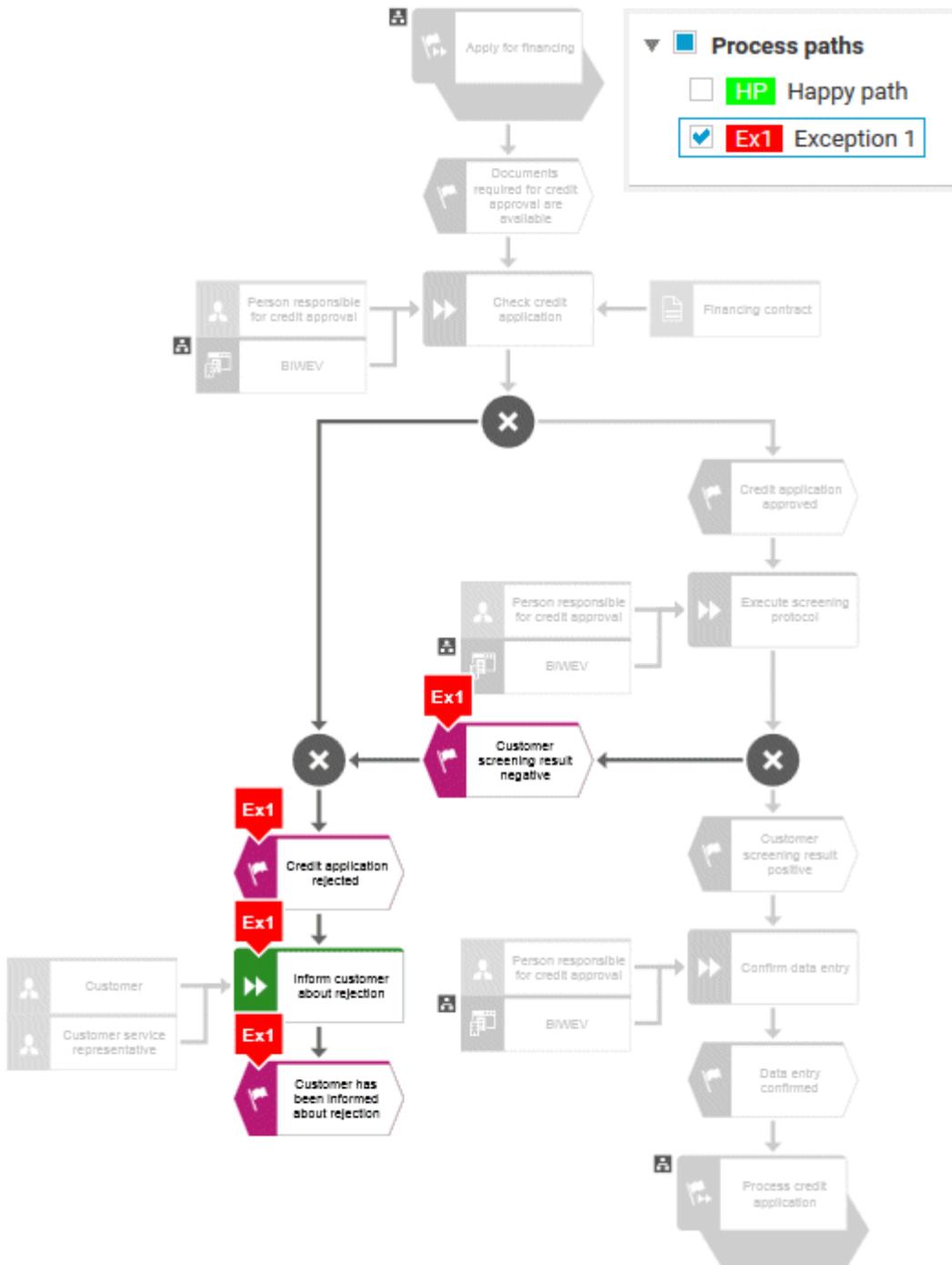
4.2.7.9.8.5 How is the happy path highlighted?

The happy path is highlighted.



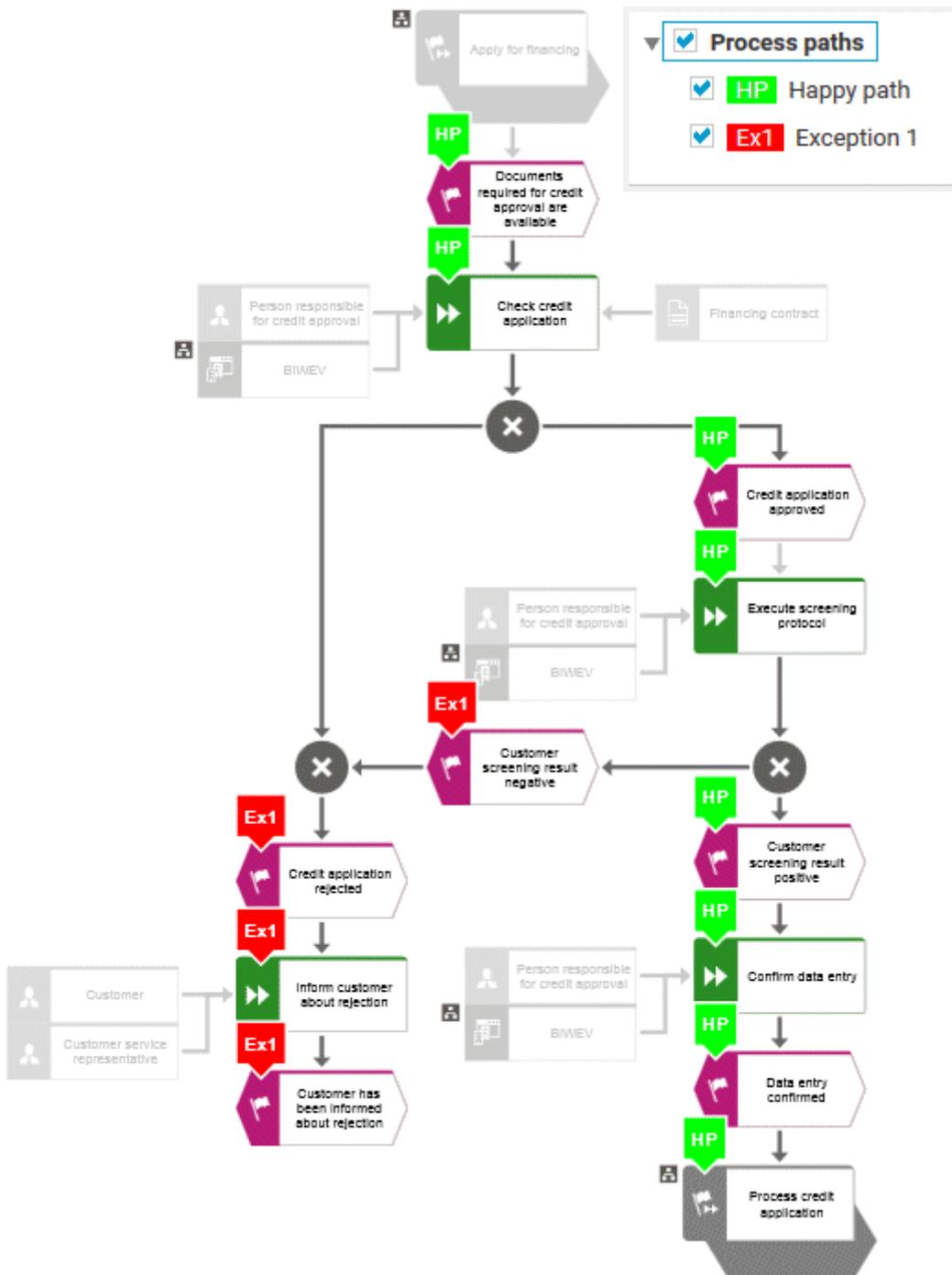
4.2.7.9.8.6 How is the exception path highlighted?

The exception path is highlighted.



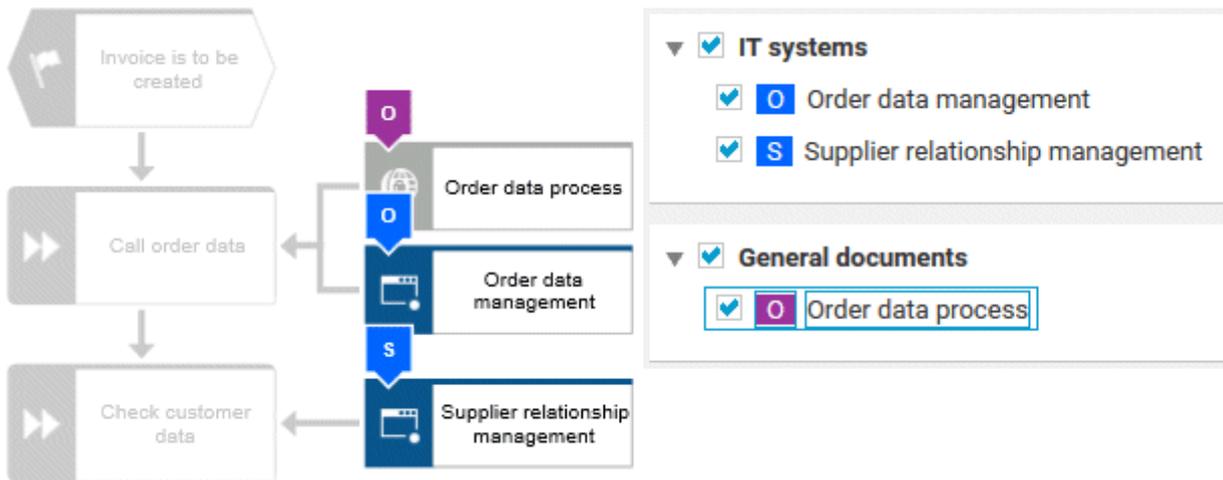
4.2.7.9.8.7 How are the happy path and exception path highlighted?

The happy path and the exception path are highlighted.



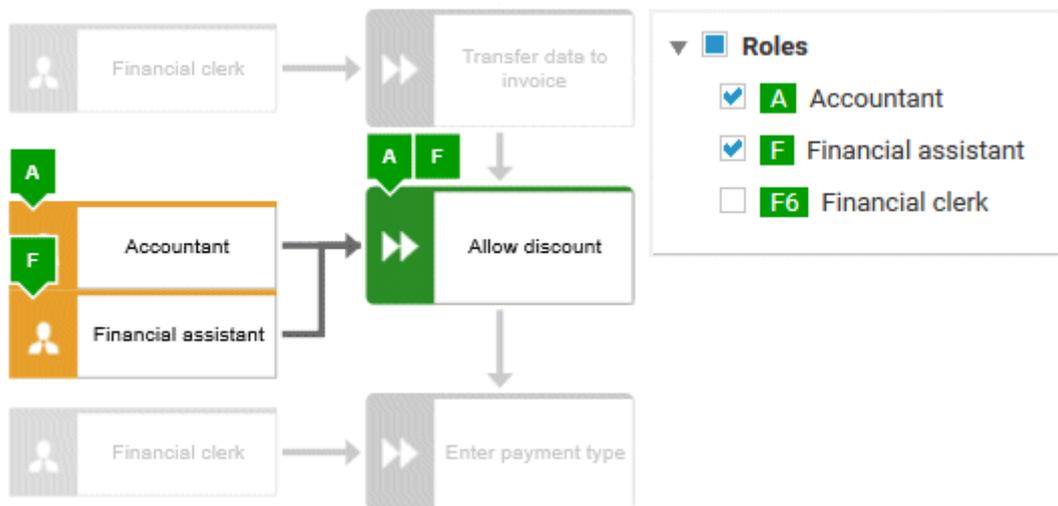
4.2.7.9.8.8 How are IT systems and general documents highlighted?

IT systems (**Application system** and **Application system type** objects) and general documents (**Information carrier** objects) are highlighted.



4.2.7.9.8.9 How are roles and functions highlighted?

Roles and functions are highlighted.



4.2.7.10 Table

The following describes the use of tables.

4.2.7.10.1 Open a table

You can open a table for a process model to list the functions and their roles.

Procedure

1. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) are shown.
4. Activate the **Table** fact sheet (page 546).

You opened a table. You can sort the functions (page 548) or open the matrix (page 547).

4.2.7.10.2 Add a column to a table

You can add columns to a table. As long as you navigate in the fact sheets (page 1055) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 546).
2. Click  **Add column**. The available columns are shown.
3. Click the column name of the column you want to add.

You added a column.

4.2.7.10.3 Remove a column from a table

You can delete columns from a table that you have added before. As long as you navigate in the fact sheets (page 1055) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 546).
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.

4.2.7.10.4 Open the matrix of a table

You can open a matrix based on the **Table (page 428)** fact sheet to clearly display the interrelations between the individual roles and functions.

Procedure

1. Activate the **Table** fact sheet (page 546).
2. Click  **Matrix**. The interrelations between the individual roles and functions are transparently displayed.
3. Click  **Add column** to extend the table. You can delete added columns at any time.

You have opened a matrix based on the **Table** fact sheet.

4.2.7.10.5 Add a column to a matrix

You can add columns to a matrix. As long as you navigate in the fact sheets (page 1055) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 546).
2. Click  **Matrix**.
3. Click  **Add column**. The available columns are shown.
4. Click the column name of the column you want to add.

You added a column.

4.2.7.10.6 Remove a column from a matrix

You can delete columns from a matrix that you have added before. As long as you navigate in the fact sheets (page 1055) view, added columns are displayed. All added columns will be removed automatically when you leave the fact sheet view, for example, when you select another model in the group structure.

Procedure

1. Activate the **Table** fact sheet (page 546).
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.

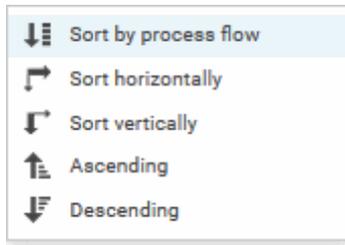
The column is removed without confirmation prompt.

4.2.7.10.7 Sort functions of fact sheets

You can sort the functions of fact sheets (page 1055), for example, of the Table (page 428) or RACI (page 429) fact sheet.

Procedure

1. Activate the **Table** fact sheet (page 546).
2. Click the column title  **Functions**. The sort options are displayed.



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

You have re-sorted the functions.

4.2.7.11 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

4.2.7.11.1 Display 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.

4.2.7.11.2 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 549)
2. Place the mouse cursor over a connection cell.

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

4.2.7.11.3 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 549)
2. Click the little arrow to expand or collapse the hierarchy. The hierarchy is shown or hidden accordingly.

The hierarchy is shown/hidden.

Location Organization	Europe	Frankfurt	Bratislava	St. Petersburg	America	Asia
						
 UMG America						
 UMG Asia						
 UMG Europe						

4.2.7.11.4 How are connections displayed?

In general, check marks indicate existing connections between objects in the matrix model. An asterisk indicates that there is more than one connection between two objects. The following display options are also available:

INDICATION OF THE DIRECTION OF THE CONNECTION

In the matrix model, a small arrow indicates the direction of a connection.

	Indicates the direction from an icon placed in the column header to an icon placed in the row header.
	Indicates the direction from an icon placed in the row header to an icon placed in the column header.

INDICATION OF ABBREVIATIONS

If an abbreviation is defined, this abbreviation is displayed instead of the check mark.

4.2.7.11.5 How to control the matrix using the keyboard

You can control the matrix using the keyboard:

Shortcut	Selection	Action
+ key	Matrix	Zooms in the matrix.
- key	Matrix	Zooms out the matrix.
0	Matrix	Set zoom to 100 %
Home	Matrix	Scrolls to first cell of a column but does not change the selection
End	Matrix	Scrolls to last cell of a column but does not change the selection
Page up	Matrix	Scrolls page-wise up but does not change the selection
Page down	Matrix	Scrolls page-wise down but does not change the selection
Shift + Page up	Matrix	Scrolls page wise-left but does not change the selection
Shift + Page down	Matrix	Scrolls page-wise right but does not change the selection
Arrow keys	Matrix	Moves to the next/previous symbol in arrow direction.
Enter	Cell	Collapses or expands hierarchically grouped objects
Space	Cell	Collapses or expands hierarchically grouped objects
Backspace	Cell	Deletes the selected cells.

4.2.8 Use documents

ARIS document storage enables you to propose documents or to submit a change request for a document.

4.2.8.1 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**.

4.2.8.2 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**.

4.2.8.3 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 487) 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**.

4.2.9 Contribute as a viewer

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you can change values of specific items (page 564), create new or reuse existing items (page 557), as well as delete items (page 559) 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.

4.2.9.1 Change values of items

You can change values of items (page 564) 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Click  **Edit** >  **Contribute**. Edit mode (page 564) is enabled.
5. Navigate (page 412) to the group containing the relevant item.
6. Select the item you want to edit.
7. Activate the **Overview** fact sheet if it is not activated yet.
8. Change the relevant attribute. Depending on the attribute, various editing options (page 567) are available.
9. 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 567) if you do not enter a numerical value.

4.2.9.2 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 567). 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Click  **Edit** >  **Contribute**. Edit mode (page 564) is enabled.
5. Navigate (page 412) to the required diagram and select it.
6. 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.
7. In the **Activities** area, click the  **plus sign**. The input box opens.
8. 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.
9. 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.
10. Click  **Change**. A completion message is displayed.

The new role was created (page 572) 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.

4.2.9.3 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 567). 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 750).

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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Click  **Edit** >  **Contribute**. Edit mode (page 564) is enabled.
5. Navigate (page 412) to the required diagram and select it.
To add objects of the **Application system type** type to the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
6. Activate the **Overview** fact sheet if it is not activated yet.
7. Click the **Subordinate IT systems** edit box. Existing objects are displayed one next to the other and the option **Insert item** is shown.
8. Enter the name of the required application system type.
If an application system type with the same name already exists, it is offered to you for selection. In addition, this name is listed with **(new item)** added to it.
9. To create a new application system, click the entry with **(new item)** added to it.
To reuse an existing application system type, click the other entry.
10. Enter other names for additional application system types.
11. Click  **Change**. A confirmation prompt is shown listing all new application system types for confirmation.
12. Click **OK**.

New application system types (page 572) 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.

4.2.9.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 567). 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Click  **Edit** >  **Contribute**. Edit mode (page 564) is enabled.
5. Navigate (page 412) to the required diagram and select it.
6. Click the object whose associated item you want to delete. To delete objects of the **Role** type from the **Groups** table, you can select a risk from the sample configuration supplied.
7. In the **Groups** area, click  **Delete** for the role from which you want to remove the risk assignment. A confirmation prompt is shown.
8. Click **OK** to confirm the prompt if you really want to delete the assignment to the role.

The assignment to the role is then deleted. If the assignment was represented as a connection in diagrams, this connection will be deleted from these diagrams. Definitions are retained in the database.

4.2.9.5 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 567). 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 750).

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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Click  **Edit** >  **Contribute**. Edit mode (page 564) is enabled.
5. Navigate (page 412) to the required diagram and select it. To delete objects of the **Application system type** type from the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
6. Activate the **Overview** fact sheet if it is not activated yet.
7. Click the edit box in the **Subordinate IT systems** area. Existing objects are displayed one next to the other with a delete sign (x) added to them.
8. Click the delete sign for the application system types you want to delete from the diagram.
9. Click  **Change**. A confirmation prompt is displayed listing all application system types to be deleted.
10. Click **OK**.

The application system types are deleted from the list, and also from the application system type diagram together with their connections. Definitions are retained in the database.

4.2.9.6 Valuable information

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

4.2.9.6.1 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 567) 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 567) if you do not enter a numerical value.

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

4.2.9.6.2 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 419), Default view (page 420), or a view derived from these views.

4.2.9.6.3 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:



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

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



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

The availability of various edit boxes (page 567) is another clear indication that the edit mode is active.

4.2.9.6.4 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

4.2.9.6.5 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 567) 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 567) if you do not enter a numerical value.

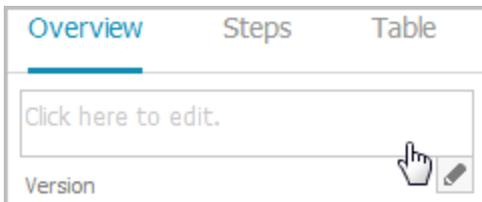
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

4.2.9.6.6 Which editing options are available?

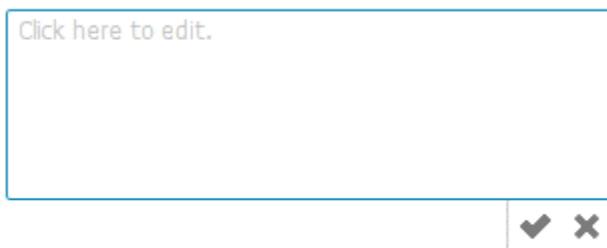
Depending on the attribute (page 566), various editing options are available.

EDIT BOX

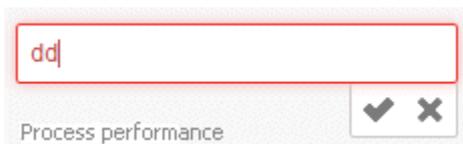
If the edit mode is active (page 564), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 556), the hint **Click here to edit.** is displayed:



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:

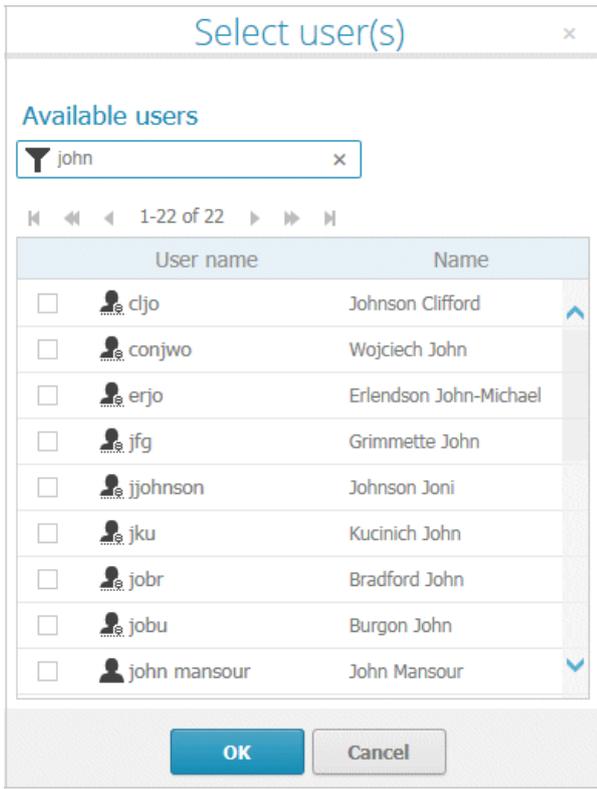


If the entry is correct, the field is displayed without a special characteristic:



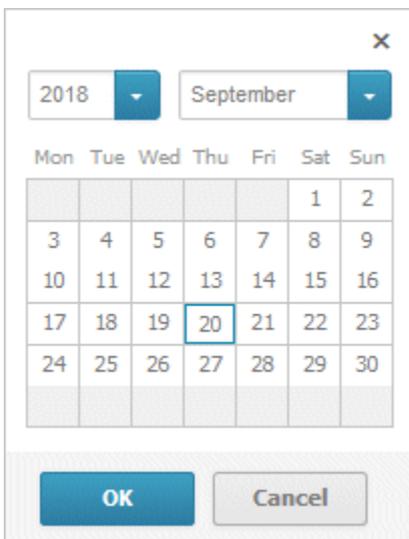
SELECT USER(S)

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:



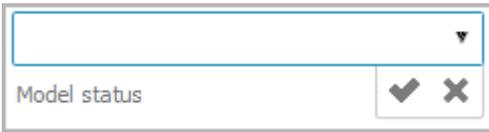
DATE INPUT

You can enter dates using the calendar. It opens when you click in the edit box:

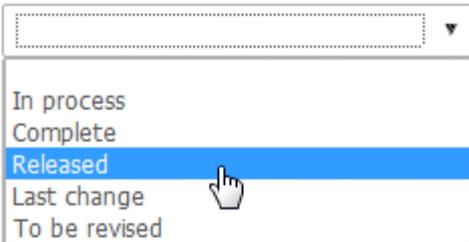


DROP-DOWN LIST BOX

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:

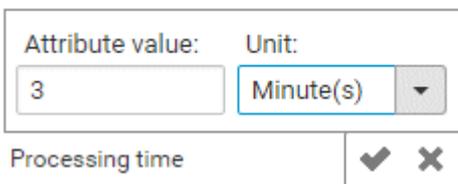
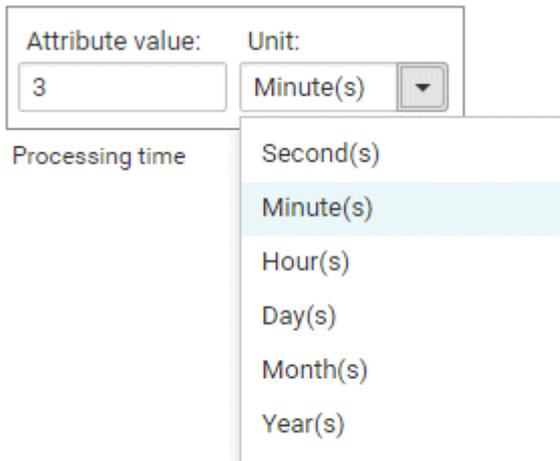


Clicking in the field will offer possible values for selection:



COMBO BOX

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

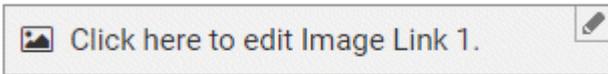


LINK ATTRIBUTE BOXES

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.



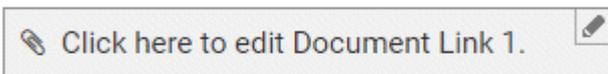
Click here to edit Video Title 1.

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.

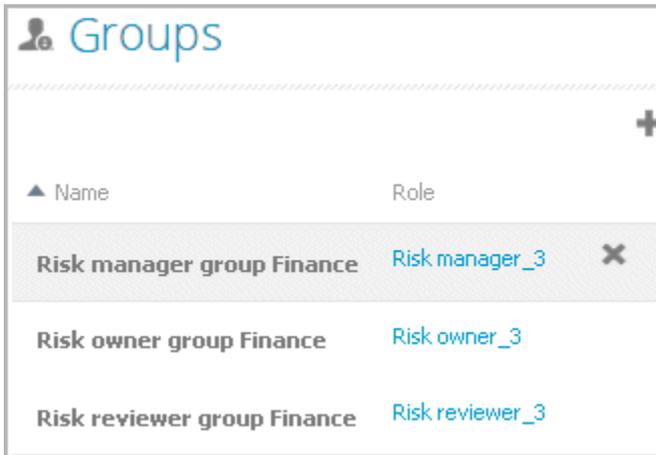


If you click in the title, description, or link row of a link attribute, the appropriate edit field opens and you can enter the relevant details.

CREATE AND REUSE OBJECTS

TABLE

Existing objects are listed in a table. Additional information is displayed in the individual rows:

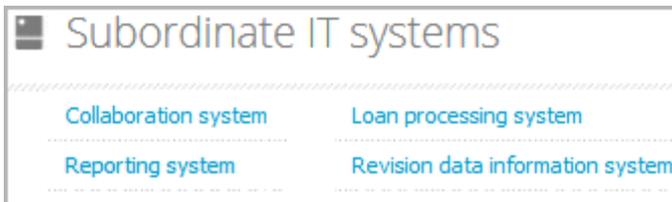


Name	Role
Risk manager group Finance	Risk manager_3
Risk owner group Finance	Risk owner_3
Risk reviewer group Finance	Risk reviewer_3

You can add individual objects to the table (page 557) or remove objects from the table (page 559).

LIST

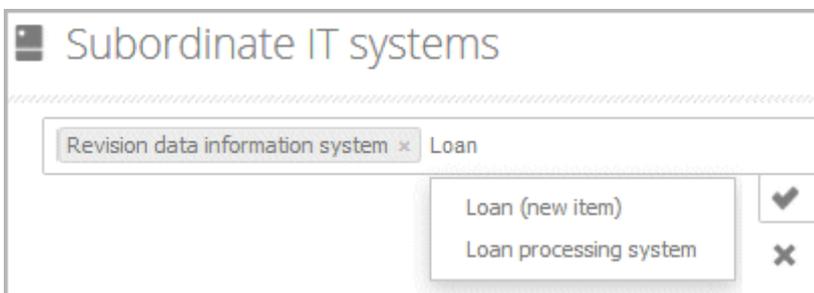
Existing objects are displayed in a list:



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 × Loan

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

DELETE OBJECTS

You can delete objects from tables (page 559) and lists (page 560):

TABLE

▲ Name	Role	
Risk manager group Finance	Risk manager_3	✕ 

LIST



4.2.9.6.7 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.

4.2.10 Use RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process (page 575). RACI is short for **R**esponsible, **A**ccountable, **C**onsulted, and **I**nformed.

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

- **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.
- **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.
- **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.

4.2.10.1 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** license privilege.

Procedure

1. Create a process model (page 575).
2. Use objects (page 575) 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 574).

4.2.10.2 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, 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Show the  **Navigation** bar if it is not visible yet.
5. In the  **Navigation**, open the group in which the required process (page 575) 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 382) and Default view (page 396). You can configure the representation as RASCI matrix. Please contact your local Software AG sales organization (<http://www.softwareag.com>).

You can use the RA(S)CI - Output organizational participations in processes (page 509) report to output the RACI matrix in Microsoft® Excel format from an open process model (page 800). 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**.

4.2.10.3 Valuable information

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

4.2.10.3.1 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**)

4.2.10.3.2 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)

4.2.10.3.3 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_AB_T_1)
- must be informed about (API name: CT_MUST_BE_INFO_AB_T_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)

4.2.11 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.

4.2.11.1 Edit models

You can edit models in ARIS Connect.

Prerequisite

- You have 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
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 (page 800).
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the model.

4.2.11.2 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 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
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 (page 800).
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**.

4.2.11.3 Share model

You can share models with other users.

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Click the model you want to send to another user.
6. Click  **Share** >  **Share model**. The corresponding dialog opens.
7. Select the user you want to share the model with.
8. Enable **Send copy to me** to receive a copy of the message, if required.
9. You can also enter a subject and a comment.
10. Click **Send**.

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

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

4.2.11.4 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
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**.

4.2.11.5 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Click the model.
6. Click  **Comment** in the bar panel if the bar is not activated yet.
7. Enter your comment in the box provided.
8. Click  **Tag**.
9. Enter the words to be used as keywords (page 728) 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.

**OUR PRODUCT RELEASE VIRTUAL EVENT:
PLAY IT ON DEMAND**
Listen, learn and grow your skills!

Attach:  Tag  Link  File

release × event × Add tags. Confirm with 'Enter'.

 Public × Enable the relevant privacy option. Confirm with 'Enter'.

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

16. Click **Upload**.
17. Enable the check box of the document you want to add to your post.
18. Click **OK**.

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

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

4.2.11.6 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 556). 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the items and change the relevant attributes (page 556). Depending on the attributes, various editing options (page 567) are available.
5. Click  **Inform owner of change**. The **Inform of change** dialog opens.
6. Insert a change description
7. Click **Submit**. The **Information** dialog opens.
8. Enable the **Do not show this message again** check box if you do not want to be informed again by the dialog when executing the mini workflow more than once during the current session.
9. Click **OK**.

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

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

4.2.12 Execute processes

The following describes the execution of processes.

4.2.12.1 Start governance process

You can start governance processes from the portal.

Prerequisite

The  **Start governance process** function is provided only if an executable process is available, and if the item for which the governance process is to be started is defined as the execution context.

Procedure

1. Navigate to the process or object for which you want to start the governance process.
2. Click  **Start governance process**. If multiple processes are available, they will be displayed for selection.
3. Click the executable process.

The executable process will start.

4.2.13 Show dashboards

If you have an ARIS Aware (page 587) license, you can open dashboards that are supplied with the software.

4.2.13.1 Show the Dashboards fact sheet

You can show dashboards (page 1054) for various items. The following example is based on predefined standard dashboards that are contained in the supplied **United Motor Group** database and the Classic view (page 379).

Prerequisite

- The supplied database **United Motor Group** is published.
- Dashboards (page 1054) are configured for the items selected.

Procedure

1. In the  **Portal**, select (page 411) the **United Motor Group** database.
2. Click **Groups**. The Group tree opens.
3. Click **2. Processes > 2.1 Process architecture >  Enterprise process map**. The **Overview** fact sheet of the **Enterprise process map** model opens. Click the **Dashboards** fact sheet. The model's dashboards are shown. You can switch between the Process Change Management (page 610) and the Local Maturity (page 605) dashboards.
4. Now click **Core processes > Marketing & sales > Billing >  Vehicle billing processing**. The **Overview** fact sheet of the **EPC** model opens.
5. Click the **Dashboards** fact sheet. The GRC dashboard is shown.

You have shown different standard dashboards. The dashboard sidebar

4.2.13.2 Show dashboard in a sidebar

You can show dashboards (page 1054) in a sidebar. The following example is based on predefined standard dashboards that are contained in the supplied **United Motor Group** database and the Classic view (page 379).

Prerequisite

- The supplied database **United Motor Group** is published.
- Dashboards (page 1054) are configured for the items selected.

Procedure

1. In the  **Portal**, select (page 411) the **United Motor Group** database.
2. Click **Groups**. The Group tree opens.
3. Click **2 Processes > 2.1 Process Architecture > Core processes > Marketing & sales > Billing >  Vehicle billing processing**. The **Overview** fact sheet of the **EPC** model opens.
4. Click the **Diagram** fact sheet.
5. Click  **Dashboards** in the bar panel (page 420).

The **Dashboard** sidebar opens and shows the Local maturity level (page 605) dashboard.

4.2.13.3 Show system dashboards

You can show dashboards that give you information about the **ARIS Connect** system and its contents. The content of the dashboards depends in part on whether and which database has been published and selected.

Prerequisite

Dashboards (page 1054) are configured for the system.

Procedure

1. Click  **Portal**. The The Home (page 380) area is activated.
2. Click  **Dashboards**. The system dashboards are available.

You can select dashboards that displays information about the system and its contents.

4.2.13.4 Show dashboard on a separate tab

You can show a dashboard on a separate tab of the web browser.

Prerequisite

Dashboards (page 1054) are configured for the system.

Procedure

1. Open a system dashboard (page 585), a dashboard of the Dashboards fact sheet (page 584) or of the sidebar (page 585).
2. Move the mouse pointer over the dashboard. The  **On separate tab** icon appears.
3. Click  **On separate tab**.

A new tab containing the dashboard opens.

4.2.13.5 Valuable information

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

4.2.13.5.1 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 predefined templates for common scenarios in the context of business process management, including:

Center of Excellence (CoE) (page 594)

Collaboration (page 667)

Customer Experience Management (CXM) (page 615)

Business Strategy (page 674)

Enterprise Architecture Management (page 639)

Governance Risk and Compliance Management (page 684)

General Data Protection Regulation (GDPR) (page 693)

Portal usage (page 627)

Process Performance Management (page 651)

SAP Solutions data (page 589)

These templates can be extended and customized according to the individual requirements of a company.

4.2.13.5.2 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 1028).

CREATE DASHBOARDS AND DATA FEEDS

You can create and connect dashboards (page 1010) and data feeds (page 1013). Dashboards and data feeds are stored on the server you defined.

STORE DATA

Database information to be compiled for dashboard display is gathered by different reports.

For some reports parameters can be specified. These parameterized reports are to be started frequently using report schedules. This keeps the dashboards up to date. The scheduled reports themselves trigger related reports. Each report collects specific pieces of information. The results are stored in ARIS document storage as XML report output files. These pieces of information are formed into dashboards. That is why dashboards correlate very closely to the set of executed reports.

READ DATA

Data to be displayed in a dashboard is loaded from the ARIS document storage database and combined with ARIS attributes extracted from the XML files that are stored in the ARIS document storage database as well.

CONFIGURE DASHBOARDS

Dashboards can be configured for different items to be shown in different views in the ARIS Connect portal and in Collaboration.

SHOW DASHBOARDS

Dashboards can be shown in different views in the  **Portal** and collaboration. You can use the supplied database United Motor Group to show various dashboards (page 584).

4.2.13.5.3 What standard dashboards are available?

ARIS Aware offers many standard demo dashboards. The predefined dashboards consist of charts or tables that show the results of various visual analyses of the **United Motor Group** database content.

4.2.13.5.3.1 Dashboards using ARIS for SAP Solutions data

Available dashboards (page 1054) based on ARIS for SAP® Solutions.

4.2.13.5.3.1.1 SAP - Synchronization status - Diagram (Side-by-Side)

This dashboard gives an aggregated view on the SAP® Solution Manager synchronization status based on related SAP functions and their corresponding SAP IDs.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of the **Sales order processing (to-be)** process model (EPC) in the **United Motor Group** demo database.

CHARTS

PROGRESS OF SAP SYNCHRONIZATION

Provides an overview on the progress of SAP synchronization in %.

The progress is visualized by a progress bar. Progress is calculated as the ratio of SAP functions that have already been synchronized to the number of SAP functions that have not yet been synchronized. SAP functions that have already been synchronized appear in assigned models and the SAP ID attribute of these functions is maintained. SAP functions that are not yet synchronized do not have an SAP ID.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

- SAP - Synchronization progress
- SAP - Object information

Calculation

Ratio of the number of SAP functions that have a specifies **SAP ID** attribute value, to the overall number of SAP functions related to the context.

Already synchronized SAP functions

Gives an overview on the number of synchronization-relevant SAP functions already synchronized with SAP Solution Manager.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation

List of SAP functions occurring in subordinate models related to the context whose **SAP function type** attribute and **SAP ID** attribute is maintained.

NOT YET SYNCHRONIZED SAP FUNCTIONS

Provides an overview on all SAP functions occurring in related models that are not yet synchronized with SAP Solution Manager.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation

List of SAP functions occurring in subordinate models related to the context whose **SAP function type** attribute is maintained, but the **SAP ID** attribute is not specified.

NOT SAP RELATED FUNCTIONS

Gives an overview on the number of functions not related to SAP.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

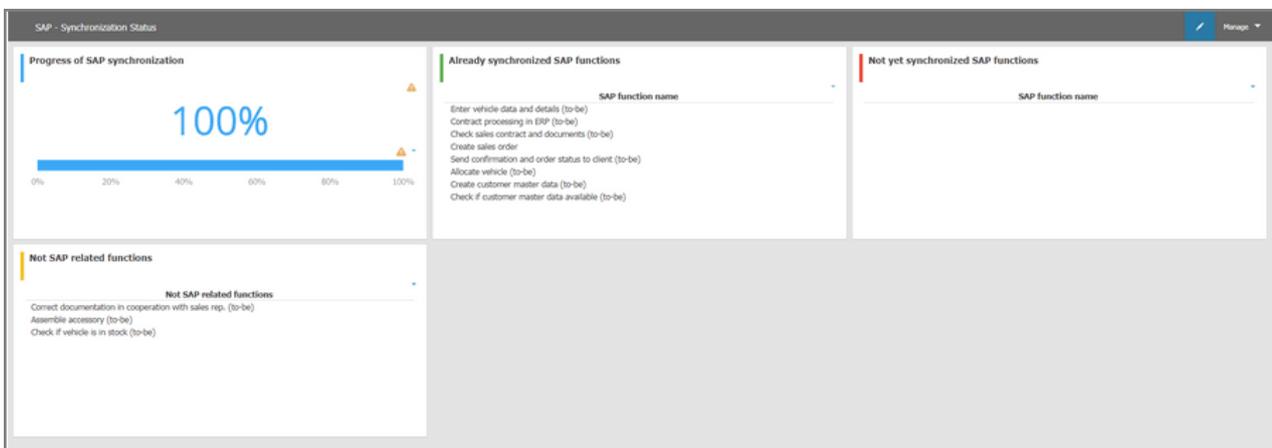
Data feed

SAP - Object information

Calculation

List of functions occurring in subordinate models related to the context whose **SAP function type** attribute is not maintained.

EXAMPLE



4.2.13.5.3.1.2 SAP - Function details - Diagram (Side-by-Side)

This dashboard visualizes SAP items assigned to SAP functions.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of the **Sales order processing (to-be)** process model (EPC) in the **United Motor Group** demo database.

CHARTS

ASSIGNED SAP DOCUMENTS

Lists all SAP documents related to a SAP function.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation

Collects all documents related to the context and connected to functions using the **provides input for** connection type. Possible context is a process model or an activity.

ASSIGNED SAP TRANSACTIONS

Lists all executables related to a SAP function.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation

Collects all executables related to the context. Possible context is a process model or an activity. Executables are **Scree** objects whose **Transaction code** and **Transaction type** attributes are maintained. These **Screen** objects occur in related models and are connected to a SAP function.

ASSIGNED SAP COMPONENTS

Lists all application systems related to a SAP function.

Report configurable?

Yes

Data source

ARIS Architect:

Report: Export item data to tables. For this report the **SAP objects to processes** value set must be used for execution.

Report configurable?

Yes

Data feed

SAP - Object information

Calculation

Collects all application systems related to the context. Possible context is a process model or an activity. application systems **Application system** objects whose **SAP component** attribute is maintained. These **Application system** objects occur in related models and are connected to a SAP function.

EXAMPLE

The screenshot displays the 'SAP - Function Details' interface with three main sections:

- Assigned SAP documents:** Shows a single entry: 'Training video "Create Sales Order"' with the column header 'SAP document name'.
- Assigned SAP transactions:** A table with two columns: 'SAP transaction name' and 'Transaction code'.

SAP transaction name	Transaction code
Create sales order	VA01 (Create sales order)
Periodic billing	V.07 (Periodic billing)
Display contract	VA43 (Display contract)
Collective processing for quotations	VA26 (Collective processing for quotations)
Display quotation	VA23 (Display quotation)
Create contract	VA41 (Create contract)
Allocate material	CS07 (Customer overview)
Change contract	VA42 (Change contract)
Create customer (centrally)	XD01 (Create customer (centrally))
- Assigned SAP components:** Shows a single entry: 'SAP_Z_ERP_MYARIS10' with the column header 'SAP component'.

4.2.13.5.3.2 Dashboards using Center of Excellence (CoE) data

Here you can find information about Center of Excellence dashboards (page 1054) delivered by default. Consequently, the dashboards provide information about leadership and best practice for the focus area business concept via Business Process Modeling.

4.2.13.5.3.2.1 CoE - Aggregated maturity - Diagram

The dashboard shows an aggregated view of all process models based on hierarchy of models in the ARIS Connect configuration. That is, starting with the top-level model, for example, a value-added chain diagram, and ending with the process model of the lowest level, for example, an EPC of level 4. The progress of models that are at a lower level of the hierarchy is weighted with 70 % by default.

AVAILABILITY

This dashboard is shown on the **Diagram** fact sheet of value-added chain diagrams.

CHARTS

AGGREGATED MODELING PROGRESS

Overview of the mandatory properties that have already been specified.

Data source

ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?

Yes

Data collection

Context - process model:

Collection of all processes in the hierarchy starting from the top level model, for example, Value-added chain, down to the last level process model, for example, Level 4 EPC, and aggregated evaluation of all mandatory properties.

Data feed

CoE - Aggregated maturity level

Calculation

Aggregated progress of the mandatory attributes calculated for all process models in the hierarchy. The calculation is based on the mandatory attributes to be maintained, for example, person responsible, validity date etc. Hereby, the progress of the subordinate result (children in the hierarchy) is weighted with 70% by default.

MANDATORY PROPERTIES SUMMARY

Shows all mandatory properties and lists the number of properties that have not been specified.

Data source

ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?

Yes

Data collection

Context - process model:

Collection of all mandatory properties in the hierarchy.

Data feed

CoE - Mandatory attributes

Calculation

Aggregation of the mandatory properties in the hierarchy level.

MODEL AGE (PERCENT DISTRIBUTION)

Shows the aggregated age distribution of process models (how long process models have remained unchanged) based on the **Last change** property.

Data source

ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?

Yes

Data collection

Context - process model

Collection of the **Last change** property for all process models in the hierarchy.

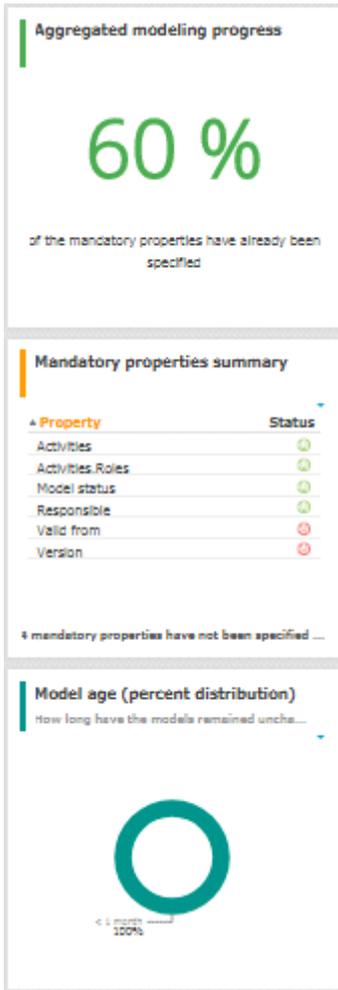
Data feed

CoE - Model age

Calculation

Aggregation of the **Last change** property in the hierarchy level.

EXAMPLE



4.2.13.5.3.2.2 CoE - Aggregated maturity level (overview)

The dashboard shows an aggregated view of all process models based on hierarchy of models in the ARIS Connect configuration. That is, starting with the top-level model, for example, a value-added chain diagram, and ending with the process model of the lowest level, for example, an EPC of level 4. The progress of models that are at a lower level of the hierarchy is weighted with 70 % by default.

AVAILABILITY

This dashboard is shown for value-added chain diagrams in the dashboard sidebar of the **Overview** fact sheet.

CHARTS

AGGREGATED MODELING PROGRESS

Overview of the mandatory properties that have already been specified.

Data source

ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?

Yes

Data collection

Context - process model:

Collection of all processes in the hierarchy starting from the top level model, for example, Value-added chain, down to the last level process model, for example, Level 4 EPC, and aggregated evaluation of all mandatory properties.

Data feed

CoE - Aggregated maturity level

Calculation

Aggregated progress of the mandatory attributes calculated for all process models in the hierarchy. The calculation is based on the mandatory attributes to be maintained, for example, person responsible, validity date etc. Hereby, the progress of the subordinate result (children in the hierarchy) is weighted with 70% by default.

AGGREGATED MODEL COUNT FOR CURRENT PROCESS

Shows how many processes are modeled in the corresponding hierarchy level.

Data source

ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?

No

Data collection

Context - process model:

Collection and count of all processes in the hierarchy.

Data feed

CoE - Number of process models

Calculation

Aggregated number of processes in the hierarchy level.

MODEL RELEASE STATUS

Shows the aggregated release progress considering the aggregated value of the property **Model status**.

Data source

ARIS Architect:

Report: CoE - Aggregated maturity level

Report configurable?

Yes

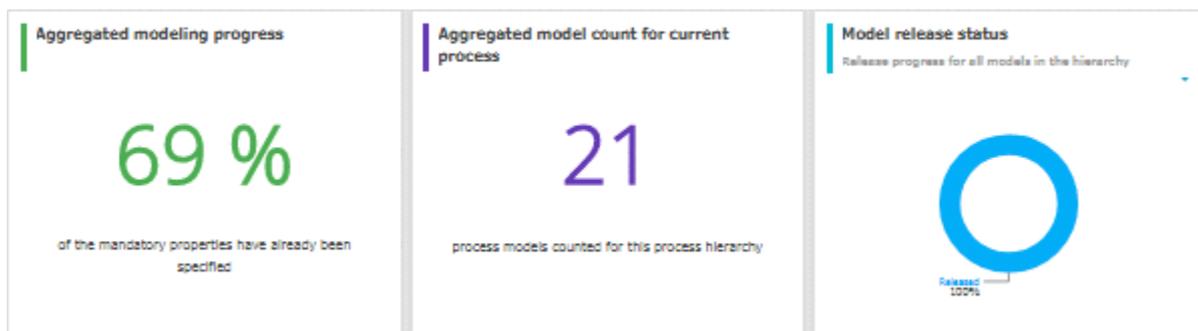
Data collection

Context - process model:

Collection of all processes in the hierarchy considering the aggregated value of the property **Model status**.

Data feed

CoE - Model status

CalculationAggregation of the property **Model status** in the hierarchy level.**EXAMPLE**

4.2.13.5.3.2.3 CoE - Global maturity level

This dashboard provides different types of information on all process models and organizational charts within a database.

AVAILABILITY

ARIS Connect >  **Portal** >  **Dashboards**

CHARTS

VALIDITY DATE STATUS

Overview of validity date statuses for models. Shows when models will expire based on the value that was specified for the **Validity** attribute.

Data source

ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?

Yes

Data collection

Context - database:

Collection of all models of the database, and evaluation and grouping of their validity dates into the following categories:

- **undefined**: no validity date is maintained
- **next 5 days**: validity date is next week
- **next 14 days**: validity date is within the next two weeks
- **next 30 days**: validity date is within the next 30 days
- **later**
- **expired**: validity date is in the past

Data feed

CoE - Validity date

Calculation

Collection of all models of the database, and evaluation and grouping of their validity dates into the following categories:

- **undefined**: no validity date is maintained
- **next 5 days**: validity date is next week
- **next 14 days**: validity date is within the next two weeks
- **next 30 days**: validity date is within the next 30 days
- **later**
- **expired**: validity date is in the past

VALIDITY DATE OVERVIEW

Lists the process models and organizational charts in a table and shows the expiration status for each model based on the value of the **Validity** attribute.

Data source

ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?

Yes

Data collection

Context - database:

Collection of all models of the database and evaluation and grouping their validity dates.

Data feed

CoE - Validity date

Calculation

Collects the values of the **Validity** attribute for every model in a table.

MOST SHARED MODELS

Shows the top-7 most shared models.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of the number of all instances of the **Share model** mini workflow.

Data feed

CoE - Process Instances (Share)

Calculation

Collection of the number of all instances of the **Share model** mini workflow and display of the top seven models which are the most frequently selected context of the mini workflow.

OWNERS WITH THE MOST MODEL RESPONSIBILITY

Shows the seven responsible people with the most process models in their responsibility (maintained as **Person responsible** attribute value for these models).

Data source

ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?

Yes

Data collection

Context - database:

Collection of all models in the database and evaluation of their process owners.

Data feed

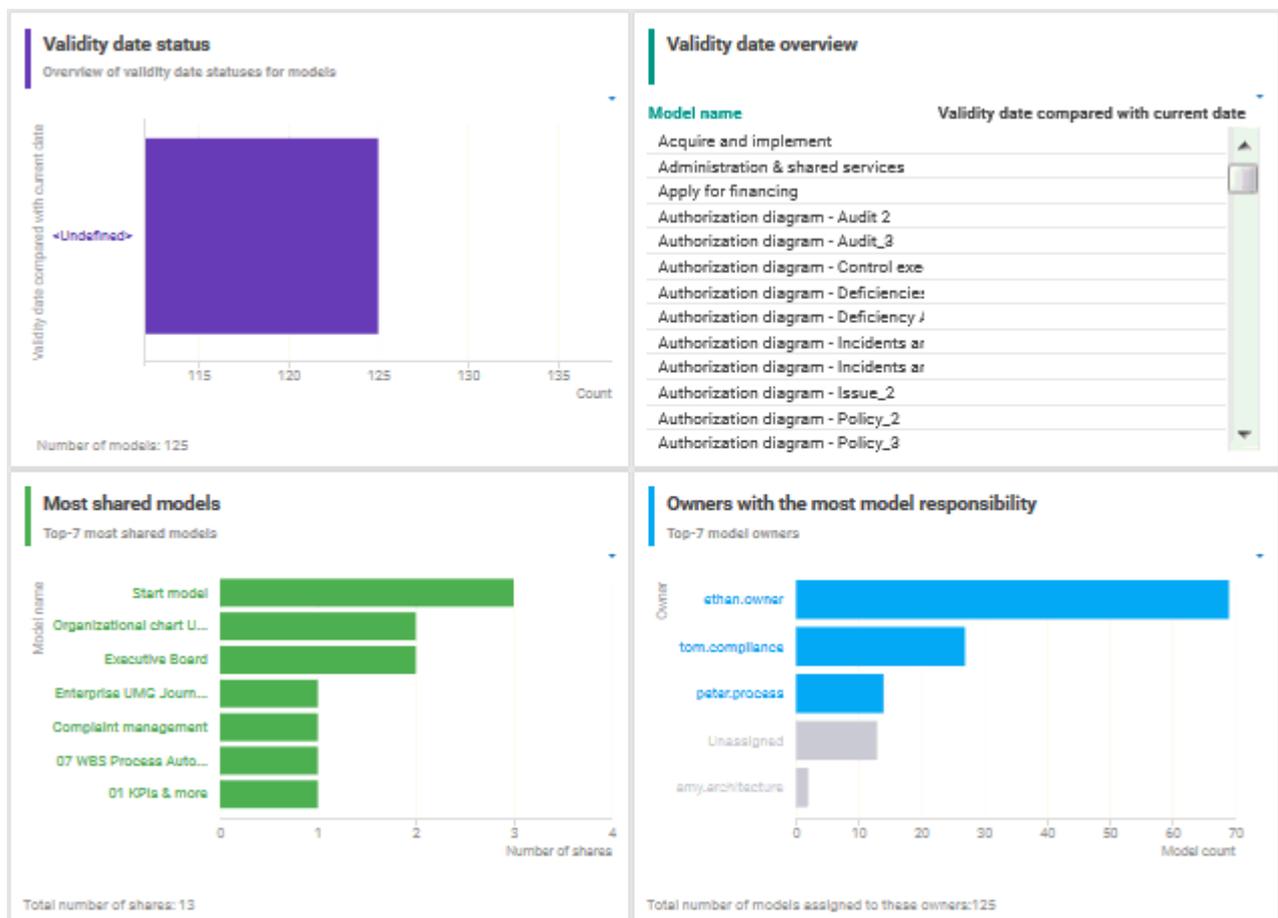
CoE - Process Owners

Calculation

Collection of all models in the database and evaluation and count of the most frequent process owners maintained as **Person responsible** attribute value.

By default the top 7 owners with the most models are shown. This can be configured.

EXAMPLE



4.2.13.5.3.2.4 CoE - Human tasks

This dashboard shows overall governance information about the human tasks submitted via Process Governance

AVAILABILITY

ARIS Connect >  **Portal** >  **Dashboards**

CHARTS

TOTAL NUMBER OF HUMAN TASKS

Shows the total number of human tasks regardless of the Process Governance process they belong to. For example, it includes the human tasks belonging to the  **Submit change request** and  **Inform owner of change** mini workflow, but also the ones from custom APG workflows. The **CoE - Human tasks** dashboard can be filtered based either on database and model context, or on task-related information such as status and priority.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

No

Data collection

Context - APG:

Collection of the number of all human tasks in APG.

Data feed

CoE - Process Instances and Human Tasks

Calculation

Collection of the number of all human tasks in APG.

HUMAN TASKS OVER TIME

Shows the timeline of the human tasks based on their creation date.

The **CoE - Human tasks** dashboard can be filtered based either on database and model context, or on task-related information such as status and priority.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

No

Data collection

Context - Process Governance:

Collection of the creation date of all human tasks in Process Governance.

Data feed

CoE - Process Instances and Human Tasks

Calculation

Collection of the creation date of all human tasks in Process Governance.

HUMAN TASK DETAILS

Lists all human tasks including specific details such as priority, creation date, status, and participant.

The **CoE - Human tasks** dashboard can be filtered based either on database and model context, or on task-related information such as status and priority.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

No

Data collection

Context - APG:

Collection of all human tasks in APG and their details.

Data feed

CoE - Process Instances and Human Tasks

Calculation

Collect all human tasks in APG and display the details:

- **Human task name** (as it appears in Process Board)
- **Human task priority** (HIGH, LOW, NORMAL)
- Creation date of the human task
- Human task status (ACTIVE or COMPLETED)
- Human task participant (the user to whom the human task is assigned)
- Item (the selection context for this human task, for example, the model for which the change request has been submitted or for which approval has been initiated)
- Description (the human task description as it appears in Process Board)
- Database (in which the workflow has been started to which the human task belongs)

EXAMPLE

Date

From

To

Task

Task name

Task status

Priority

Context

Item Name

Database

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	16
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	Priority	Creation date	Status	Participant	Item	Description	Database
Realize change request for model [Spare parts	NOR!	2016-06-30	COMPLET	Owner, Eths	Spare parts & acces	please adapt	United Motor
Change request for model [Spare parts & acces	NOR!	2016-06-30	COMPLET	Owner, Eths	Spare parts & acces	please adapt	United Motor
Change request for model [Enterprise process	NOR!	2016-06-30	COMPLET	Owner, Eths	Enterprise process	Please adapt to the cu	United Motor
Realize change request for model [Enterprise p	NOR!	2016-06-30	COMPLET	Owner, Eths	Enterprise process	Please adapt to the cu	United Motor
Change request for model [Product Overview] F	NOR!	2016-06-30	COMPLET	Owner, Eths	Product Overview	please change	United Motor
Change request for model [Organizational char	NOR!	2016-06-30	ACTIVE	Process, Pe	Organizational char	please adapt	United Motor
Change request for model [Executive Board] Mi	NOR!	2016-07-18	ACTIVE	Process, Pe	Executive Board	pls adapt	United Motor
Change request for model [Operational manag	NOR!	2016-07-14	ACTIVE	Owner, Eths	Operational manag	pls add missing parts	United Motor
Change request for model [Complaint manager	NOR!	2016-07-14	ACTIVE	Owner, Eths	Complaint manager	is outdated, please ad	United Motor
Change request for model [Organizational char	NOR!	2016-06-30	ACTIVE	Process, Pe	Organizational char	please remodel	United Motor
Change request for model [Document check] S	NOR!	2016-06-30	ACTIVE	Complianc	Document check	please enhance	United Motor
Change request for model [Customer services]	NOR!	2016-07-15	ACTIVE	Owner, Eths	Customer services	pls add	United Motor
Change request for model [UMG Bank] Please c	HIGH	2017-03-10	ACTIVE	Process, Pe	UMG Bank	Please check	United Motor

4.2.13.5.3.2.5 CoE - Local maturity level

This dashboard is shown for selected process models and organizational charts.

AVAILABILITY

This dashboard is shown for process models (EPCs) in the dashboard sidebar of the **Diagram** fact sheet and on the **Dashboard** fact sheet of value-added chains.

CHARTS

TOTAL NUMBER OF CHANGE REQUESTS

Shows the total number of change requests submitted for a specific model using the  **Submit change request** mini workflow.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - model:

Collection of the number of all change requests started on the context of this model.

Data feed

CoE - Process Instances (Change Request)

Calculation

Calculation of the number of change requests for which this model was the selected context (by default using the  **Submit change request** mini workflow).

MANDATORY SEMANTIC CHECKS

Shows the result of the **Mandatory semantic checks** semantic check as a symbol.

Data source

ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?

Yes

Data collection

Context - model:

Collection of the result of the configured semantic check.

Data feed

CoE - Local maturity - Conventions

Calculation

Collection of the result of the configured semantic check - by default the **Mandatory semantic check** semantic check with the result **SUCCESSFUL** or **FAILED**.

MANDATORY ATTRIBUTES

Identifies the number of mandatory properties specified and compares it with the total number of mandatory properties. The default mandatory attributes include **Model status**, **Person responsible**, **Version**, **Validity**, and **Activities**.

Data source

ARIS Architect:

Report: CoE - Local and global maturity level

Report configurable?

Yes

Data collection

Context - model:

Collection of the statuses of the mandatory attributes - whether they are maintained or not.

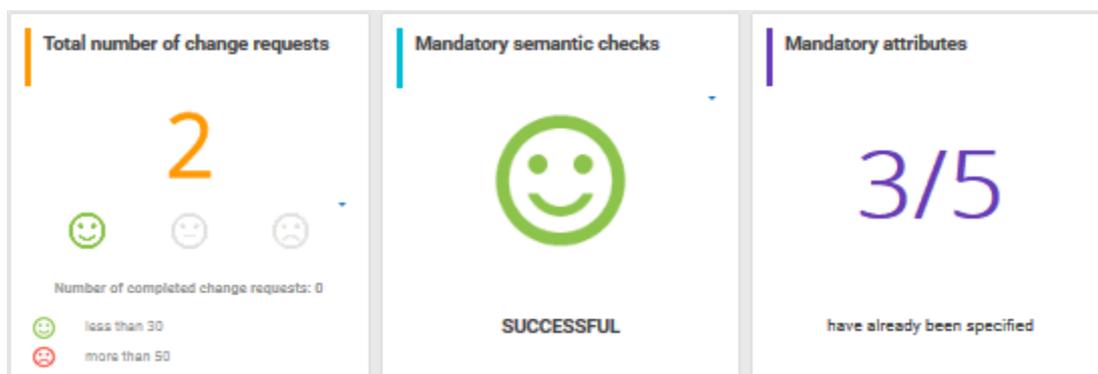
Data feed

CoE - Local maturity - Conventions

Calculation

Collection of the statuses of the mandatory attributes - whether they are maintained or not.

EXAMPLE



4.2.13.5.3.2.6 CoE - Portal usage

Dashboard that gives an overview of the use of the models in the ARIS Connect portal.

AVAILABILITY

ARIS Connect >  **Portal** >  **Dashboards**

CHARTS

MODELS WITH ASSIGNED CHANGE REQUESTS

Shows models with the most assigned pending change requests.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the  **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of their context (the models for which the change requests have been started). Display of the top 7 of these models.

MODEL OWNERS WITH ASSIGNED CHANGE REQUESTS

Model owners with the most assigned pending change requests.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the  **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of the number of requests per owner (the responsible person for the model for which the change request has been submitted). Display of the top 7 process owners. The ID of the workflow to be considered can be configured.

MODELS WITH ASSIGNED APPROVAL REQUESTS

Models with the most assigned pending approval requests.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the  **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of the number of requests per owner (the responsible person for the model for which the change request has been submitted). Display of the top 7 process owners. The ID of the workflow to be considered can be configured.

MOST SHARED MODELS

Shows the top-7 most shared models.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of the number of all instances of the **Share model** mini workflow.

Data feed

CoE - Process Instances (Share)

Calculation

Collection of the number of all instances of the **Share model** mini workflow and display of the top seven models which are the most frequently selected context of the mini workflow.

MOST FOLLOWED MODELS

The top seven most followed models in Collaboration.

Data source

ARIS models in Collaboration

Data feed

Collaboration – Most followed ARIS content

MOST COMMENTED MODELS

The top seven most commented models in Collaboration.

Data source

ARIS models in Collaboration

Data feed

Collaboration – Most commented ARIS content

EXAMPLE



4.2.13.5.3.2.7 CoE - Process Change Management

The dashboard shows governance information based on Process Governance.

AVAILABILITY

ARIS Connect >  **Portal** >  **Dashboards**

CHARTS

STATUS OF CHANGE REQUESTS FOR MODELS

Shows the processes with change requests in the PENDING and COMPLETED status. This is based on the  **Submit change request** mini workflow.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all process instances of  **Submit change request** mini workflow and grouping them into the following categories:

- PENDING (running change requests)
- COMPLETED (realized change requests)

Data feed

CoE - Process Instances (Change Request)

Calculation

Collection of the number of all instances of  **Submit change request** mini workflow (by default) and grouping them by status PENDING or COMPLETED. The ID of the workflow to be considered can be configured.

CHANGE REQUEST COUNT IS

Shows the change requests submitted for models with the  **Submit change request** mini workflow within the last 3 months.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of the number of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances (Change Request)

Calculation

Collection of the number of all instances of the  **Submit change request** mini workflow for models (by default). The ID of the workflow to be considered can be configured.

MODEL CHANGE REQUESTS OVER TIME

Shows the change requests submitted within the last 3 months.

Timeline of the change requests over time based on the assignment date of the  **Submit change request** mini workflow for models.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of the assignment date of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances (Change Request)

Calculation

Collection of the assignment date of all instances of the  **Submit change request** mini workflow for models (by default) and count per date. The ID of the workflow to be considered can be configured.

MODELS WITH ASSIGNED CHANGE REQUESTS

Shows models with the most assigned pending change requests.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the  **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of their context (the models for which the change requests have been started). Display of the top 7 of these models.

MODEL OWNERS WITH ASSIGNED CHANGE REQUESTS

Model owners with the most assigned pending change requests.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

Calculation

Collection of all instances of the  **Submit change request** mini workflow for models (by default) which are in the RUNNING status and evaluation of the number of requests per owner (the responsible person for the model for which the change request has been submitted). Display of the top 7 process owners. The ID of the workflow to be considered can be configured.

STATUS OF CHANGE REQUESTS AND CHANGE REQUEST DETAILS

Shows both the Status of change requests as well as Change request details. Both charts depend on each other.

Data source

ARIS Architect:

Report: CoE - Governance

Report configurable?

Yes

Data collection

Context - APG:

Collection of all instances of the  **Submit change request** mini workflow for models.

Data feed

CoE - Process Instances and Human Tasks (Change Request)

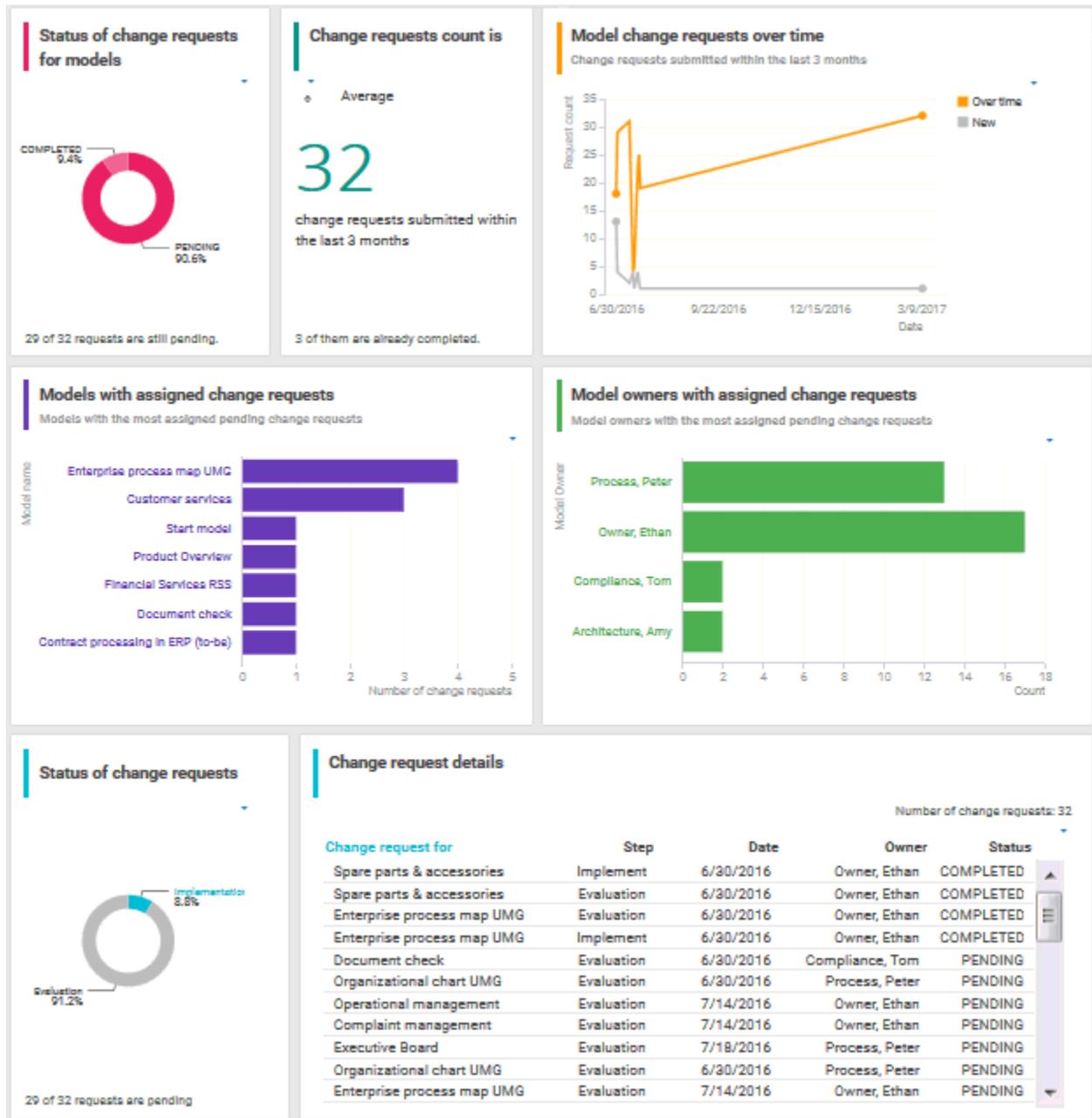
Calculation

Collection of all instances of the  **Submit change request** mini workflow for models (by default) and display of the details:

- The name of the model for which the change request has been submitted.
- The current active step in the mini workflow
(evaluation step: change request not yet evaluated or
realization step: change request has been evaluated and is now being realized).
- The assignment date of the change request (start date of the process instance).
- The owner of the human task - the person to whom this task has been assigned.
- The change request status (RUNNING or COMPLETED).

The ID of the workflow to be considered can be configured.

EXAMPLE



4.2.13.5.3.3 Dashboards using Customer Experience Management (CXM) data

Available dashboards (page 1054) using content that is retrieved from Customer Experience Management (CXM)-related models.

Since Customer Experience is based on expectations, experiences and attitudes, ABC offers the possibility to model personas (page 1060) and create their infographics (page 699). In this way, target groups can be clearly distinguished from each other and their needs can be addressed.

4.2.13.5.3.3.1 Customer experience

Dashboard providing an overview of how customers experience their interaction with the company during a so-called customer journey. This dashboard includes various charts that illustrate the customer experience from different angles.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of model of type **Customer journey landscape**.

CHARTS

NUMBER OF AFFECTED INTERNAL PROCESSES

Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Retrieves customer touchpoint data from all customer journeys contained in customer journey maps that are assigned to a selected model of the Customer journey landscape type. Identifies the customer touchpoints of each customer journey map. In addition, the following data is collected:

- checks whether the customer touchpoints have a connection to an internal process.
- counts all customer touchpoints that have a connection to an internal process.
- checks whether the **Pain point** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Pain point** attribute type is set to **true**.
- checks whether the **Moment of truth** attribute is specified for any of the touchpoints.

- counts the customer touchpoints for which the value of the **Moment of truth** attribute type is set to **true**.
- checks whether the **Best practice** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Best practice** attribute type is set to **true**.

Data feed

CXM - Analyze customer experience

Calculation

Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

PERCENTAGE OF CRITICAL CUSTOMER TOUCHPOINTS

Overview of the percentage of critical customer touchpoints.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

-.-

Data feed

CXM - Analyze customer experience

Calculation

Number of customer touchpoints for which the **Moment of truth** attribute type is specified over the aggregated number of customer touchpoints multiplied by 100.

OVERALL CUSTOMER EXPERIENCE

Percent distribution of customer feelings calculated for an entire customer journey landscape.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Data is retrieved from all customer journeys related to a selected model of the **Customer journey landscape** type.

All customer touchpoints contained in the customer journey maps assigned to the selected customer journey landscape are retrieved. The following data is counted:

- All customer touchpoints for which the **Customer feeling** attribute is specified as **Positive**.
- All customer touchpoints for which the **Customer feeling** attribute is specified as **Neutral**.
- All customer touchpoints for which the **Customer feeling** attribute is specified as **Negative**.

Data feed

CXM - Overall customer experience

Calculation

Aggregated number of values (Positive, Neutral, and Negative) retrieved from the **Customer feeling** attribute.

CUSTOMER JOURNEYS LEADING TO A GOOD EXPERIENCE

Top seven customer journeys creating a good customer experience.

Data source

ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/EA.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the **Customer experience** CXM dashboard (page 615).

CONTEXT

Database

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Data is retrieved from all customer journeys related to a selected model of the **Customer journey landscape** type.

All customer touchpoint contained in customer journey maps are retrieved, and all customer touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive** are counted.

Data feed

CXM - Analyze customer journeys

Calculation

Number of customer touchpoints for which the **Customer feeling** attribute type is set to **Positive** over the number of customer touchpoints per customer journey.

CUSTOMER JOURNEYS LEADING TO A BAD EXPERIENCE

Top seven customer journeys creating a bad customer experience.

Data source

ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/EA.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the **Customer experience** CXM dashboard (page 615).

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.

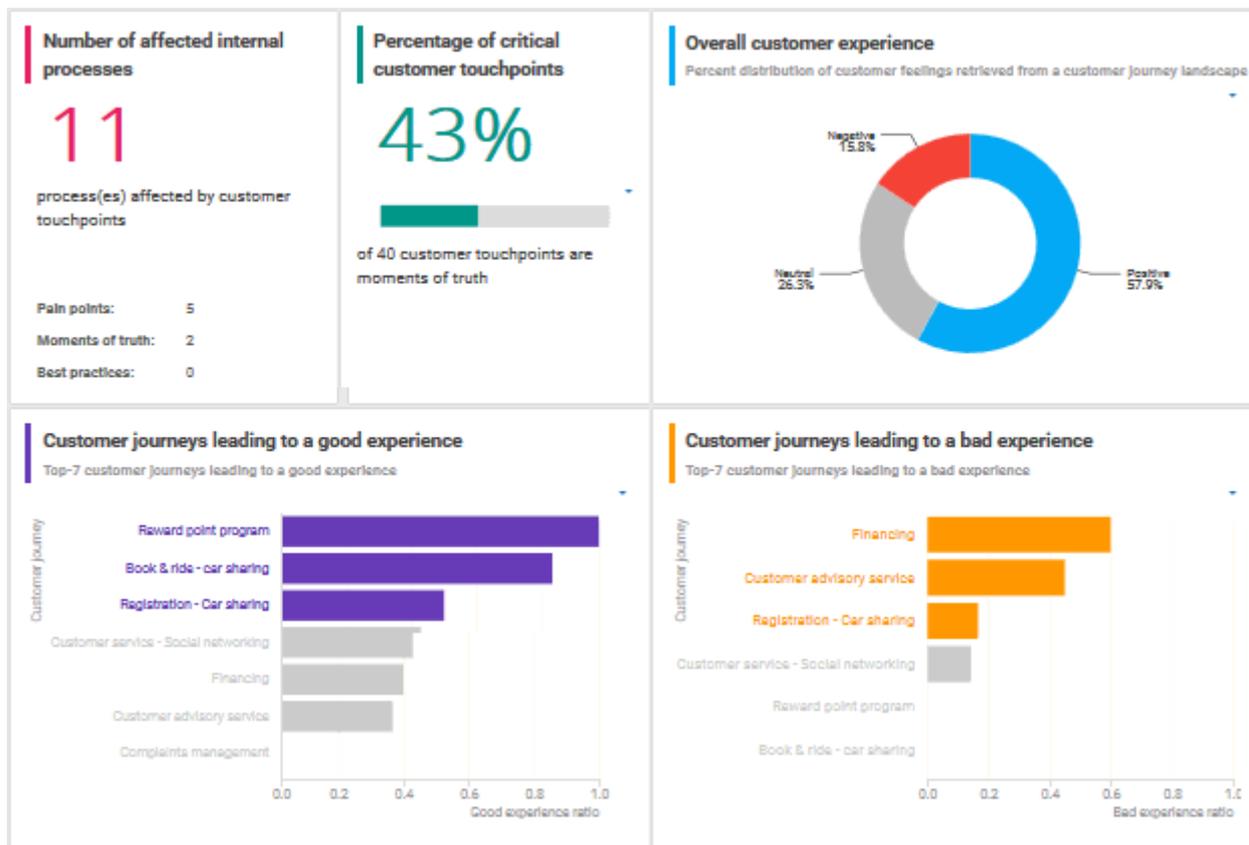
Data feed

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



4.2.13.5.3.3.2 Responsibilities

Customer experience dashboard evaluating business units and channels.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of model of type **Customer journey landscape**.

CHARTS

BUSINESS UNITS ASSOCIATED WITH GOOD EXPERIENCE

Top seven business units associated with a good customer experience.

Data source

ARIS Architect:

Report: CXM - Responsibility (Ownership)

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all owners specified in the **Ownership** row and their associated customer touchpoints are retrieved from all assigned customer journey maps. Checks whether the **Customer feeling** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive**.

Data feed

CXM - Responsible owner

Calculation

Good experience ratio: Number of customer touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive** divided by the total number of customer touchpoints.

BUSINESS UNITS ASSOCIATED WITH BAD EXPERIENCE

Top seven business units associated with a bad customer experience.

Data source

ARIS Architect:

Report: CXM - Responsibility (Ownership)

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all owners specified in the **Ownership** row and their associated customer touchpoints are retrieved from all assigned customer journey maps. Checks whether the **Pain point** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Pain point** attribute type is set to **true**.

Data feed

CXM - Responsible owner

Calculation

Number of customer touchpoints for which the value of the **Pain point** attribute type is set to **true** divided by the total number of customer touchpoints (bad experience ratio).

CHANNELS ASSOCIATED WITH GOOD EXPERIENCE

Top-7 channels associated with a good customer experience.

Data source

ARIS Architect:

Report: CXM - Responsibility (Channel)

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all channels specified in the **Channel** row and their associated customer touchpoints are retrieved for all assigned customer journey maps. Checks whether the **Customer feeling** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive**.

Data feed

CXM - Responsibility channel

Calculation

Good experience ratio: Number of customer touchpoints for which the value of the **Customer feeling** attribute type is set to **Positive** divided by the total number of customer touchpoints.

CHANNELS ASSOCIATED WITH BAD EXPERIENCE

Top-7 channels associated with a bad customer experience.

Data source

ARIS Architect:

Report: CXM - Responsibility (Channel)

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the selected customer journey landscape, all channels specified in the **Channel** row and their associated customer touchpoints are retrieved for all assigned customer journey maps. Checks whether the **Pain point** attribute is specified for any of the customer touchpoints and counts the touchpoints for which the value of the **Pain point** attribute type is set to **true**.

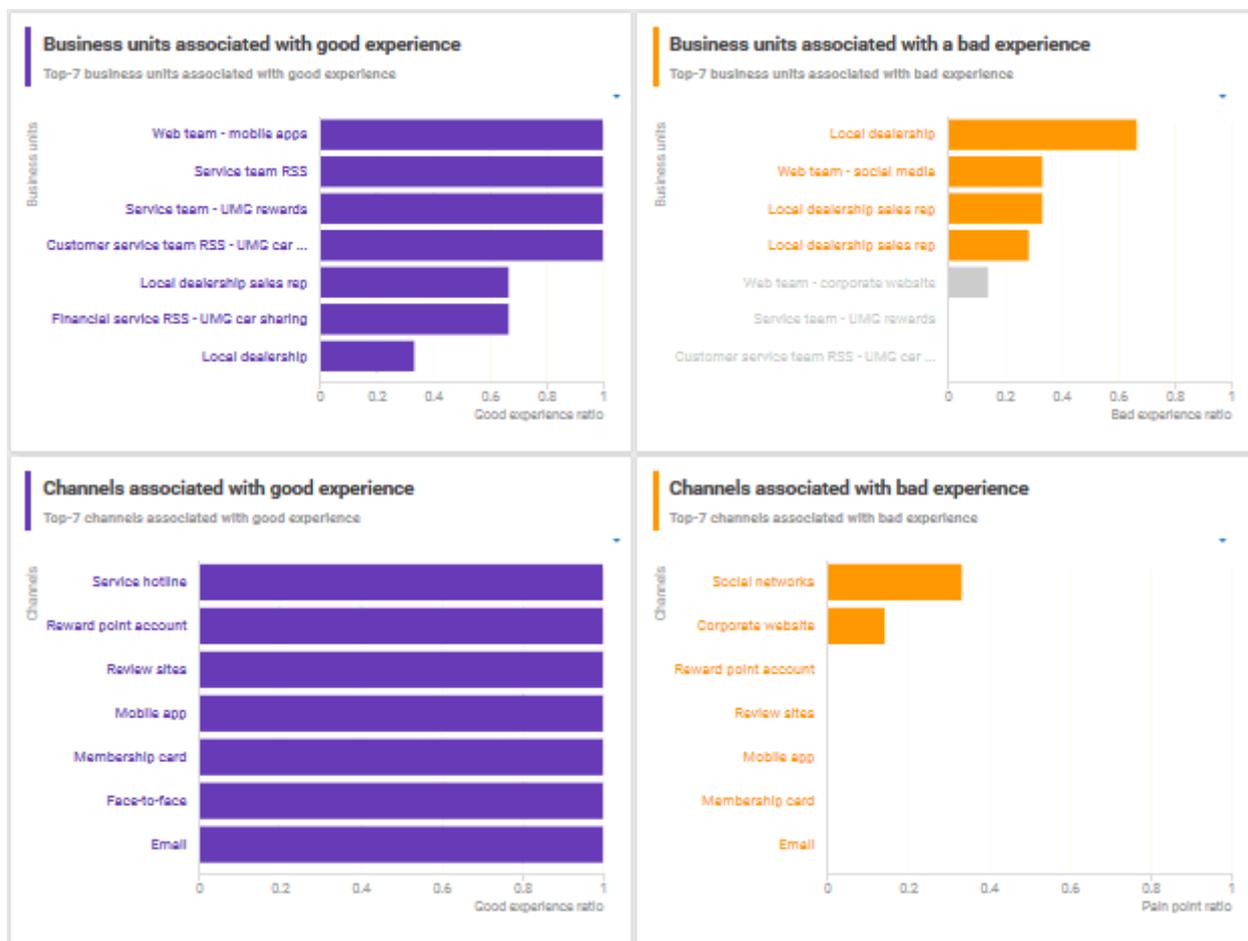
Data feed

CXM - Responsibility channel

Calculation

Number of customer touchpoints for which the value of the **Pain point** attribute type is set to **true** divided by the total number of customer touchpoints (bad experience ratio).

EXAMPLE



4.2.13.5.3.3.3 Customer experience overview

Customer journey map dashboard that evaluates customer touchpoints and retrieves the customer touchpoints with high market potential.

AVAILABILITY

This dashboard is shown for model of type **Customer journey map** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

NUMBER OF AFFECTED INTERNAL PROCESSES

Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

Context: **Customer journey landscape** model type.

Retrieves customer touchpoint data from all customer journeys contained in customer journey maps that are assigned to a selected model of the Customer journey landscape type. Identifies the customer touchpoints of each customer journey map. In addition, the following data is collected:

- checks whether the customer touchpoints have a connection to an internal process.
- counts all customer touchpoints that have a connection to an internal process.
- checks whether the **Pain point** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Pain point** attribute type is set to **true**.
- checks whether the **Moment of truth** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Moment of truth** attribute type is set to **true**.
- checks whether the **Best practice** attribute is specified for any of the touchpoints.
- counts the customer touchpoints for which the value of the **Best practice** attribute type is set to **true**.

Data feed

CXM - Analyze customer experience

Calculation

Number of internal processes that include customer touchpoints of the **Pain point**, **Moment of truth**, or **Best practice** type.

PERCENTAGE OF NEGATIVE CUSTOMER TOUCHPOINTS

Overview of the percentage of negative customer touchpoints.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

.-

Data feed

CXM - Analyze customer experience

Calculation

Number of pain points divided by the number of customer touchpoints multiplied by 100.

PERCENTAGE OF CRITICAL CUSTOMER TOUCHPOINTS

Overview of the percentage of critical customer touchpoints.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

.-

Data feed

CXM - Analyze customer experience

Calculation

Number of customer touchpoints for which the **Moment of truth** attribute type is specified over the aggregated number of customer touchpoints multiplied by 100.

PERCENTAGE OF POSITIVE CUSTOMER TOUCHPOINTS

Overview of the percentage of positive customer touchpoints.

Data source

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable?

No

Data collection

.-.

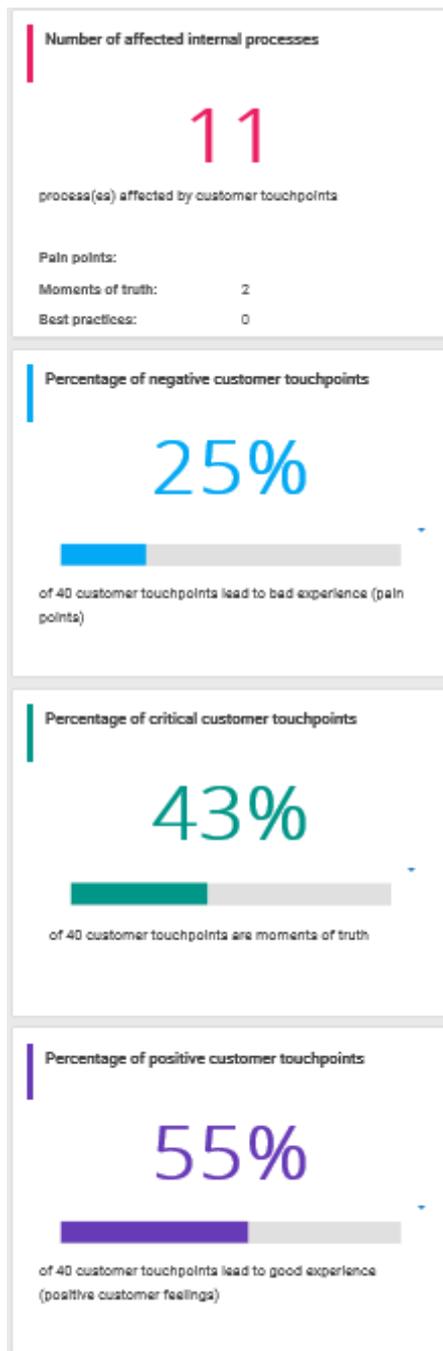
Data feed

CXM - Analyze customer experience

Calculation

Number of customer touchpoints with the value **Positive** set for the **Customer feeling** attribute divided by the number of customer touchpoints multiplied by 100.

EXAMPLE



4.2.13.5.3.3.4 Business driver distribution & social media conversation rate

Customer experience dashboard evaluating business units and channels.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of model of type **Customer journey landscape**.

CHARTS

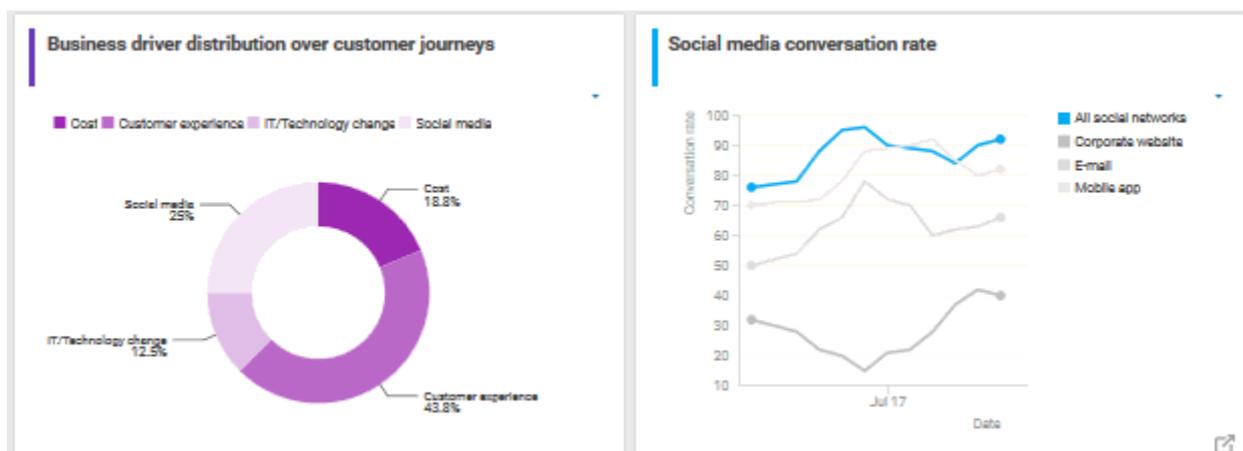
BUSINESS DRIVER DISTRIBUTION OVER CUSTOMER JOURNEYS

Displays the distribution of business drivers, such as **Cost** and **IT/Technology change**, across customer journeys.

SOCIAL MEDIA CONVERSATION RATE

Displays the conversation rate for each medium and the aggregated conversation rate for a specific time period.

EXAMPLE



4.2.13.5.3.4 Dashboards using content that is retrieved by ARIS reports that access Matomo data

Available dashboards (page 1054) using content that is retrieved by ARIS reports that access Matomo data. Matomo is an open-source analytics platform.

4.2.13.5.3.4.1 Matomo - Publications

Dashboard that includes an overview of the ARIS portal usage. It provides charts that consider various aspects for which you can select different evaluation periods, such as last week, last month, and last year.

AVAILABILITY

ARIS Connect >  **Portal** >  **Dashboards**

CHARTS

NUMBER OF VISITS OVER TIME

Shows the number of visits (visits/unique visitors) over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **VisitsSummary** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 634) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed

Matomo - Summary of visits over time

MOST VIEWED ITEM TYPES (E.G., 'PROCESS', 'ROLE')

Top seven item types most viewed over the selected time period, for example, processes.

Data source

ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 627) dashboard.

CONTEXT

Database

Data feed

Matomo - Most viewed item types

MOST VIEWED ITEMS

Top seven items most viewed over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 627) dashboard.

CONTEXT

Database

Data feed

Matomo - Most viewed items

MOST SEARCHED KEYWORDS

Top seven of the keywords most searched over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 627) dashboard.

CONTEXT

Database

Data feed

Matomo - Most searched keywords

MOST VIEWED ITEM TYPES LIST

Top-fifty list of item types most viewed over the selected time period, for example, processes.

Data source

ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 627) dashboard.

CONTEXT

Database

Data feed

Matomo - Most viewed items types

MOST VIEWED ITEMS LIST

List of top fifty items most viewed over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 627) dashboard.

CONTEXT

Database

Data feed

Matomo - Most viewed items

MOST SEARCHED KEYWORDS LIST

Top-fifty list of the keywords most searched over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Database-specific portal usage running the Matomo **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific Matomo reports, and adds ARIS data to them, if required.

The following Matomo reports are retrieved:

- **PageTitles** report
- **CustomDimension** report
- **SiteSearchKeywords** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/<database name; default=United Motor Group>/**Matomo** subgroup.

The report result is used as input for the Matomo - Publications (page 627) dashboard.

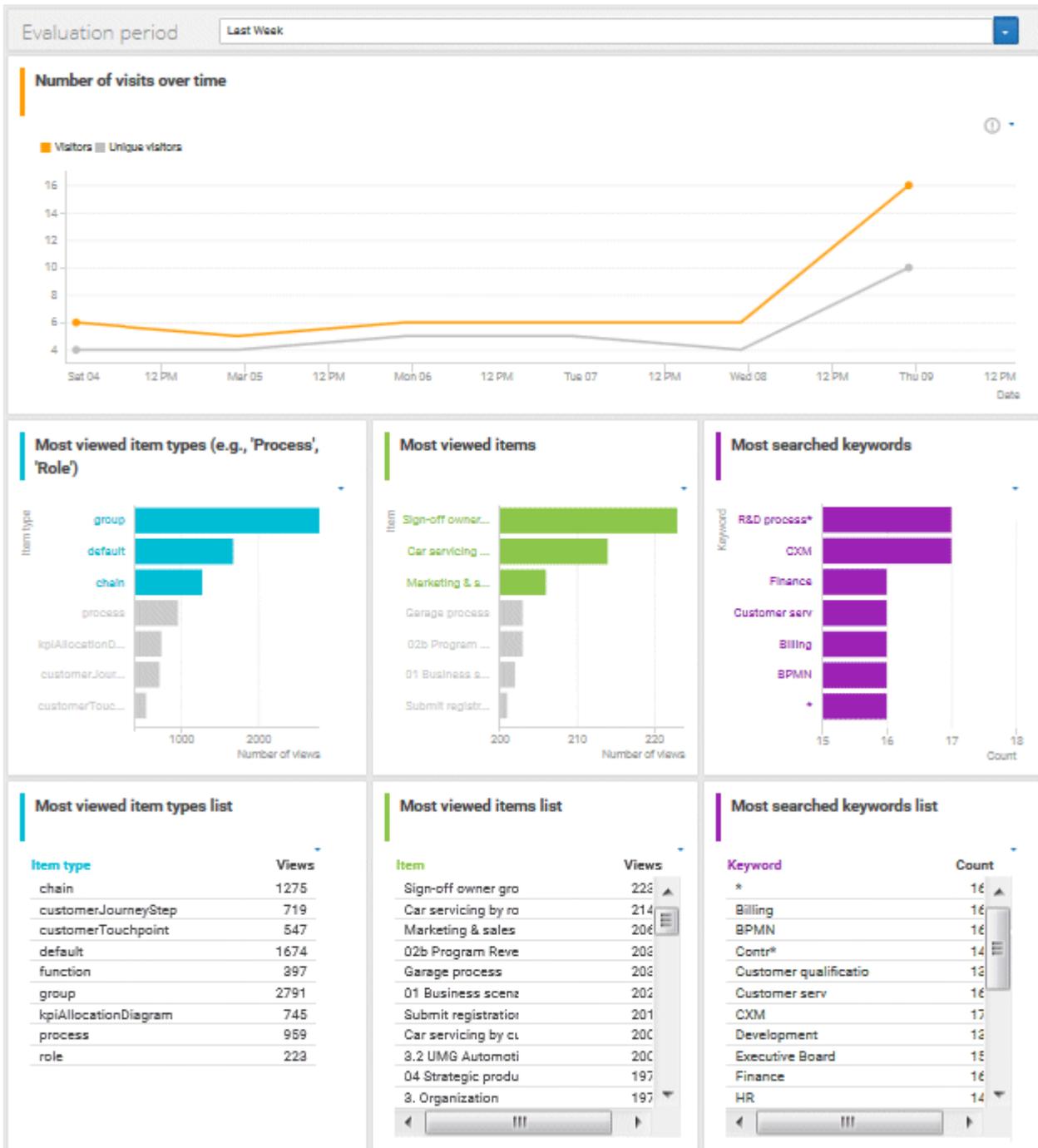
CONTEXT

Database

Data feed

Matomo - Most searched keywords

EXAMPLE



4.2.13.5.3.4.2 Matomo - Technical KPIs

Dashboard that shows technical KPIs regarding the ARIS usage. It provides charts that consider various technical aspects for which you can select different evaluation periods, such as last week, last month, and last year.

AVAILABILITY

ARIS Connect >  **Portal** >  **Dashboards**

CHARTS

PERCENT DISTRIBUTION OF BROWSER ENGINES

Percent distribution of the browser engines used over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **BrowserEngines** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 634) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed

Matomo - Browser engines

MOST USED OPERATING SYSTEMS

Operating systems most used over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **OsVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 634) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed

Matomo - Operating system version

MOST USED BROWSER VERSIONS (LIST)

List of browser versions most used over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **BrowserVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 634) dashboard.

CONTEXT

Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed

Matomo - Browser version

MOST USED PORTAL LANGUAGES (LIST)

List of portal languages most used over the selected time period.

Data source

ARIS Architect:

Report: Matomo - Global portal usage running the Matomo **Language** report.

This report creates global portal usage statistics. Therefore, it accesses an external Matomo instance that contains a collection of ARIS portal events, retrieves specific **Matomo** reports, and adds ARIS data to them, if required.

The following **Matomo** reports are retrieved:

- **VisitsSummary** report
- **BrowserVersions** report
- **BrowserEngines** report
- **Language** report
- **OsVersions** report

In order to use the Matomo - Global portal usage and Matomo - Database-specific portal usage reports, make sure to have Matomo installed and configured and the report parameters specified accordingly.

The parameters must be specified according to the required Matomo settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in this subfolder: ARIS document storage/Dashboarding/**Matomo**.

The report result is used as input for the Matomo - Technical KPIs (page 634) dashboard.

CONTEXT

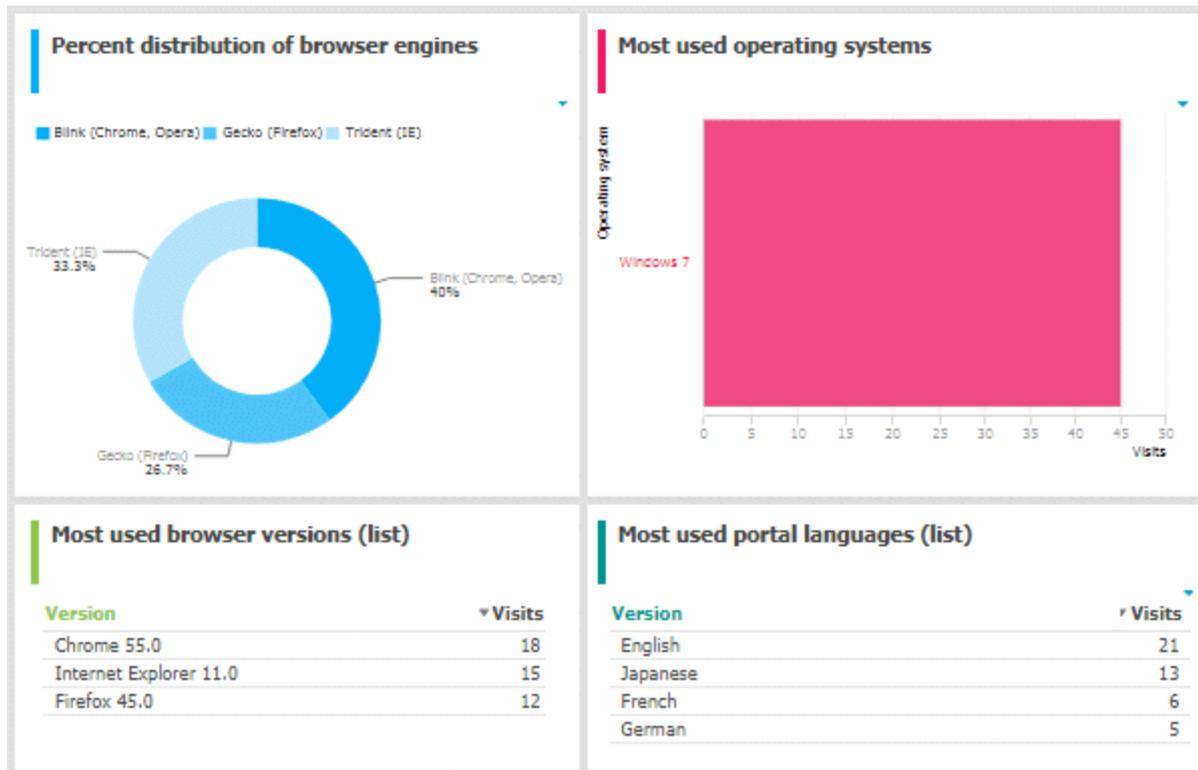
Database

Since a context is mandatory for ARIS reports, an ARIS database must be specified as context for this report. However, the database will not be evaluated by the report and it therefore does not matter which database is selected.

Data feed

Matomo - Portal language

EXAMPLE



4.2.13.5.3.5 Dashboards using Enterprise Architecture (EA) data

Available dashboards (page 1054) based on Enterprise Architecture (EA) information.

4.2.13.5.3.5.1 EA dashboard for organizational units

Displays the dashboard for IT systems, that is, for object of type **Application system type**.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of objects of type **Organizational unit**.

CHARTS

SYSTEMS HAVING EXPIRED

Number of systems that are no longer standard.

Data source

ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?

No

Data feed

- EA - 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 that will become standard within 12 months.

Data source

ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?

No

Data feed

- EA - 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.

SYSTEM USAGE

Distribution of standard and non-standard systems used by the selected organizational unit.

Data source

ARIS Architect or ARIS Architect and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Report configurable?

No

Data feed

EA - 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.

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 639) dashboard.

CONTEXT

Database

Report configurable?

Yes

Data feed

EA - Organizational unit - Systems with data

Calculation

Compares systems via the **Costs per unit** and **Critically** attributes

- System that supports an organizational unit via function or optionally via position or role or
- System that lies under the responsibility of an organizational role.

SYSTEM REPLACEMENT CANDIDATES BY CAPABILITY OVERLAP

Top 7 pairs of systems with the most overlap in capabilities used by the given organizational unit.

Data source

ARIS Architect:

- Report: EA - Relations between organizational units and systems
- Report: EA - Systems redundancies

This report creates a table listing all IT system pairs that have common capabilities. In each pair, **System A** is considered to be the potential replacement for **System B**. For each pair, the capability overlap is shown as a percentage.

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **EA_SYSTEM_REDUNDANCIES.XML** file. **The System redundancies in the use of capabilities** document is stored in this subfolder: ARIS document storage/Dashboarding/<database name; default=United Motor Group>/EA.

The report result is used as input for the **EA - System - System redundancies** data feed. This data feed is related, for example, to the EA dashboard for organizational units (page 639) 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

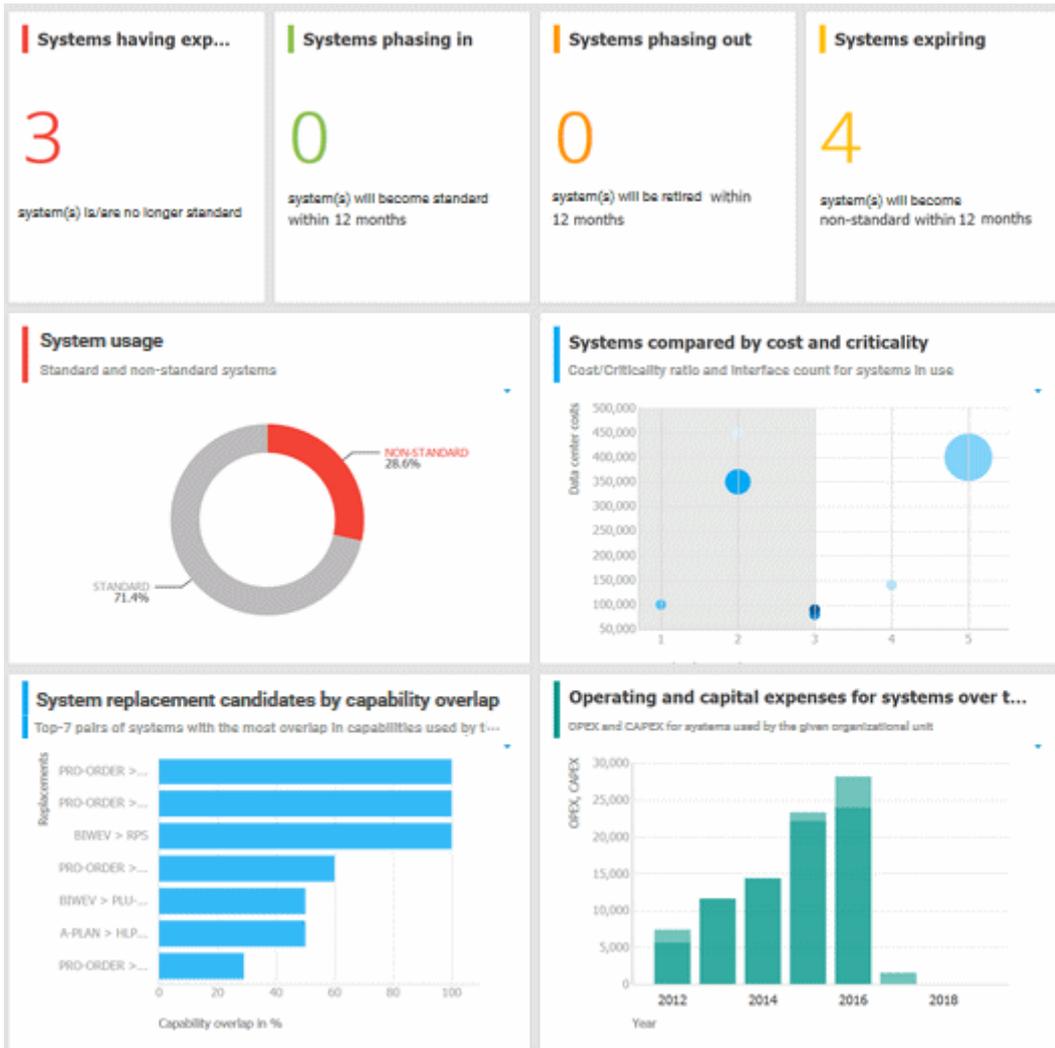
Data feed

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



4.2.13.5.3.5.2 EA dashboard for IT systems

Displays the dashboard for objects of type **Organizational unit**.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of objects of type **Application system type**.

CHARTS

MOST SUPPORTED ORGANIZATIONAL UNITS

Based on process support maps, Top-7 organizational units with the highest number of associated processes actively supported by the given system.

Data source

ARIS Architect:

Report: EA - System support

Report configurable?

No

Data feed

EA - System - Supported organizational units

Calculation

Lists all supported objects of **Application system type** object type. These objects are identified using the Process support unit, the Organizational unit, and Function objects connected to the IT system.

SUPPORT DISTRIBUTION BY ORGANIZATIONAL UNIT

Based on process support maps, list of organizational units and the corresponding system support distribution.

Data source

ARIS Architect:

Report: EA - System support

Report configurable?

No

Data feed

EA - System - Supported organizational units

Calculation

Shows the distribution of supported objects of **Application system type** object type. These objects are identified using the Process support unit, the Organizational unit, and Function objects connected to the IT system.

MOST SUPPORTED PROCESSES

Top-7 processes with the highest number of functions actively supported by the given system.

Data source

ARIS Architect:

Report: EA - System support for VACDs

Report configurable?

No

Data feed

EA - System Supported processes

Calculation

Counts and ranks the systems supported per processes.

Traversing the hierarchy of value-added chain diagrams (VACDs), searches for all functions supporting IT systems. Functions support IT systems if they are connected using the connection type **supports** in event-driven process chains (EPCs) that are assigned to VACDs.

SUPPORT DISTRIBUTION BY PROCESSES

List of processes and the corresponding system support distribution.

Data source

ARIS Architect:

Report: EA - System support for VACDs

Report configurable?

No

Data feed

EA - System Supported processes

Calculation

Lists the systems supported per processes together with the percentage distribution, based on the rank.

Traversing the hierarchy of value-added chain diagrams (VACDs), searches for all functions supporting IT systems. Functions support IT systems if they are connected using the connection type **supports** in event-driven process chains (EPCs) that are assigned to VACDs.

SYSTEM REPLACEMENT CANDIDATES BY CAPABILITY OVERLAP

Top-7 options for replacing the selected system (as a source or target).

Data source

ARIS Architect:

Report: EA - System redundancies

Report configurable?

No

Data feed

EA - System - System redundancies

Calculation

Compares systems regarding their common capabilities.

OPERATING COSTS BY COST TYPE

Operating expenses for the given IT system by cost type over time.

Data source

ARIS Architect:

Report: EA/Alfabet - System costs

Report configurable?

No

Data feed

EA - System (costs over time)

Calculation

Lists all IT systems of the database that also exist in Alfabet. All cost values are listed per system and year for the various cost types specified.

EXAMPLE



4.2.13.5.3.5.3 EA dashboard for objectives

Displays the goal accomplishment for objectives across all KPIs and per KPI.

AVAILABILITY

This dashboard is shown for the model types **Strategy diagram** and **Objective diagram** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

OBJECTIVES

Shows all objectives in the model and their goal accomplishments over all KPIs.

Data source

ARIS Architect:

- Report: Strategy - Models and objectives
- Report: Strategy - Objectives with data

Report configurable?

No

Data feed

EA - Goal accomplishment (objectives)

Calculation

Lists all **Strategy diagram** and **Objective diagram** model types and the objectives contained with their goal accomplishments.

KPIS PER OBJECTIVE

Displays the KPIs of the objective selected in the diagram and their respective values.

Data source

ARIS Architect:

- Report: Strategy - Objectives and KPIs
- Report: Strategy - KPIs with data

Report configurable?

No

Data feed

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. €	●
Acquisition of profitable niche play...	●
Align 100% delivery processes ac...	●
Be the future no. 1 premium car s...	●
Design game changing 21st centur...	●
Improve buying experience	●
Improve decision making experience	●
Improve operating margin to 6%	●

KPIs per objective

Goal accomplishment per KPI

▲ KPI GA

Cycle time improvement rate	●
Over all error ratio	●
Over all process effectiveness (OPE)	●

4.2.13.5.3.6 Dashboards using ARIS Process Performance Manager data

Available dashboards (page 1054) based on ARIS Process Performance Manager data.

4.2.13.5.3.6.1 Process and Finance KPIs dashboard

Displays an overview of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database on the **Dashboards** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

FINISHED PROCESS INSTANCES

Number of process instances measured by ARIS Process Performance Manager.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances per day (persisted)

Calculation

Counts the number of recorded process instances over the entire period.

PROCESS INSTANCES INCLUDING PRODUCTION FAULTS

Shows the percentage of process instances for which the quality checks (mentioned in the process) failed.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances (persisted)

Calculation

Calculates the percentage of process instances for which the quality checks (mentioned in the process) failed.

NUMBER OF TRACTORS PRODUCED WITHOUT FAULTS

Shows the number of finished process instances over time (on an hourly scale).

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances per hour (persisted)

Calculation

Number of finished process instances over time (on an hourly scale).

TRACTORS SOLD

Shows the overall number of sold tractors without production faults.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances (persisted)

Calculation

Counts the overall number of sold tractors without production faults.

MATERIAL COST PER TRACTOR VARIANT

Shows the average material cost per tractor variant.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM - Cost per tractor variant (persisted)

Calculation

Average sum of the values of all cost attributes in all trace entries of all process instances per variant.

AVERAGE MATERIAL COSTS

Shows the overall average material costs.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data collection

In the side-by-side view: Reacts to the function selection and shows the average cost of the assembled part.

Data feed

PPM - Function details (persisted)

Calculation

Average sum of the values of all cost attributes in all trace entries of all process instances.

REVENUE

Shows the overall revenue over all sold tractors.

Data source

Process Performance Manager favorite persisted for the use case demo.

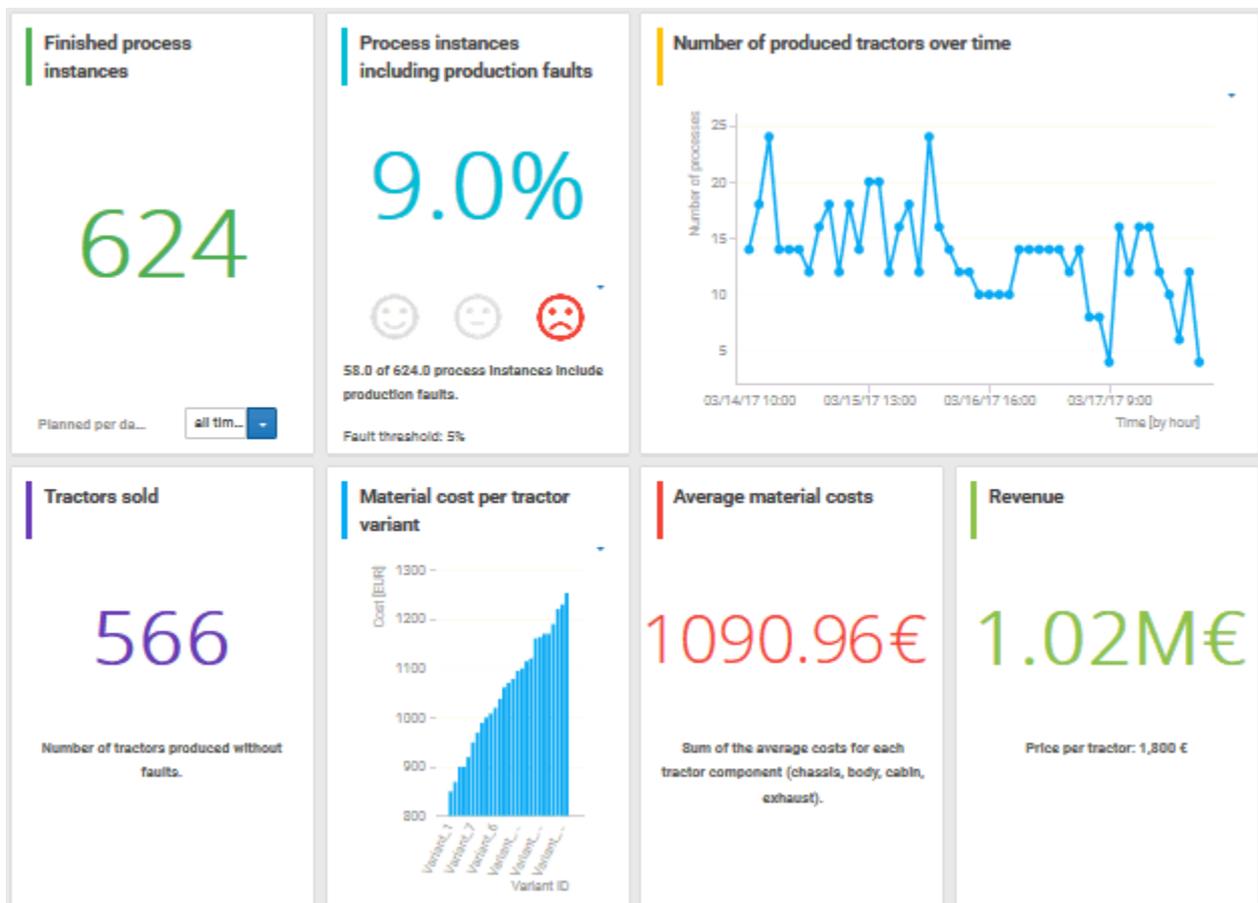
Data feed

PPM instances (persisted)

Calculation

Number of sold tractors multiplied by the price per tractor.

EXAMPLE



4.2.13.5.3.6.2 Process variant comparison

Displays modeled process variants side-by-side.

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database on the **Dashboards** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

PROCESS VARIANT WITH THE SHORTEST CYCLE TIME (MINUTES)

Shows the function flow that describes the process variant with the shortest process cycle time in minutes of all recorded instances.

Data source

PPM instances (persisted)

Data feed

PPM - Workflow with shortest cycle time (persisted)

PROCESS VARIANT WITH THE LONGEST CYCLE TIME (MINUTES)

Shows the function flow that describes the process variant with the longest process cycle time in minutes of all recorded instances.

Data source

PPM instances (persisted)

Data feed

PPM - Workflow with shortest cycle time (persisted)

4.2.13.5.3.6.3 Performance

Displays financial overview of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

FINISHED PROCESS INSTANCES

Number of process instances measured by ARIS Process Performance Manager.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances per day (persisted)

Calculation

Counts the number of recorded process instances over the entire period.

PROCESS INSTANCES INCLUDING PRODUCTION FAULTS

Shows the percentage of process instances for which the quality checks (mentioned in the process) failed.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances (persisted)

Calculation

Calculates the percentage of process instances for which the quality checks (mentioned in the process) failed.

AVERAGE PROCESS THROUGHPUT TIME (MINUTES)

In the side-by-side view: Delivers the average process throughput time over all recorded process instances as well as min./max. values and the planned value.

Data source

Process Performance Manager favorite persisted for the use case demo. Alternatively, regarding planned value, you can use the report **Export to table** report or an individual ARIS query.

Data collection

The KPI reacts to the function selection. If nothing is selected, it presents the average throughput time over all instances. If a function is selected, it presents the average throughput time over all instances that include the function.

Min./Max. values always consider all recorded instances. The planned value is entered in the underlying data feed (this is the case in the example) or is requested from the ARIS repository via report or query.

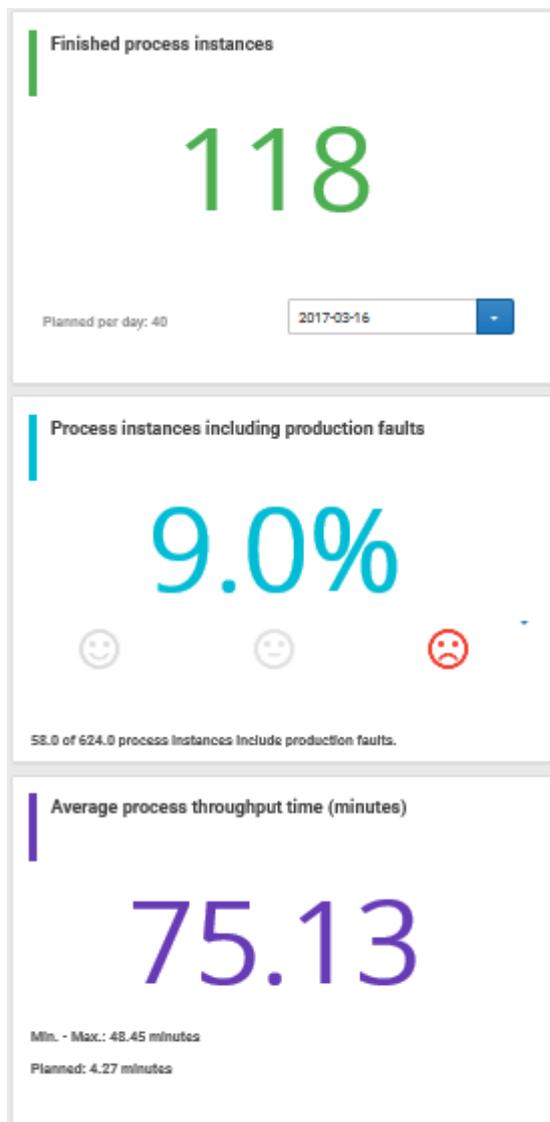
Data feed

PPM instances (persisted)

Calculation

Average sum of the values of all cost attributes in all trace entries of all process instances.

EXAMPLE



4.2.13.5.3.6.4 Finance

Displays financial overview of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

AVERAGE MATERIAL COSTS

Shows the overall average material costs.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data collection

In the side-by-side view: Reacts to the function selection and shows the average cost of the assembled part.

Data feed

PPM - Function details (persisted)

Calculation

Average sum of the values of all cost attributes in all trace entries of all process instances.

TRACTORS SOLD

Shows the overall number of sold tractors without production faults.

Data source

Process Performance Manager favorite persisted for the use case demo.

Data feed

PPM instances (persisted)

Calculation

Counts the overall number of sold tractors without production faults.

REVENUE

Shows the overall revenue over all sold tractors.

Data source

Process Performance Manager favorite persisted for the use case demo.

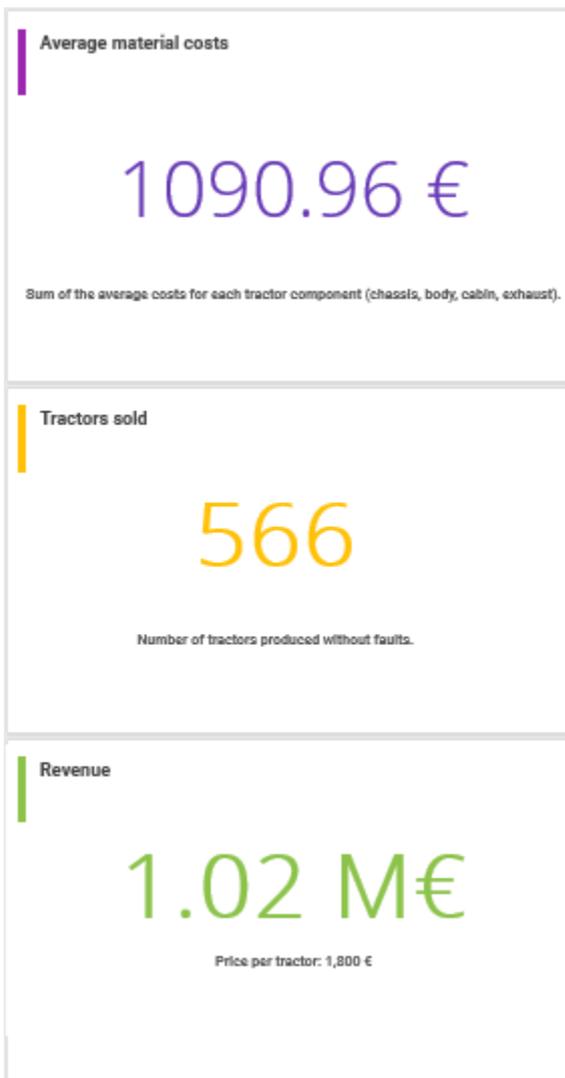
Data feed

PPM instances (persisted)

Calculation

Number of sold tractors multiplied by the price per tractor.

EXAMPLE



4.2.13.5.3.6.5 IoT - Device status (persisted)

Displays the device status of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

SELECT DEVICE

Device type and device instance selection to filter the downtime rate.

Data source

Report: Exports item data to tables with the value pair **IoT objects to processes** (Cumulocity API).

Report configurable?

No

Data collection

Context - process model: Collects all IoT device types and device instances (Cumulocity) relevant in the process model.

Data feed

IoT - Object information and **IoT - Devices**

Calculation

.-

SELECT DATA RANGE

Date selection for selecting a date range to filter the downtime rate.

DOWNTIME RATE [%]

Displays the downtime rate of the selected device type and device instance in the selected date range.

Data source

Report: Exports item data to tables with the value pair **IoT objects to processes** (Cumulocity API).

Report configurable?

No

Data collection

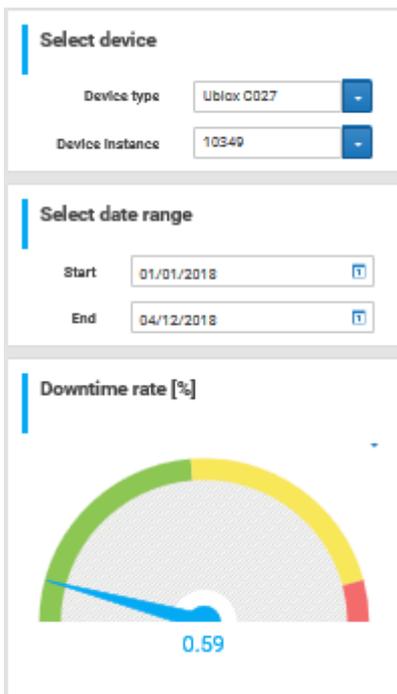
Context - process model: Collects all downtimes of all IoT devices (Cumulocity) relevant in the process model.

Data feed

IoT - Object information and **IoT - Devices**

Calculation

Aggregates the downtimes of the selected data.

EXAMPLE

4.2.13.5.3.6.6 IoT - Alarm status (persisted)

Displays the alarm status of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

SELECT DATA RANGE

Date selection for selecting a date range to filter the dashboard.

CRITICAL IOT ALARMS

Shows the number of critical IoT alarms.

Data source

Report: Exports item data to tables with the value pair **IoT objects to processes** (Cumulocity API).

Report configurable?

No

Data collection

Context - process model: Collects all alarms from all IoT devices (Cumulocity) relevant in the process model.

Data feed

IoT - Device Alarms and **IoT - Object information**

Calculation

Counts the number of critical IoT alarms.

IOT ALARMS AT A GLANCE

Provides an overview of all IoT alarms by device and severity.

Data source

Report: Exports item data to tables with the value pair "IoT objects to processes" (Cumulocity API).

Report configurable?

No

Data collection

Context - process model: Collects all alarms from all IoT devices (Cumulocity) relevant in the process model.

Data feed

IoT - Device Alarms and **IoT - Object information**

Calculation

Counts the number of IoT alarms by device and severity.

EXAMPLE

Select date range

Start: 01/01/2018

End: 04/12/2018

Critical IoT alarms

4

IoT alarms at a glance

IoT device n...	Severity	# Alarms
Ublox C027	MAJOR	1
Ublox C027	CRITICAL	4

4.2.13.5.3.6.7 IoT Project status

Displays the project status of a sample assembly process (manufacturing).

AVAILABILITY

This example dashboard is available for the model **Tractor assembly** in the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet. You will find the model in the group **2. Processes > 2.1 Process architecture > Core processes > Production > Make-to-order > Assembly**.

CHARTS

PROGRESS OF IOT PROCESS IMPLEMENTATION

Gives an overview of how many of the planned IoT resources are already implemented.

Data source

Report: Exports item data to tables with the value pair **IoT objects to processes**.

Report configurable?

No

Data collection

Context - process model/activity/IoT object: Collects all IoT objects that are connected to the context (can be **process model**, **activity**, or **IoT object**). Evaluates whether the attribute **Cumulocity type** is true.

Data feed

IoT - Implementation progress and **IoT - Object information**

Calculation

Ratio of the number of IoT objects whose **Cumulocity type** attribute is true to the total number of IoT objects that relate to the context.

PROCESS COST RATE SINCE IOT PROJECT IMPLEMENTATION

Displays the impact of the IoT implementation on the process costs.

Data source

PPM: Standard private favorite **01 Process cycle time** extended by the process dimension **Time**, filtered by **month** with selected function measure **Process cost rate**.

Report configurable?

No

Data collection

Context - process model: Aggregates the process cost rate measured by PPM.

Data feed

No data feed, direct connection to PPM.

Calculation

Aggregates the process costs over all process instances per month.

PROCESS DURATION SINCE IOT PROJECT IMPLEMENTATION

Shows how the process duration has developed since the implementation of the IoT project.

Data source

PPM: Standard private favorite **01 Process cycle time** extended by the process dimension

Time, filtered by **month**.

Report configurable?

No

Data collection

Aggregates process duration measured by PPM.

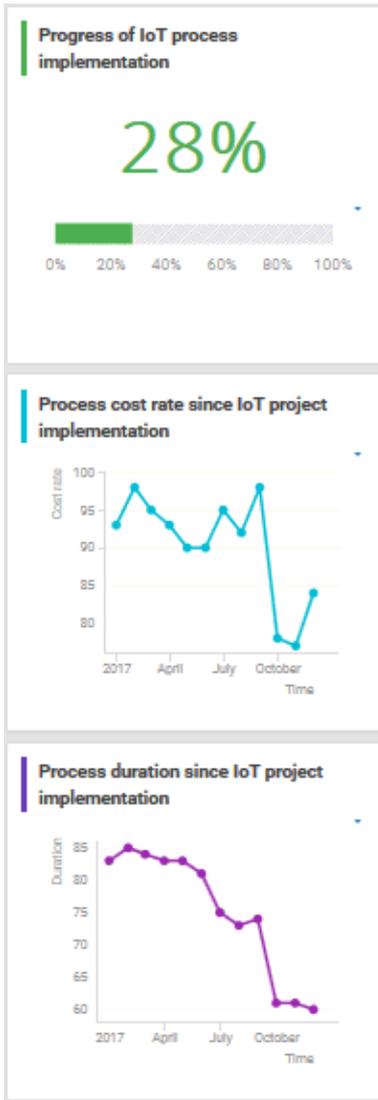
Data feed

No data feed, direct connection to PPM.

Calculation

Aggregates the process duration over all process instances per month.

EXAMPLE



4.2.13.5.3.7 Dashboards using Collaboration

Here you can find information about Collaboration dashboards delivered by default.

4.2.13.5.3.7.1 Collaboration overview

Shows the amount of content and the number of active users, as well as the types of content and user groups in Collaboration.

AVAILABILITY

- **ARIS Connect** >  **Portal** >  **Dashboards**
- **ARIS Connect** >  **Collaboration** > **Administration** >  **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

CONTENT ADDED OVER TIME

Amount and type of Collaboration content created in the last three months.

Data source

Posts, comments, tags, etc. of Collaboration.

Data feed

Collaboration - Content overview

NUMBER OF ACTIVE USERS OVER TIME

Number of active Collaboration users in the last five days.

Data source

Users of Collaboration who posted and commented on content.

Data feed

Collaboration - Usage overview

NUMERICAL CONTENT TYPE DISTRIBUTION

Percentage distribution of Collaboration content created in the last three months.

Data source

Posts, comments, tags, etc. of Collaboration.

Data feed

Collaboration - Content overview

NUMERICAL GROUP TYPE DISTRIBUTION

Numerical distribution of private and public groups created in Collaboration.

Data source

Private and public groups in Collaboration

Data feed

Collaboration - Largest groups

EXAMPLE



4.2.13.5.3.7.2 Content overview (Collaboration)

Shows the most frequently used Collaboration and ARIS content by users.

AVAILABILITY

- **ARIS Connect** >  **Portal** >  **Dashboards**
- **ARIS Connect** >  **Collaboration** > **Administration** >  **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

MOST FOLLOWED MODELS

The top seven most followed models in Collaboration.

Data source

ARIS models in Collaboration

Data feed

Collaboration – Most followed ARIS content

MOST COMMENTED MODELS

The top seven most commented models in Collaboration.

Data source

ARIS models in Collaboration

Data feed

Collaboration – Most commented ARIS content

MOST BOOKMARKED POSTS

The top seven most bookmarked posts in Collaboration.

Data source

Posts in Collaboration

Data feed

Collaboration – Most bookmarked posts

MOST LIKED POSTS

The top seven most liked posts in Collaboration.

Data source

Posts in Collaboration

Data feed

Collaboration – Most liked posts

MOST COMMENTED POSTS

The top seven most commented posts in Collaboration.

Data source

Posts in Collaboration

Data feed

Collaboration – Most commented posts

MOST SHARED POSTS

The top seven most shared posts in Collaboration.

Data source

Posts in Collaboration

Data feed

Collaboration – Most shared posts

EXAMPLE



4.2.13.5.3.7.3 Group monitoring (Collaboration)

Shows the most frequently used groups and details of Collaboration groups.

AVAILABILITY

- **ARIS Connect** >  **Portal** >  **Dashboards**
- **ARIS Connect** >  **Collaboration** > **Administration** >  **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

MOST FOLLOWED GROUPS

The top seven most followed groups in Collaboration.

Data source

Groups in Collaboration

Data feed

Collaboration – Largest groups

GROUPS WITH THE MOST POSTS ADDED

The top seven groups with the most posts in Collaboration.

Data source

Groups and posts in Collaboration

Data feed

Collaboration – Most active groups

MOST COMMENTED GROUPS

The top seven most commented groups in Collaboration.

Data source

Groups and comments in Collaboration

Data feed

Collaboration – Most active groups

PERCENT DISTRIBUTION OF GROUP TYPES

Percentage distribution of private and public groups created in Collaboration.

Data source

Private and public groups in Collaboration

Data feed

Collaboration – Largest groups

GROUP DETAILS

Details of the largest Collaboration groups: group type, number of followers, amount of ARIS content, number of posts, and number of comments. If a group type is selected in the **Percent distribution of group types** chart, the details are filtered according to the selected group type.

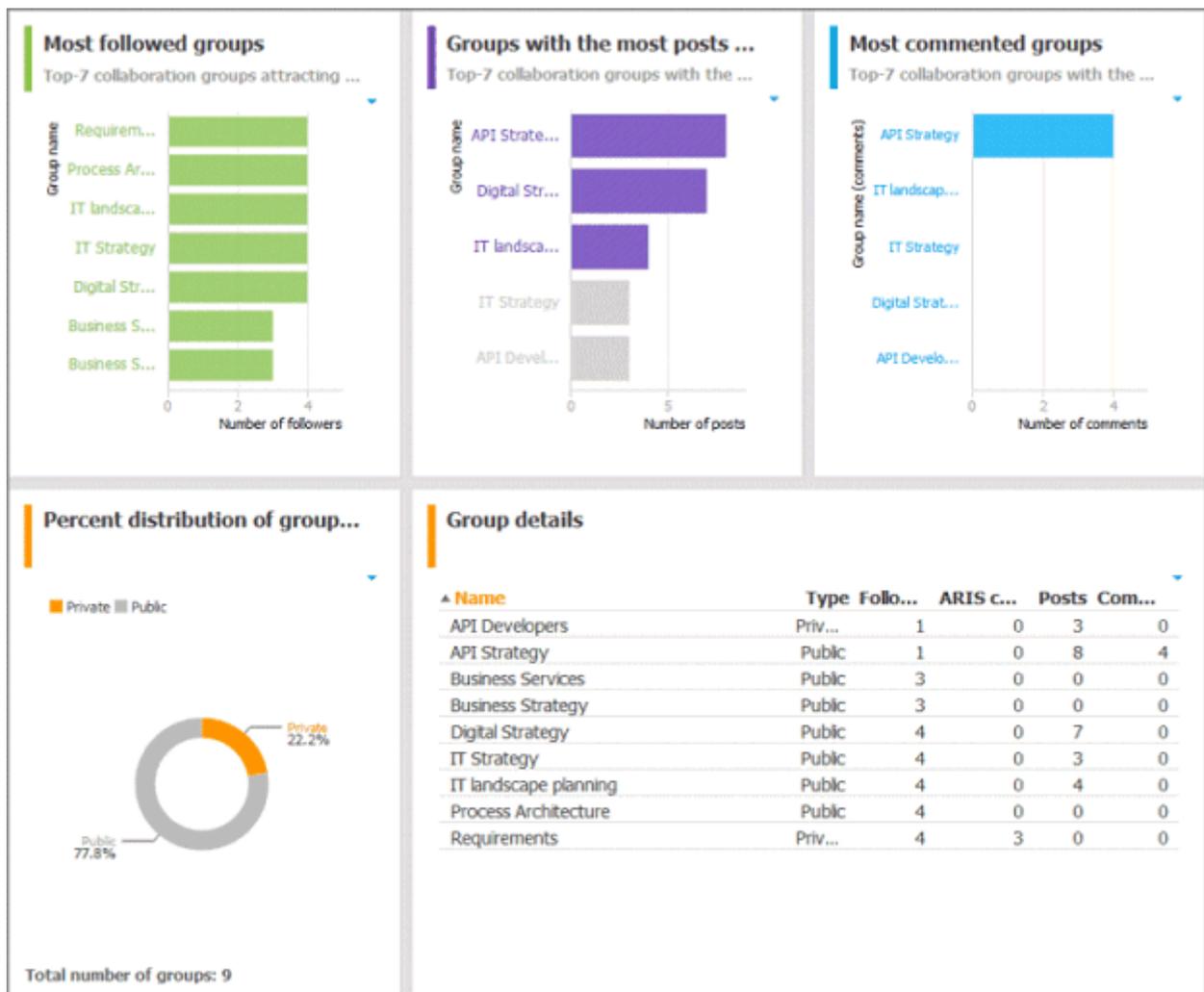
Data source

Private and public groups in Collaboration

Data feed

Collaboration – Largest groups

EXAMPLE



4.2.13.5.3.7.4 Users

Shows details of Collaboration users.

AVAILABILITY

ARIS Connect >  **Collaboration** > **Administration** >  **Dashboards** (only for users with the **Collaboration administrator** function privilege)

CHARTS

USERS GENERATING THE MOST CONVERSATIONS

The top seven users most involved in conversations in Collaboration.

Data source

Users in Collaboration

Data feed

Collaboration – Most active users

MOST FOLLOWED USERS

The top seven most followed Collaboration users.

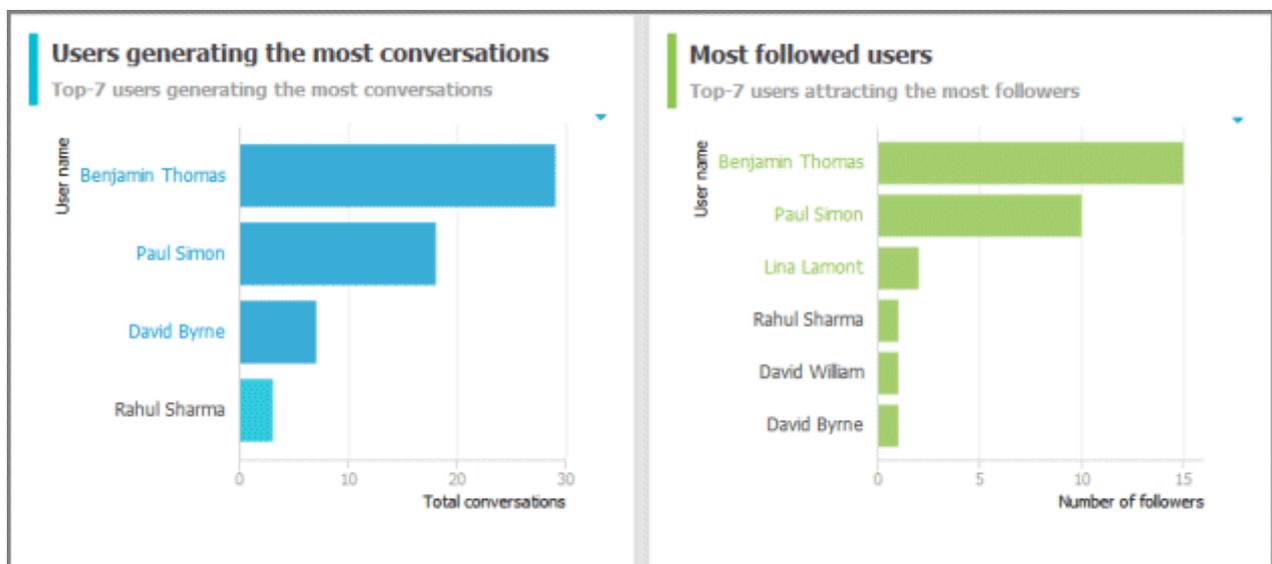
Data source

Users in Collaboration

Data feed

Collaboration – Most followed users

EXAMPLE



4.2.13.5.3.8 Business Strategy dashboards

Here you can find information about Business strategy dashboards (page 1054) delivered by default. Consequently, the dashboards provide information about leadership and best practice for the focus area business concept via Business Process Modeling.

4.2.13.5.3.8.1 Strategy map - Balanced scorecard (BSC)

Dashboard that provides an overview of the aspects of the strategy scorecard. In the **Scorecard Perspectives** area, you can filter the input of the charts. The charts are adjusted immediately.

AVAILABILITY

This dashboard is shown on the **Dashboards** fact sheet of models of type **BSC Cause-and-effect diagram**.

CHARTS

FINANCE

Displays the average financial KPI for the selected time period.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

Data collection

Collects all key performance indicators regarding finances.

Data feed

Strategy - UMG strategy balanced scorecard - perspectives

Calculation

The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

CUSTOMER

Displays the average customer KPI for the selected time period.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

Data collection

Collects all key performance indicators regarding customers.

Data feed

Strategy - UMG strategy balanced scorecard - perspectives

Calculation

The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

PROCESS

Displays the average process KPI for the selected time period.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

Data collection

Collects all key performance indicators regarding the process.

Data feed

Strategy - UMG strategy balanced scorecard - perspectives

Calculation

The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

LEARNING & GROWTH

Displays the average **Learning & Growth** KPI for the selected time period.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

Data collection

Collects all key performance indicators regarding learning & growth.

Data feed

Strategy - UMG strategy balanced scorecard - perspectives

Calculation

The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

STRATEGY OBJECTIVES

Displays all objectives of the model **BSC** as well as the achievements and the trend from a Microsoft® Excel spreadsheet.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

Data collection

Collects all objectives of the model **BSC** and assigns them the achievements and the trend from a Microsoft® Excel spreadsheet.

Data feed

Strategy - UMG strategy balanced scorecard - perspectives

Calculation

The KPI is the result of the planned value and the actual value. The actual value is displayed as a percentage of the planned value.

KEY PERFORMANCE INDICATOR

Displays all current and plan values of all **KPIs** or from the scorecard details.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

Data collection

Collects all **KPI** values from the KPIs of the Microsoft® Excel spreadsheet.

Data feed

Strategy - UMG strategy balanced scorecard - perspectives

ACTION PLAN

Shows all initiatives with the responsible roles from selected scorecard details or from selected targets.

Data source

Report: Strategy - BSC Objectives

Report configurable?

No

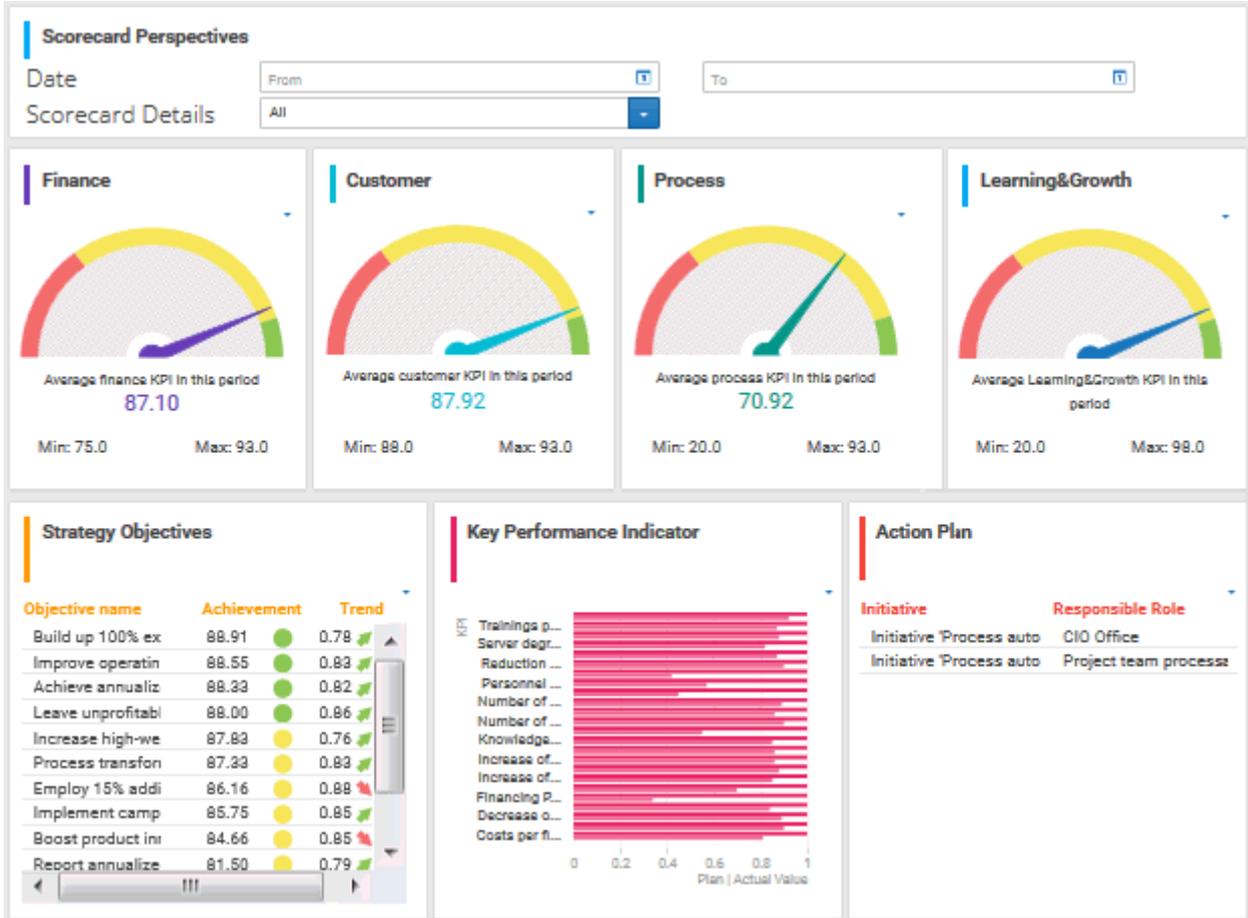
Data collection

Collects all initiatives and responsible roles from the connected models.

Data feed

Strategy - UMG strategy balanced scorecard - initiatives

EXAMPLE



4.2.13.5.3.8.2 Objectives per strategy

Dashboard that provides an overview of strategy objects and the association of objectives to strategy objects.

AVAILABILITY

This dashboard is shown for models of type **Strategy diagram** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

STRATEGY

Gives an overview of the existing objects of type **Strategy** in models of type **Strategy diagram** of the database.

Data source

Report: Strategy - Strategies with objectives

Report configurable?

No

Data collection

Collects all objects of type **Strategy** from models of type **Strategy diagram** of the database.

Data feed

Strategy - Strategy and Objectives

Calculation

.-

OBJECTIVES FROM STRATEGY

Gives an overview of the existing objectives associated with objects of type **Strategy**.

Data source

Report: Strategy - Strategies with objectives

Report configurable?

No

Data collection

Collects all objectives connected to an object of type **Strategy** contained in a model of type **Strategy diagram** of the database.

Data feed

Strategy - Strategy and Objectives

Calculation

.-

EXAMPLE

Objectives per strategy ▾

Strategy

Strategy ↑

- Boost efficiency for the entire group and implement
- Implement sustainable mobility
- Optimize and expand overall product portfolio
- Provide outstanding customer experience

Objectives from Strategy

Objective name ↑

- Achieve annualized sales of 30 bn. €
- Acquisition of profitable niche player in car mar
- Align 100% delivery processes across all count
- Design game changing 21st century mobility ca
- Improve buying experience
- Improve decision making experience
- Improve operating margin to 6%

Percentage of all Objectives: 100.0 %

4.2.13.5.3.8.3 Process transformation

Dashboard that provides an overview of strategy objects and the association of objectives to strategy objects.

AVAILABILITY

This dashboard is shown for models of type **KPI allocation diagram** in the dashboard sidebar of the **Diagram** fact sheet.

CHARTS

KPI VALUES

Displays the previous, current, and planned values of the existing KPIs.

Data source

Report: Strategy - KPI values

Report configurable?

No

Data collection

Collects all KPI objects from the models of type **KPI allocation diagram** in the database.

Data feed

Strategy - Process transformation KPI Values

Calculation

-.-

KPI TREND

Displays the increase and trend of the KPIs.

Data source

Report: Strategy - KPI values

Report configurable?

No

Data collection

Collects information about the KPI trend.

Data feed

Strategy - Process transformation KPI Values

Calculation

Aggregation of the previous and current values to calculate the increase and trend.

ACHIEVEMENT OF OBJECTIVES

Indicates whether the objectives were achieved with at least 75%, with at least 50% or not.

Data source

Report: Strategy - KPI values

Report configurable?

No

Data collection

Collects the achievement of the KPIs objectives.

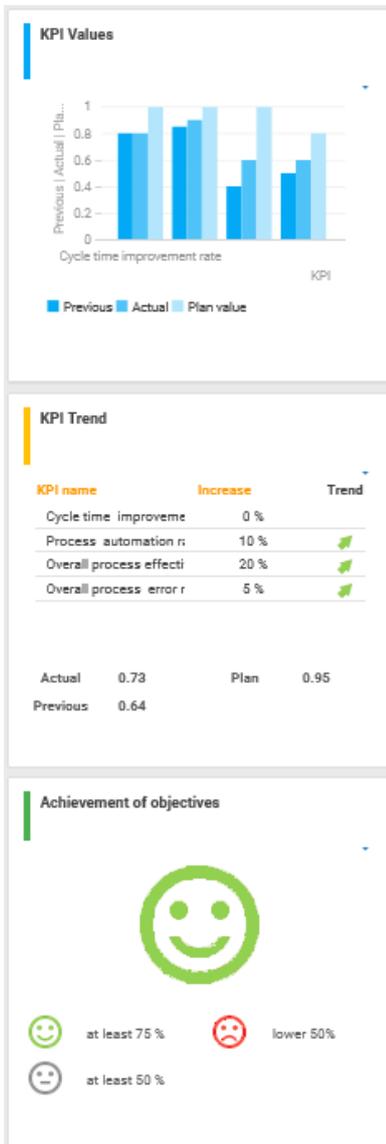
Data feed

Strategy - Achievement of Objectives

Calculation

Aggregation of the number of KPIs whose objectives have been met.

EXAMPLE



4.2.13.5.3.8.4 Increase of IoT enablement of production processes

Dashboard that displays the IoT enablement of production processes.

AVAILABILITY

This dashboard is shown for the model **Increase IoT enablement in production** of the **United Motor Group** database in the dashboard sidebar of the **Diagram** fact sheet (1. Strategy > 1.1 Business strategy > Strategy implementation).

CHARTS

PROCESSES OF PRODUCTION

Displays an overview of all processes of production.

Data source

Report: Strategy - IoT objects

Report configurable?

No

Data collection

Collects all processes of production.

Data feed

Strategy - IoT increase

Calculation

.-

INCREASE OF IOT

Indicates whether at least one of the subordinate processes of the selected process is associated with an IoT object. If yes, the smiley is green, if not, the smiley is red.

Data source

Report: Strategy - IoT objects

Report configurable?

No

Data collection

Selected process.

Data feed

Strategy - IoT increase

Calculation

Aggregates the number of the IoT-enabled processes.

PERCENTAGE OF ALL IOT ENABLED PROCESSES

Displays the percentage of IoT-enabled processes.

Data source

Report: Strategy - IoT objects

Report configurable?

No

Data collection

Collects the number of the IoT object of the processes contained in the **Production** group of the **United Motor Group** database (2. Processes > 2.1 Process architecture > Core processes > Production).

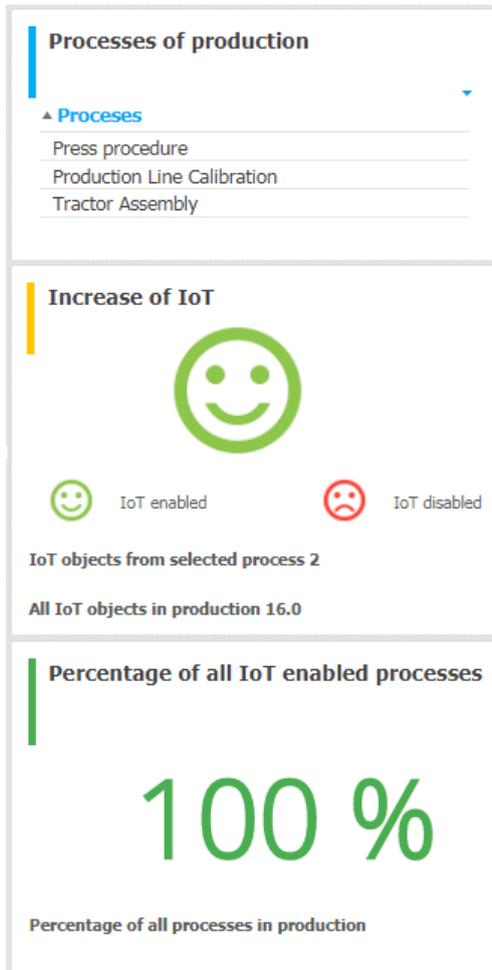
Data feed

Strategy - IoT increase

Calculation

Aggregates the number of the IoT-enabled processes divided by the number of all processes multiplied by 100.

EXAMPLE



4.2.13.5.3.9 Governance, Risk and Compliance (GRC) dashboards

The following GRC dashboards (GRC = Governance, Risk and Compliance) are included in the ARIS installation by default: GRC overview, GRC management, and GRC portfolio. The dashboards show an overview of GRC-related objects and workflows, such as risks, controls, or issues. The dashboards use data from ARIS and, if available, from ARIS Risk & Compliance Manager. The dashboards use the **Export item data to tables** ARIS Report in ARIS Architect (**ARIS >  Administration > Evaluations > Reports > Dashboard data**). To update the data, run this report at the database level, select **Dashboard data** category and **GRC management** parameter value set.

4.2.13.5.3.9.1 GRC overview

The **GRC overview** dashboard only uses data from the ARIS database that is filtered by the selected process. Data from ARIS Risk & Compliance Manager is not included. This dashboard gives an overview of different GRC indicators and objects regarding a process item.

AVAILABILITY

By default, it is available for two processes:

- **Sales order processing (as-is)**, (GUID: 0adfca71-2960-11dc-2729-000bcd0cce4e)
- **Generic monthly closing process** (GUID: a55af59c-19cb-4b78-bc41-07fae048a864)

CHARTS

FUNCTIONS WITH RISKS

Displays the number of functions that have risks assigned.

Data source

ARIS

Calculation

Counts the number of functions in the selected process that are connected with risks.

NUMBER OF RISKS

Displays the number of risks assigned to functions.

Data source

ARIS

Calculation

Counts the number of risks in the selected process that are connected with functions.

CONTROL COVERAGE

Displays the percentage of risks that have at least one control assigned.

Data source

ARIS

Calculation

Calculates the percentage of risks in the selected process that are connected with at least one control in relation to the total number of risks in the selected process.

CONTROL TEST COVERAGE

Displays the percentage of risks that have at least one control assigned that is connected to a control test definition.

Data source

ARIS

Calculation

Calculates the percentage of risks in the selected process that are connected to at least one control that is connected with a control test definition, in relation to the total number of risks in the selected process.

RISK DETAILS

Displays details of each risk assigned to a function:

- **Risk** name (to open the object, click the name)
- **Related function** (to open the object, click the name)
- **Basis of valuation**
- **Data source**

Data source

ARIS

Calculation

Uses the risks calculated in the **Number of risks** chart.

CONTROL TEST DETAILS

Displays details of each control test assigned to a risk by a control:

- **Test definition** name (to open the object, click the name)
- **Control** name (to open the object, click the name)
- **Test type** (Test of design/Test of effectiveness)

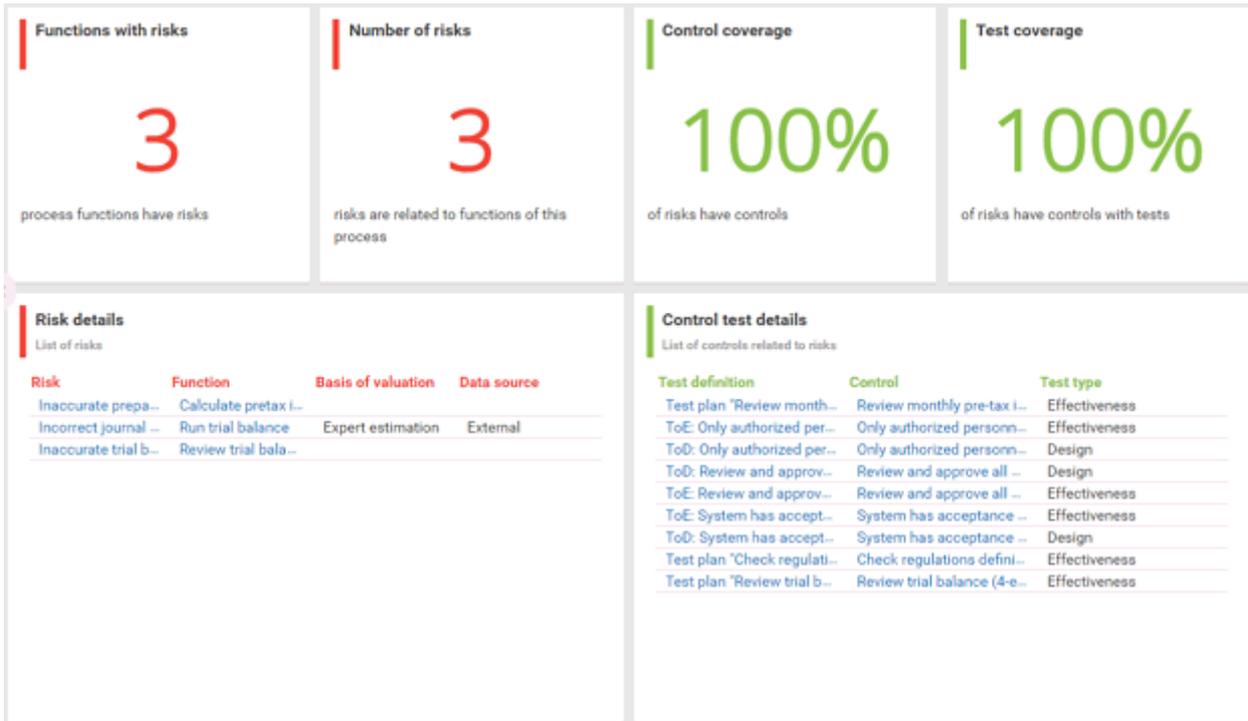
Data source

ARIS

Calculation

Uses the control tests calculated in the **Control test coverage** chart.

EXAMPLE



4.2.13.5.3.9.2 GRC management

The **GRC management** dashboard uses data from ARIS and ARIS Risk & Compliance Manager database filtered by the selected process. This dashboard gives an overview of different GRC indicators and objects regarding a process item. The default installation of the **GRC management** and the **GRC portfolio** dashboards uses static demo data stored in ARIS document storage. The runtime version of these dashboards uses real ARIS Risk & Compliance Manager data. To replace demo data by runtime data, refer to the **GRC dashboard - runtime installation** guide. For detailed information, refer to the ARIS Aware online help, or contact Software AG or the sales partner responsible.

AVAILABILITY

By default, it is available for two processes:

- **Sales order processing (as-is)**, (GUID: 0adfca71-2960-11dc-2729-000bcd0cce4e)
- **Generic monthly closing process** (GUID: a55af59c-19cb-4b78-bc41-07fae048a864)

CHARTS

ASSESSED RISKS

Displays the number of risks assigned to functions that are connected to risk assessments with reviewer status **Completed**.

Data source

ARIS and ARIS Risk & Compliance Manager

Calculation

Counts the number of risks in the selected process that are connected to a function that is at least connected to one completed risk assessment.

OPEN RISK ASSESSMENTS

Displays the number of risk assessments with the status **Open** (= owner status **New** or **In progress**, or owner status **Assessed** or **Assessment not possible** and reviewer status **Unspecified**).

Data source

ARIS and ARIS Risk & Compliance Manager

Calculation

Counts the number of risks in the selected process that are connected to functions that are connected to risk assessments with the status **Open**.

CONTROL TEST COVERAGE

Displays the percentage of controls that have at least one control test assigned.

Data source

ARIS and ARIS Risk & Compliance Manager

Calculation

Calculates the percentage of controls in the selected process that are connected to at least one control test, in relation to the total number of controls connected to risks that are connected to functions in the selected process.

OPEN TEST CASES

Displays the number of test cases with the status **Open** (= owner status **New** or **In progress**, or owner status **Control effective** and reviewer status **Unspecified**).

Data source

ARIS and ARIS Risk & Compliance Manager

Calculation

Counts the number of test cases in the selected process with the status **Open**.

DETAILS OPEN RISK ASSESSMENTS

Displays details of each risk assessment with the status **Open**:

- **Risk assessment ID** (to open the object in ARIS Risk & Compliance Manager, click the ID)
- **Risk** name (click the name)
- **Owner status**
- **Reviewer status**

Data source

ARIS and ARIS Risk & Compliance Manager

Calculation

Uses the risk assessments calculated in the **Open risk assessments** chart.

CONTROL TEST RESULT

Displays the owner status of completed test cases that have the reviewer status **Accepted**, or that have the owner status **Not possible** or **Control effective**, or that have the owner status **Not tested** (= closed by system because test was not performed within the testing period). Test cases with owner status **Not possible**, **Control effective**, and **Not tested** are not reviewed.

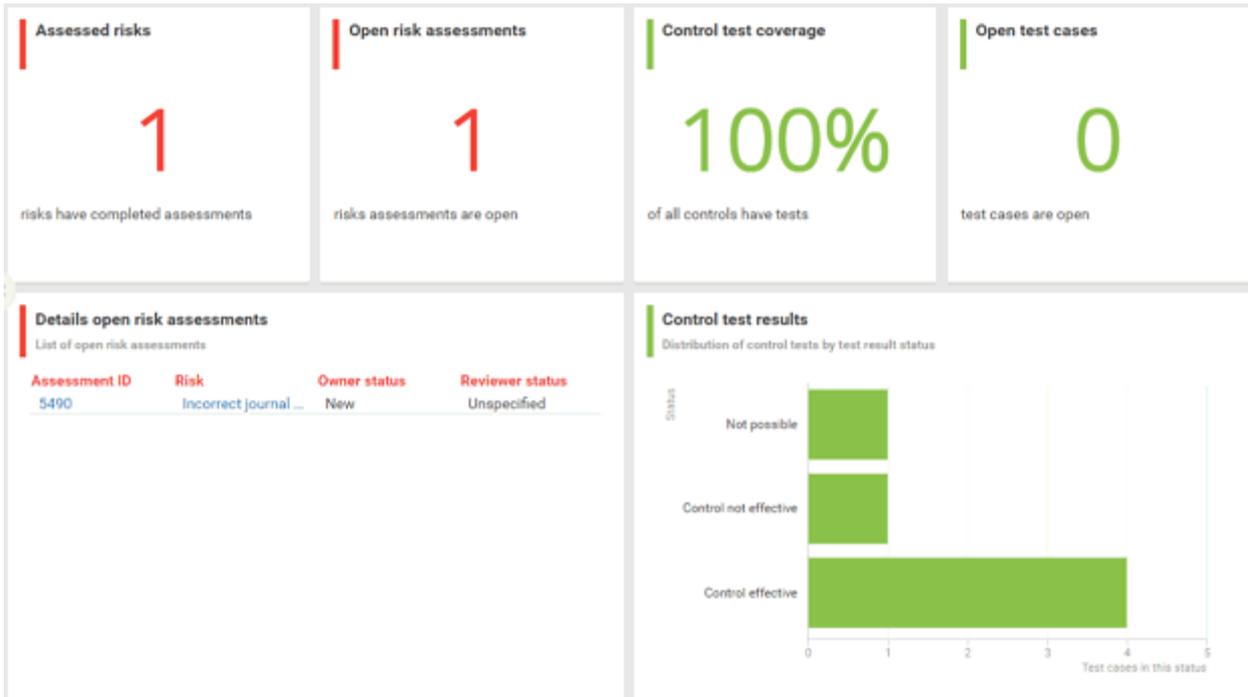
Data source

ARIS and ARIS Risk & Compliance Manager

Calculation

Counts the number of completed test cases in the different status in the selected process.

EXAMPLE



4.2.13.5.3.9.3 GRC portfolio

The **GRC portfolio** dashboard uses data from ARIS and ARIS Risk & Compliance Manager database. This dashboard gives an overview of different GRC indicators and objects regarding a database. The default installation of the **GRC management** and the **GRC portfolio** dashboards uses static demo data stored in ARIS document storage. The runtime version of these dashboards uses real ARIS Risk & Compliance Manager data. To replace demo data by runtime data, refer to the **GRC dashboard - runtime installation** guide. For detailed information, refer to the ARIS Aware online help, or contact Software AG or the sales partner responsible.

AVAILABILITY

By default, it is available for the entire database ( **Portal** >  **Dashboards**).

CHARTS

TOTAL NUMBER OF RISKS

Displays the total number of risks relevant for risk management.

Data source

ARIS

Calculation

Counts the number of risk management-relevant risks in the ARIS database.

CONTROL COVERAGE

Displays the distribution of risks that have at least one control assigned as well as risks without control.

Data source

ARIS

Calculation

Calculates the percentage of risks in the ARIS database that are connected with at least one control in relation to the total number of risk management-relevant risks in the ARIS database.

TOTAL NUMBER OF OPEN GRC ISSUES

Displays the total number of issues with the status **Open** (= owner status **New**, **In progress** or **On hold**, or reviewer status **Unspecified**.)

Data source

ARIS Risk & Compliance Manager

Calculation

Counts the number of issues in the ARIS Risk & Compliance Manager database with the status **Open**.

GRC ISSUES PROPERTY

Displays the distribution of issues with the status **Open** according to their priority.

Data source

ARIS Risk & Compliance Manager

Calculation

Calculates the percentage of issues with the status **Open** according to the various priorities in the ARIS Risk & Compliance Manager database.

RISK HEAT MATRIX

Displays all risks with reviewed risk assessment in a matrix. To open a risk assessment, click a bubble.

Data source

ARIS Risk & Compliance Manager

Calculation

Positions all risks with reviewed risk assessment of the selected impact types according to the result of the most recent qualitative risk assessment.

RISK DETAILS

Displays details of each risk from the **Risk heat matrix** chart:

- **Risk** name
- **Assessment date**
- **Impact type**
- **Qualitative risk score**
- **Reduced qualitative risk score**

The list is filtered according to the selected element in the **Risk heat matrix** chart.

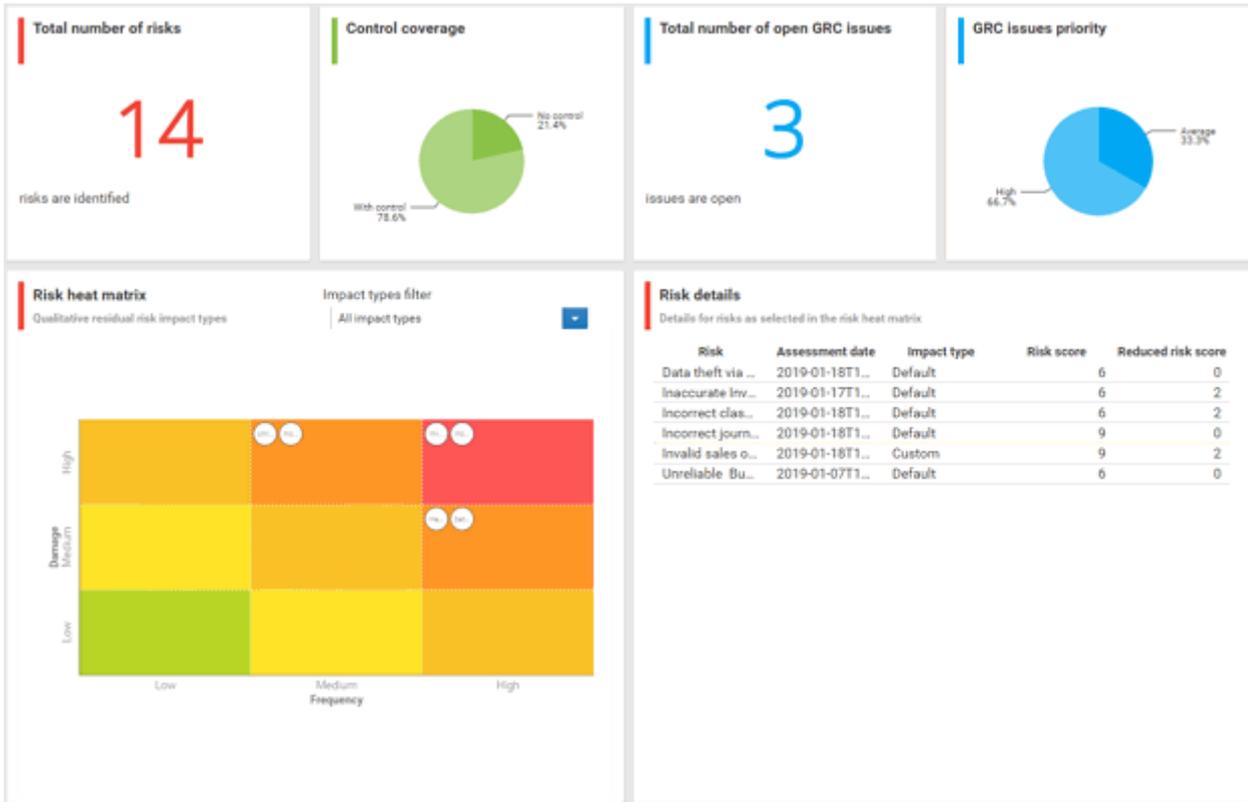
Data source

ARIS Risk & Compliance Manager

Calculation

Uses the risk assessments from the **Risk heat matrix** chart.

EXAMPLE



4.2.13.5.3.10 GDPR Dashboards

You can find information about GDPR dashboards that are contained in ARIS Accelerators for GDPR in the **ARIS Accelerators for GDPR Installation Guide** and the **ARIS Accelerators for GDPR Use Case** manual.

4.2.14 Manage SAP Solutions

ARIS for SAP® Solutions is available, if your ARIS administrator has configured the system in ARIS Connect as well as in ARIS Architect. For details see **ARIS for SAP® Solutions** and **ARIS Requirements for SAP® Solutions** on DVD, ARIS Download Center (<https://aris.softwareag.com/>) or Empower (<https://empower.softwareag.com/>).

You can refine and evaluate your business processes in ARIS. This enables you to optimize your business processes.

ARIS video tutorial

Process-Driven SAP Management Explainer, 4 minutes

(<https://resources.softwareag.com/youtube-product-videos-for-uberflip/manage-your-digital-future-support-best-in-class-sap-solutions-with-aris>)

4.2.14.1 Run SAP executable

Run executables in the connected SAP system.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using ARIS for SAP Solutions.
- Your administrator has configured the portal for the use of SAP content.
- Your administrator has register a SAP® Server for ARIS Connect

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate to the relevant model of the **EPC** type, where executables are available.
5. Click **Executables**. You can start the ► executable automatically via the default server in each row displaying the related **Transaction code** attribute value. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.
6. Run the executable. The **SAP logon** dialog opens.
7. Enter the number of the SAP client and the user name, and click **OK**. Depending on your browser settings, the **Run SAP executable** dialog opens.

8. Enter the password and click **Log on**.

The executable is run in the current language. The logon remains active until you log out of the portal, enter different logon data, or close the SAP system. To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next executable start you need to log on to the SAP system again.

If you start an executable of the **Fiori application** type for the first time or log out from SAP Fiori® launchpad before you start the executable, the **Start** page is displayed instead of the Fiori app. In this case, start the same executable again.

4.2.14.2 Download SAP documents

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

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using **ARIS for SAP® Solutions**.
- Documents are available.
- This function has been configured in the portal.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Open (page 800) the relevant model.
5. Click **Executables**.
6. Click the relevant executable. The fact sheet opens.
7. Next to the relevant document, click  **Download document**.

The document is downloaded.

4.2.14.3 Start ARIS Online Guide

If your administrator has provided ARIS Online Guide via ARIS Connect, you can open the relevant portal pages from SAP screens using the **F1** key. All executables are shown there in relation to the process. Details are summarized in corresponding fact sheets.

Prerequisites

- This function has been configured in the portal.
- You have configured the help call.

Procedure

Press the **F1** key in the open screen. The corresponding portal page opens (link syntax: `http://<server name:port>/?tcode=<transaction code>#<tenant>/onlineguide`)

All information pertaining to this executable is available on the open page.

4.2.14.4 Reset SAP logon data

Change the logon information for running executables.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using **ARIS for SAP Solutions**.
- This function has been configured in the portal.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Open the model.
6. Click **Executables**.
7. In the last column of an executable, click the ▼ arrow head and then **Reset logon data**.

For the next executable start (page 693) you need to log on to the SAP system again.

4.2.15 Output information

The following describes different ways to get information.

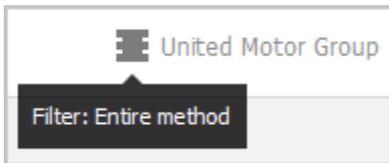
4.2.15.1 Display the current method filter

You can display the method filter (page 798) that you use for the current database.

Procedure

1. Drag the mouse pointer to the database name with the database symbol at the top right of the screen.
2. Leave the mouse cursor above the  database symbol for a short time.

The filter name is displayed:



4.2.15.2 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
2. Navigate to the group where the relevant model is stored.
3. Select the model. The fact sheets (page 1055) 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.

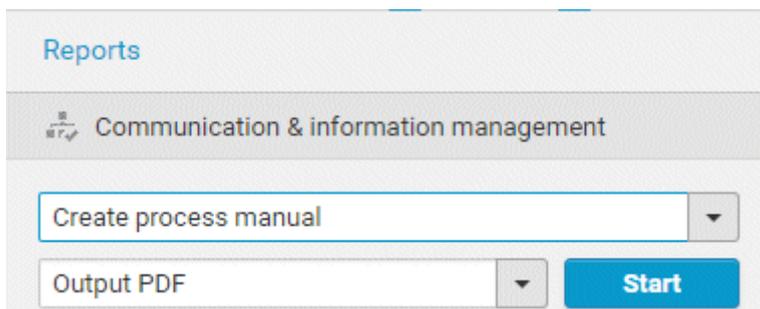
To the left of the user name, a  notification is inserted. Click the notification icon and  **Export graphic as PDF** to download the result again. The result is also listed on the **Reports** bar. If you select the **Diagram** fact sheet, you can open the **Reports** bar and download the printed model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

4.2.15.3 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.

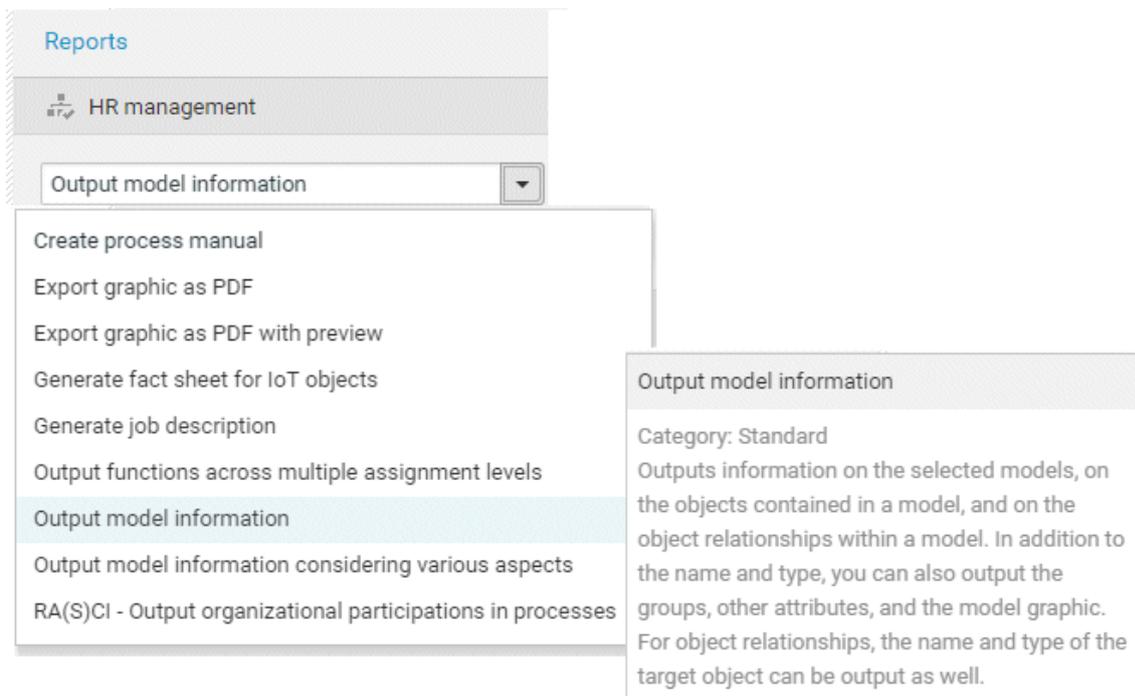
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
3. Navigate (page 412) to the relevant group.
4. Select the model for which you want to create a report.
5. Activate the **Diagram (page 430)** fact sheet. The diagram is displayed in the Model Viewer.
6. Click  **Reports**. The **Reports** bar opens showing the name of the item for which the report is to be generated.

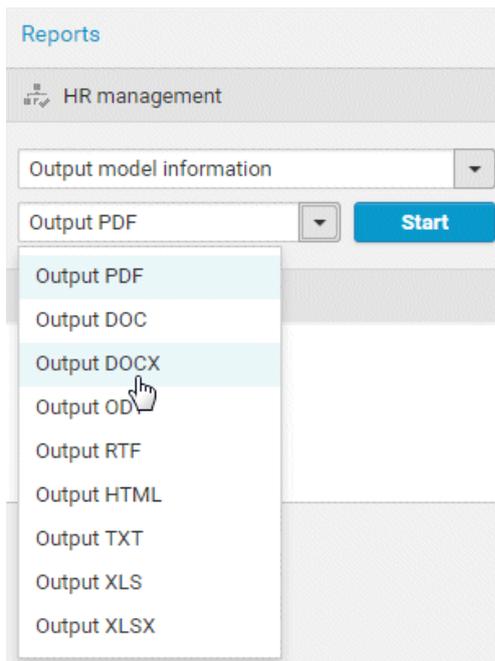


All reports you can start for this diagram are displayed.

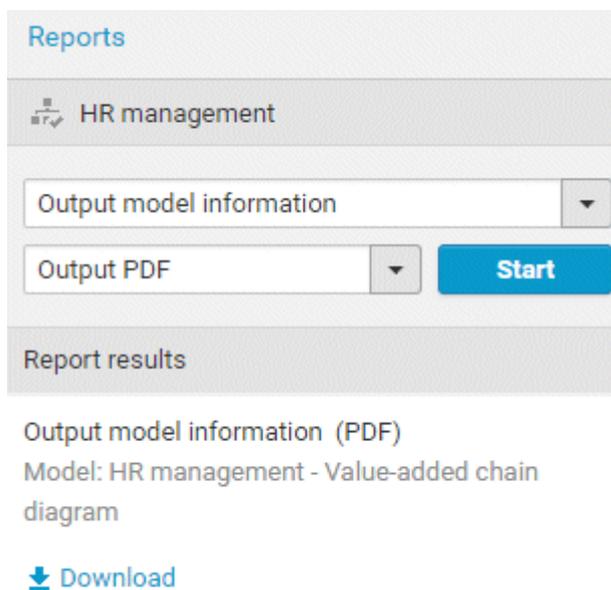
7. Click the ▼ down arrow next to the report name.
8. Select the relevant report. A report description is displayed.



9. Select the output format (page 511), for example, **Output DOCX**.



10. Click **Start**.
11. 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.
12. After the report is complete, the report is shown in the **Report results** link list for downloading, and a dialog opens.
13. Click **Download result** if you want to download the report immediately.
14. 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.

4.2.15.4 Create infographics

You can create infographics (page 1056) for selected personas (page 1060) (objects of the **Persona** type). You can select an object in a fact sheet (page 1055) of the  **Portal**, in the  **Repository**, or in the open model. Objects of the **Persona** type can be used in models of **Customer segmentation map** and **Matrix model** type.

The following describes how to proceed in the  **Portal**.

Prerequisite

The corresponding attributes of the persona objects must be specified (page 496).

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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Select the model that contains the persona.
6. If you have selected a model of the **Customer segmentation map** type, select the **Diagram** fact sheet. If you have selected a model of the **Matrix model** type, select the **Matrix** fact sheet.
7. Select the relevant **Persona** object in the fact sheet.
8. Click  **Evaluation**. The **Evaluation** bar opens showing the name of the item for which the report is generated.
9. Click the ▼ down arrow next to the currently displayed report name.
10. Select the **Create infographic for persona (page 496)** report.
11. Select the output format (page 511), 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.

4.2.15.5 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 421)** in **Home** (page 380).
2. Click  **View models & documents**. Depending on the active configuration set, the navigation area opens, for example, **Groups** or **Processes**.
3. Navigate to the group containing the relevant model.
4. Click the name of the model. The fact sheets (page 1055) of the model open.
5. Click **Diagram**. The **Diagram** fact sheet opens.
6. Select the required object in the **Diagram** fact sheet.
7. Click  **Properties**. The Properties bar opens.
8. Click **More**.
9. Click the **Related models** tab. The occurrences of the selected object are listed. If more than one occurrence exists in the current model, the number of the selected occurrence and the total number of occurrences are displayed next to the object name.
10. Click the left or right arrow to navigate to the next occurrence in the model. The next occurrence is selected and its number updated.
11. To directly select an occurrence, expand the drop-down list and click the occurrence number.
12. To open a model that contains an occurrence of the selected object, click the name of the model in the **In other diagrams** area. The model opens and the first occurrence of the object is selected. If there is no **Diagram** fact sheet for the occurrence, the first fact sheet is shown, for example, **Overview**

In the **In other models** area, all models are displayed to which you have at least read access. You have switched between the occurrences of an object using the navigation controls.

4.2.15.6 Valuable information

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

4.2.15.6.1 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.

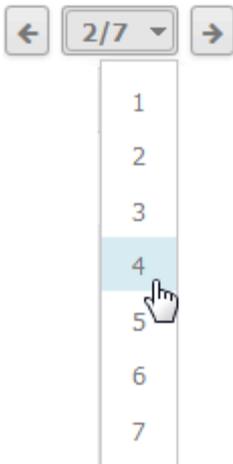
The navigation controls include arrows and a drop-down list:



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:



4.2.15.6.2 What are time zone-dependent attributes?

Time zone-dependent attributes are attributes that take the current time zone into account when they are displayed. The values of the attributes are adjusted depending on the time zone in which they are displayed.

Time-zone dependent attributes are:

- Time of generation: AT_CREAT_TIME_STMP
- Last change: AT_LAST_CHNG_2
- Time of last semantic check: AT_TIME_OF_LAST_SEMANTIC_CHECK
- (Internal attribute: AT_TIME_STAMP)

STORING

In the database, these attributes are stored in Greenwich Mean Time (GMT + 0). When the attributes are displayed to users in the attribute editor, designer, model viewer, etc., they are first converted to the client's local time.

When the values are changed by a user in his local client time zone, the values are internally converted to GMT + 0 and stored in the database.

REPORTS

When a report is started from a client, the client's time zone is transferred to the server. The server converts the time zone-dependent attributes when creating the output.

When a report is run as a scheduled report, no client information is available and no conversion can be performed. Therefore, the time zone-dependent attribute is displayed as if the server were in the GMT + 0 time zone.

REPORT SCRIPT API

You should always use the methods accepting a string as parameter to change the value of time attributes. Example:

```
oDef.Attribute(Constants.AT_SAP_TIME_GEN, 0).setValue("07:12:45;11/19/2018");
```

RECOMMENDATION

We recommend not using **java.util.Date**, especially the **setValue()** methods, which accept a **Date** object as parameter: most of the various constructors of **Date** perform automatic conversion depending on the client's time zone. The conversion of a date into a character string, for example, via **toString()**, also performs a conversion into the client's time zone.

Example

This example assumes that both users are accessing the same server.

A user in Germany creates an object on **Nov. 19 2018 4:12PM**. (Based on his operating system local, the creation time is displayed as **19.11.2018 16:12**.) If another user located in San Francisco looks at the **Time of generation** attribute, the value is not **Nov. 19 2018 4:12PM**, but **Nov. 19 2018 7:12AM**, because San Francisco is 9 hours behind German time.

4.2.15.7 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.

Prerequisite

You have a **Designer** license.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the group where the content you want to select is stored.
5. In the detailed view, activate the check boxes of the relevant elements.
6. Click  **Reports**. The **Reports** bar opens. The number of item for which the report is generated is shown.
7. Click the drop-down list box to display the list of available reports.
8. Leave the mouse pointer on the name of a report if you want to display its description.
9. Click the name of the relevant report.
10. Click the **Start** button if you want to output the report in the displayed format (page 511). To select a different output format, click the **Output format** field and select the format you want to use, for example, **Output PDF**.
11. Click the **Start** button. The report is created.
12. When the report is created, the result is listed in the **Reports** bar, and a dialog to download the result opens.
13. Click  **Download result**. Depending on your browser settings, you can specify the download folder or the result is downloaded in the default download folder.
14. To download the result later, click  **Download report** in the **Reports** bar.

You have created a report for multiple elements.

4.3 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: <ul style="list-style-type: none"> ▶ 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: <ul style="list-style-type: none"> ▶ Vehicle billing ▶ Accounts receivable management ▶ Pay cash 	ethan.owner		
Billing (to-be)	Billing (to-be) consists of: <ul style="list-style-type: none"> ▶ 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 (page 1055) opens.

4.3.1 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
All A B C D E F G H I J K L M N	
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.

4.3.2 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.

4.3.3 Remove catalog filter

You can easily remove the catalog filter.

Prerequisite

You have filtered the catalog content (page 705).

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.

4.3.4 Choose a catalog page

If not all catalog entries fit on one page, you can switch to the page that contains the relevant catalog entry.

Procedure

1. Click  **Catalog**.
2. Click the relevant page number at the bottom of the page.

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
		

All items of the selected page are listed.

4.4 Collaborate with users



Collaboration is the platform for cooperation across teams. With Collaboration, information can be exchanged faster, knowledge can be shared, and cooperation across borders is improved.

4.4.1 Getting started

These five steps are an optimal start to Collaboration.

Prerequisites

- Collaboration is activated in ARIS Administration configuration.
- You have at least the **ARIS Connect Viewer** license privilege.
- You have the required access privilege (page 729) in ARIS Architect.

Procedure

1. Edit (page 708) your user profile.
2. Search (page 709) for groups and people who provide interesting content.
3. Create filters and check (page 716) for new information.
4. Comment on (page 714), share, flag posts, etc.
5. Invite (page 722) others to Collaboration.

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

4.4.2 Open Collaboration

Open Collaboration to exchange information, share knowledge, etc.

Prerequisites

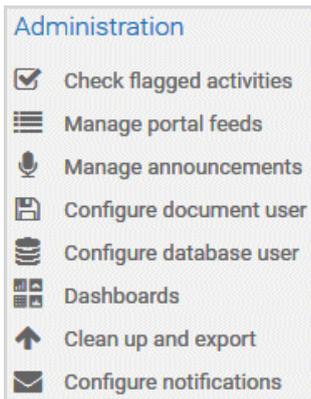
- Collaboration is activated in ARIS Administration configuration.
- You have at least the **ARIS Connect Viewer** license privilege.
- You have the required access privilege (page 729) in ARIS Architect.

Procedure

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

Collaboration opens.

As an Collaboration administrator you have several options for managing Collaboration.



4.4.3 Edit your Collaboration user account

Specify your user profile to provide other users with information about your areas of activity and your interests.

Prerequisite

You have at least the **ARIS Connect Viewer** license privilege.

Procedure

1. Click **<user name>** on the left, then click **Edit profile** on the right. Your profile page for Collaboration is displayed.
2. Upload a picture in JPG, PNG, or GIF format, with the specified maximum size.
If your user profile in ARIS Administration already includes a picture, it is also displayed in Collaboration. If a different picture is uploaded in ARIS Connect or in Collaboration, it is automatically transferred to the other application.
3. Click **Edit** to specify the trimming and size of the picture for Collaboration.
4. Select the preferred picture trimming by dragging the picture with the mouse.
5. Enlarge (+) or reduce (-) the picture.
6. Click **OK**.
7. Enter the title of your position in the company.
8. Describe your activities.
9. Specify keywords that will enable colleagues looking for particular information or expertise to find you. Use a comma as the separator.
10. Enter your telephone number.
11. Specify whether colleagues should be able to post information (**Allow others to post to my feed**) and submit comments (**Allow others to comment on activities in my feed**) in your feeds. To do this, enable the check box for the relevant option.
12. Click **OK**.

Your profile is changed. The information is now available to other users.

4.4.4 Find users and groups and follow their feeds

Look for colleagues or groups to find interesting contacts and information.

Procedure

1. Enter the name of the user or group in the global  **Search** box at the top right. The search results are displayed during input.
2. Continue entering characters until the relevant user or group is displayed.
3. Click the name you are looking for. The profile of the user or the group is displayed with all posts.
4. For users and public groups, click **Follow**. For private groups, click **Send request**. (Private groups are identified as follows: .)

When you follow users, you have access to the posts that they publish in their feeds. In private groups, a coordinator must confirm your request before you are allowed access to this group's posts, comments, etc. In public groups you have immediate access to the group. The feeds you follow are displayed under  **My feed** and the groups you follow under **Groups**. To stop following a user or group, click **Unfollow** in the user or group profile. Users who are following your feeds are displayed under **Followers** in your profile. Users and groups you are following are displayed under **Following** in your profile. Activities of deleted and anonymized users are shown with **Anonymized user**.

Tip

- To find groups, you can also use the group search function (**Groups** >  **Find groups** > **All groups**).
- Alternatively, you can find out which groups and feeds another user follows from the user's profile ( **Search** > **User XY** > **Following**).
- You can also use the global search to search for keywords, in order to find interesting feeds, users, and groups.



4.4.5 Follow and comment on content in the portal as a user

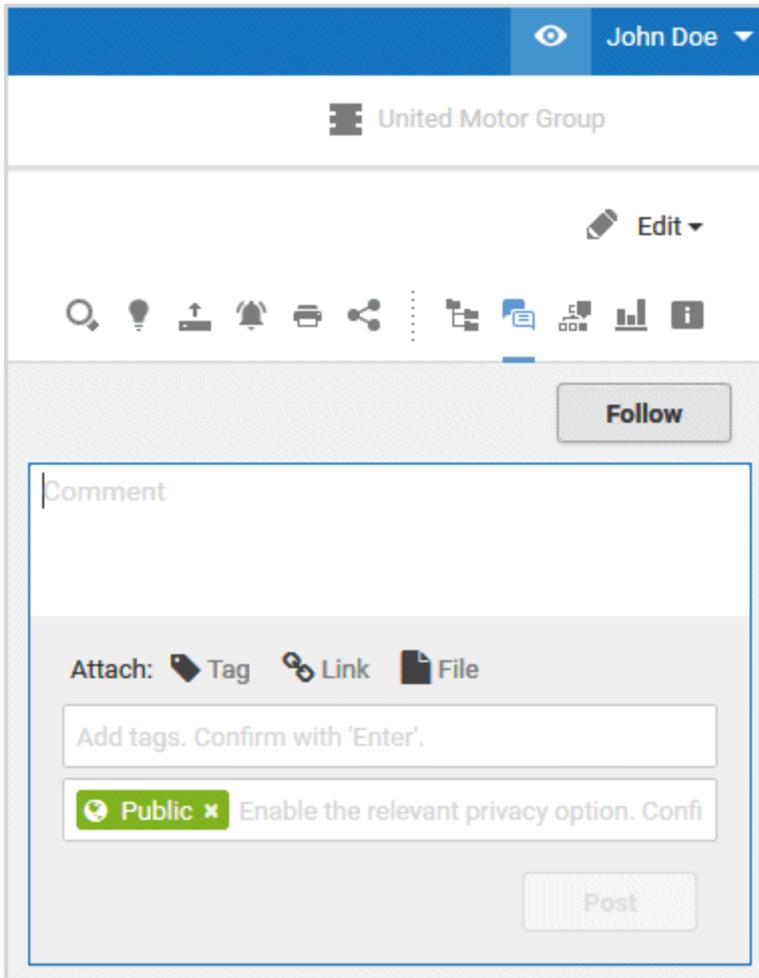
Follow interesting content in the portal to be informed about updates, etc., in Collaboration.

Prerequisite

You have the required access privilege (page 729) in ARIS Architect.

Procedure

1. Open the process you want to follow.
2. Click  **Comment** in the bar panel if the bar is not activated yet.



3. Click **Follow**.
4. To comment, write or copy your text into the input box. Up to 2000 characters are available.
5. Click  **Tag**.

6. Enter the words to be used as keywords (page 728) 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.

OUR PRODUCT RELEASE VIRTUAL EVENT:
PLAY IT ON DEMAND
Listen, learn and grow your skills!

Attach: Tag Link File

release × event × Add tags. Confirm with 'Enter'.

Public × Enable the relevant privacy option. Confirm with 'Enter'.

Post

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.

4.4.6 Publish posts

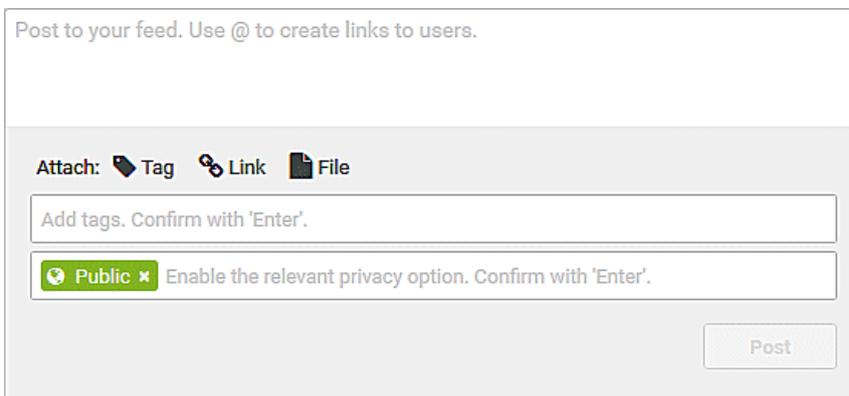
Post information that could be of interest to your colleagues, or start a discussion on a particular topic.

Prerequisite

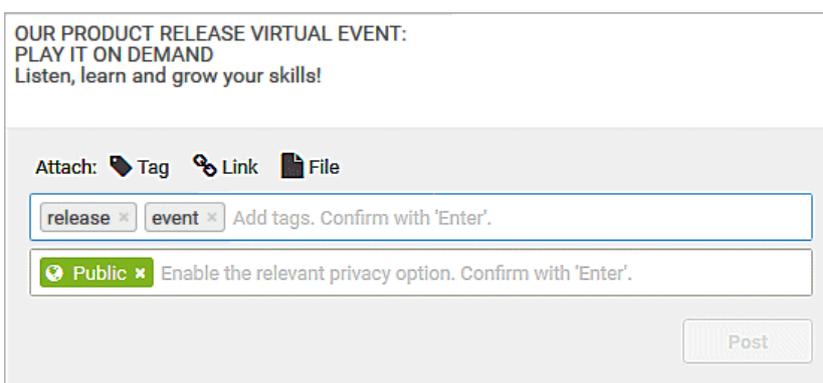
You have the required access privilege (page 729) in ARIS Architect.

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 728) 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 727) 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.

4.4.7 Comment on, share, flag posts, etc.

Depending on whether a post is your own or from another user, you can perform different actions.

Prerequisites

- The Like button, commenting on and sharing content, creating bookmarks, and flagging posts are enabled in ARIS Administration configuration.
- You have the required access privilege (page 729) 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.

4.4.8 Add documents to posts

You can use documents from ARIS document storage in your posts. Use documents that have already been uploaded to ARIS document storage or upload new documents yourself.

Prerequisite

Using documents from ARIS document storage is enabled in ARIS Administration configuration.

Procedure

1. Add your post (page 712) 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.

4.4.9 View notifications and specify settings

Read your internal notifications and specify the situations in which you want to receive a notification about activities in Collaboration as well as the notification frequency.

Procedure

1. Click  **View notifications**. Your notifications are displayed. Various filters provide you with a better overview, for example, **All**, **Unread**, **Read**.
2. Click **Change your notification settings**. Your notification settings are displayed.
3. Specify the situations in which you want to be informed about activities by other users, groups, or portal feeds. In each case, decide whether you want to receive the notification as an internal notification in Collaboration (**In-app**), or as an **E-mail**.
4. Specify the e-mail notification frequency, for example, **Daily digest**. If you do not want to receive e-mail notifications, select **Never** for the relevant situation.
5. Click **OK**.

Your settings are saved. From now on, you will be notified according to your specifications. The time for daily digest e-mail and the day for weekly digest e-mail are defined by the Collaboration administrator.

4.4.10 Define filters

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

Prerequisite

Creating filters is enabled in ARIS Administration configuration.

Procedure

1. Click **+** **Create filter**. The form for creating a filter opens.
2. Select the relevant filter criteria, for example, whether you want all feeds or only feeds you follow to be included in the filter.
3. Enter a name for the filter.
4. Specify the keywords that can be used to find relevant posts. Use a space to separate the keywords.
5. Click **OK**.

The filter is saved and is displayed under **Filters**. Click the filter name to display the posts that contain the specified keywords.

To change a saved filter, click **Filter XY >**  **Edit filter**. To delete filters that you no longer require, click  **Delete filter**.

4.4.11 Use tags

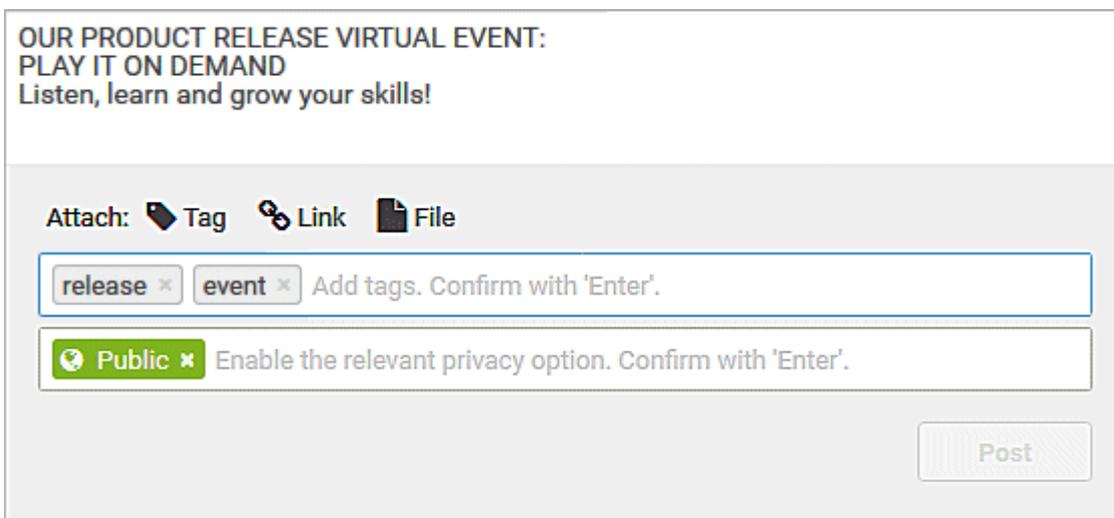
Use tags to categorize posts using keywords. This enables other users to find posts on interesting topics more easily.

Prerequisite

Creating tags and filtering using tags are activated in the ARIS Administration configuration.

Procedure

1. Add your post (page 712) 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 728) 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.



OUR PRODUCT RELEASE VIRTUAL EVENT:
PLAY IT ON DEMAND
Listen, learn and grow your skills!

Attach:  Tag  Link  File

release × event × Add tags. Confirm with 'Enter'.

 Public × Enable the relevant privacy option. Confirm with 'Enter'.

Post

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.

4.4.12 Filter feeds by means of tags

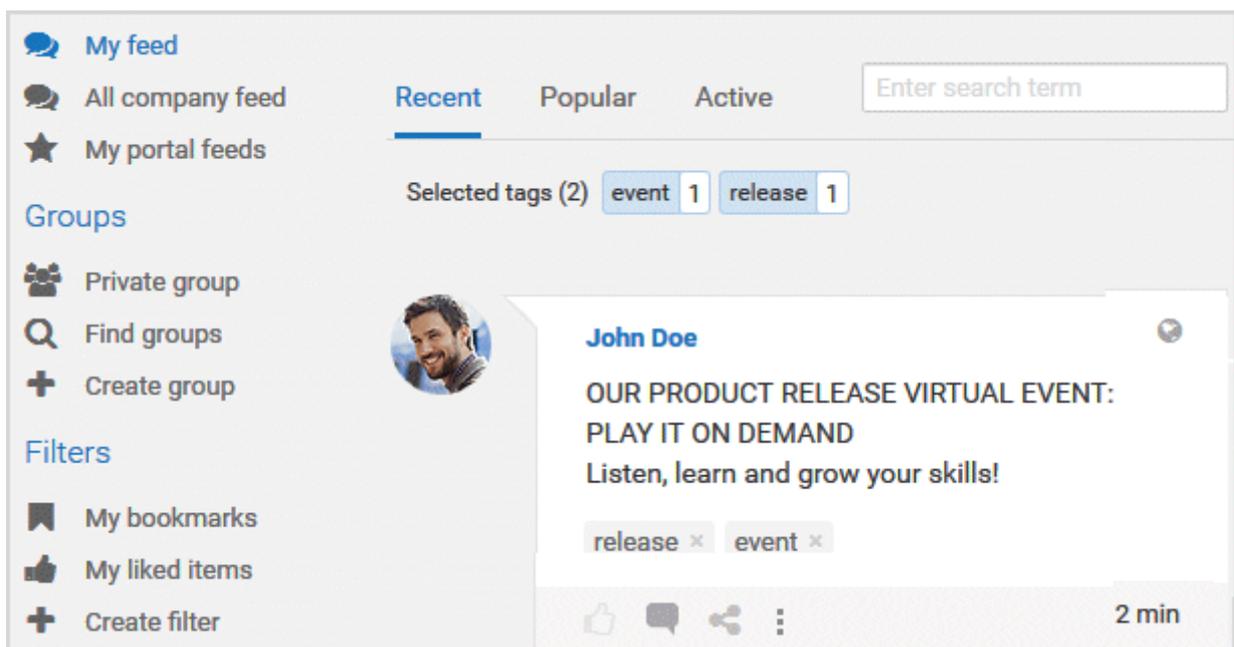
Use tags (page 728) to filter feeds using keywords.

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.

4.4.13 Use hashtags

Use hashtags (page 729) 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 712) 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 712) 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 716). You can then use the same hashtag in the filter definition, for example, #BPM.

4.4.14 Find help

In addition to this online help, there are various ways you can find support in Collaboration.

Procedure

Publish a post containing your question and use the hashtag (page 729) **#Help**.

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

4.4.15 Work with groups

4.4.15.1 Create a group

Create your own group if you cannot find any interesting groups or you need a group for your team. Groups enable users to collaborate in a team and to participate in a special interest group or a particular topic.

Prerequisite

Creating groups is enabled in ARIS Administration configuration.

Procedure

1. Click **+ Create group**.
2. Enter the name of the group and the short name.
3. Describe the group's interests, so that your group can be found by other users. The best way to do this is to use keywords.
4. If necessary, specify an additional coordinator who will manage the group profile and privileges (**+ Add coordinator**).
5. Enable the relevant privacy option (**Public/Private**). After saving the group, you cannot change this option.
6. For private groups, you can follow portal feeds (page 722).
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.

4.4.15.2 Edit or delete a group

Change the details of a group, if the information is outdated. Delete an unused group, for example, to provide a better overview.

Prerequisite

You are the coordinator of the group.

Procedure

1. Under **Groups**, click the group that is to be edited.
If the group is not displayed in your groups list because it is unpinned (page 721), 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 722).
5. Click **OK**.

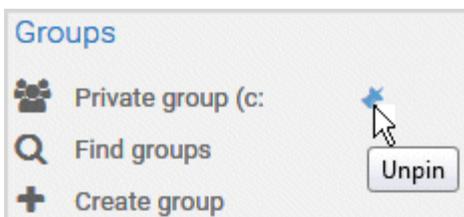
Your changes are saved.

4.4.15.3 Unpin and pin your groups

Decide if groups you are following should be displayed or not in your groups list. This is useful to provide a better overview if you are following a lot of groups.

Procedure

1. To remove a group from your list, move the mouse pointer over the group name you want to unpin from the list.
2. Click **★ Unpin**.



The group is removed from the list.

3. To display a group in your groups list, click **Find groups** and then the relevant group. The **group** is displayed.
4. Click **★ Pin** next to the group's name. The group is displayed in your groups list.

Depending on your decision, the group is displayed or not under **Groups**.

4.4.15.4 Invite other users to join a group

Invite other users to become a member in a specific group.

Procedure

1. Activate the group you want to issue an invitation for.
2. If you are a coordinator of the group, enter the name of the person you want to invite in the **Add colleagues** box.
3. Click **Add**. The user is added as a follower of this group.
4. If you are not a coordinator of the group, enter the name of the person you want to invite in the **Invite colleagues** box.
5. Click **Invite**.

The user receives a notification that they have been invited to join a private group. This user can then request membership of the group ( **Find groups > Send request**). If the group coordinator approves (page 723) 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**).

4.4.15.5 Follow portal contents as a group

Follow interesting content for private groups in ARIS Connect to be informed about updates, etc., in Collaboration. This enables a private group, for example, a project team, to jointly discuss and edit relevant processes.

Prerequisites

- The group is a private group.
- You are the coordinator of the group.
- The item from ARIS Connect must be followed as a portal feed in Collaboration.
- You have the required access privilege (page 729) 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 721), 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.

4.4.15.6 Edit requests to join private groups as a coordinator

Edit requests for group memberships.

Prerequisite

The group is a private group you are the coordinator of.

Procedure

1. Open the group.
2. Click **Requests**. The user requests are displayed.
3. For each request, click **Approve** or **Deny**.

If the user was accepted as a group member, the user will be notified accordingly and displayed in the list of followers. If the user was denied membership the user and all other group coordinators receive a corresponding notification.

4.4.15.7 Grant/revoke group users coordinator privileges

Grant additional group members coordinator privileges or revoke them from them.

Procedure

1. Open the private group.
2. Click **Followers**. The members of this group are displayed.
3. In the row for the group member you want to grant/revoke coordinator privileges to/from, click **Grant** or **Revoke**. The button always shows the command that can be executed next, that is, **Revoke** if the user has administrator privileges, and vice versa.

The user is granted coordinator privileges (page 729) 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.

4.4.16 Valuable information

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

4.4.16.1 Keyboard shortcuts for Collaboration

The following shortcuts are available in Collaboration (page 707).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
End	Moves to the lower entries if they cannot be displayed completely due to the window size or the screen resolution.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
Home	Moves to the upper entries if they cannot be displayed completely due to the window size or the screen resolution.
Tab	<ul style="list-style-type: none"> Highlights the next control or input field. Jumps from the Comment box to the  Tag,  Link, and  File symbols that you can use to attach tags, links, or files to your comment. It also jumps to the other input fields and to the Post button.
Shift + Tab	Highlights the previous control or input field.
Right arrow/ Left arrow	Moves the cursor through the text in input fields.
Up arrow/ Down arrow	Selects the previous/next item in lists.
Enter	<p>Opens the attachment fields and places the cursor in the input field if the Tag or Link symbol is selected. Opens the Select document dialog when the File symbol is selected.</p> <ul style="list-style-type: none"> Posts the comment when the Post button is selected. Executes the highlighted button. Opens the dialog/the selection list of the highlighted item.
Ctrl + Enter	Posts a comment when the Post button is active.

4.4.16.2 What is a feed?

Feeds contain the posts (page 712) in Collaboration, which for example, can be commented (page 714) 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.

4.4.16.3 How can users automatically follow content?

These options enable users to automatically become followers.

POSTING OR COMMENTING ON FEEDS

If **Automatically follow users/Automatically follow groups/Automatically follow models** is enabled in the configuration (**ARIS Administration > Collaboration > General settings**), you automatically become a follower of users, groups, or models, by posting or commenting on their feeds. To stop following this content, click **Unfollow**.

PERSON RESPONSIBLE

If a user name is set for the **Person responsible** model attribute of a model in an ARIS database, this user automatically becomes a follower of this model. Once automatic following is activated in Collaboration (**ARIS Administration > Collaboration > Configure database**), this user sees all model activities in **My feed**, and receives notifications about them. However, this only applies if this user has at least the **Read (r---)** access privilege in the corresponding ARIS database.

If a different user name is set for the **Person responsible** model attribute at a later point in time, the automatic following remains activated for the previous user until this user manually stops following this model (**Unfollow**).

4.4.16.4 What does following posts mean?

When you follow users, you have access to the posts that they publish in their feeds. In private groups, a coordinator must confirm your request before you are allowed access to this group's posts, comments, etc. In public groups you have immediate access to the group.

The feeds you follow are displayed under  **My feed** and the groups you follow under **Groups**. To stop following a user or group, click **Unfollow** in the user or group profile. Users who are following your feeds are displayed under **Followers** in your profile. Users and groups you are following are displayed under **Following** in your profile.

4.4.16.5 Which target groups can be assigned to posts?

The following target groups can be selected for posts (page 712):

-  **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.

4.4.16.6 What does Like mean?

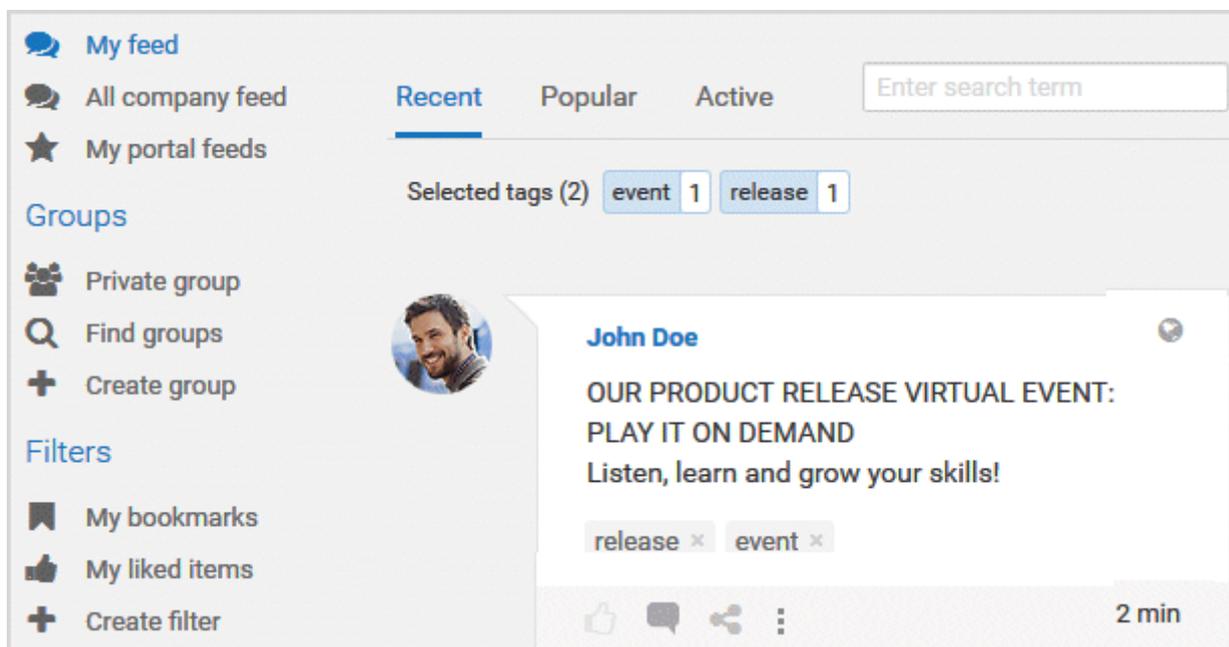
By clicking on  **Like** under a post, you are telling other people that you are giving this post a positive rating, but without leaving a comment. Just like a comment, this is shown along with your user name below the post. To cancel your Like, click  **Unlike**.

4.4.16.7 What is a timestamp?

A timestamp (page 714) indicates when a post was last updated in Collaboration. Example: Last update was 2 hours ago. Timestamp = **2 h**.

4.4.16.8 What is a tag?

Tags are used to categorize posts using keywords, making them easier to find (page 718). 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.



4.4.16.9 What is a hashtag?

Hashtags are used to categorize posts and comments using keywords or topics, making them easier to find. The keyword entered as a hashtag is displayed as a link, highlighted in color. If a user clicks the hashtag, all post and comments subsequently entered are displayed on a separate page. A hashtag can be saved as a filter (page 716). 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

4.4.16.10 What does flagging a post mean?

You can send (page 714) posts you deem inappropriate to the Collaboration administrator for review. The administrator decides whether the post will be deleted or not.

4.4.16.11 Which group types exist?

Groups can be created (page 720) 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 723) to the group.

4.4.16.12 Which database access privileges of ARIS Architect are relevant to Collaboration?

For some interactions in Collaboration, users need special access privileges, for example, to post on portal feeds. These access privileges are assigned in ARIS Architect. You can synchronize the privileges in Collaboration manually, after you edited them in ARIS Architect. The following database access privileges are relevant to Collaboration:

- **No access (----)**
No portal content is displayed.
- **Read (r---)**
Portal content is displayed. Users can read posts added to models, and they can like, share, bookmark, tag, and flag them. However, they cannot comment on models.
- **Read + Comment (rc--), Read + Write (rw--)** (and all other types of rw access)
Portal content is displayed. Users can use all functions of Collaboration.

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

4.5 Use the repository



The repository contains databases and documents etc. of the selected server.

4.5.1 Work in the repository



In databases, you can navigate to database groups and edit its content, for example, rename models and objects.

These procedures and other procedures that you can execute directly in the repository are summarized here.

Repository tree (page 745)

Group menu (page 746)

Detail view (page 745)

Item menu in the detailed view (page 747)

Item editing buttons (page 748)

Item editing buttons (multi selection) (page 748)

Repository buttons (page 749)

4.5.1.1 Create model

You can create a new model in the selected database group.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new model. When you select the group, its contents are displayed in the right pane.
5. In the upper right, click  **Create model**. The corresponding dialog opens.
6. In the **Model name** box specify the name that the new model is to be created with in the selected group.
7. Click the **Model type** box and enter part of the model type name. All model types (page 793) are displayed whose names contain the term you entered.

8. Select the required model type.
9. Click **OK**.

The new model is created and saved in the selected group. A new tab with the model opens and you can model the content.

4.5.1.2 Create group

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

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new group. When you select the group, its contents are displayed in the right pane.
5. In the upper right, click  **Create group**. The corresponding dialog opens.
6. Enter the required name in the **Name** box.
7. Click **OK**.

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

4.5.1.3 Refresh content of a database group

You can update the contents of the selected database to display the current contents. This is useful if several people are working in the database at the same time. For example, if someone else changes the names of groups, you can see the changes after refreshing.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Select a database group.
5. In the upper right, click  **Refresh**.

The current database data is read and displayed.

4.5.1.4 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.

Prerequisite

You have a **Designer** license.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the group where the content you want to select is stored.
5. In the detailed view, activate the check boxes of the relevant elements.
6. Click  **Reports**. The **Reports** bar opens. The number of item for which the report is generated is shown.
7. Click the drop-down list box to display the list of available reports.
8. Leave the mouse pointer on the name of a report if you want to display its description.
9. Click the name of the relevant report.
10. Click the **Start** button if you want to output the report in the displayed format (page 511). To select a different output format, click the **Output format** field and select the format you want to use, for example, **Output PDF**.
11. Click the **Start** button. The report is created.
12. When the report is created, the result is listed in the **Reports** bar, and a dialog to download the result opens.
13. Click  **Download result**. Depending on your browser settings, you can specify the download folder or the result is downloaded in the default download folder.
14. To download the result later, click  **Download report** in the **Reports** bar.

You have created a report for multiple elements.

4.5.1.5 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. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Select the database group containing the models and/or objects you want to check.
5. In the detailed view, enable the check boxes of the relevant models and/or objects.
6. 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.
7. Click in the semantic check list box. The relevant semantic checks are listed.
8. Select the required semantic check.
9. 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 998) in the selected format (page 988).

4.5.1.6 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. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. 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.
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 998) in the selected format (page 988).

4.5.1.7 Delete a model or an object

You can delete a model or an object from the database.

Warning

You cannot undo the deletion of models and objects.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
5. Move the mouse cursor over the row of the item you want to delete. The edit buttons are displayed at the end of the row.
6. Click  **Delete**. A confirmation prompt is displayed.
7. Click **OK**.

The item is deleted.

Tip

You can delete multiple items at the same time. To do this, activate two or more items and click  **Delete** that is displayed in the upper right corner.

4.5.1.8 Rename a model or an object

You can rename a model or an object.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
5. Move the mouse cursor over the row of the item you want to delete. The edit buttons are displayed at the end of the row.
6. Click  **Rename**. The corresponding dialog opens.
7. Overwrite the current item name.
8. Click **OK**.

The item is renamed.

4.5.1.9 Copy a model or an object into another group

You can copy models and objects and paste them into a database group.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
5. Move the mouse cursor over the row of the item you want to copy. The edit buttons are displayed at the end of the row.
6. Click  **Copy**.
7. Select the group in which you want to paste the model or the object.
8. Click the ▼ down arrow of the group and click  **Paste**.

If you insert a model, it is newly created, while occurrence copies (page 1059) of the existing objects are used for the objects it contains. If an object is inserted, a definition copy (page 1054) is created.

Tip

You can copy and paste either multiple models or multiple objects at the same time. To do this, activate two or more check boxes of models or objects and click  **Copy** displayed in the upper right corner. Now you can paste them into a group.

4.5.1.10 Paste objects from the repository into a model

You can copy objects in the repository and paste them into a model of the same database as occurrence copies (page 1059) or as definition copies (page 1054).

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
5. If you want to copy an object, move the mouse cursor over the row of the object. The edit buttons are displayed at the end of the row.
If you want to copy more than one object, enable the check boxes of two or more objects.
6. Click  **Copy** at the end of the row to copy an object or click  **Copy** in the upper right corner to copy multiple objects.
7. Select the model tab in which you want to paste the objects.
8. If you want to insert the objects as occurrence copies, click  **Paste** in the **Start** tab bar.
If you want to insert the objects as definition copies, click the ▼ **Paste as** down arrow to the right of the  **Paste** button in the **Start** tab bar and then click **Definition copy**.

The objects are inserted as occurrence copies or as definition copies (page 1054) and can be dragged to the corresponding positions.

4.5.1.11 Move a model or an object

You can move a model or an object to another database group of the same database.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
5. Move the mouse cursor over the row of the item you want to move. The edit buttons are displayed at the end of the row.
6. Click  **Cut**.
7. Select the group in which you want to move the model or the object.
8. Click the ▼ down arrow of the group and click  **Paste**.

The selected item is moved.

Tip

You can move multiple models and objects at the same time. To do this, activate two or more check boxes of models and objects and click  **Cut** displayed in the upper right corner. Now you can paste them into another group.

4.5.1.12 Show technical information for models and objects

You can show the GUID (page 1056), the type number, and the API name (page 1050) for selected models or objects. You can copy the data.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
5. At the end of the row for the relevant item, click  **More >**  **Technical information**. The corresponding dialog opens.

The GUID, the type number, and the API name for the selected model or the selected object are shown. You can copy the data. In this way, you can insert the GUID elsewhere, for example.

4.5.1.13 Go to the fact sheets of a model

You can navigate from the  **Repository** to the fact sheets (page 1055) of a model in the  **Portal**.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new model. When you select the group, its contents are displayed in the right pane.
5. At the end of the row for the relevant item, click  **More** >  **Go to ARIS Connect fact sheet**.

A new tab with the fact sheets of the model opens. The **Overview** fact sheet is activated.

4.5.1.14 Use database groups

You can use the database group functionality to manage database contents.

4.5.1.14.1 Create group

You can create a new group in the database.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new group. When you select the group, its contents are displayed in the right pane.
5. Navigate to the database group in which the relevant item is saved. When you select the group, its contents are displayed in the right pane.
6. Click the ▼ down arrow of the group and click  **Create group**. The corresponding dialog opens.
7. Enter the required name in the **Name** box.
8. Click **OK**.

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

4.5.1.14.2 Move a group

You can move a database group and its contents to another group of the same database.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Select the database group you want to move. When you select the group, its contents are displayed in the right pane.
5. Click the ▼ down arrow of the group and click  **Cut**.
6. Select the group into which you want to move the cut group.
7. Click the ▼ down arrow of the group and click  **Paste**.

The group and its contents is moved.

4.5.1.14.3 Rename a group

You can rename a group.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group you want to rename.
5. Click the ▼ down arrow of the group and click  **Rename**. The corresponding dialog opens.
6. Overwrite the current group name.
7. Click **OK**.

The group is renamed.

4.5.1.14.4 Create model

You can create a new model in the selected database group.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new model. When you select the group, its contents are displayed in the right pane.
5. Click the ▼ down arrow of the group and click  **Create model**. The corresponding dialog opens.
6. In the **Model name** box specify the name that the new model is to be created with in the selected group.
7. Click the **Model type** box and enter part of the model type name. All model types (page 793) are displayed whose names contain the term you entered.
8. Select the required model type.
9. Click **OK**.

The model is created and saved in the selected group. A new tab with the model opens and you can model the content.

4.5.1.14.5 Copy group with models

You can copy a group. The models contained in the group are also copied by this operation. Objects contained in the group are not copied. You can copy objects using the specific functionality (page 735).

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group that you want to copy. When you select the group, its contents are displayed in the right pane.
5. Click the ▼ down arrow of the group and click  **Copy**.

The group and the contained models are copied and can be pasted (page 741) into another group.

4.5.1.14.6 Paste content in a group

You can insert models (page 735), objects (page 735), and groups with models (page 741) into a group.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group into which you want to paste content. When you select the group, its contents are displayed in the right pane.
5. Click the ▼ down arrow of the group and click  **Paste**.

The models, objects, or groups with models are inserted into the group.

4.5.1.14.7 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 798) you are using.
- You have a **Designer** license.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to import the ARIS Express model. When you select the group, its contents are displayed in the right pane.
5. Click the ▼ down arrow of the group and click  **Import ARIS Express model**. The corresponding dialog opens.
6. Click **Select file** and use the **File Upload** dialog to navigate to the group in which the model is stored in **ADF** format.
7. Select the relevant ADF file and click **Open**.
 - d. The selected model is imported if an ARIS Express filter or an ARIS Express template is available.
 - e. If no ARIS Express filter or ARIS Express template is available, you are asked whether you still want to import the model. Click **OK** if you want to import the model. Only after you have imported the ARIS Express filter and ARIS Express template does the model look as in ARIS Express. Click **OK** to confirm the message that some object types are represented by default symbols.
8. Use ARIS Architect to import the ARIS Express filter and 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.

4.5.1.14.8 Import BPMN file

You can import (page 959) data from a BPMN file and use the BPMN diagram that was generated by the import in ARIS Connect.

Prerequisites

- The method filter (page 798) you are using allows BPMN diagrams.
- You have a **Designer** license.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Select the database group into which you want to import the BPMN diagram. When you select the group, its contents are displayed in the right pane.
5. Click the ▼ **down arrow** and select  **Import BPMN diagram**. The corresponding dialog opens.
6. Click **Select file** and navigate to the relevant BPMN file.
7. Select the BPMN file and click **Open**. The file is parsed. If it is a valid BPMN file it is imported. The BPMN diagram is stored in the selected group, and you can open it for editing on a tab.

4.5.1.14.9 Refresh repository content

You can update the contents of the selected database to display the current contents. This is useful if several people are working in the database at the same time. For example, if someone else changes the names of groups, you can see the changes after refreshing.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Edit the relevant content.
5. Click  **Refresh** when you want to know whether other editors have edited content, added new content, renamed items, or deleted items.

The current database data is read and displayed.

4.5.1.14.10 Delete a group

You can delete a group and its contents.

Warning

You cannot undo the deletion of the group and its contents.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group you want to delete.
5. Click the ▼ down arrow of the group and click  **Delete**. A confirmation prompt is displayed.
6. Click **Delete**. If the group does not contain any items, it is deleted immediately.
7. If the group contains items, you are asked in a confirmation prompt whether you also want to delete these items.
8. Click **Yes**.

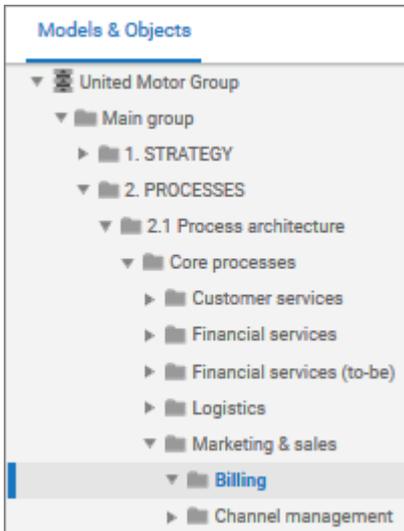
The group and its contents are deleted.

4.5.1.15 Valuable information

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

4.5.1.15.1 Repository tree

The repository tree contains the database content.



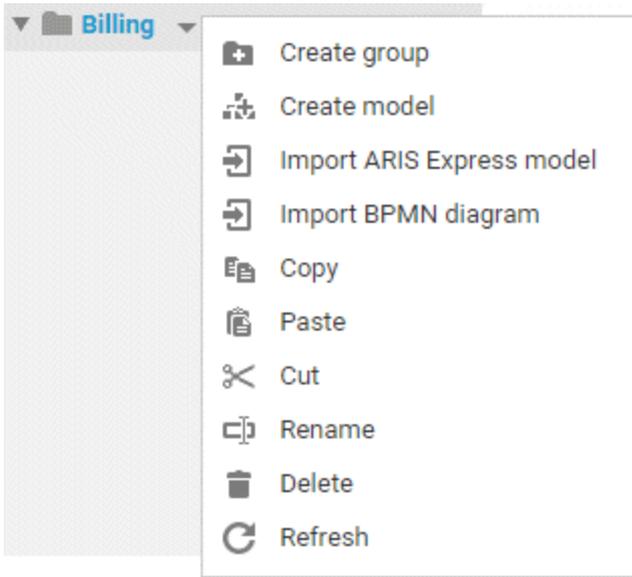
4.5.1.15.2 Detail view

The detail view displays the contents of a group.

<input type="checkbox"/>	Name	Type	1-41 of 41
<input type="checkbox"/>	Billing Last change on 12.02.2019 20:44:36 by system	Value-added chain diagram	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Billing issues Last change on 29.09.2018 17:48:56 by system	Quick model	
<input type="checkbox"/>	Vehicle billing processing Last change on 29.09.2018 17:48:43 by system	EPC	
<input type="checkbox"/>	Accounts receivable management Last change on 14.09.2009 15:26:38 by system	Function	
<input type="checkbox"/>	Allow discount Last change on 26.03.2018 21:05:16 by system	Function	
<input type="checkbox"/>	AND rule Last change on 14.09.2009 15:26:38 by system	Rule	
<input type="checkbox"/>	Billing Last change on 03.01.2014 16:15:39 by system	Function	

4.5.1.15.3 Group menu

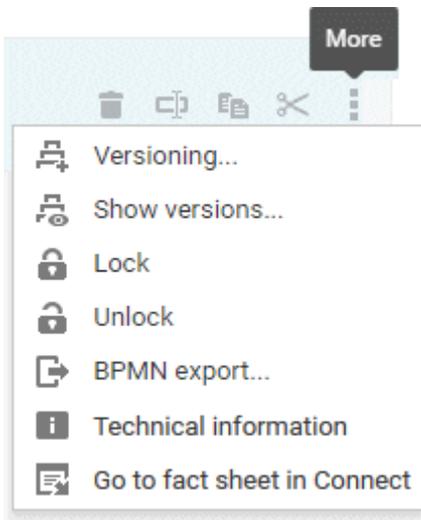
The following menu items are available for groups.



-  Create group (page 739)
-  Create model (page 740)
-  Import ARIS Express model (page 742)
-  Import BPMN diagram (page 743)
-  Copy (page 741)
-  Paste (page 741)
-  Cut (page 739)
-  Rename (page 740)
-  Delete (page 744)
-  Refresh (page 743)

4.5.1.15.4 Item menu in the detail view

Items of the detail view have the following menu items. Depending on the selected item, the menu items are enabled or disabled.



-  Versioning (page 1007)
-  Show versions (page 1008)
-  Lock (Models (page 1004)/Objects (page 1005))
-  Unlock (Models (page 1005)/Objects (page 1006))
-  BPMN export (page 904)
-  Technical information (page 737)
-  Go to fact sheet in Connect (page 909)

4.5.1.15.5 Item editing buttons

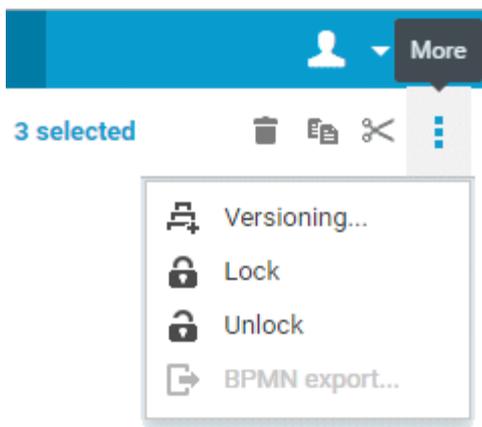
The following editing buttons are available for editing items. Depending on the selected item, the editing buttons are enabled or disabled.



-  **Delete** (page 734)
-  **Rename** (page 734)
-  **Copy** (page 735)
-  **Cut** (page 737)
-  **More**

4.5.1.15.6 Item editing buttons

The following editing buttons are available for editing several selected elements. Depending on the selected elements, the editing buttons are activated or deactivated.



Placed above the detail view.

-  Versioning (page 1007)
-  Lock (selected models (page 1004)/objects (page 1005))
-  Unlock (selected models (page 1005)/objects (page 1006))
-  BPMN export (page 904)

4.5.1.15.7 Repository buttons

The following repository buttons are available. They affect the repository view, such as refreshing the content, or start specific functionality, such as reports or semantic checks.



Placed above the detail view.

 Create model (page 730)

 Create group (page 731)

 Refresh (page 731)

 Reports (page 703)

 Semantic checks (page 733)

4.5.2 Create and edit models

ARIS Connect Designer allows you to edit existing and new models (page 790) in ARIS Connect. Using the **ARIS Connect Designer** license privilege you can create new models (page 790) directly in the portal, as well as edit (page 800) or create models (page 790) in the repository. You can access the entire modeling functionality of ARIS Connect Designer using buttons and bars (page 779) that you can use to efficiently edit your models.

If you have created or opened a model, you can set up the perspective (page 772) and adjust it to your own needs. Modeling (page 800) your organization, processes, data, etc., is just as simple as extended model editing (page 861). In addition to the graphic information, you can add further information to your models using attributes (page 832) that can be placed in the model as a symbol (page 874) or a text (page 870), if necessary.

In combination with ARIS Architect, automated processing steps can be inserted via macros (page 856). In addition, semantic checks can be used to execute exactly specified model and object checks.

Of course, you can also add comments to models (page 908) and discuss models with other users.

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

4.5.2.1 ARIS Connect Designer quick start

In the following you can create a simple model step by step with Smart Modeling (page 776) and learn how to use the basic functions of ARIS Connect Designer.

4.5.2.1.1 Before you start

The Quick Start Guide introduces you to the basic functions of ARIS Connect Designer. Using simple examples, you learn about important workflows for creating models, as well as for evaluating model content.

After specifying the required settings, you will first create a model of the **EPC** type and then evaluate it with a report.

Your work with ARIS Connect Designer can be divided into the following phases:



The Quick Start Guide guides you step by step through the required workflow.

If you have questions about working with ARIS Connect Designer, visit the **Model** (page 800) area of the online help. Activate the ARIS Connect tab, click your user name, and then **Help**.

The screenshots in this manual may differ from your program interface because your system may be customized and/or various features may be provided in ARIS Connect depending on your license.

4.5.2.1.2 Prerequisites

The following points are assumed.

- You have an **ARIS Connect Designer** license and the necessary privileges in the system.
- You have **Read**, **Write**, and **Delete** database privileges for the database group in which you want to create the sample model.
- You have the access data for ARIS Connect, that is, user name, password, and a link to the start page of ARIS Connect. This link should have been provided to you by your system administrator.

If in doubt, please contact your system administrator.

4.5.2.1.3 Start ARIS Connect

This description is based on the fact that the prerequisites for working with ARIS Connect (page 751) are fulfilled.

Procedure

1. Click the link to ARIS Connect or enter it in the address bar of your browser. The ARIS Connect start page opens.
2. Enter your user name and your password.
3. Click **Log in**.

ARIS Connect opens.

4.5.2.1.4 Create model and specify settings

On the following pages, you will learn how to create your first model and make settings for modeling.



4.5.2.1.4.1 Create a model

To create the **Customer acquisition** EPC, proceed as follows.

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Click the ► arrow of the database in which you want to create the new model.
4. Navigate in the same way to the group in which you want to save the model and select the group. A ▼ down arrow is displayed at the right hand side.
5. Click the ▼ down arrow and  **Create model**. The **Create model** dialog opens.
6. Enter the model name **Customer acquisition**.
7. Press **Tab**. The cursor jumps in the **Model type** box.
8. Enter **ep**. All model type are listed that have **ep** in its name.
9. Click **EPC**.
10. Click **OK**.

The **Create model** dialog is closed and the new model is opened in a new tab. The functionality of ARIS Connect Designer is available.

4.5.2.1.4.2 Hide grid

Normally, you do not need the grid if you use Guided Modeling (page 776) and Smart Modeling (page 776). Therefore, switch off the grid.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Modeling area** > **Use grid**. The check box is disabled.

The dot grid is hidden.

4.5.2.1.4.3 Set up default distance

With Smart Modeling, objects are automatically placed in the specified default distance (page 776). In addition, Guided Modeling (page 849) displays the default distance with a specific cursor () when you move objects.

Procedure

1. In the activated Model (page 844) tab bar, click  **Layout**. The layout options are provided.
2. Enter the value **20** for **Horizontal item spacing** and **10** for **Vertical item spacing**.
3. Click **OK**.

When you create a model with Smart Modeling, the objects are placed at the set distance.

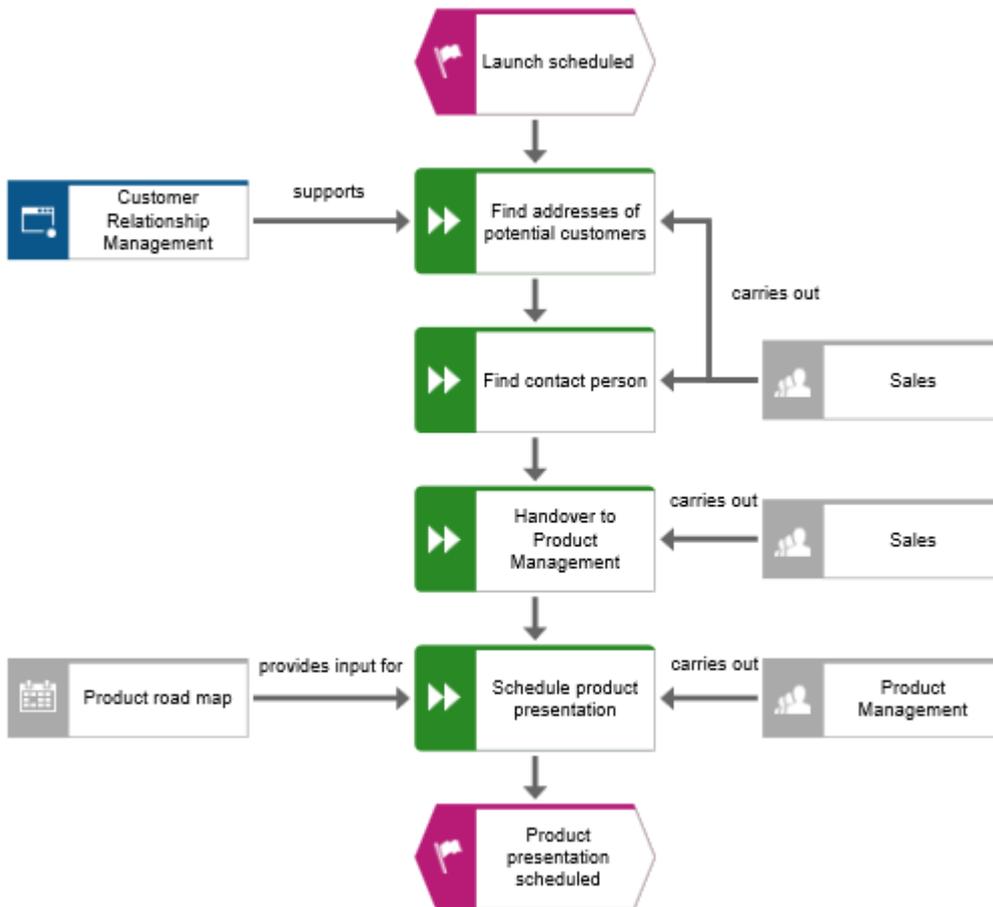
4.5.2.1.4.4 Model

In the following sections, you place objects in your model and edit object attributes.



Please note: If you create the model in a database that contains objects, when you enter object names, you will get name suggestions if a name begins with the letters you entered. Ignore these suggestions.

Your model will look like this after completion:



4.5.2.1.4.4.1 Create the basic control flow model

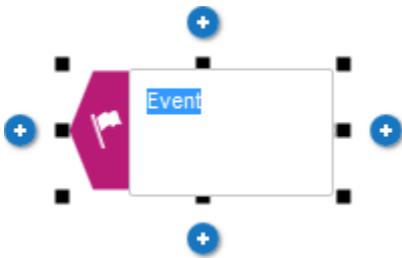
In this section, you create the basic control flow model, which includes the required work steps in the correct sequence.

Procedure

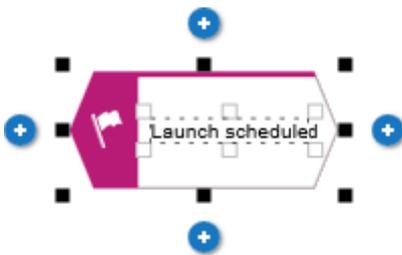
1. Click the  **Event** symbol in the **Symbols** bar and hold the mouse button down. An event shows that a certain state has occurred.
2. Drag the mouse pointer to the position you want to place the object in the modeling area.



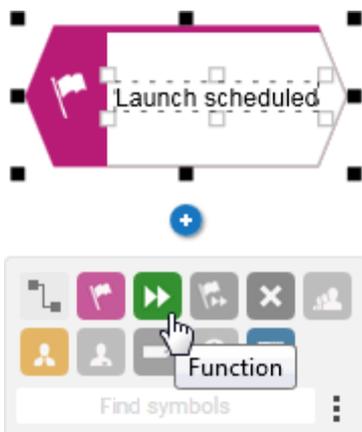
3. Release the mouse button. The object is placed and its name is selected for overwriting.



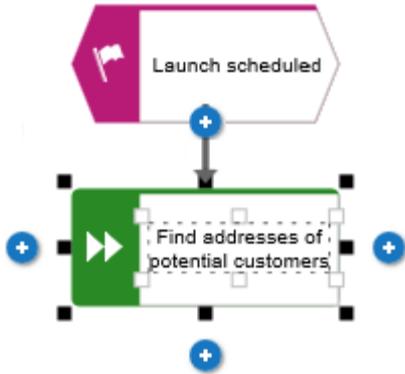
4. Enter a name for the event by overtyping the selection with **Launch scheduled** and press **Enter**.



5. Click  **Insert at the bottom** under the **Launch scheduled** event.



6. Click  **Function**. The function is placed in the default distance to the event and the name is selected for overwriting.
7. Since a function indicates that an activity must be performed, type **Find addresses of potential customers** and press **Enter**.



8. Create the following objects one below the other in the same way:
 - f.  Function: Find contact person
 - g.  Function: Schedule product presentation
 - h.  Event: Product presentation scheduled



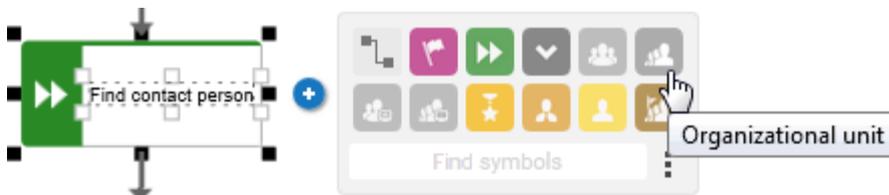
The basic control flow model, which includes the required work steps in the correct sequence, is completed.

4.5.2.1.4.4.2 Assign work steps to organizational units

In this section, you assign the work steps (functions) to the organizational units that you want to execute.

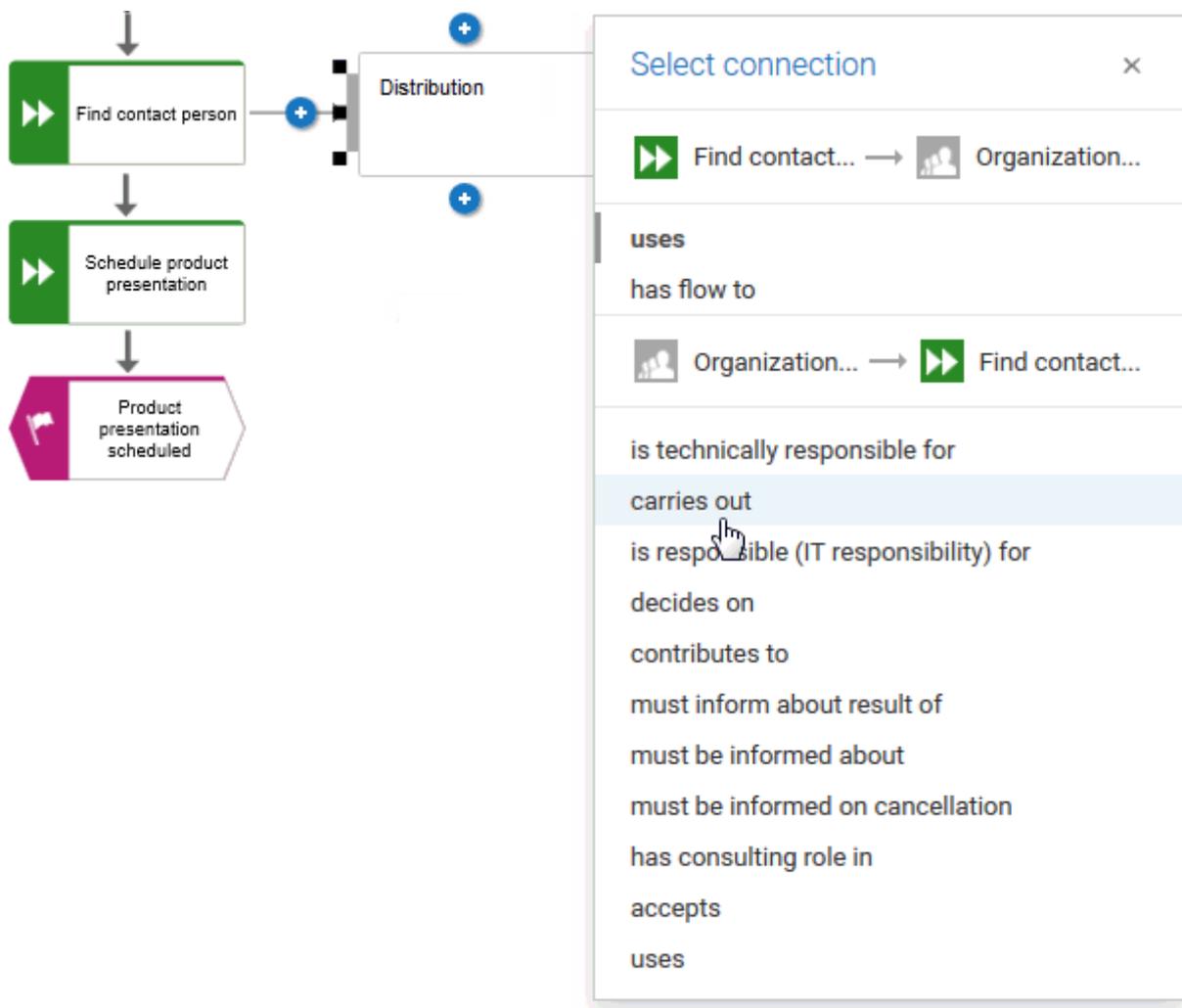
Procedure

1. Click the **Find contact person** function and then  **Insert to the right**.
2. Click **Organizational unit**.



There are various connections available to connect the work step (function) and the organizational unit.

3. Enter the name **Distribution** and click **carries out**.

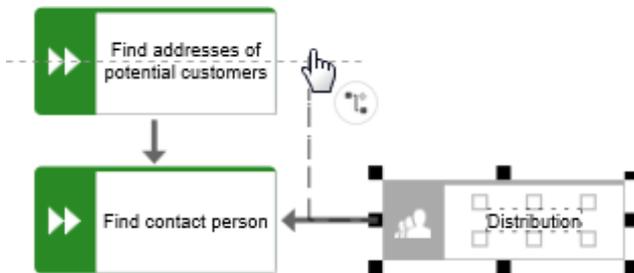


The organizational unit is placed.



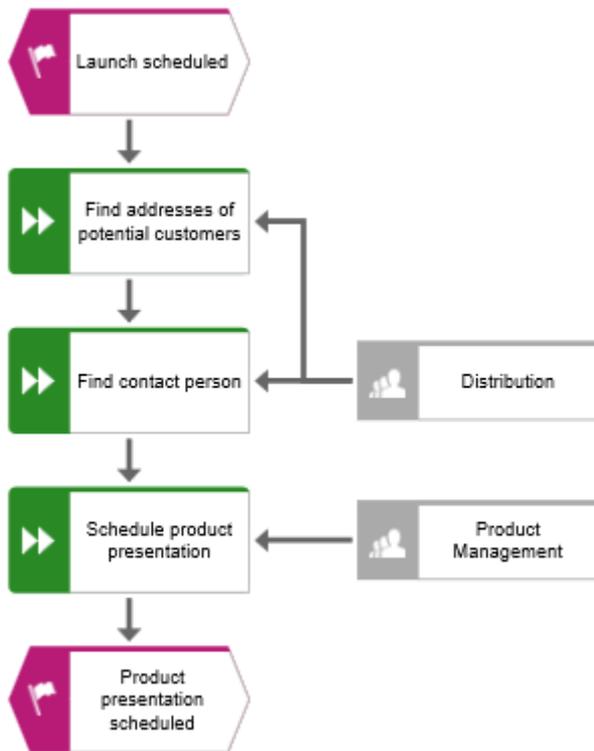
Not only the **Find contact person** work step, but also the **Find addresses of potential customers** work step is performed by the **Distribution** organizational unit. Therefore, connect **Distribution** with **Find addresses of potential customers**.

4. Click the **Distribution** organizational unit and then  **Insert to the left** and hold the mouse button down.
5. Move the mouse pointer to the border of the **Find addresses of potential customers** function. While you move the mouse pointer, the Guided modeling (page 849) line helps you to connect the connection centrally to the side of the object.



6. Release the mouse button when the connection anchor point is displayed. The connection selection is displayed. The connection **carries out** is activated.
7. Click in the modeling area to keep the connection.

8. Assign the function **Schedule product presentation** to the organizational unit **Product Management**. The connection **carries out** is already selected, so click in the modeling area to finish. Your model now looks as shown.



You have assigned the work steps to organizational units.

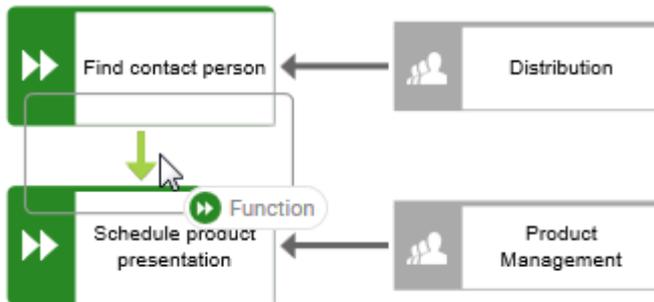
4.5.2.1.4.4.3 Insert a missing object

In this section, you use drag and drop (page 800) to insert a missing object.

As you inserted the object **Product Management**, you noticed that the handover between the organizational units is not modeled. Do this now.

Procedure

1. Click the **Function** symbol in the **Symbols** bar and hold the mouse button down.
2. Move the mouse pointer over the connection between the functions **Find contact person** and **Schedule product presentation**. The connection is colored green.



3. Release the mouse button. In one step the object is placed, the connection between the functions **Find contact person** and **Schedule product presentation** is removed, and connections from the new object to **Find contact person** and **Schedule product presentation** are created.
4. Enter **Handover to Product Management** and press **Enter**.

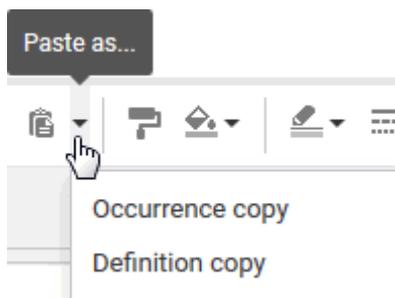
The missing object is inserted.

4.5.2.1.4.4.4 Create object occurrences

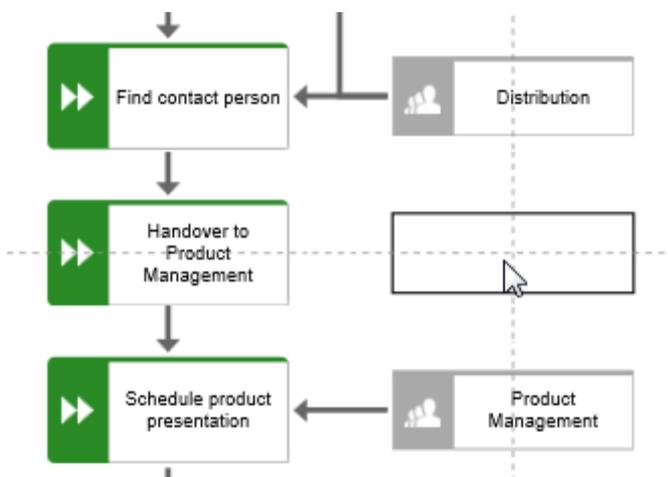
Of course, the **Distribution** organizational unit is also responsible for the **Handover to Product Management** step. To structure your model clearly, create an occurrence (page 1059) of the **Distribution** object beside the functions **Handover to Product Management**. Object occurrences are copies of object symbols that represent the same object in one or more models. Each occurrence of the **Distribution** object you have created represents the object you have already created in this model. If you change an attribute, for example, the name of an occurrence, the names of all occurrences of this object change.

Procedure

1. Select the **Distribution** object and click  **Copy** in the Model tab bar.
2. Click  **Paste as > Occurrence copy**.

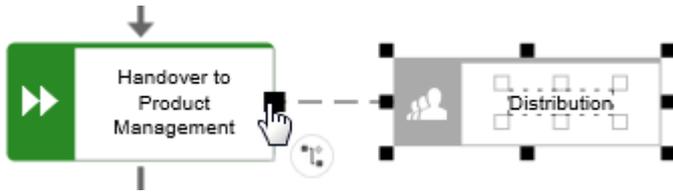


3. A preview frame of the object is displayed in the modeling area.
4. Move the mouse pointer beside the **Handover to Product Management** object. Lines indicate the distance and orientation (page 776) of the moved object from the other objects.
5. Click on this position.



The **Distribution** occurrence copy is placed, selected, and the  **Insert** icons are displayed.

6. Click  **Insert to the left** and hold down the mouse button.
7. Move the mouse pointer to the border of the **Handover to Product Management** function and release the mouse button when the connection anchor point is displayed.



The connection selection is displayed.

8. Click **carries out**.

The occurrence copy is created and connected to the work step.

4.5.2.1.4.4.5 Assign supporting systems

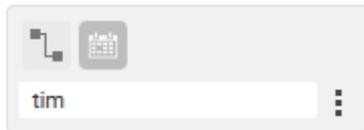
In this section, you assign the systems that support the work steps.

Procedure

1. Click the **Find addresses of potential customers** function and then  **Insert to the left**.
2. Because the application system is not listed in the **Smart Modeling** toolbar, enter **app** in the **Find symbols** box. The **Application** object symbols are displayed.

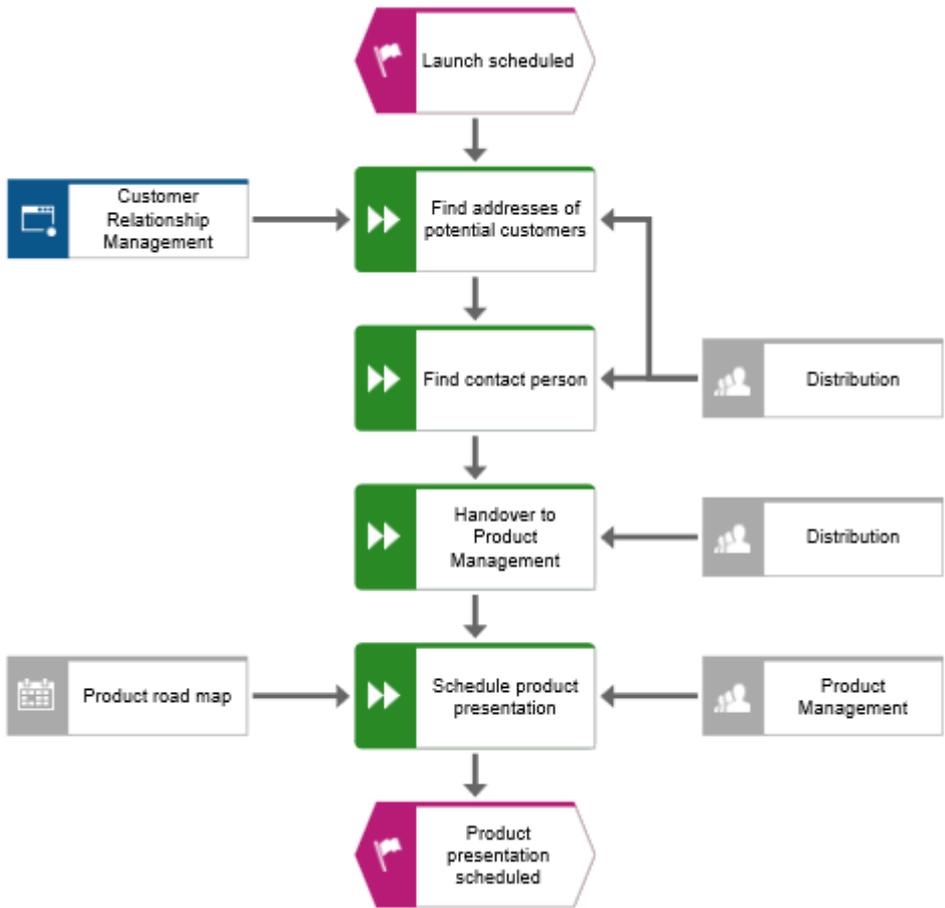


3. Click **Application system**. The application system is placed.
4. Enter the name **Customer Relationship Management**. The supporting system is placed.
5. Click the **Schedule product presentation** function and then  **Insert to the left**.
6. Because the **Time planner** object is not listed in the **Smart Modeling** toolbar, enter **tim** in the **Find symbols** box. The **Time planner** object symbol is displayed.

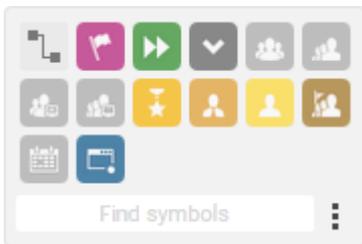


7. Click **Time planner**. There are various connections available.
8. Enter the name **Product road map** and click **provides input for**.

The supporting systems are assigned. The current model looks like this:



In the **Smart Modeling** toolbar for functions, both the object symbol of the application system and the object symbol of the time planner are now available for direct access.



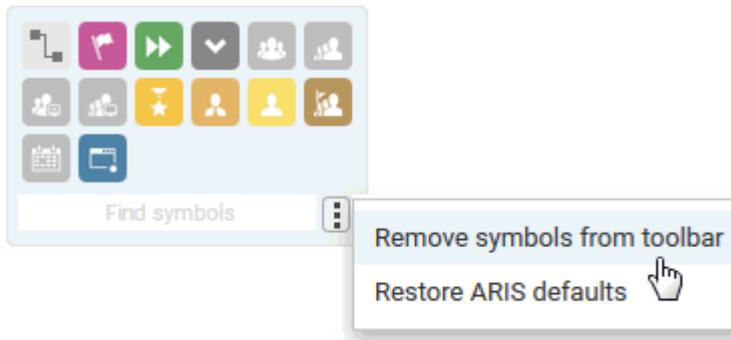
You can configure the **Smart Modeling** toolbar (page 765).

4.5.2.1.4.4.6 Configure Smart Modeling toolbar

In this section, you customize the **Smart Modeling** toolbar to your needs.

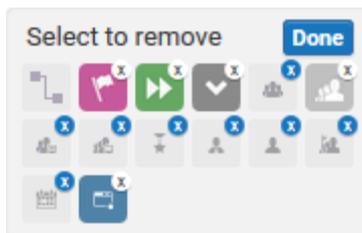
Procedure

1. Click the function **Find contact person** and then an  **Insert** button. You can click any  **Insert** button because you were not changing the model, only the number of object symbols provided by the **Smart Modeling** toolbar.
2. Click  **Configure > Remove symbols from toolbar**.



The available object symbols are marked by remove icons.

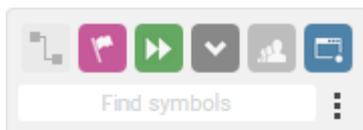
3. Click the icons you want to remove. They are grayed and their remove icons are highlighted.



If you want to exclude an already selected object symbol from removal, click the object symbol again.

4. Click **Done**.

The selected object symbols are removed from the **Smart Modeling** toolbar.



4.5.2.1.4.4.7 Rename objects

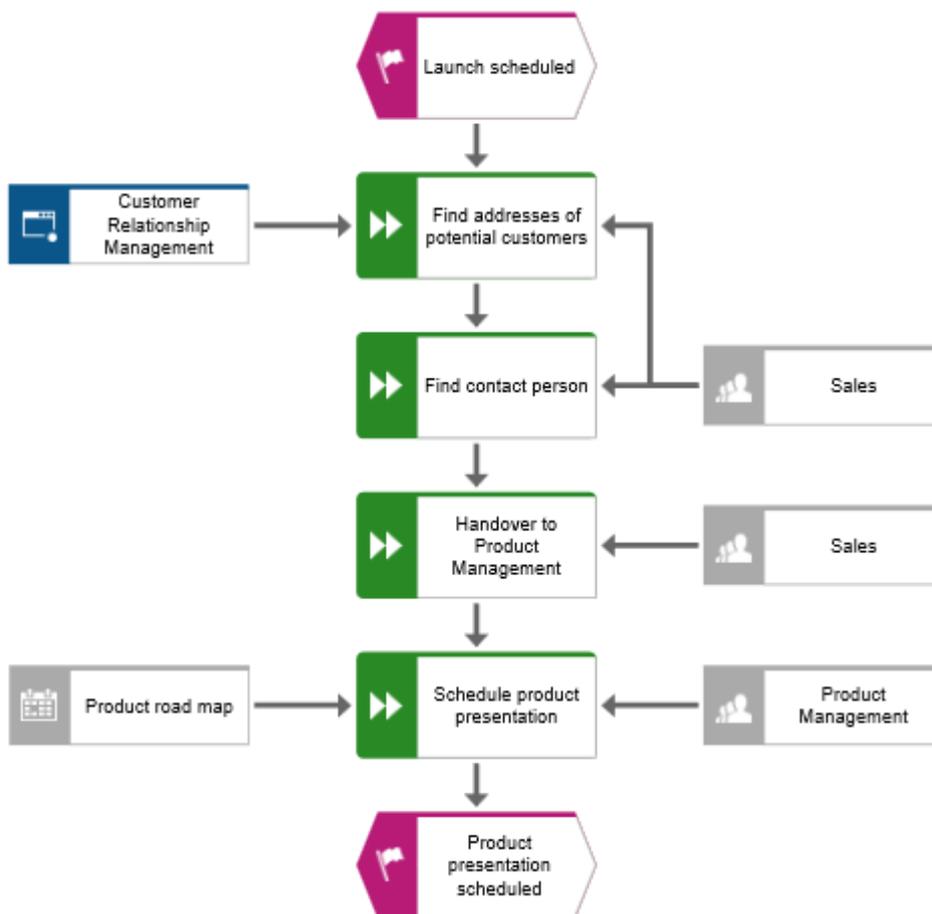
You can change object names directly in the model. If you change a name, all occurrences of the object (page 761) in the database are renamed accordingly.

In the following, you will change the name of the **Distribution** organizational unit.

Procedure

1. Select one of the **Distribution** symbols and click on the symbol name again. The name is selected and can be overwritten.
2. Enter **Sales** and click in the modeling area.

The name of the organizational unit is now **Sales** and both occurrences (page 1059) of the object are displayed with the new name.

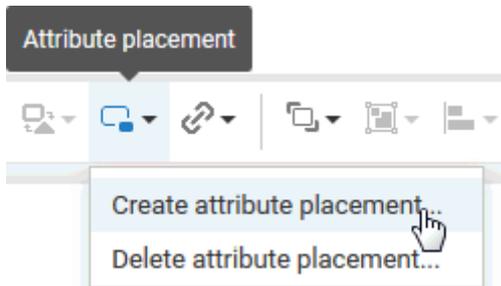


4.5.2.1.4.4.8 Place attributes

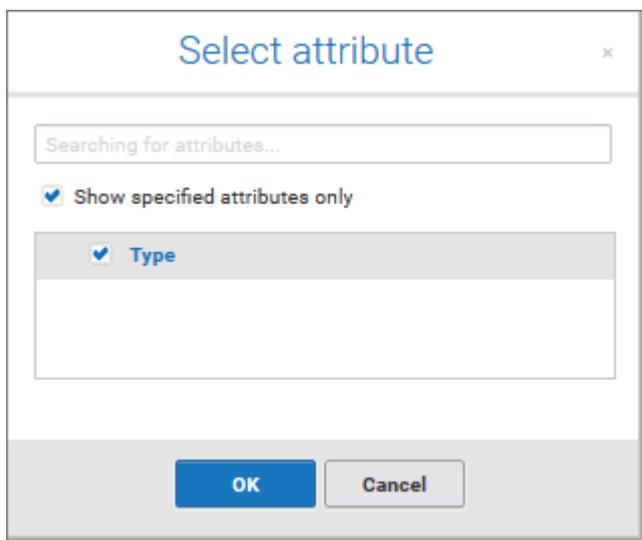
You can display the attributes of objects and connections in your model. Now, you will display connection types.

Procedure

1. Select the connection between the **Sales** and **Find addresses of potential customers**.
2. Click  **Attribute placement** in the **Start** tab bar.
3. Click **Create attribute placement**.



The **Select attribute** dialog opens. Enable the **Show specified attributes only** check box and enable **Type**.



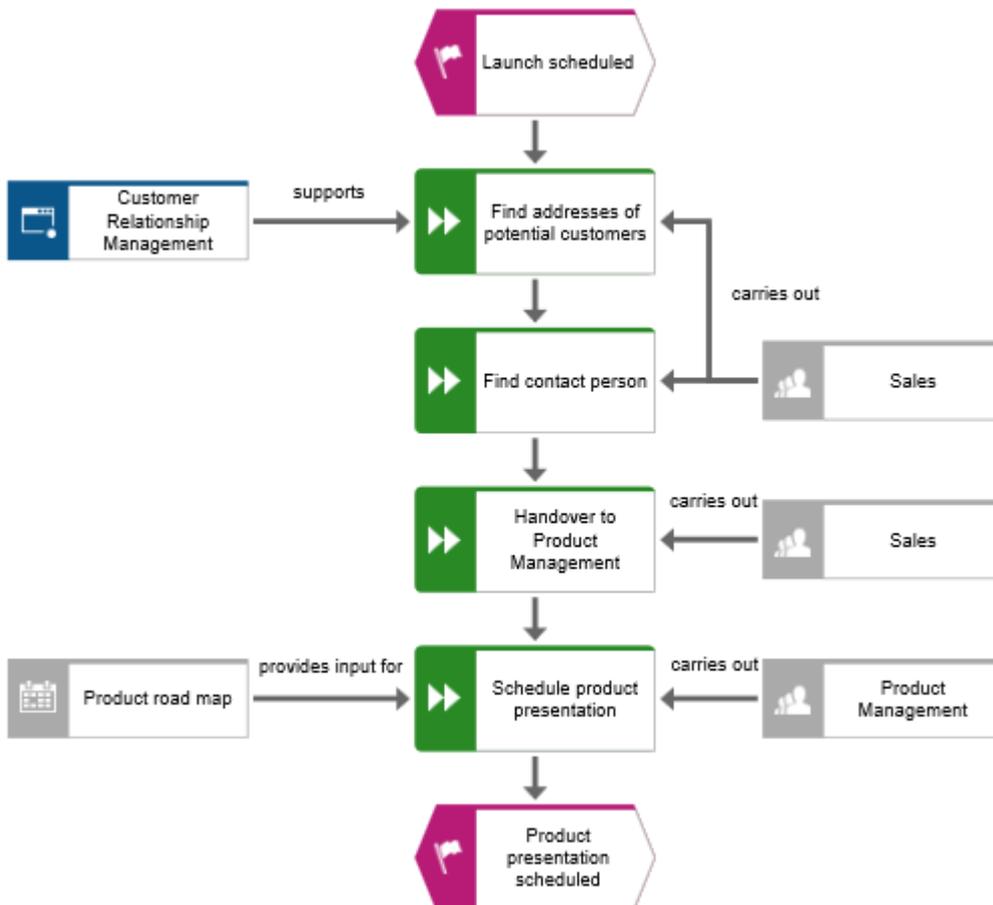
4. Click **OK**. The dialog closes and a preview frame for the attribute to be placed is displayed at the mouse pointer.

5. Drag the attribute to the selected connection and click where you want to place it. It is displayed in the modeling area.



6. Place the attributes for the connections between the functions and the organizational units and supporting objects in the same way. To be able to place the connection attribute **provides input for** between **Product road map** and **Schedule product presentation** close to the connection, click on the object **Customer Relationship Management**, press the **Ctrl** key, and click on **Product road map**. Release the **Ctrl** key and drag the selected objects to the left.

You have completed the model. Your model now looks like this:



4.5.2.1.4.5 Save model

To save your work, click  **Save** in the **Start tab** bar.

The model is saved and you are informed about the result.



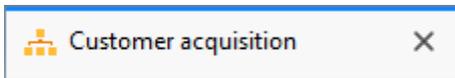
Model 'Customer acquisition' was successfully saved. x

4.5.2.1.4.6 Close model

You have created the model. Now you can close it.

Procedure

1. Click  **Close** on the model tab.



If you have not yet saved the model, an information dialog opens. Depending on the browser, various buttons are offered to close the dialog and return to the tab for saving.

2. For example, click **Stay on Page** and save the model (page 769).
3. Click  **Close** on the model tab again.

The model tab is closed.

4.5.2.1.5 Output model

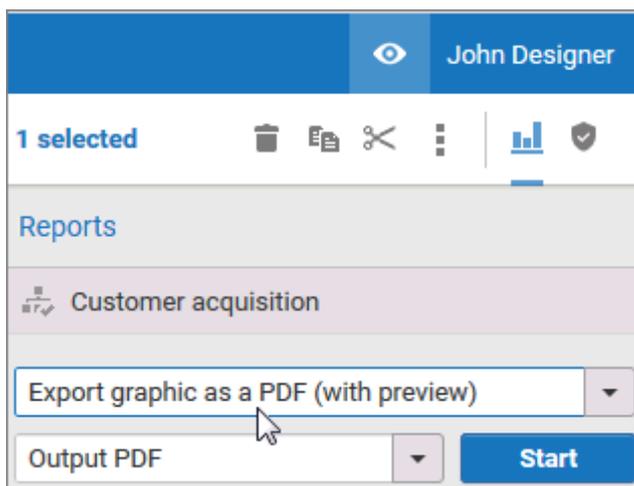
You can create a PDF file of your model.

Procedure

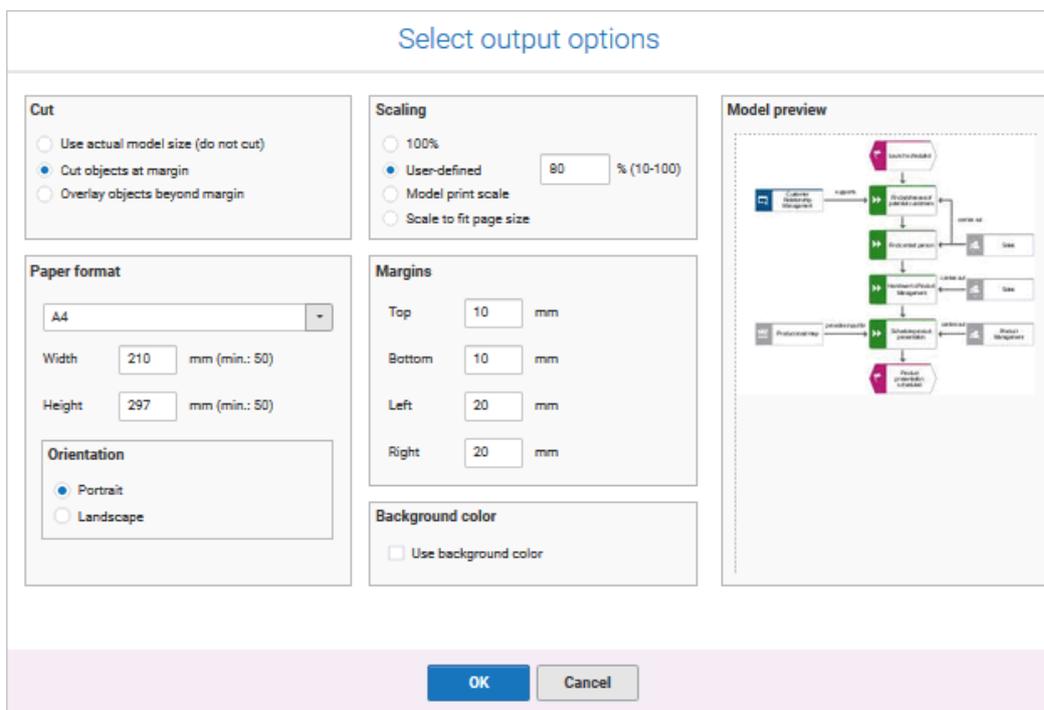
1. After closing the model tab, activate the **ARIS Connect** tab if it is not already activated.
2. Activate the check box of the **Customer acquisition** model.



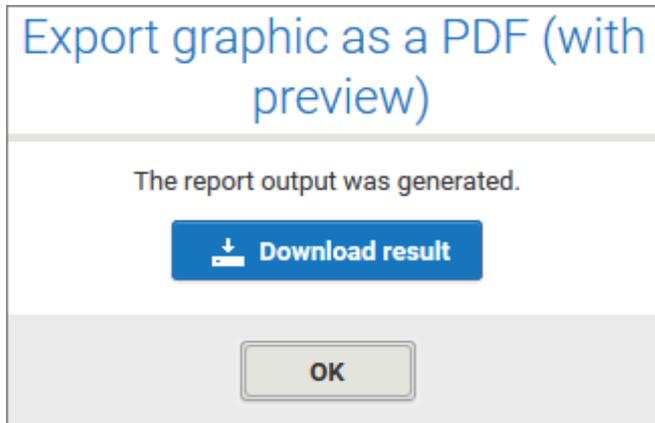
3. Click **Reports**. The **Reports** bar opens.
4. Select the report **Export graphic as a PDF (with preview)**.



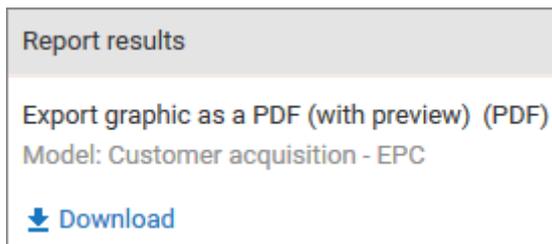
5. Click **Start**. The report is executed and the **Select output options** dialog opens.



6. Set up the output. For example, you can specify that objects lying on margins should be cut or that the output model size should be 80 %.
7. Click **OK**.
8. The PDF file is created. In the **Reports** bar, the report execution is listed. The result dialog opens and you can download the PDF file.



9. Click **Download result**. Depending on your browser settings, the PDF file is saved in your **Download** folder or you can select the folder in which you want to save the PDF file. The PDF file is downloaded.
10. If you want not to download the PDF file immediately, you can close the result dialog and download the PDF file later from the **Reports** bar.



You have created a PDF file from your model.

4.5.2.2 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.

4.5.2.2.1 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.

4.5.2.2.2 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.

4.5.2.2.3 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 848) 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.

4.5.2.2.4 Customize Attributes tab

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

Procedure

1. Click  **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 868) 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. If you want to add only specified attributes, enable the **Show specified attributes only** check box. You can restrict the result of displayed attributes using a search term.
6. Enter a search term for the attributes you want to display. The attribute type groups that contain attributes whose names contain the term you entered are expanded and the attributes are displayed.
7. Enable the check boxes of the relevant attributes.
8. Click **OK**. The selected attributes are added to the **Attributes** tab.
9. Click  **More** next to the attribute whose visibility you want to specify.
10. 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**.
11. Click  **Hide, if not specified** if you want the attribute to be displayed on the **Attributes** tab only if a value has been specified.
12. Click  **Place attribute** and the relevant position in the modeling area if you want the attribute value to be displayed in the model.
13. 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 on the **Attributes** tab are displayed according to your settings.

4.5.2.2.5 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 848) 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 775), 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.

4.5.2.2.6 Configure mini toolbar

You can define which object symbols the mini toolbar (page 848) 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 775) the selected object symbols are available.

4.5.2.2.7 Enable or disable Smart Modeling

You can enable or disable Smart Modeling that provides automatic modeling features (page 816), such as creating space for new objects, placing objects, and reconnecting connections.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Modeling area** > **Smart Modeling**. The check box is enabled () and the Smart Modeling can be used. Keep the setting if you want to leave Smart Modeling enabled.
3. To disable Smart Modeling, click  **Modeling area** > **Smart Modeling**. The check box is disabled.

You have enabled or disabled Smart Modeling.

4.5.2.2.8 Enable and disable Guided Modeling

You can enable or disable Guided Modeling (page 849), which uses lines and arrows to help you place objects or connections (page 833) in the modeling area.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Modeling area** > **Show guides**. The check box is enabled () and the guides for placing items are shown in the modeling area.
3. To disable the guides, click  **Modeling area** > **Show guides**. The check box is disabled.

You have enabled or disabled the guides for Guided Modeling.

Set up default distance for Guided Modeling

What is Guided Modeling for?

4.5.2.2.9 Use or hide grid

If the grid is hidden, you can show and use it in the modeling area (page 779). When you place or move model items (page 829), they are inserted or moved according to the grid width. This facilitates the orderly placement of model items.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Modeling area** > **Use grid**. The check box is enabled () and the dot grid is displayed in the modeling area. Model items are placed and moved according to the grid width.
3. To hide the grid, click  **Modeling area**> **Use grid**. The check box is disabled. The dot grid is hidden and model items (page 822) are placed or moved pixel by pixel.

You have enabled or disabled the grid.

4.5.2.2.10 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.

4.5.2.2.11 Apply model template

You can apply a template (page 1058) to a model and thus, change its appearance as well as its attribute placements in the modeling area (page 779) at once automatically.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click the required template.

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

4.5.2.2.12 Reset model template

You can reset the appearance of a model for which a template (page 1058) was used to the ARIS default appearance. Color and size changes and attribute placements assigned by templates are removed.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click **Reset**.

The content of the modeling area (page 779) is adjusted immediately.

4.5.2.2.13 Valuable information

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

4.5.2.2.13.1 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 820), 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 936), **Semantic checks** (page 985), 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 modeling area 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 785). 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 842).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 844).

FORMAT TAB BAR

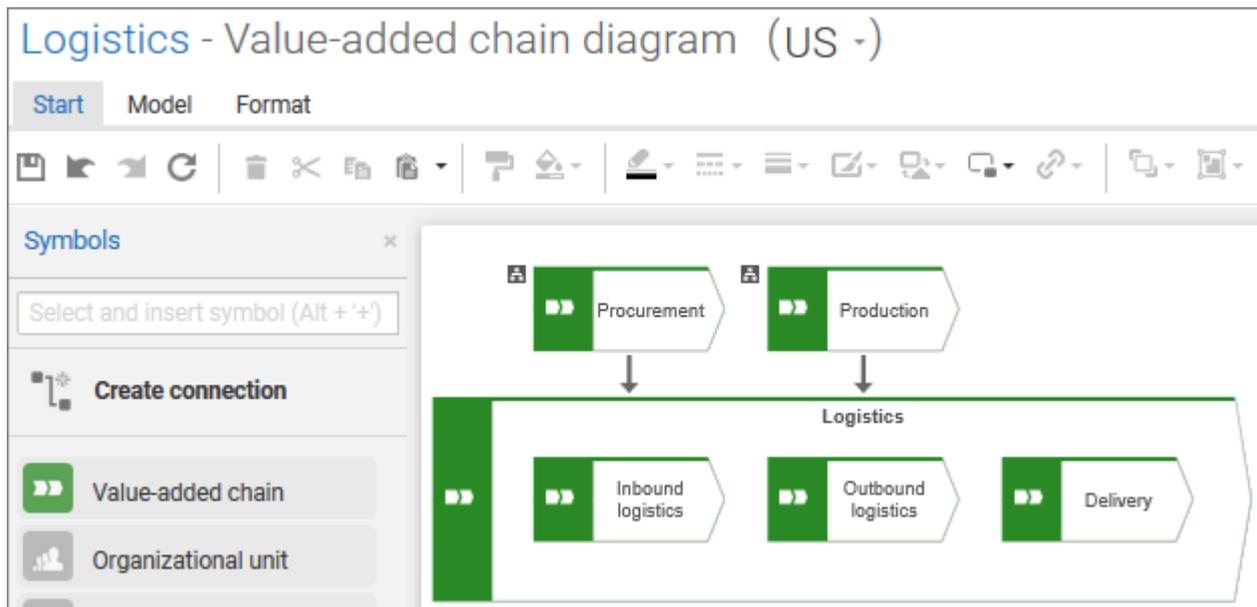
The **Format** tab bar groups the functions related to the presentation of written data in models (page 845).

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 847).

MODELING AREA

The model items are arranged in the modeling area. 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.



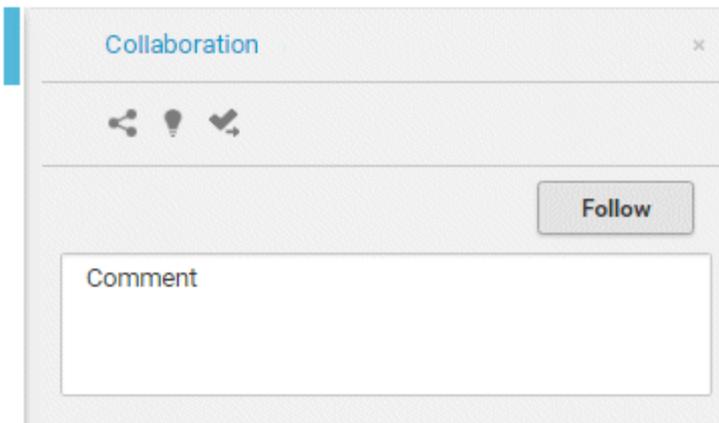
SEARCH BAR

Click  **Search** in the bar buttons to show the **Search** bar that you can use to have objects selected in the model (page 865).



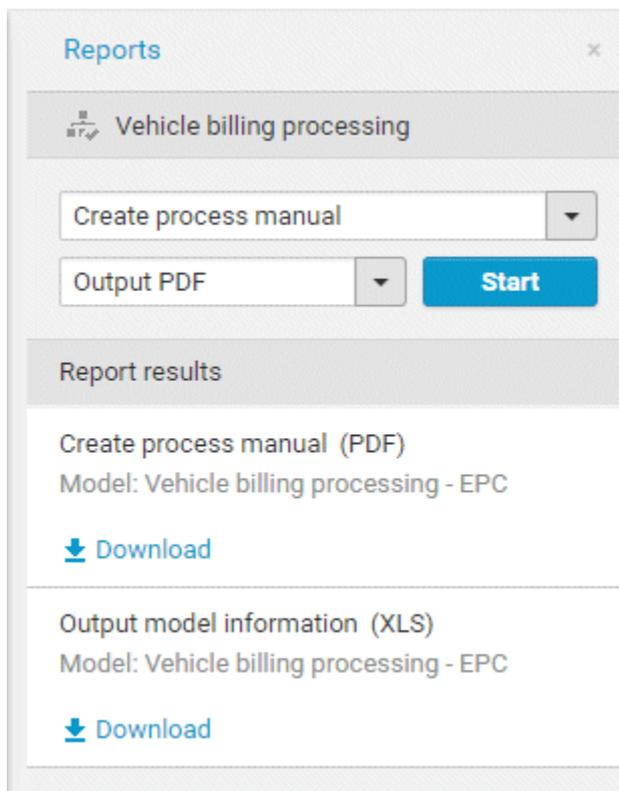
COLLABORATION BAR

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 908).



REPORTS BAR

Click  **Reports** in the bar buttons to show the **Reports** tabs and generate reports (page 910).



PROPERTIES BAR

Click **i Properties** in the bar buttons to show the **Properties** bar where you can edit attributes (page 832), or view occurrences (page 837) and relationships of objects (page 838), for example.

Properties			
Attributes	Documents	Occurrences	Relationships
Name	Value		
Name	Allow discount		
Type	Function [Function]		
Time of generation	5/7/2019, 6:41:39 PM		
Creator	w.becker		
Last change	9/14/2019, 3:26:38 PM		
Last user	system		
 Add...  Edit language			

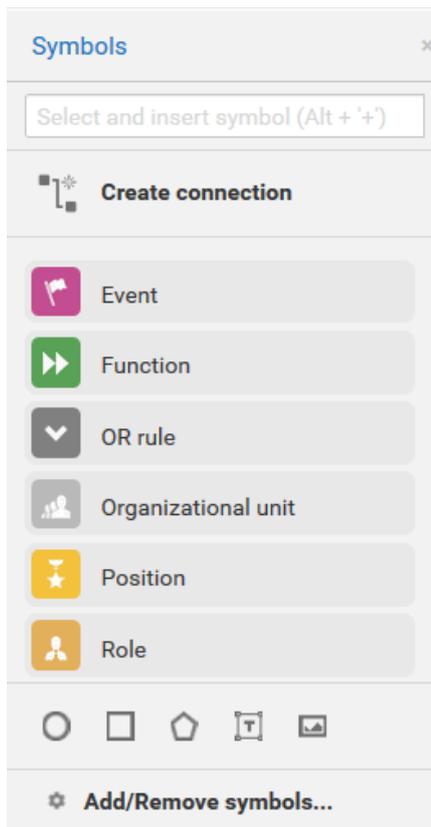
SEMANTIC CHECKS BAR

Click **✓ Semantic checks** in the bar buttons to show the **Semantic checks** bar where you can run semantic checks for a model (page 985) or for one or more objects (page 986). Among other things, the toolbar allows you to restrict the view to errors, warnings, or notes (page 987).

Rules for organizational elements			
#	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 822), graphic objects (page 882), and text for insertion into the modeling area. It also allows you to filter the available object symbols by entering names and create connections between (page 833) objects.



DISPLAY BAR

The Display bar is located at the bottom of the modeling area. You can use this bar to quickly define which model areas are to be displayed in the visible window pane (page 777).

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).



4.5.2.2.13.2 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 785). 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 842).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 844).

FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 845).

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 847).

4.5.2.2.13.3 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 912) is inserted. Click the arrow next to the **Paste** icon if you want to paste a definition copy.

4.5.2.2.13.4 Keyboard shortcuts for ARIS Connect Designer

The following shortcuts are available in ARIS Connect Designer (page 750).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Alt	Temporarily switches off Guided Modeling and grid (page 825) when you drag items.
Alt + down arrow	Moves selected objects down four grid lines.
Alt + F4	Closes the web browser. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Alt + left arrow	Moves selected objects four grid lines to the left.
Alt + - (minus)	Inserts an optional hyphen (page 827) at the cursor position in a text.
Alt + right arrow	Moves selected objects four grid lines to the right.
Alt + up arrow	Moves selected objects up four grid lines.
Backspace	Removes selected object symbols or deletes selected items, such as free-form text and graphic objects.
Ctrl + A	Selects all items.
Ctrl + C	Copies selected items to the clipboard. This enables you to paste copied items from the clipboard into models/diagrams and into other Windows programs.
Ctrl + down arrow	Moves selected items downwards by increments of one pixel.
Ctrl + End	Displays the bottom right pane of the modeling area.
Ctrl + Enter	Inserts a line break for text attributes, such as free-form texts, object names, etc.
Ctrl + F	Opens the Find bar.
Ctrl + F4	Closes the model tab. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Ctrl + Home	Displays the upper left pane of the modeling area.
Ctrl + left arrow	Moves selected items to the left by increments of one pixel.
Ctrl + Page down	Switches to the next web browser tab from left to right if your web browser supports changing tabs using the keyboard.

Shortcut	Action
Ctrl + Page up	Switches to the next web browser tab from right to left if your web browser supports changing tabs using the keyboard.
Ctrl + right arrow	Moves selected items to the right by increments of one pixel.
Ctrl + S	Saves your changes.
Ctrl + Shift + V	Inserts a definition copy of an object if an object is in the clipboard.
Ctrl + up arrow	Moves selected items upwards by increments of one pixel.
Ctrl + V	Pastes the content of the clipboard, if this is content that can be placed in the modeling area. If an object is in the clipboard, an occurrence copy of the object is inserted.
Ctrl + X	Cuts selected items and copies them to the clipboard.
Ctrl + Y	Redoes editing steps that were undone.
Ctrl + Z	Undoes preceding editing steps.
Del	Removes selected object symbols or deletes selected items, such as free-form text and graphic objects.
Down arrow	Moves the modeling area contents up (the contents of the modeling area that are further down will be displayed).
Enter	Ends the input.
ESC	Removes selections and closes dialogs. Closing dialogs with the ESC key is the same as clicking Cancel .
F2	Selects the selected text attribute of an element or the object name of a selected object for editing.
F3	Opens the Find bar. When the find bar is open, pressing the F3 key jumps to the next occurrence of the searched term.
F5	Updates the current view based on the database changes.
F11	Turns full screen mode on or off if your web browser supports full screen.
Left arrow	Moves the modeling area contents to the right (the contents of the modeling area that are further left will be displayed).
- (minus)	Reduces the display of the model content by 10%.
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
+ (plus)	Enlarges the display of the model content by 10%.

Shortcut	Action
Right arrow	Moves the modeling area contents to the left (the contents of the modeling area that are further right will be displayed).
Shift	Keeps the shapes of a circle and a square (page 885) when you place and scale the graphic objects Circle/Ellipse and Square/Rectangle .
Shift + Page down	Moves the contents of the modeling area page by page to the right (the contents of the modeling area that are further left will be displayed).
Shift + Page up	Moves the contents of the modeling area page by page to the left (the contents of the modeling area that are further right will be displayed).
Up arrow	Moves the modeling area contents down (the contents of the modeling area that are further up will be displayed).

4.5.2.2.13.5 Keyboard shortcuts for the Select attribute dialog

The following shortcuts are available in the **Select attribute** dialog with which you can add attributes on the Attributes tab (page 867).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Down arrow	Moves the focus down to the next attribute if the focus is in the attribute list field.
End	Moves to the lower attributes if the focus is in the attribute list field.
Enter	Closes the dialog and adds the selected attributes when the focus is on the OK button, or closes the dialog and adds no attributes when the focus is on the Cancel button.
ESC	Closes the dialog without changes. Pressing this key corresponds to clicking Cancel .
F5	Updates the current view based on the database changes. The Select attribute dialog is closed without changes.
F11	Turns full screen mode on or off if your web browser supports full screen. The Select attribute dialog remains open.
Home	Moves to the upper attributes if the focus is in the attribute list field.
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
Space	Toggles the check box of the attribute on which the focus is located.
Tab	Jumps from the Search field to the Show specified attributes only check box, the attribute list field, in the attribute list, the OK button, and the Cancel button.
Up arrow	Moves the focus up to the next attribute if the focus is in the attribute list field.

4.5.2.3 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>).

4.5.2.3.1 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 421)** 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 793) 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. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new model. When you select the group, its contents are displayed in the right pane.
5. In the upper right, click  **Create model**. The corresponding dialog opens.

6. In the **Model name** box specify the name that the new model is to be created with in the selected group.
7. Click the **Model type** box and enter part of the model type name. All model types (page 793) are displayed whose names contain the term you entered.
8. Select the required model type.
9. Click **OK**.

The new model is created and opened in a new tab. You can set up ARIS Connect Designer (page 772) and model the model.

4.5.2.3.2 Create group

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

Procedure

1. Click  **Repository**.
2. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Navigate to the database group in which you want to create a new group. When you select the group, its contents are displayed in the right pane.
5. In the upper right, click  **Create group**. The corresponding dialog opens.
6. Enter the required name in the **Name** box.
7. Click **OK**.

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

4.5.2.3.3 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 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 421)** area. The corresponding dialog opens.
4. Click the **Model type** box and enter part of the model type name. All model types (page 793) 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.

4.5.2.3.4 Valuable information

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

4.5.2.3.4.1 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 798).

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 ecosystem
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
Matrix model
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

4.5.2.3.4.2 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.

4.5.2.3.4.3 Which method filter is used?

When you open and edit models, your work is based on one of the method filters (page 1058) 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.

4.5.2.3.4.4 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.

4.5.2.4 Model

ARIS Connect Designer assists you in editing models, for example, by providing Guided Modeling (page 776), a grid (page 777), a mini toolbar (page 831), graphic objects (page 882), or in-place formatting options (page 832).

4.5.2.4.1 Modeling by drag and drop

This section describes how to model using drag and drop. This includes placing objects between existing objects (page 802) and rearranging objects (page 803).

4.5.2.4.1.1 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 799) by the method filter (page 798) in use.

Procedure

From Groups or the Processes area

1. If you are authorized to use multiple databases, select the database (page 411) containing the contents you want to access.
2. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
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, select the database (page 411) containing the contents you want to access.
2. Click the **Search** box (page 1044) and enter a term that is included in the model name. All models containing this term are listed immediately.
3. In the **Models** 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, select the database (page 411) containing the contents you want to access.
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.

4.5.2.4.1.2 Place object with drag and drop

You can place objects from the Symbols using drag and drop.

Procedure

1. Open the Symbols bar if it is not already open by clicking  **Symbols**.
2. Click the object symbol you want to place and hold down the mouse button.
3. Drag the mouse pointer to the position you want to place the object in the modeling area. If you have enabled Guided Modeling (page 776), lines and arrows inform you of the orientation and distance of the dragged object from adjacent items.
4. Release the mouse button. The object is placed and its name is selected for overwriting.
5. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).
6. Click in the modeling area or press **Enter**.

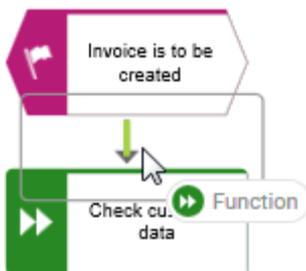
You have placed an object from the **Symbols** bar with drag and drop. You can also place objects with drag and drop using Smart Modeling (page 813).

4.5.2.4.1.3 Place object between existing objects

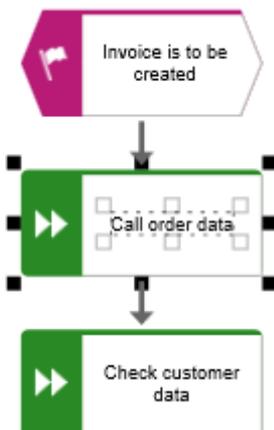
You can quickly place objects between existing objects using drag and drop.

Procedure

1. Open the Symbols bar if it is not already open by clicking  **Symbols**.
2. Click the object symbol you want to place and hold down the mouse button.
3. Drag the preview frame between the objects where you want to place the object. If you have enabled Guided Modeling (page 776), lines and arrows inform you of the orientation and distance of the dragged object from adjacent items. The connection on which the preview frame is placed is highlighted in green.



4. Release the mouse button. The object is placed, the lower objects are moved, and the connections are newly linked. The name of the new object is selected for renaming.
5. Enter a name. If you enter an existing name, existing objects are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).



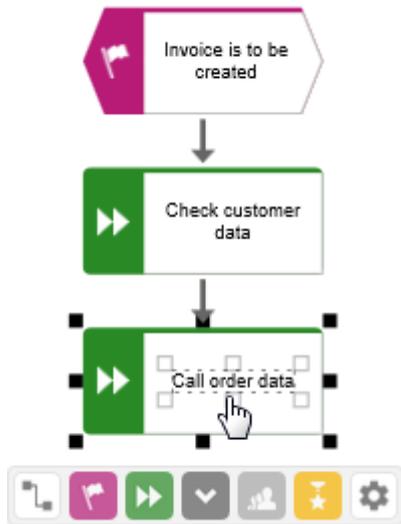
You have quickly placed an object between existing objects. You can also place objects with drag and drop using Smart Modeling (page 813).

4.5.2.4.1.4 Rearrange objects with drag and drop

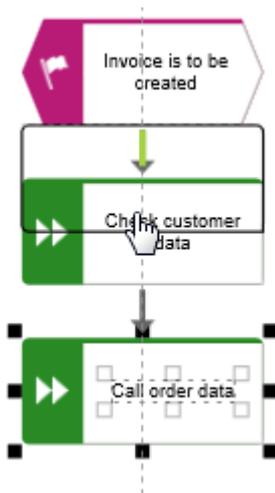
You can easily Rearrange objects with drag and drop.

Procedure

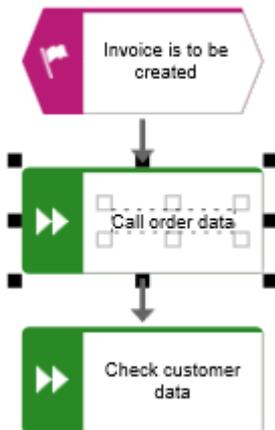
1. Click the object you want to move and hold down the mouse button.



2. Drag the preview frame between the objects where you want to place the object. If you have enabled Guided Modeling (page 776), lines and arrows inform you of the orientation and distance of the dragged object from adjacent items. The connection on which the preview frame is placed is highlighted in green.



3. Release the mouse button. The object is placed, the lower objects are moved, and the connections are newly linked.



You have rearranged objects using drag and drop. You can also place objects with drag and drop using Smart Modeling (page 813).

4.5.2.4.1.5 Under what conditions can an object be placed between existing objects?

If you drag an object onto a connection and resize the object at the same time (page 862), it cannot be placed between existing objects (page 802). In this case, you must connect the objects manually.

ADDITIONAL CONDITIONS

- Only one object is dragged, pasted, or placed.
- The object to be placed is only dragged onto one connection (page 802).
- Source and target object are not placed in an object (page 864).
- Both the connection between the source and target objects is structurally relevant (process-flow) and the source and target objects are structurally relevant. (page 1061)

4.5.2.4.2 Use Smart Modeling

This section describes how to model by drag and drop. You can

4.5.2.4.2.1 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 799) by the method filter (page 798) in use.

Procedure

From Groups or the Processes area

1. If you are authorized to use multiple databases, select the database (page 411) containing the contents you want to access.
2. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
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, select the database (page 411) containing the contents you want to access.
2. Click the **Search** box (page 1044) and enter a term that is included in the model name. All models containing this term are listed immediately.
3. In the **Models** 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, select the database (page 411) containing the contents you want to access.
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.

4.5.2.4.2.2 Enable or disable Smart Modeling

You can enable or disable Smart Modeling that provides automatic modeling features (page 816), such as creating space for new objects, placing objects, and reconnecting connections.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Modeling area** > **Smart Modeling**. The check box is enabled () and the Smart Modeling can be used. Keep the setting if you want to leave Smart Modeling enabled.
3. To disable Smart Modeling, click  **Modeling area** > **Smart Modeling**. The check box is disabled.

You have enabled or disabled Smart Modeling.

4.5.2.4.2.3 Set the default distance for Smart Modeling

You can set the default distance for objects that are placed when modeling with Smart Modeling. Please note that this procedure will layout the current model, but you can easily undo the layout as described below. Keep in mind that the change of the default distance affects future layouts operations.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Layout**. The layout options are provided.
3. Enter values for **Horizontal item spacing** and **Vertical item spacing** (page 995).
4. Keep the **Use as default** check box enabled.
5. Click **OK**. The model is layouted.
6. If the new layout does not meet your requirements, click  **Undo**. The layout operation is undone and the model looks as before.

The entered item spacing is set as the default distance for objects you place using Smart Modeling (page 808).

4.5.2.4.2.4 Place object

With Smart Modeling (page 776), you can easily place new and existing objects (page 813).

Procedure

PLACE A DIRECTLY ACCESSIBLE OBJECT

1. Select the object you want to connect with a new object. The  **Insert** icons are displayed (page 817).
2. Click the  **Insert** icon of the direction in which you want to place the object. The **Smart Modeling** toolbar (page 816) opens.
3. Click an object shown on the **Smart Modeling** toolbar you want to place. The object is inserted in the direction you selected the  **Insert** icon and a connection is created to the previously selected object. The name of the new object is selected for renaming.
4. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).
5. If selectable connections are displayed (page 818), click another connection or click in the modeling area to obtain the current connection.

With Smart Modeling, you have placed an object at the specified distance (page 807).

PLACE AN OBJECT WITH THE FIND SYMBOLS BOX

1. Select the object you want to connect with a new object. The  **Insert** icons are displayed (page 817).
2. Click the  **Insert** icon of the direction in which you want to place the object. The **Smart Modeling** toolbar (page 816) opens.
3. Click the **Find symbols** box and enter the name of the object symbol you want to place.
4. Enter a term that is contained in the name of the object symbol you want to place. All object symbols containing the term are listed.
5. Click the object you want to place. The object is inserted in the direction you selected the  **Insert** icon and a connection is created to the previously selected object. The name of the new object is selected for renaming.
6. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).
7. If selectable connections are displayed (page 818), click another connection or click in the modeling area to obtain the current connection.

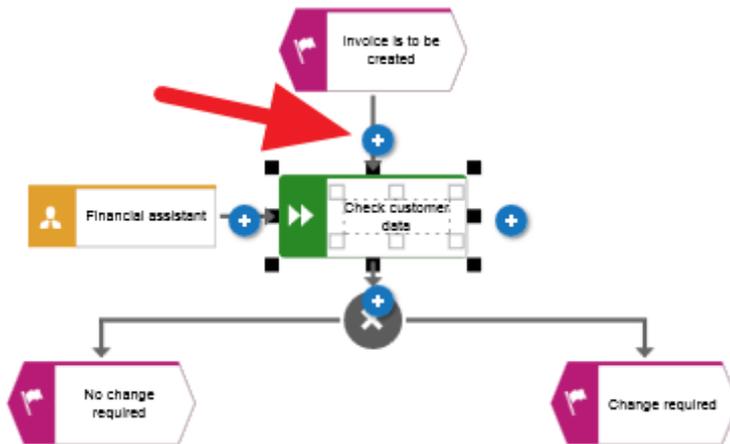
With Smart Modeling, you have placed an object at the specified distance (page 807). The object symbol of the placed object is added to the **Smart Modeling** toolbar for later use.

4.5.2.4.2.5 Place object between existing objects

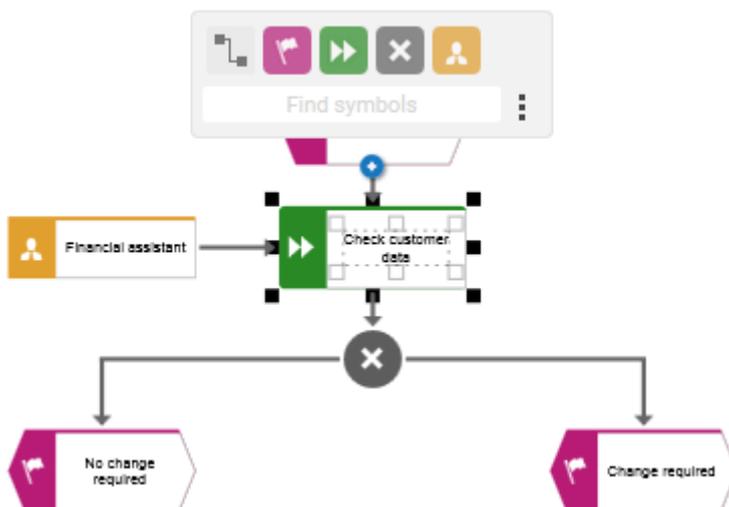
With Smart Modeling (page 776), you can quickly place objects between existing objects.

Procedure

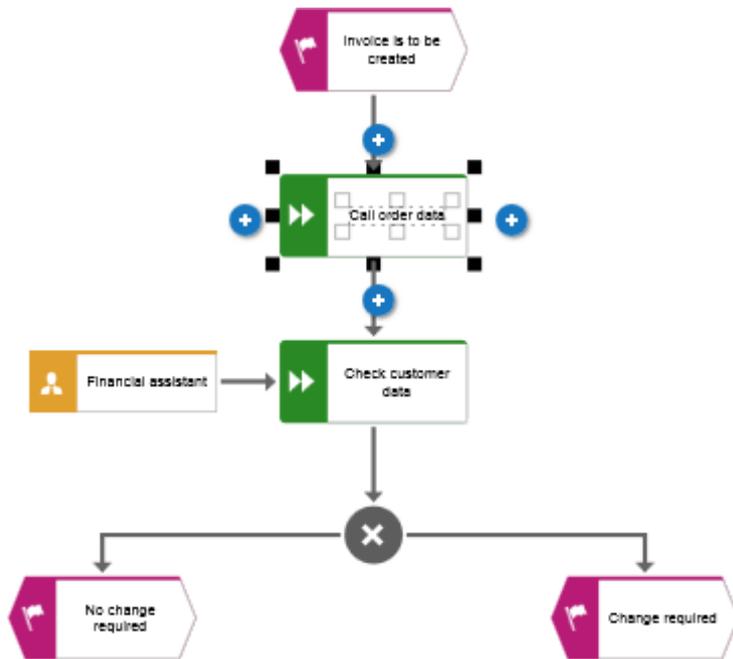
1. Select the object that is connected to another object. The  **Insert** icons are displayed (page 817).
2. Click the  **Insert** icon of the direction in which the selected object is connected to the other object.



The **Smart Modeling** toolbar opens.



3. Click the object you want to place between the existing objects. The object is placed between the existing object and new connections are created between the three objects.
4. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).



With Smart Modeling, you have quickly placed an object between existing objects.

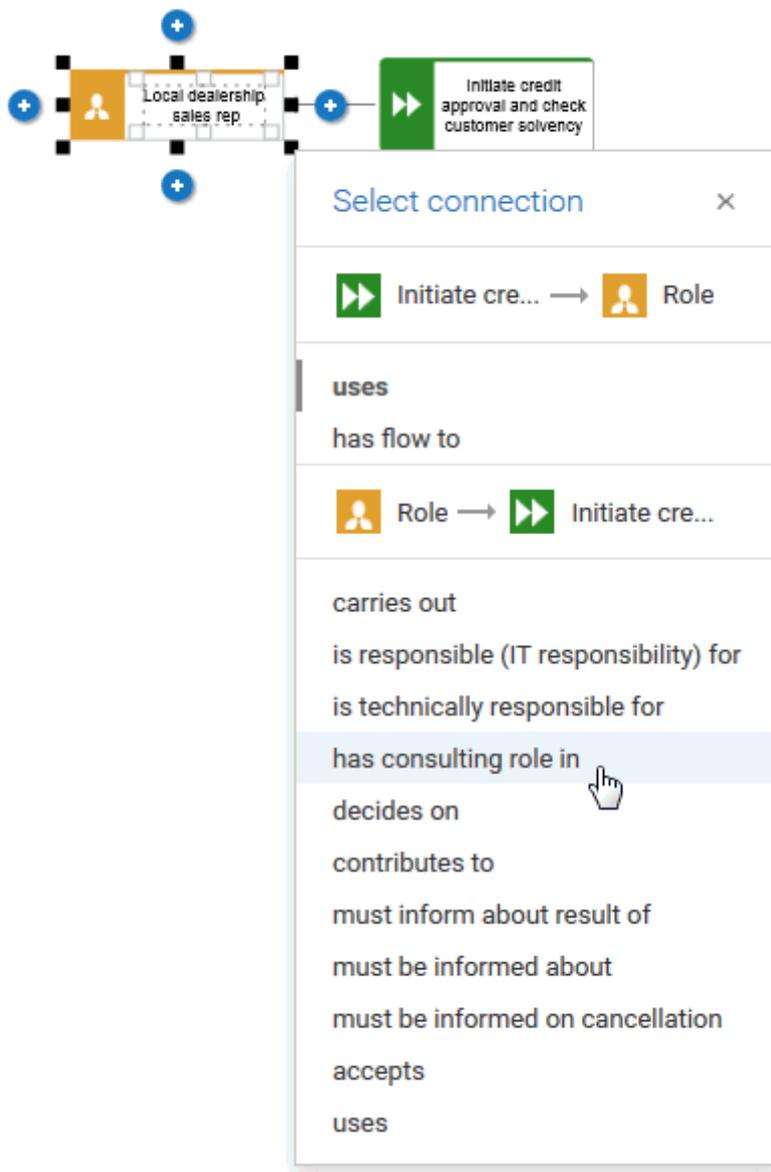
4.5.2.4.2.6 Place multiple satellite objects

With Smart Modeling (page 776), you can easily place multiple satellite objects (page 1061). The following example shows how to place multiple satellite objects for an object of type **Function**.

Procedure

1. Select the object you want to connect with multiple satellite objects. The  **Insert** icons are displayed (page 817).
2. Click the  **Insert** icon of the direction in which you want to place the object. The **Smart Modeling** toolbar (page 816) opens.
3. Click the object symbol shown on the **Smart Modeling** toolbar you want to place, for example, **Role**. The object is inserted in the direction you selected the  **Insert** icon and a connection is created to the previously selected object. The name of the new object is selected for renaming.
4. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).

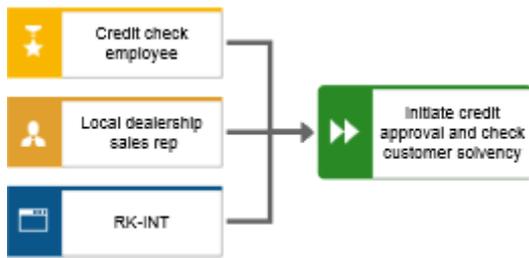
5. Select a connection, for example, **has consulting role in**.



The satellite object is inserted.

6. Reselect the object you want to connect with multiple satellite objects.
7. Click the  **Insert** icon in the same direction in which you placed the previous object, and click the **Application system type** object symbol. The object is placed below the satellite that was placed first.
8. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).
9. Select a connection, for example, **supports**.
10. Reselect the object you want to connect with multiple satellite objects.
11. Click the  **Insert** icon in the same direction in which you placed the previous object, and click the **Position** object symbol. The object is placed above the other satellites.

12. Select a connection, for example, **carries out**. The satellite object is inserted.



With Smart Modeling, you have placed multiple satellites.

4.5.2.4.2.7 Place object with drag and drop

Objects placed with Smart Modeling are placed according to the set default distance (page 807). If you want to place a smart object in a specific position, you can place it via drag and drop in the modeling area.

Procedure

1. Select the object that you want to connect to a new object. The  **Insert** icons are displayed (page 817).
2. Click the  **Insert** icon on the side of the selected object to which you want to attach the connection. The **Smart Modeling** toolbar (page 816) opens.
3. Click the object symbol you want to place and hold down the mouse button.
4. Drag the mouse pointer to the position you want to place the object in the modeling area. If you have enabled Guided Modeling (page 776), lines and arrows inform you of the orientation and distance of the dragged object from adjacent items.
5. Release the mouse button. The object is placed and its name is selected for overwriting.
6. Enter a name. If you enter an existing name, existing objects (page 813) are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).
7. If selectable connections are displayed (page 818), click another connection or click in the modeling area to obtain the current connection.

With Smart Modeling, you have placed an object with drag and drop.

4.5.2.4.2.8 Place an existing object

With Smart Modeling (page 776), you can easily place existing objects.

Procedure

1. Place an object (page 808). The name of the new object is selected for renaming.
2. Enter a term. As soon as you have entered two or more letters, all objects in the database that are of the same type as the selected object and whose names contains the entered term are listed.
3. Click the name of the object you want to place.

With Smart Modeling, you have placed the symbol of an existing object in the modeling area.

4.5.2.4.2.9 Connect objects

When you use Smart Modeling (page 776), some connections (page 818) are automatically created between the selected and the newly created objects (page 808). Objects are also reconnected when you place new objects between existing objects (page 809). You can also connect unconnected objects using the **Smart Modeling** toolbar (page 816).

Procedure

CONNECT OBJECTS BY CLICKING

1. Select the object you want to connect with an object that has already been placed. The  **Insert** icons are displayed.
2. Click the  **Insert** icon on the side of the selected object to which you want to attach the connection. The **Smart Modeling** toolbar (page 816) opens.
3. In the **Smart Modeling** toolbar, click  **Connection**.
4. Move the mouse pointer to the border of the target object.
5. Click the connection anchor point to which you want to attach the connection to the target object. If more than one connection can be created between the objects, the selectable connections are displayed (page 818) and the currently used connection is highlighted in bold.
6. If you want to use another connection, click the corresponding name, otherwise click on the modeling area. The connection selection is closed.

You have created a connection using the **Smart Modeling** toolbar.

CONNECT OBJECT BY DRAG AND DROP

1. Select the object you want to connect with an object that has already been placed. The  **Insert** icons are displayed.
2. Click the  **Insert** icon on the side of the selected object to which you want to attach the connection and hold the mouse button down.
3. Move the mouse pointer to the border of the target object.
4. Click the connection anchor point to which you want to attach the connection to the target object. If more than one connection can be created between the objects, the selectable connections are displayed (page 818) and the currently used connection is highlighted in bold.
5. If you want to use another connection, click the corresponding name, otherwise click on the modeling area. The connection selection is closed.

You have created a connection using the **Smart Modeling** toolbar.

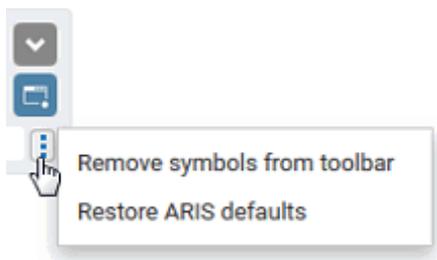
4.5.2.4.2.10 Configure the Smart Modeling toolbar

You can configure the **Smart Modeling** toolbar (page 816) for symbol type per model type to provide direct access to the objects you want to connect with that object type.

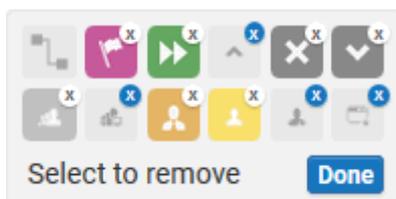
The object symbols you place using the search box (page 808) are automatically added to the **Smart Modeling** toolbar of the corresponding object symbol for later use.

Procedure

1. Select an object symbol of an object of the type you want to configure. The  **Insert** icons are displayed.
2. Click one of the  **Insert** icons. The **Smart Modeling** toolbar (page 816) opens.
3. In the **Smart Modeling** toolbar, click **Configure**.



4. To remove individual object symbols, click **Remove symbols from toolbar**. The available object symbols are marked by remove icons.
5. Click the icons you want to remove. They are grayed and their remove icons are highlighted.



6. If you want to exclude an already selected object symbol from the removal list, click it again.
7. To complete the removal, click **Done**. The selected objects symbols are removed.
8. To reset direct access to object symbols of the bar to the default setting, click **Configure** and **Restore ARIS defaults**. The **Smart Modeling** toolbar provides the object symbols for direct access that are default set by ARIS.

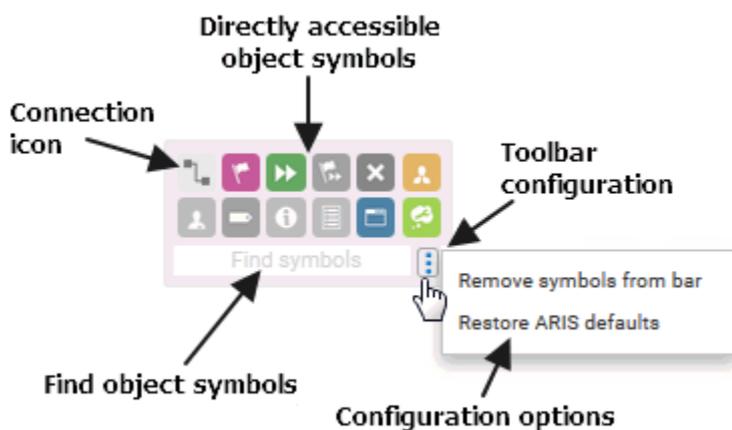
You have configured the **Smart Modeling** toolbar.

4.5.2.4.2.11 Valuable information

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

4.5.2.4.2.11.1 What is the Smart Modeling toolbar for?

The **Smart Modeling** toolbar provides functionality for the simple and very fast placement of objects. It provides objects that are directly accessible and a search box for finding and placing object symbols that are not listed in the toolbar. In addition, you can use the smart object toolbar to create connections to existing objects.



When you place an object using the search box, the symbol of the placed object is added to the list of directly accessible objects for the selected object type.

You can configure the toolbar (page 815) for each object type so that you always have access to the objects you want to connect with it.

4.5.2.4.2.11.2 When are Insert icons displayed?

Under the following conditions insert icons are displayed.

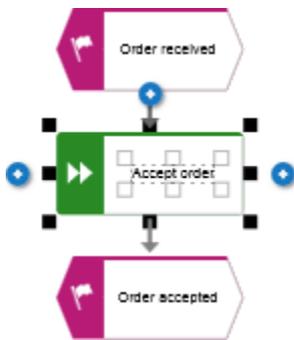
ENOUGH SPACE

There must be enough space to arrange  **Insert** icons around an object symbol. Therefore, the model display (page 777) must be large enough to display  **Insert** icons in the model in addition to the objects.

Thus,  **Insert** icons are displayed when Smart Modeling is enabled and the model display is equal or greater than 60 %.

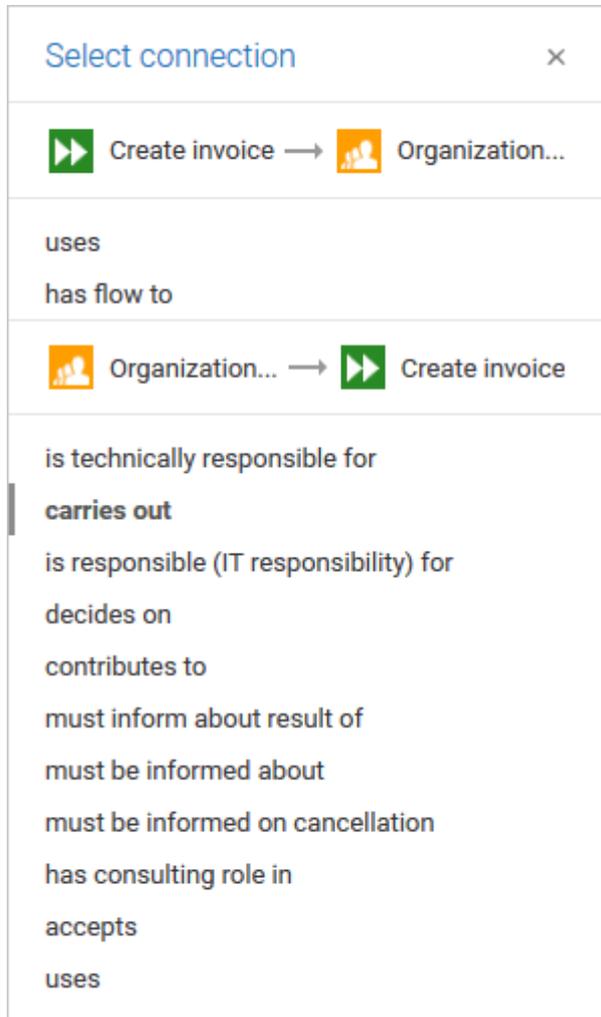
PERMISSION TO USE A CONNECTION

The user must have a privilege to use the outgoing connection of the selected object. If a user does not have the privilege because the used filter does not allow the connection, the  **Insert** icon for the corresponding direction is not displayed.



4.5.2.4.2.11.3 How are connections created when using Smart Modeling?

If you place structurally relevant objects (page 1061), the connection is chosen automatically. If you place satellites (page 1061), the selectable connections are displayed. The currently used connection is highlighted in bold.



4.5.2.4.3 Basic modeling

This section describes the basic procedures for editing models.

4.5.2.4.3.1 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 799) by the method filter (page 798) in use.

Procedure

From Groups or the Processes area

1. If you are authorized to use multiple databases, select the database (page 411) containing the contents you want to access.
2. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
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, select the database (page 411) containing the contents you want to access.
2. Click the **Search** box (page 1044) and enter a term that is included in the model name. All models containing this term are listed immediately.
3. In the **Models** 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, select the database (page 411) containing the contents you want to access.
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.

4.5.2.4.3.2 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 820), 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 772).

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 modeling area 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.

4.5.2.4.3.3 Set up default distance for Guided Modeling

You can set the default distance for Guided Modeling (page 849).

Please note that this procedure will layout the current model, but you can easily undo the layout as described below. Keep in mind that the change of the default distance affects future layouts operations.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Layout**. The layout options are provided.
3. Enter values for **Horizontal item spacing** and **Vertical item spacing** (page 995).
4. Keep the **Use as default** check box enabled.
5. Click **OK**. The model is layouted.
6. If the new layout does not meet your requirements, click  **Undo**. The layout operation is undone and the model looks as before.

The entered item spacing is set as the default distance. When placing objects, the default distance is indicated by the following cursor: 

4.5.2.4.3.4 Place object symbols

You can place object symbols in the modeling area (page 779) in various ways.

Procedure

Using the Symbols bar by clicking

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 modeling area.
 3. Move the mouse pointer to the modeling area. The frame of the object is displayed. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
 4. Click the position in the modeling area 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 modeling area.

Using the Symbols bar by drag and drop (page 801)

Using the selection box in the Symbols bar

Procedure

1. Open the Symbols bar if it is not already open by clicking  **Symbols**.
 2. In the **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. Move the mouse pointer to the modeling area. The frame of the object is displayed. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
 5. Click the position in the modeling area where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
 6. If necessary, overwrite the previous name with the name of your choice and press Enter.
- The object symbol has been inserted in the modeling area.

Using the mini toolbar

Prerequisite

An object symbol has already been placed in the modeling area.

Procedure

1. Click the placed object symbol. The mini toolbar is shown.
 2. In the mini toolbar, click the symbol you want to place in the modeling area.
 3. The **Select connection** box and the outline of the object is displayed. The currently used connection is marked with a preceding bar and is highlighted in bold.
 4. Click on another connection or close the **Select connection** box with **× Close**.
 5. Move the mouse pointer to the position to where you want to insert the object. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
 6. Click the position in the modeling area where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
 7. If necessary, overwrite the previous name with the name of your choice and press Enter.
- The object symbol is placed in the modeling area and linked to the previously selected object symbol using the selected connection.

Using the Smart Modeling toolbar (page 808)

As an occurrence copy

Create a new occurrence for an existing object. This enables you, for example, 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 modeling area.

Procedure

1. Click the placed object symbol and then  **Copy**.
2. Click  **Paste**. Alternatively, press **Ctrl + V**. A frame for the occurrence copy is displayed in the modeling area.
3. Drag the frame to the required position. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
4. Click the position in the modeling area where you want to insert the object symbol.

The object symbol is placed in the modeling area. It represents the object whose object symbol you copied as an occurrence copy (page 1059). 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

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 modeling area.

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 frame for the definition copy is displayed in the modeling area.
3. Drag the frame to the required position. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
4. Click the position in the modeling area where you want to insert the object symbol.

The object symbol is placed in the modeling area. As a definition copy (page 1054) 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.

4.5.2.4.3.5 Temporary switch off of Guided Modeling and grid

You can temporarily switch off of Guided Modeling and the grid when you drag items.

Prerequisite

Guided Modeling (page 776) and/or the grid (page 777) are enabled.

Procedure

1. Select the item you want to drag.
2. Press the **Alt** key.
3. Drag the item.

The item is not "caught" by Guided Modeling and/or the grid and can be moved pixel by pixel. Depending on how you want to align objects, you can turn off the grid (page 777) and align objects using Guided Modeling (page 849) only.

4.5.2.4.3.6 Place occurrence copy

You can place occurrence copies in the modeling area (page 779) in different ways.

Procedure

By drag and drop

Procedure

1. Click the relevant object symbol in the Symbols bar or in the Smart object toolbar and hold down the mouse button.
2. Move the mouse pointer to the modeling area. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
3. Drag the object symbol over a connection or the position in the modeling area where you want to insert the object symbol.
4. Release the mouse button. The object is placed and its name is selected for overwriting.
5. 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.
6. 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 between existing objects (page 802) or in the modeling area (page 801).

By placing an object symbol

Procedure

1. Click the relevant object symbol in the Symbols bar or the mini toolbar.
2. Move the mouse pointer to the modeling area. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
3. Click the position in the modeling area where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. 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.
5. 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 modeling area.

By copying and pasting

Procedure

1. In the modeling area, 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 modeling area.
4. Drag the frame to the required position. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
5. Press the mouse button.

You have placed the occurrence copy.

4.5.2.4.3.7 Create object of the same name

You can create a new object with the same name as an existing object.

Procedure

1. Place an object in the modeling area. The name of the new object is selected for renaming.
2. Enter a name of an existing object.
3. Click in the modeling area or press **Enter**. You are informed that the entered name is already used.
4. In the Create a new object with this name area, click the name you entered.

The new object is created. The existing object and the new object are independent from each other. They have different GUIDs and can have completely different attributes except for the name.

4.5.2.4.3.8 Use optional hyphens

You can insert optional hyphens in texts. These hyphens are displayed only when necessary when texts must be broken up due to, for example, resizing an object. Optional hyphens can be used for attribute texts and free-form texts. The following procedure describes an example use of optional hyphens for the name attribute of an object.

Procedure

1. Click a selected object in the model. The name of the object is selected for editing.
2. Place the cursor at the position at which you want to insert an optional hyphen.
3. Press **Alt + -**. An optional hyphen is inserted and the placeholder for the optional hyphen is displayed (↵).
4. Insert optional hyphens wherever you want to separate the attribute value when you change the size of an object.
5. Click in the modeling background.

The text input box is closed and the optional hyphen placeholders are no longer displayed.

If you now change the size of the object so that the text requires a line break, the text is wrapped at the position of the optional hyphen and a hyphen is automatically inserted at that position.

4.5.2.4.3.9 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**. The frame of the object is displayed.
4. Move the mouse pointer to the relevant position. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
5. Click the position in the modeling area 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.

4.5.2.4.3.10 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**. The frame of the object is displayed.
4. Move the mouse pointer to the relevant position. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
5. Click the position in the modeling area 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.

4.5.2.4.3.11 Move model item

You can place model items in a different position than the existing one using the mouse or using the keyboard.

Using the keyboard, objects in column and row models can be moved only within the columns and rows in which they are placed. If you want to move objects between columns or rows in which the objects are allowed by the method, use the mouse or the **Cut/Copy** functionality.

Procedure

Using the mouse

1. Click the model item, for example, an object symbol or a graphic object and hold down the mouse button.
2. Drag the mouse pointer to the relevant position. The preview frame of the model item is displayed. If you move objects, lines indicate the alignment of the moving object to the placed objects and arrows indicate the distances.
3. Release the mouse button.

If you set a grid, the model item "jumps" to the grid. If multiple model items are selected for moving, they "jump" from one gridline to the next in the grid width you set.

If you want to place a model item in a position outside the visible area, you have a number of options:

- Drag the model item to the edge of the modeling area. The visible area is moved automatically as long as you keep the model item in this position with the mouse button held down.
- Reduce the zoom factor so that the new position will be visible, and drag the model item to the relevant position.

Using the keyboard

1. Select the model item you want to move.
2. Hold down the **Shift** key and press the arrow keys to move the model item in the corresponding direction by increments of one gridline.
3. Hold down the **Ctrl** key and press the arrow keys to move the model item in the corresponding direction by increments of one pixel, regardless of the grid scale set.
4. Hold down the **Alt** key and press the arrow keys to move the model item in the corresponding direction by increments of four gridlines.

You have moved a model item.

4.5.2.4.3.12 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 798) 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 842) 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.

4.5.2.4.3.13 Modeling using the mini toolbar

You can model very effectively using the mini toolbar (page 848). By configuring (page 775) it you are quickly offered the object symbols (page 775) required for your model.

Prerequisite

Smart Modeling is disabled (page 776).

Procedure

1. Click a placed object symbol (page 822). The mini toolbar is shown.
2. In the mini toolbar, click the object symbol you want to place. A preview frame is displayed for the new object.
3. Move the mouse pointer to the modeling area. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
4. Click the position in the modeling area where you want to insert the object symbol. The object symbol is placed together with a connection to the source object and the name field for overwriting.
5. Enter a name. If you enter an existing name, existing objects are offered for selection. You can create a new object, select an existing one, or create a new one with the same name (page 827).
6. Press **Enter**.

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

4.5.2.4.3.14 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 867) 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 870) 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.

4.5.2.4.3.15 Directly format placed attributes

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

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 modeling area. The attribute selection is undone.

You have formatted the placed attribute.

4.5.2.4.3.16 Create connections

You can link objects using connections in different ways in the modeling area (page 779).

Procedure

When placing objects using the mini toolbar

Prerequisite

An object symbol has already been placed in the modeling area.

Procedure

1. Click the placed object symbol. The mini toolbar is shown.
 2. In the mini toolbar, click the symbol you want to place in the modeling area.
 3. The **Select connection** box and the outline of the object is displayed. The currently used connection is marked with a preceding bar and is highlighted in bold.
 4. Click on another connection or close the **Select connection** box with **× Close**.
 5. Move the mouse pointer to the position to where you want to insert the object. Lines indicate the alignment of the moving object (page 776) to the placed objects and arrows indicate the distances.
 6. Click the position in the modeling area where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
 7. If necessary, overwrite the previous name with the name of your choice and press Enter.
- The object symbol is placed in the modeling area and linked to the previously selected object symbol using the selected connection.

Subsequently using the Symbols bar

1. In the **Symbols** bar click  **Create connection**.
2. Click the object in the modeling area 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 modeling area 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 modeling area.

4.5.2.4.3.17 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 842) 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 842) tab bar.
3. Click  **Line style**.
4. Click the solid, dashed, or dotted line to adjust the selected connections.
5. Click  **Line weight**.
6. Click the weight in points in which the connections are to be displayed.

The line style and the line weight of the selected connections are adjusted.

Determine the bridge height and rounding intensity

1. Open the model you want to adjust.
2. Activate the **Model** (page 844) 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.

4.5.2.4.3.18 Insert graphic

You can place images and graphics in the modeling area 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 (page 800) 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 modeling area. You can change its size, drag it to another position, and place it behind model items (page 900), for example.

4.5.2.4.3.19 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 modeling area.
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 (page 1052)), click  **More > Go to object**.

The connected object is selected in the modeling area.

4.5.2.4.3.20 Display and select connection

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

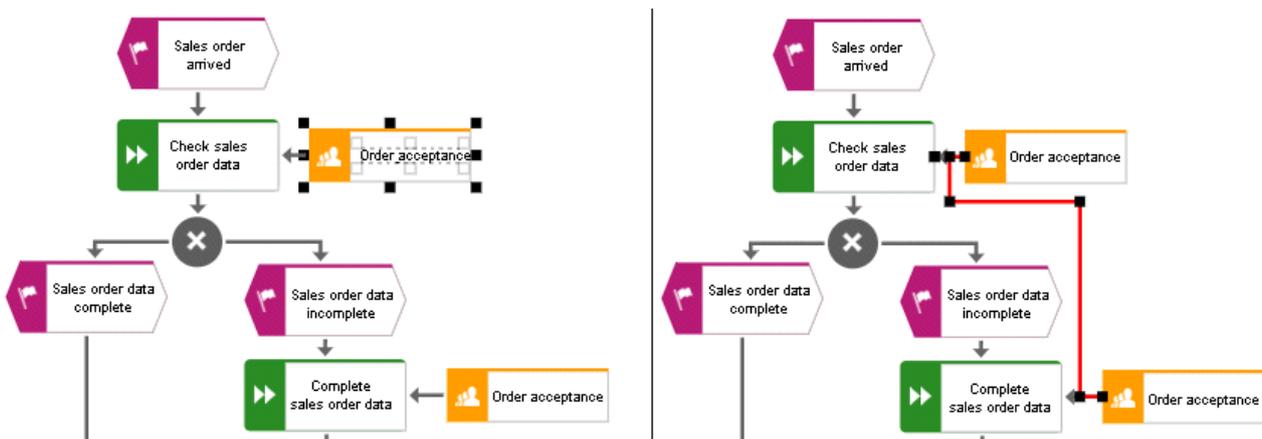
Procedure

1. Click **i Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the modeling area.
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 (page 1052)), 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.



4.5.2.4.3.21 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 modeling area.
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 (page 1052)), 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.

4.5.2.4.3.22 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 modeling area.
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.
 - i. From top to bottom or left to right: Click the  right arrow.
 - j. From bottom to top or right to left: Click the  left arrow.
 - k. 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.

4.5.2.4.3.23 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  **Properties**. The Properties bar opens.
2. Select the relevant occurrence in the modeling area.
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.

4.5.2.4.3.24 Display relationships of selected objects

You can display the relationships of selected objects (page 851).

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the modeling area.
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 (page 1052), you can select the object (page 835) that is linked to the selected object by the connection. You can also delete connections that do not have any occurrences in models.

4.5.2.4.3.25 Delete model items

You can delete model items from the modeling area (page 779).

Procedure

1. Select the model items you want to delete.
2. Click  **Delete** in the tab bar, or press the **Del** key, or press the **Backspace** 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 modeling area.

4.5.2.4.3.26 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.

4.5.2.4.3.27 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.

4.5.2.4.3.28 Valuable information

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

4.5.2.4.3.28.1 Bars and buttons

4.5.2.4.3.28.1.1 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 785). 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 842).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 844).

FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 845).

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 847).

4.5.2.4.3.28.1.2 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 912) is inserted. Click the arrow next to the **Paste** icon if you want to paste a definition copy.

4.5.2.4.3.28.1.3 What buttons does the Start tab bar have?

Beside the general buttons (page 785), the **Start** tab bar provides the following buttons.



Format painter: Transfers the format (page 892) from one item to another.



Fill color: Colors the item in the selected color (page 892).



Equation 1: Edit

Line color: Colors the line of the item in the selected color (page 894).



Line style: Assigns selected items a different style (page 895) (**Dotted**, **Dashed**, or **Solid**).



Line weight: Assigns selected items a different line weight (page 895) in points.



Appearance: Assigns other properties to or removes properties from selected items (page 896), such as **Shaded**, **3-D effect**, and in addition, **Active** for objects.



Change symbol: Changes the symbol (page 830) 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 898). The type and name of the new model can be selected.



Arrange: Positions selected items (page 900) behind or in front of other items.



Group/Ungroup: Groups selected items (page 900), so that they can be treated like a single item or ungroups them (page 901).



Align: Aligns selected items in the model area with regard to each other (page 901).



Match size of items: Matches the size of selected model items with each other (page 901).



Go to: Opens the **Go to** menu.



Go to occurrence in Repository: Opens a new tab showing the repository for the selected object or model and enables the relevant check box.



Go to fact sheet in Connect: Opens the fact sheets (page 1055) of the current model on a new tab. The **Overview** fact sheet is activated.



Alfabet: Provides functionality for establishing connections (page 907) with Alfabet.

4.5.2.4.3.28.1.4 What buttons does the Model tab bar have?

Beside the general buttons (page 785), the **Model** tab bar provides the following buttons.



Check diagram: Starts the selected semantic check (page 986) for the current model or the selected objects.



Layout: Automatically creates a new layout for the model (page 905).



Horizontal space: Inserts space in your model (page 905) from left to right.



Vertical space: Inserts space in your model (page 905) from top to bottom.



Export graphic: Exports the graphic of the model (page 903) to your download area.



Connection properties: Determines the bridge height and rounding intensity of connections (page 834).



Modeling area: Enables or disables Smart Modeling (page 776), enables or disables Guided Modeling (page 776), uses or hides (page 777) the grid in the modeling areas, and sets the grid width.



Background color: Changes the background (page 896) color of an open model.



Apply template: Provides the available model templates for selection (page 778).

4.5.2.4.3.28.1.5 What buttons does the Format tab bar have?

Beside the general buttons (page 785), the **Format** tab bar provides the following buttons.



Format painter: Transfers the format (page 892) 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.

4.5.2.4.3.28.1.6 What buttons does the BPMN tab bar have?

Beside the general buttons (page 785), the **BPMN** tab bar provides the following buttons.



Change symbol: Changes the symbol (page 830) of a selected object or the symbols of all selected objects of a type.



Add lane: Adds a new lane (page 954) to a pool or lane.



Insert lane: Inserts a selected lane in the selected pool or lane (page 955).



Delete pool or lane: Deletes the selected pool or lane (page 956).



Move lane: Moves the selected lane (page 955) in the required direction.



Transform into call conversation: Transforms communication elements into call conversations (page 957).



Change type of sequence flow: Specifies the type of a sequence flow (page 957).



Collapse subprocess: Collapses a subprocess object (page 958).



Expand subprocess: Expands a subprocess object (page 958).



Figure 1: Edit

Edit: Opens the assigned model contained in the subprocess (page 958) 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 959).

4.5.2.4.3.28.1.7 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 modeling area, 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.

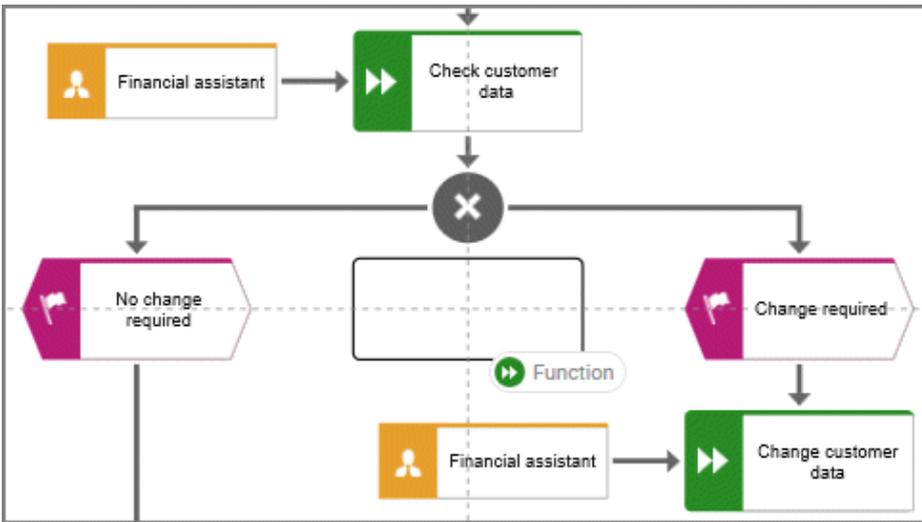
The mini toolbar is configured for each object type. When you click an object, the mini toolbar provides the object symbols you selected for the underlying object type.

4.5.2.4.3.28.2 Model display

4.5.2.4.3.28.2.1 What is Guided Modeling for?

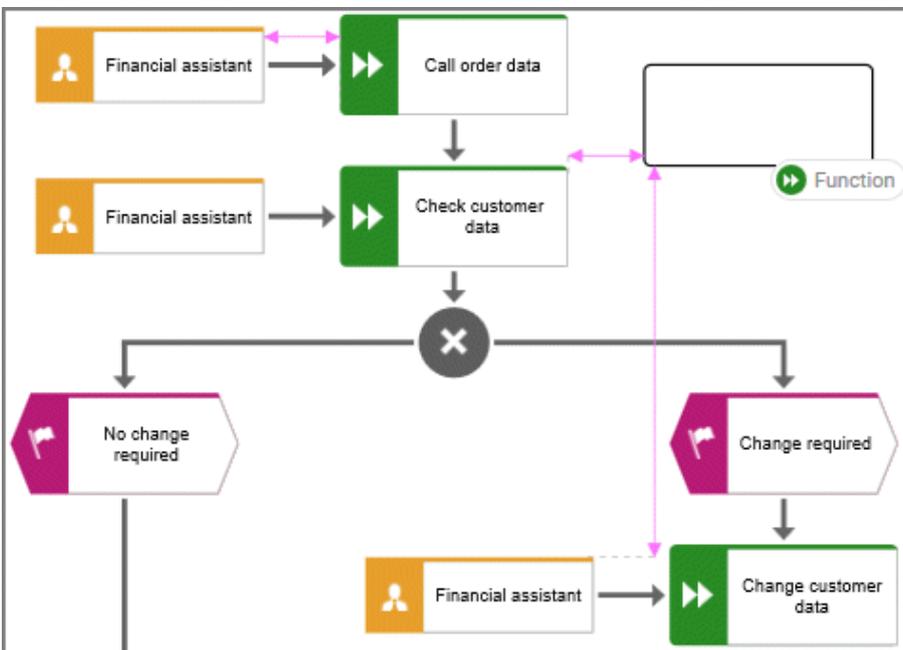
Guided Modeling supports you in placing or moving items. When you place or move objects or connections in a model, lines and arrows appear informing you of the orientation and distance of the items from adjacent items. The items snap into place at the point where Guided Modeling "suggests" that they be positioned. If Guided Modeling (page 776) and the grid are switched on, Guided Modeling has priority when you position items.

Lines show the horizontal and vertical alignment to the adjacent items.



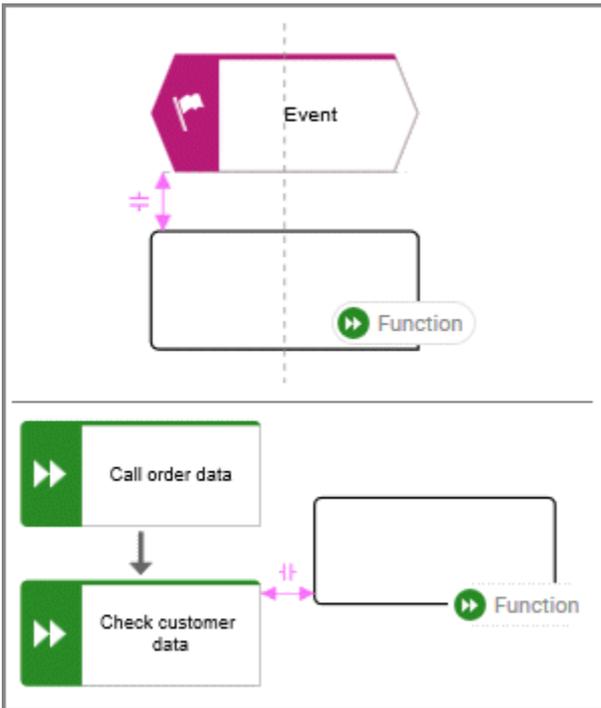
Guided Modeling always takes into account the nearest relevant items for the alignment lines.

Arrows indicate the distance between the moving object and the adjacent items.



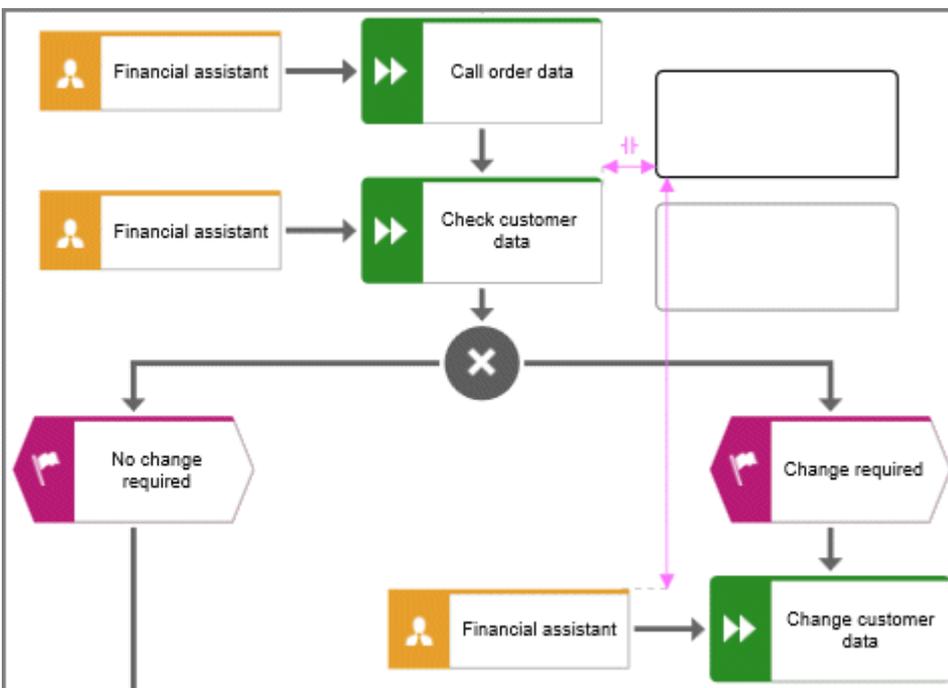
Distances are only displayed for items that are in the visible area of the modeling area.

When placing objects, the default distance is indicated by the following cursor: 



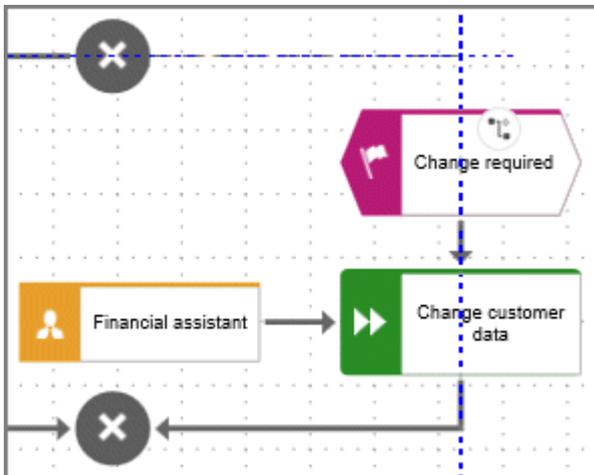
The default distance is the distance set for the horizontal and vertical item spacing of an optimized layout (page 905). To set the default distance, you must perform an optimized layout with an item spacing setting (page 821).

Guided Modeling is also provided for multi selections and connections.



The item of several selected items that you click to drag is used as the reference item. It is highlighted in bold when dragged and the orientation and distance guides are displayed for this item.

Guided Modeling for connections allows you to connect connections centrally at the border of the object regardless of the grid. (The blue highlighting of the guides in the screenshot serves only for clarification.)



4.5.2.4.3.28.2.2 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.

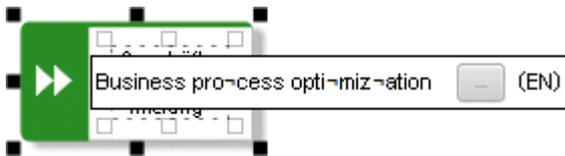
4.5.2.4.3.28.2.3 What are optional hyphens for?

The purpose of optional hyphens is to specify separation points for longer words. Where required, automatic separation occurs at these points and optional hyphens are inserted.

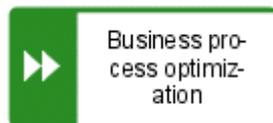
When entering an attribute text, for example, optional hyphens can be specified. They are indicated by a placeholder (↵) during input. If, for example, optional hyphens are inserted for an object name, the name is automatically adjusted if the size of the object is changed.

Example

You insert optional hyphens when entering the text:



When you exit the entry by clicking in the model background, the name is separated.



When you enlarge the object, the name is separated at a different place and provided with a hyphen. The previously displayed hyphens are removed.



4.5.2.4.3.28.2.4 What to consider when placing objects in/on objects

You can place objects on other objects (page 864) or in other objects (page 864). 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.

4.5.2.4.3.28.2.5 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.

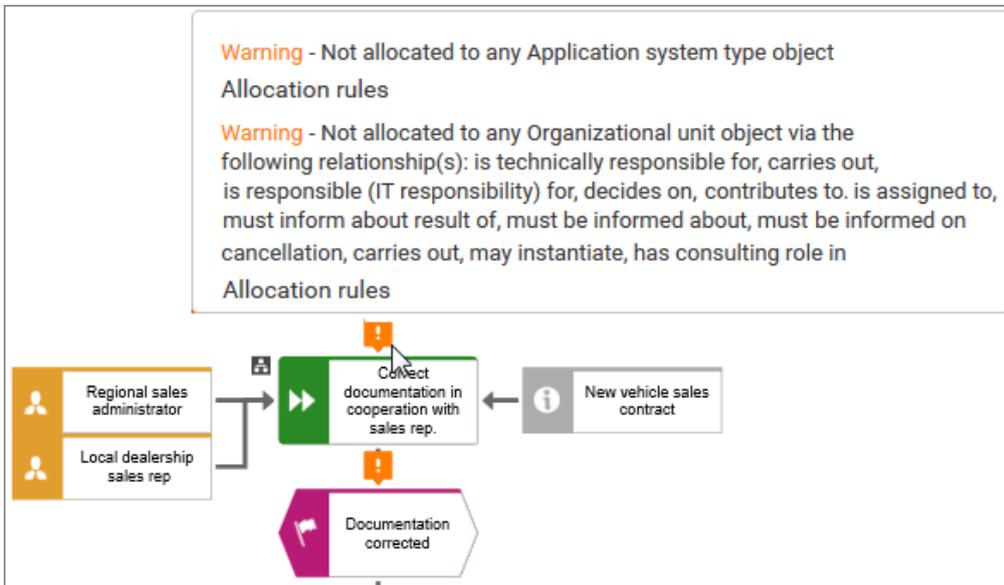
However, for an object to be pasted in the target model it has to be allowed there by the method. For example, if you copy functions and organizational units in the source model, only the organizational units will be pasted into a model of the **Organizational chart** type because functions are not allowed 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.

4.5.2.4.3.28.2.6 How are errors, warnings, and notes marked in the model?

If a semantic check detects errors, warnings, or notes, the corresponding object is marked in the model.

Severity	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 marker, additional information about the warning is displayed.



You can show detailed information in the **Semantic checks** bar by expanding an entry.

#	Item	Finding type	Description
32	 Correct documentation in cooperation with sales rep.	 Allocation rules	Not allocated to any Organizational unit object via the following relationship(s): is technically responsible for, carries out
33	 Correct documentation in cooperation with sales rep.	 Allocation rules Warning	Not allocated to any Application system type object Rule: Function can be supported by application system type (1:n) This rule checks whether at least one application system type is allocated to each function.

4.5.2.4.3.28.3 ARIS and Alfabet

4.5.2.4.3.28.3.1 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.

4.5.2.4.3.28.3.2 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.

4.5.2.4.3.28.3.3 When is the Alfabet button shown?

When Alfabet is configured with ARIS Architect, the Alfabet button is available in the Start (page 842) tab bar. You can find the complete configuration description in the ARIS Architect online help.

4.5.2.4.3.28.4 Macros

You can apply macros to your models in ARIS Connect. The macros are executed on the server, which means that the models are locked when the macros are applied.

4.5.2.4.3.28.4.1 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 856).

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**).

4.5.2.4.3.28.4.2 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 856) 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 to start a macro.

4.5.2.4.3.28.4.3 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.

4.5.2.4.3.28.5 Keyboard shortcuts for ARIS Connect Designer

The following shortcuts are available in ARIS Connect Designer (page 750).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Alt	Temporarily switches off Guided Modeling and grid (page 825) when you drag items.
Alt + down arrow	Moves selected objects down four grid lines.
Alt + F4	Closes the web browser. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Alt + left arrow	Moves selected objects four grid lines to the left.
Alt + - (minus)	Inserts an optional hyphen (page 827) at the cursor position in a text.
Alt + right arrow	Moves selected objects four grid lines to the right.
Alt + up arrow	Moves selected objects up four grid lines.
Backspace	Removes selected object symbols or deletes selected items, such as free-form text and graphic objects.
Ctrl + A	Selects all items.
Ctrl + C	Copies selected items to the clipboard. This enables you to paste copied items from the clipboard into models/diagrams and into other Windows programs.
Ctrl + down arrow	Moves selected items downwards by increments of one pixel.
Ctrl + End	Displays the bottom right pane of the modeling area.
Ctrl + Enter	Inserts a line break for text attributes, such as free-form texts, object names, etc.
Ctrl + F	Opens the Find bar.
Ctrl + F4	Closes the model tab. If changed models have not yet been saved, the system displays a message to notify you. You can cancel the dialog and save the model or leave the model page without saving.
Ctrl + Home	Displays the upper left pane of the modeling area.
Ctrl + left arrow	Moves selected items to the left by increments of one pixel.
Ctrl + Page down	Switches to the next web browser tab from left to right if your web browser supports changing tabs using the keyboard.

Shortcut	Action
Ctrl + Page up	Switches to the next web browser tab from right to left if your web browser supports changing tabs using the keyboard.
Ctrl + right arrow	Moves selected items to the right by increments of one pixel.
Ctrl + S	Saves your changes.
Ctrl + Shift + V	Inserts a definition copy of an object if an object is in the clipboard.
Ctrl + up arrow	Moves selected items upwards by increments of one pixel.
Ctrl + V	Pastes the content of the clipboard, if this is content that can be placed in the modeling area. If an object is in the clipboard, an occurrence copy of the object is inserted.
Ctrl + X	Cuts selected items and copies them to the clipboard.
Ctrl + Y	Redoes editing steps that were undone.
Ctrl + Z	Undoes preceding editing steps.
Del	Removes selected object symbols or deletes selected items, such as free-form text and graphic objects.
Down arrow	Moves the modeling area contents up (the contents of the modeling area that are further down will be displayed).
Enter	Ends the input.
ESC	Removes selections and closes dialogs. Closing dialogs with the ESC key is the same as clicking Cancel .
F2	Selects the selected text attribute of an element or the object name of a selected object for editing.
F3	Opens the Find bar. When the find bar is open, pressing the F3 key jumps to the next occurrence of the searched term.
F5	Updates the current view based on the database changes.
F11	Turns full screen mode on or off if your web browser supports full screen.
Left arrow	Moves the modeling area contents to the right (the contents of the modeling area that are further left will be displayed).
- (minus)	Reduces the display of the model content by 10%.
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
+ (plus)	Enlarges the display of the model content by 10%.

Shortcut	Action
Right arrow	Moves the modeling area contents to the left (the contents of the modeling area that are further right will be displayed).
Shift	Keeps the shapes of a circle and a square (page 885) when you place and scale the graphic objects Circle/Ellipse and Square/Rectangle .
Shift + Page down	Moves the contents of the modeling area page by page to the right (the contents of the modeling area that are further left will be displayed).
Shift + Page up	Moves the contents of the modeling area page by page to the left (the contents of the modeling area that are further right will be displayed).
Up arrow	Moves the modeling area contents down (the contents of the modeling area that are further up will be displayed).

4.5.2.4.3.28.6 Keyboard shortcuts for the Select attribute dialog

The following shortcuts are available in the **Select attribute** dialog with which you can add attributes on the Attributes tab (page 867).

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

Shortcut	Action
Down arrow	Moves the focus down to the next attribute if the focus is in the attribute list field.
End	Moves to the lower attributes if the focus is in the attribute list field.
Enter	Closes the dialog and adds the selected attributes when the focus is on the OK button, or closes the dialog and adds no attributes when the focus is on the Cancel button.
ESC	Closes the dialog without changes. Pressing this key corresponds to clicking Cancel .
F5	Updates the current view based on the database changes. The Select attribute dialog is closed without changes.
F11	Turns full screen mode on or off if your web browser supports full screen. The Select attribute dialog remains open.
Home	Moves to the upper attributes if the focus is in the attribute list field.
Page down	Scrolls the screen down. The scroll distance may vary depending on the application.
Page up	Scrolls the screen up. The scroll distance may vary depending on the application.
Space	Toggles the check box of the attribute on which the focus is located.
Tab	Jumps from the Search field to the Show specified attributes only check box, the attribute list field, in the attribute list, the OK button, and the Cancel button.
Up arrow	Moves the focus up to the next attribute if the focus is in the attribute list field.

4.5.2.4.4 Extended editing

Besides the basic editing options, Model Editor provides you with additional functionality, such as copying formatting (page 892), creating groupings (page 900), applying various colors (page 893), inserting user-defined descriptions (page 889), or automatic resizing of objects (page 901).

4.5.2.4.4.1 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 842) 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 798) 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.

4.5.2.4.4.2 Use objects

4.5.2.4.4.2.1 Place objects directly below each other

You can easily place objects directly below each other.

Procedure

1. Enable Guided Modeling. (page 776)
2. Drag the object to the border of the object under which you want to position it directly. It snaps into place here.
3. Release the mouse button.

The object is now placed directly below the other object.

4.5.2.4.4.2.2 Change object size when placing

You can place an object and determine its size at the same time.

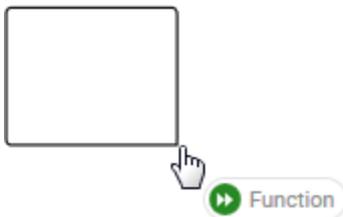
Procedure

USING THE SYMBOLS BAR

1. In the Symbols bar, click the object you want to place.
2. Move the mouse pointer to the modeling area, click, and hold down the mouse bottom.



3. Move the mouse pointer in the direction in which you want to resize of the object. The position of the upper left object corner is the anchor point.



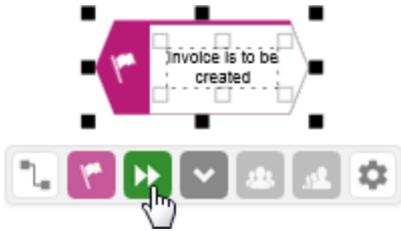
4. Release the mouse button, when the object has the size you want.



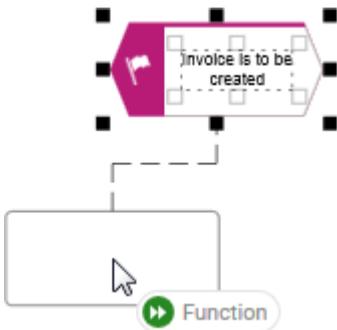
You have placed an object and determined its size at the same time.

USING THE MINI TOOLBAR

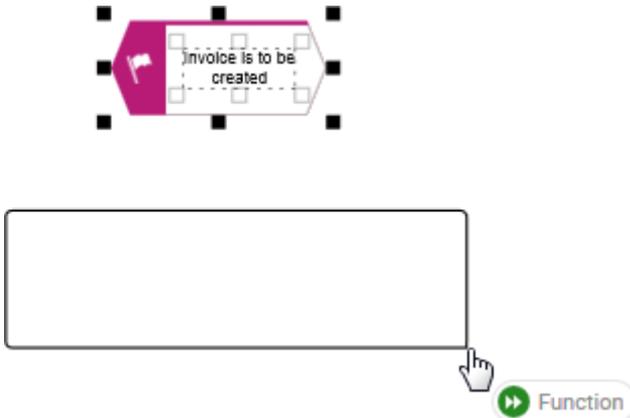
- In the mini toolbar (page 848), click the object you want to place.



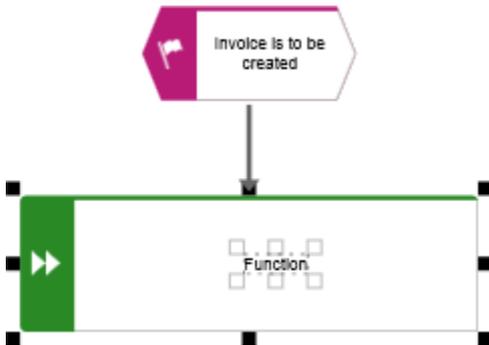
- Place the preview frame of the object so that the upper left corner of the object is placed as anchor point at the position you want.



- Move the mouse pointer in the direction in which you want to resize of the object.



- Release the mouse button, when the object has the size you want.



You have placed an object and determined its size at the same time.

4.5.2.4.4.2.3 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.

4.5.2.4.4.2.4 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.

4.5.2.4.4.2.5 Find objects in an open model

You can have objects selected in the modeling area. If the object is not located in the visible area of the modeling area the visible area is moved and the object is displayed as selected in the visible area.

Procedure

1. Click the  **Find** bar button or press **Ctrl + F**. 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.

4.5.2.4.4.2.6 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 (page 1055) 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.

4.5.2.4.4.3 Use attributes

You can use attributes to describe and distinguish between models, objects and connections. You can place attributes directly in the modeling area (page 871), and specify for specific attributes that they are to be displayed as a symbol (page 874).

4.5.2.4.4.3.1 Customize Attributes tab

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

Procedure

1. Click  **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 868) 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. If you want to add only specified attributes, enable the **Show specified attributes only** check box. You can restrict the result of displayed attributes using a search term.
6. Enter a search term for the attributes you want to display. The attribute type groups that contain attributes whose names contain the term you entered are expanded and the attributes are displayed.
7. Enable the check boxes of the relevant attributes.
8. Click **OK**. The selected attributes are added to the **Attributes** tab.
9. Click  **More** next to the attribute whose visibility you want to specify.
10. 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**.
11. Click  **Hide, if not specified** if you want the attribute to be displayed on the **Attributes** tab only if a value has been specified.
12. Click  **Place attribute** and the relevant position in the modeling area if you want the attribute value to be displayed in the model.
13. 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 on the **Attributes** tab are displayed according to your settings.

4.5.2.4.4.3.2 Add attributes in the Attributes tab

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

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 want to see only attributes with assigned values, enable the **Show specified attributes only** check box. You can restrict the result of displayed attributes using a search term.
6. Enter a search term for the attributes you want to display. The attribute type groups that contain attributes whose names contain the term you entered are expanded and the attributes are displayed.
7. Enable the check boxes of the relevant attributes.
8. Click **OK**.

The selected attributes are added to the **Attributes** tab.

4.5.2.4.4.3.3 Hide attributes of the Attributes tab

You can hide attributes of the **Attributes** tab to keep the attribute list clear.

Procedure

1. Click  **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. If you want to hide model attributes, ensure that no model item is selected.
If you want to hide object or connection attributes, select the corresponding object or connection.
4. Move the mouse pointer over the row of the attribute you want to remove.
5. Click the  three dots at the end of the row. The attribute menu opens.
6. Click  **Hide always** if you want to hide the attribute, even if it has a value.
Click  **Hide, if not specified** if you want to hide the attribute if it is not specified, but should be displayed if a value has been entered.

The attributes you "hide always" are hidden.

The attributes you "hide, if not specified" are hidden if no value is entered or hidden as soon as their values are deleted. If a value is entered for them, for example, in the modeling area, they are displayed again on the **Attributes** tab.

4.5.2.4.4.3.4 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 867) 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 870) 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.

4.5.2.4.4.3.5 Show language column

You can show a column for another language next to the original column. This enables you to compare and edit (page 869) 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.

4.5.2.4.4.3.6 Hide language column

You can hide the shown language column (page 868) 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.

4.5.2.4.4.3.7 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 868).
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 870) 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.

4.5.2.4.4.3.8 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 832) 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.

4.5.2.4.4.3.9 Place attributes at fixed positions

You can place any attribute of objects and connections, not just the name, visibly in the modeling area. 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 842) 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 modeling area.
9. Click anywhere in the modeling area.
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 842) 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.

4.5.2.4.4.3.10 Place attributes at any position

You can place any attribute of objects and connections, not just the name, visibly in the modeling area. These cannot only be placed at fixed positions (page 870), but also freely.

Procedure

Place new attribute freely

Select the object you want to place a new attribute for.

1. Activate the Start (page 842) 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 modeling area.
8. In the modeling area, click the position where you want to place the attribute.

The attribute is placed in the selected position in the modeling area.

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 modeling area where you want to place it and release the mouse button.

The attribute is placed in the selected position in the modeling area.

You have placed attributes at any positions.

4.5.2.4.4.3.11 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 modeling area. A frame is displayed.
7. Drag the frame in the modeling area to the position where you want to place the attribute.
8. Click the relevant position.

The attribute is placed.

4.5.2.4.4.3.12 Show formatting toolbar

The formatting toolbar is enabled for selected texts, for example, for the text of placed attributes (page 832) or free-form text (page 880). 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 modeling area.
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.

4.5.2.4.4.3.13 Display names of placed attributes

You can specify that the attribute name of placed attributes is to be displayed in the modeling area.

Procedure

1. Select the placed attribute whose attribute name you want to display in the modeling area.
2. Activate the Start (page 842) tab bar.
3. Click  **Attribute placement**.
4. Enable the **With name** check box.

The attribute value is placed in front of the attribute name.

4.5.2.4.4.3.14 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 874).

Procedure

1. Click a placed attribute in the modeling area. 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 870) the selected attributes.

4.5.2.4.4.3.15 Edit placed attributes

You can edit placed text attributes of models, objects, and connections in the modeling area. 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.

4.5.2.4.4.3.16 Directly format placed attributes

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

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 modeling area. The attribute selection is undone.

You have formatted the placed attribute.

4.5.2.4.4.3.17 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.

4.5.2.4.4.3.18 Display placed attributes as a symbol

You can display certain attributes as a symbol (page 877) 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 842) tab bar.
3. Click  **Attribute placement**.
4. Enable the **As a symbol** check box.

The placed attribute is represented as a symbol.

4.5.2.4.4.3.19 Remove placed attribute

You can remove placed attributes from the modeling area. Of course, only the attribute placement is deleted and not the value that was placed. To change the attribute value, edit the attribute (page 832) on the **Attributes** tab of the  Properties bar.

Procedure

1. Select the placed attribute (page 873) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

4.5.2.4.4.3.20 Remove multiple placed attributes

You can remove multiple placed model, object, or connection attributes from the modeling area 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 modeling area 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 842) 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.

4.5.2.4.4.3.21 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**.

4.5.2.4.4.3.22 Valuable information

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

4.5.2.4.4.3.22.1 What placed attribute does an object have?

If you place an object in the modeling area, 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 modeling area in order to have the relevant information available directly in the modeling area.

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 modeling area until you assign a value to them. If the associated object is selected the "invisible" placed attribute also receives attribute handles.

4.5.2.4.4.3.22.2 What to consider when placing objects in/on objects

You can place objects on other objects (page 864) or in other objects (page 864). 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.

4.5.2.4.4.3.22.3 What does place attribute as a symbol mean?

Attributes of objects can be placed in the modeling area 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**.

4.5.2.4.4.3.22.4 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.

4.5.2.4.4.3.22.5 What happens to placed attributes that have no attribute value?

If you place an object in the modeling area, 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 modeling area in order to have the relevant information available directly in the modeling area. 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 modeling area.

If a placeholder is to be used to make the placement of attributes without a value visible in the modeling area, 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.

4.5.2.4.4.3.22.6 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.

4.5.2.4.4.4 Use free-form text

You can use free-form text to add additional information to your model.

4.5.2.4.4.4.1 Insert free-form text

You can place text in the modeling area irrespective of other model items. This way you can add additional information to your model.

Warning

Free-form texts are not saved in groups and are thus not protected by access privileges for groups. Therefore, it is possible to have reports output the free-form texts of models for which the person running the report does not have read privileges. Therefore, remember not to include confidential information in free-form texts but to use model and object attributes for that.

Procedure

1. Open the Symbols bar if it is not already open by clicking  **Symbols**.
2. Click  **Text**. When you drag the mouse pointer onto the model background, an icon is added to the pointer:

3. Click the position in the modeling area where you want to place the text. A text box opens, in which you can make your entry.
4. Click next to the text box to finish the input.

Your text is displayed in the model and you can place it anywhere.

4.5.2.4.4.4.2 Change free-form text

You can change the content of free-form text any way you want.

Warning

Free-form texts are not saved in groups and are thus not protected by access privileges for groups. Therefore, it is possible to have reports output the free-form texts of models for which the person running the report does not have read privileges. Therefore, remember not to include confidential information in free-form texts but to use model and object attributes for that.

Procedure

1. In the modeling area, click the free-form text twice. Alternatively, you can click the free-form text and then press the **F2** key.
2. Use the arrow keys to select the text area you want to overwrite.
3. Overwrite the text area you want to modify.
4. Click next to the text box to end the input.

The free-form text is modified.

4.5.2.4.4.3 Format free-form text

You have several options for formatting free-form texts. You can format the entire free-form text as well as a selected part of the free-form text.

Warning

Free-form texts are not saved in groups and are thus not protected by access privileges for groups. Therefore, it is possible to have reports output the free-form texts of models for which the person running the report does not have read privileges. Therefore, remember not to include confidential information in free-form texts but to use model and object attributes for that.

Procedure

1. To format the entire free-form text, click the free-form text. It is marked by handles.
2. Activate the **Format** tab bar.
3. Select formatting options, such as **B Bold** or  **Centered**.
4. To format selected free-form text, click the free-form text twice. Alternatively, you can click the free-form text and then press the **F2** key. Use the arrow keys to select the text area you want to overwrite.
5. Select formatting options, such as **B Bold** or  **Font**.

The free-form text is formatted.

Tip

Alternatively, you can select all or a part of the free-form text. The formatting toolbar is displayed (page 872) above the selection to format the selected free-form text.

4.5.2.4.4.4.4 Move free-form text

You can place free-form text anywhere in the modeling area.

Warning

Free-form texts are not saved in groups and are thus not protected by access privileges for groups. Therefore, it is possible to have reports output the free-form texts of models for which the person running the report does not have read privileges. Therefore, remember not to include confidential information in free-form texts but to use model and object attributes for that.

Procedure

1. Click the free-form text and hold down the mouse button.
2. Drag the free-form text to the position where you want to place it.
3. Release the mouse button.

The free-form text is placed at the new position.

Tip

You can also move selected free-form text using the keyboard:

- Use the **Shift** key and the arrow keys to move it by increments of one gridline.
- Use the **Ctrl** key and the arrow keys to move it regardless of the grid.
- Use the **Alt** key and the arrow keys to move it by increments of four gridlines.

4.5.2.4.4.4.5 Use free-form text as occurrence copy

You can create a free-form text as an occurrence copy (page 1059) to make changes to text at different positions in the model or in various models at once.

Warning

Free-form texts are not saved in groups and are thus not protected by access privileges for groups. Therefore, it is possible to have reports output the free-form texts of models for which the person running the report does not have read privileges. Therefore, remember not to include confidential information in free-form texts but to use model and object attributes for that.

Procedure

1. Click the free-form text, and select  **Copy**.
2. In the same model or in another model, click  **Paste as > Occurrence copy**.
3. Move the mouse pointer to the position in the model at which you want to place the occurrence copy of the free-form text.

A new occurrence exist for the same free-form text. If you edit one of the occurrences, the free-form text of the other occurrences are also be changed automatically.

Tip

You can copy free-form text as a normal copy, that is, as text that can be changed without affecting other free-form texts, using the **Copy/Paste** functionality.

4.5.2.4.4.5 Use graphic objects

Graphic objects (page 1056) are shapes that can structure model content for the user. With regard to models, graphic objects do not have any semantics. That is why they cannot be evaluated by reports or included in analyses, for example.

4.5.2.4.4.5.1 Place graphic objects

You can place graphic objects in the modeling area (page 779) 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 modeling area where you want to insert the graphic objects.

The circle is inserted in the modeling area. Now you can color the line (page 894) and inside (page 892), and, for example, place the graphic object behind a model area (page 900) to highlight this area.

Tip

To create a circle of a size you have selected, press the **Shift** key while dragging the mouse pointer across the workspace. In this case, the change in size is proportional.

Place square

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

The square is inserted in the modeling area. Now you can color the line (page 894) and inside (page 892), and, for example, place the graphic object behind a model area (page 900) to highlight this area.

Tip

To create a square of a size you have selected, press the **Shift** key while dragging the mouse pointer across the workspace. In this case, the change in size is proportional.

Place rectangle

1. Open the Symbols bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Square/Rectangle**.
3. Click the position in the modeling area 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 modeling area. Now you can color the line (page 894) and inside (page 892), and, for example, place the graphic object behind a model area (page 900) 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 modeling area 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 modeling area. Now you can color the line (page 894) and inside (page 892), and, for example, place the graphic object behind a model area (page 900) 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 modeling area, 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 modeling area. Now you can color the line (page 894) and inside (page 892), and, for example, place the graphic object behind a model area (page 900) 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 modeling area, 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 modeling area. Now you can color the line (page 894).

Specify size when placing objects

You can directly resize circles/ellipses and squares/rectangles 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/Rectangle**.
3. In the modeling area, click the position where you want 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 reached the required size.
5. Release the mouse button.

The graphic object is placed with the required size.

Place and scale circle or square

4.5.2.4.4.5.2 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 modeling area where you want to insert the graphic objects.

Copying and pasting graphic objects is now complete.

4.5.2.4.4.5.3 Resize ellipses and rectangles

You can directly resize circles/ellipses and squares/rectangles 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/Rectangle**.
3. In the modeling area, click the position where you want 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 reached the required size.
5. Release the mouse button.

The graphic object is placed with the required size.

Place and scale circle or square

4.5.2.4.4.5.4 Place and scale circle or square

You can place and scale graphic objects in one operation. Placement and scaling of circles and squares differs from the placement of other graphic objects.

Procedure

1. Open the Symbols bar if it is not already open by clicking  **Symbols**.
2. To place a circle: Click the graphic object  **Circle/Ellipse**.
To place a square: Click the graphic object  **Square/Rectangle**.
3. Press the **Shift** key.
4. Click the position in the modeling area where you would like to place the graphic symbol, and hold down the mouse button.
5. Move the mouse pointer to scale the graphic object. The circular or square shape is retained during the operation.
6. Release the mouse button and the **Shift** key when the correct size of the graphic object is reached.

The circle or square is placed and scaled.

4.5.2.4.4.6 Use documents

ARIS document storage enables you to propose documents or to submit a change request for a document.

4.5.2.4.4.6.1 Upload documents

You can upload documents to ARIS document storage and assign them to models and objects (page 887) 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 798) allows the **ARIS document storage Link** attribute.

Procedure

1. Open (page 800) 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 887).

4.5.2.4.4.6.2 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 800) 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 774) 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 870). 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.

4.5.2.4.4.6.3 Open assigned document

You can easily open an assigned document.

Procedure

Placed attribute

Double-click the placed **ARIS document storage Link** attribute.

From the Attributes bar

1. Activate (page 774) 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.

4.5.2.4.4.6.4 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 800) 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.

4.5.2.4.4.6.5 Open linked document

You can easily open an assigned document.

Procedure

1. Activate (page 774) the **Documents** bar.
2. Click a document.

You can either open or save the linked document.

4.5.2.4.4.6.6 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.

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 774).
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 774).
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.

1. If the attribute is not displayed: Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 774).
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 774).
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

5. Select the item the description of which you want to display.
6. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 774).
7. 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.

4.5.2.4.4.7 Format model and model items

4.5.2.4.4.7.1 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 842) 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.

4.5.2.4.4.7.2 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 842) 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.

4.5.2.4.4.7.3 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 842) 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.

4.5.2.4.4.7.4 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 842) 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 893) for the gradient.
7. Click the second color box and select the second color (page 893) 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.

4.5.2.4.4.7.5 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 842) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click **No fill color**.

The selected model items are displayed without color.

4.5.2.4.4.7.6 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 842) 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.

4.5.2.4.4.7.7 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 842) 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.

4.5.2.4.4.7.8 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 842) 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.

4.5.2.4.4.7.9 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 842) tab bar.
3. Click  **Line style**. The style selection opens.
4. Click **Solid**, **Dashed**, or **Dotted**, 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.

4.5.2.4.4.7.10 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 842) tab bar.
3. Click  **Line weight**. The weight selection opens.
4. Click **0 pt**, **2 pt**, **4 pt**, or **8 pt**, 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.

4.5.2.4.4.7.11 Change item appearance

You can change the appearance of model items in the modeling area.

Procedure

1. Select the model items whose appearance you want to define.
2. Activate the Start (page 842) 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.

4.5.2.4.4.7.12 Change model background

You can change the background color of an open model.

Procedure

1. Open the relevant model.
2. Activate the **Model** (page 844) tab bar.
3. Click  **Background color**. The **Color palette** opens.
4. Click a color of the color palette.

The model background is colored with the selected color.

4.5.2.4.4.7.13 Use your own color for the background

You can change the background color of an open model with a custom color.

Procedure

1. Open the relevant model.
2. Activate the **Model** (page 844) tab bar.
3. Click  **Background color**. The **Color palette** opens.
4. Click  **Choose your own color**. The **Define color** dialog opens.
5. Use the colored areas to directly select a color, or insert the values in the **Red**, **Green** and **Blue** boxes to define an RGB color, or enter a hexadecimal HTML color code.
6. Click **OK**.

The model background is colored with the defined color.

4.5.2.4.4.7.14 Reset background color

You can reset the background color of an open model. The assigned background color is removed and the background color of the template on which the model is based is displayed.

Procedure

1. Open the relevant model.
2. Activate the **Model** (page 844) tab bar.
3. Click  **Background color**. The **Color palette** opens.
4. Click  **Reset**.

The color palette remains open and you can select another color (page 896).

4.5.2.4.4.8 Assign models

4.5.2.4.4.8.1 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 842) 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 798) 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.

4.5.2.4.4.8.2 Open assigned model

You can open models that you assigned (page 1050) to objects.

Procedure

1. Navigate to the object for which you want to open an assigned model.
2. Double-click the  assignment icon (page 1051).
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.

4.5.2.4.4.8.3 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 842) 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 (page 1051).
5. Click **OK**.

The selected assignment relationships are deleted without prompting for confirmation.

4.5.2.4.4.9 Use model items

You can arrange model items, such as objects, graphic objects, and free-form text in the modeling area.

4.5.2.4.4.9.1 Place model items one behind the other

You can specify in which order overlapping model items are placed one behind the other in the modeling area.

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 842) 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.

4.5.2.4.4.9.2 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 842) tab bar.
3. Click  **Group/Ungroup** > **Group**. The selected model items are combined in a group (page 1056). 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.

4.5.2.4.4.9.3 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 842) 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.

4.5.2.4.4.9.4 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 842) tab bar.
3. Click  **Align** and then the relevant alignment, for example, **Align left** or **Distribute vertically**.

The selected model items are aligned accordingly.

4.5.2.4.4.9.5 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 842) 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.

4.5.2.4.4.10 Lanes

4.5.2.4.4.10.1 Add a column/row to lane models

You can add new columns/rows to lane models (page 1057). 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.

4.5.2.4.4.10.2 Delete a column/row from lane models

You can delete columns/rows from lane models (page 1057). 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.

4.5.2.4.4.11 Export

4.5.2.4.4.11.1 Export model as a graphic

You can export the model as a graphic and use it in other programs.

Procedure

1. Open (page 800) the relevant model.
2. Ensure that no model item is selected.
3. Activate the **Model** (page 844) 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.

4.5.2.4.4.11.2 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 800) the relevant model.
2. Select the model item you want to export as a graphic.
3. Activate the **Model** (page 844) 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.

4.5.2.4.4.11.3 Export BPMN diagram

You can export (page 959) a BPMN diagram (page 953).

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 exported BPMN diagrams in other applications.

4.5.2.4.4.12 Layout

4.5.2.4.4.12.1 Optimize layout

You can automatically generate the alignment of objects of a model with each other.

Procedure

1. Open the model whose layout you want to generate automatically.
2. Activate the **Model** (page 844) tab bar.
3. Click  **Layout**. The layout options are provided.
4. Specify your settings (page 995) and click **OK**.

The objects of the model are realigned.

4.5.2.4.4.12.2 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 844) 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 modeling area.
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.

4.5.2.4.4.12.3 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 844) 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 modeling area.
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.

4.5.2.4.4.13 ARIS and Alfabet

4.5.2.4.4.13.1 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 842) 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.

4.5.2.4.4.13.2 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 842) 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.

4.5.2.4.4.13.3 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 907).
2. Select the relevant **Application system type** object.
3. In the Start (page 842) 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.

4.5.2.4.4.14 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.
2. Enter a comment or answer an existing comment.
3. Enter an http link to a Web site that provides additional information, e. g., **http://www.ariscommunity.com**. The entry must start with **http://**.
4. 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.

4.5.2.4.4.15 Select object or model in the 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 842) tab bar.
3. Click  **Go to >**  **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.

4.5.2.4.4.16 Go to the fact sheets of a model

You can navigate from a model to the fact sheets (page 1055) of the model in the  **Portal.**

Prerequisite

No object is selected.

Procedure

1. Activate the Start (page 842) tab bar.
2. Click  **Go to >**  **Go to fact sheet in Connect.**

A new tab with the fact sheets of the model opens. The **Overview** fact sheet is activated.

4.5.2.4.4.17 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 items 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 511). 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.

4.5.2.4.4.18 Create infographics

You can create infographics (page 1056) for selected personas (page 1060) (objects of the **Persona** type). You can select an object in a fact sheet (page 1055) of the  **Portal**, in the  **Repository**, or in the open model. Objects of the **Persona** type can be used in models of **Customer segmentation map** and **Matrix model** type.

The following describes how to proceed in the  **Portal**.

Prerequisite

The corresponding attributes of the persona objects must be specified (page 496).

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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
4. Navigate (page 412) to the relevant model.
5. Select the model that contains the persona.
6. If you have selected a model of the **Customer segmentation map** type, select the **Diagram** fact sheet. If you have selected a model of the **Matrix model** type, select the **Matrix** fact sheet.
7. Select the relevant **Persona** object in the fact sheet.
8. Click  **Evaluation**. The **Evaluation** bar opens showing the name of the item for which the report is generated.
9. Click the ▼ down arrow next to the currently displayed report name.
10. Select the **Create infographic for persona (page 496)** report.
11. Select the output format (page 511), 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**.

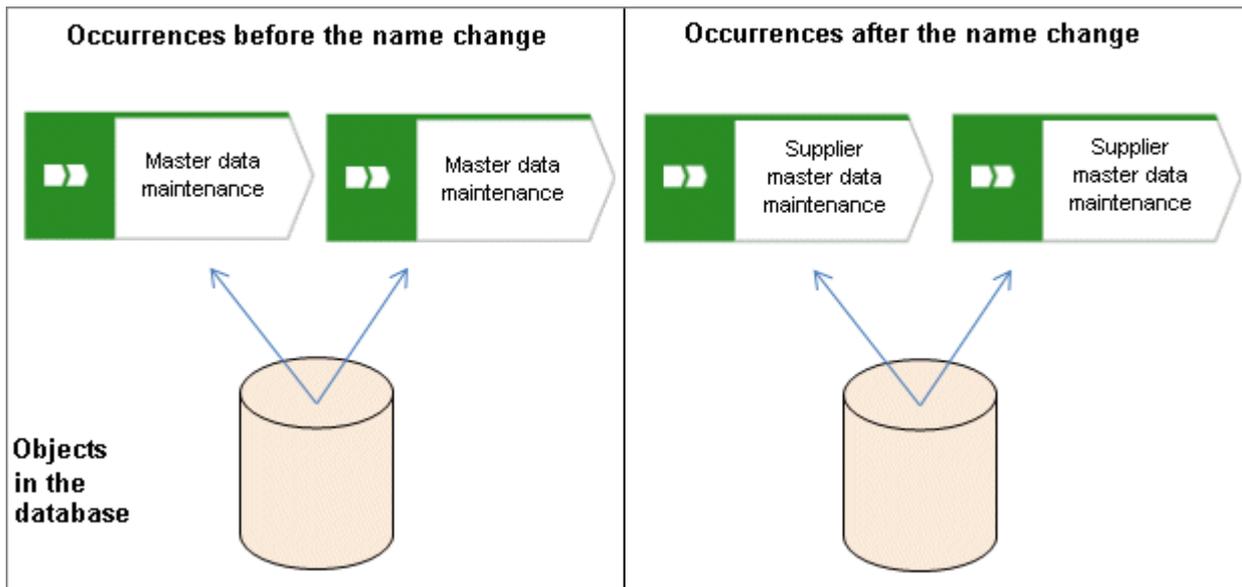
You have created an infographic for a persona. Depending on the attributes entered for the persona, the information graphic provides information about the personality, the goals, the frustrations, etc.

4.5.2.4.4.19 Valuable information

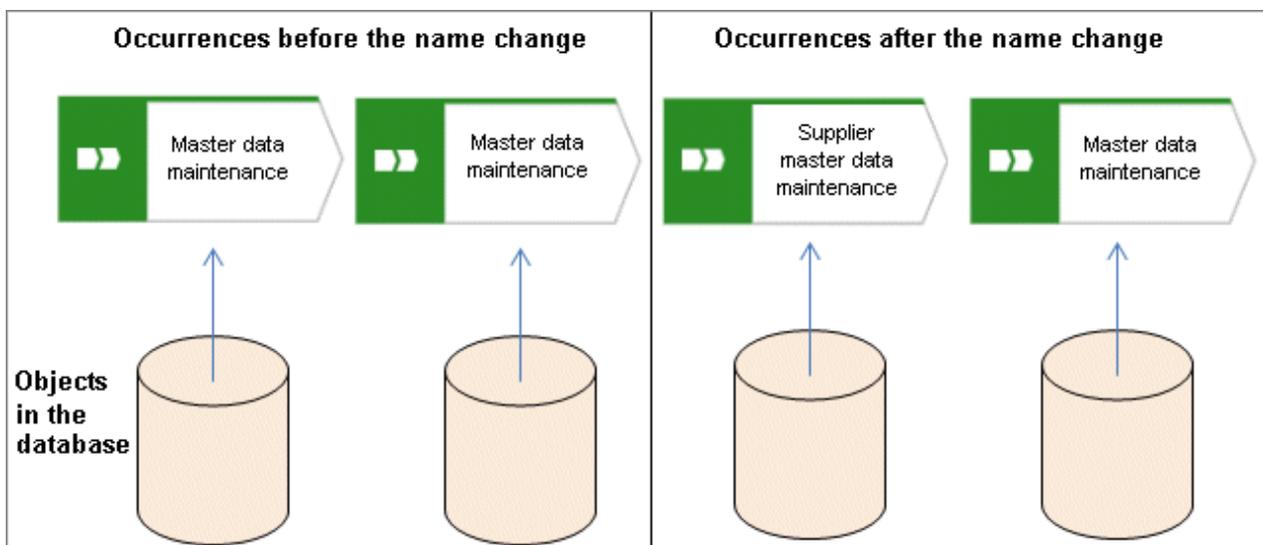
This section provides background information to assist you in carrying out the relevant procedures.

4.5.2.4.4.19.1 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			

4.5.2.4.4.19.2 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.

4.5.2.4.4.19.3 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.

4.5.2.4.4.19.4 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.

4.5.2.4.4.19.5 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.

4.5.2.4.4.19.6 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.

4.5.2.4.4.19.7 How do you enable navigation via process interface?

To navigate from one process model of the **EPC** type to another, place an object of **Process interface** type in a model and assign the relevant process model (page 898) 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 the process interface (page 414).

4.5.2.4.4.19.8 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 887](#))

DIRECTLY USING THE DOCUMENTS TAB ([PAGE 888](#))

4.5.2.4.4.19.9 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.

4.5.2.4.4.19.9.1 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.

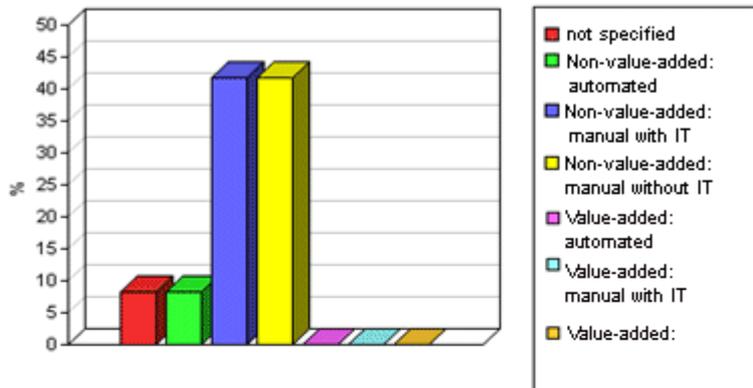
The following example is based on an analysis of the **Purchase order processing (actual)** and **Purchase order processing (target)** models. The **Assessment of value added** attribute is evaluated separately for each model. In this case, one worksheet is output with a table and one with charts.

TABLE

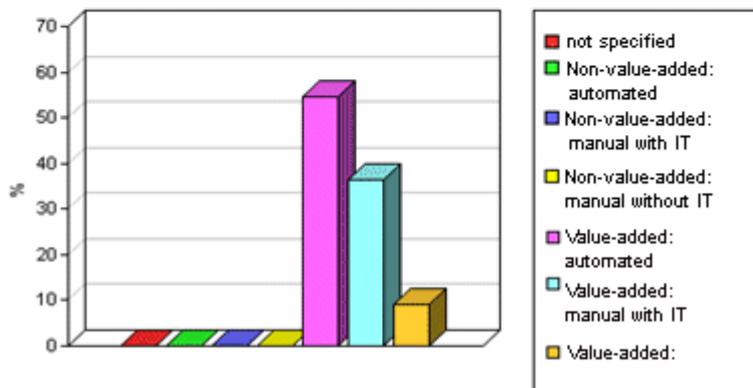
Analysis: Evaluate assessment of value added				
Created 5/25/09 11:21 AM				
Server: horus.me.corp.ids-scheer.com				
Database: DemoDB-United Motors Group				
User: system				
File: Report0.xls				
Analyze classification				
Models:				
1.) United Motors Group\2. Processes\Process Architecture\Core 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

4.5.2.4.4.19.9.2 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 have enough space to accommodate the entire family for holiday trips.</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 **Family** Customer segment is shown, because the **Lukas Andrews** Persona occurs in a Customer segmentation map and this **Persona** object is related to the **Family** Customer segment object.



CONTEXT

Object of **Persona** type

OUTPUT FORMAT

- DOC
- DOCX
- RTF
- ODT
- PDF

4.5.2.4.4.19.9.3 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

4.5.2.4.4.19.9.4 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

4.5.2.4.4.19.9.5 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

4.5.2.4.4.19.9.6 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

4.5.2.4.4.19.9.7 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

4.5.2.4.4.19.9.8 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

4.5.2.4.4.19.9.9 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

4.5.2.4.4.19.9.10 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

4.5.2.4.4.19.9.11 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

4.5.2.4.4.19.9.12 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.
- **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.
- **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

4.5.2.4.4.19.10 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

4.5.2.4.5 Model table-based

Table-based modeling enables rapid and comfortable modeling of EPCs and BPMN diagrams (page 945). 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. The distance between objects is defined by the spacings specified in the layout options.

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 939) 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.

4.5.2.4.5.1 Hide/Show modeling table

You can hide or show the modeling table.

Procedure

1. Open (page 800) a model to edit or create (page 790) 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.

4.5.2.4.5.2 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 800) a model to edit or create (page 790) a new model.
2. Click  **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.

4.5.2.4.5.3 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 800) a BPMN diagram.
2. Click  **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.

4.5.2.4.5.4 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 938) to insert lanes into the model.

Procedure

1. Open (page 800) a model.
2. Click  **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**.
Five default symbols that are allowed here are shown. To choose a different symbol, enter at least three characters of the symbols name. Symbols and objects that match with the entered text are displayed.
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.

4.5.2.4.5.5 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 800) a model.
2. Click  **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.

4.5.2.4.5.6 Use existing object

You can reuse existing objects in the model.

Procedure

1. Open (page 800) a model.
2. Click  **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.

4.5.2.4.5.7 Rename structurally relevant object

In the modeling table, you can edit structurally relevant objects (page 1061) that have already been modeled.

Procedure

1. Open (page 800) a model.
2. Click  **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.

4.5.2.4.5.8 Edit the Description/Definition column

You can specify descriptions and definitions for objects.

Procedure

1. Open (page 800) a model.
2. Click  **Modeling table** if the modeling table is not displayed.
3. If the **Description/Definition** column is not shown, add (page 942) 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.

4.5.2.4.5.9 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 800) a model.
2. Click  **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**.

Five default symbols that are allowed here are shown. To choose a different symbol, enter at least three characters of the symbols name. Symbols and objects that match with the entered text are displayed.

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 937) 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.

4.5.2.4.5.10 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 800) a model.
2. Click  **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.

4.5.2.4.5.11 Model satellites

You can insert not structurally relevant objects (page 1061) in a model or in a diagram.

Model new satellites

1. Open a model.
2. Click **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 when you have created the required satellites.

You have modeled one or more satellites.

Model existing satellites

1. Open a model.
2. Click **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.

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.

4.5.2.4.5.12 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 800) a model.
2. Click  **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.

4.5.2.4.5.13 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 800) a model.
2. Click  **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.

4.5.2.4.5.14 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 800) a model.
2. Click  **Modeling table** if the modeling table is not displayed.
3. Select the cell for the relevant attribute.
4. Press **F2**.
5. Edit (page 950) the attribute value.
6. Exit the cell (page 945) once you have finished editing the attribute value.

You have edited an attribute.

4.5.2.4.5.15 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 800) a model.
2. Click  **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.

4.5.2.4.5.16 Remove column

You can remove columns for attributes or objects from the modeling table.

Procedure

1. Open (page 800) a model.
2. Click  **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.

4.5.2.4.5.17 Valuable information

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

4.5.2.4.5.17.1 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 936).

4.5.2.4.5.17.2 How to control the table using the keyboard

Keyboard shortcuts can be performed on selected items. Selected items can be identified by the focus (page 1055) in the program.

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.)

Shortcut	Selection	Action
Arrow keys	Table	Moves to next column/row in direction of arrow.
Ctrl + End	Table	Activates the last cell in the modeling table.
Ctrl + Home	Table	Activates the first cell in the modeling table.
Ctrl + Shift + Ins	Operator	Creates split paths.
Del	Object name	Deletes the object from the model.
End	Table	Activates the last column in the current row.
Enter	Name column activated	Jumps to the next cell or ends editing.
F2	<ul style="list-style-type: none"> ▪ Name cell 	<ul style="list-style-type: none"> ▪ Activates the name editing mode.

Shortcut	Selection	Action
	<ul style="list-style-type: none"> Description/Definition cell 	<ul style="list-style-type: none"> Opens the Description/Definition dialog. The description/definition can be edited.
	<ul style="list-style-type: none"> Object cell 	<ul style="list-style-type: none"> Opens the object symbol list if symbols can be inserted.
	<ul style="list-style-type: none"> Attribute cell 	<ul style="list-style-type: none"> Opens the Edit attribute dialog.
Home	Table	Activates the first column in the current row.
Ins	Table	Adds an object row.
PageDown	Table	Scrolls one page down.
PageUp	Table	Scrolls one page up.
Shift + F2	BPMN container cell	Enables renaming of the container.
Shift + Tab	Table cell	Activates the next cell to the left.
Tab	Table cell	Activates the next cell to the right.

4.5.2.4.5.17.3 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.

Example

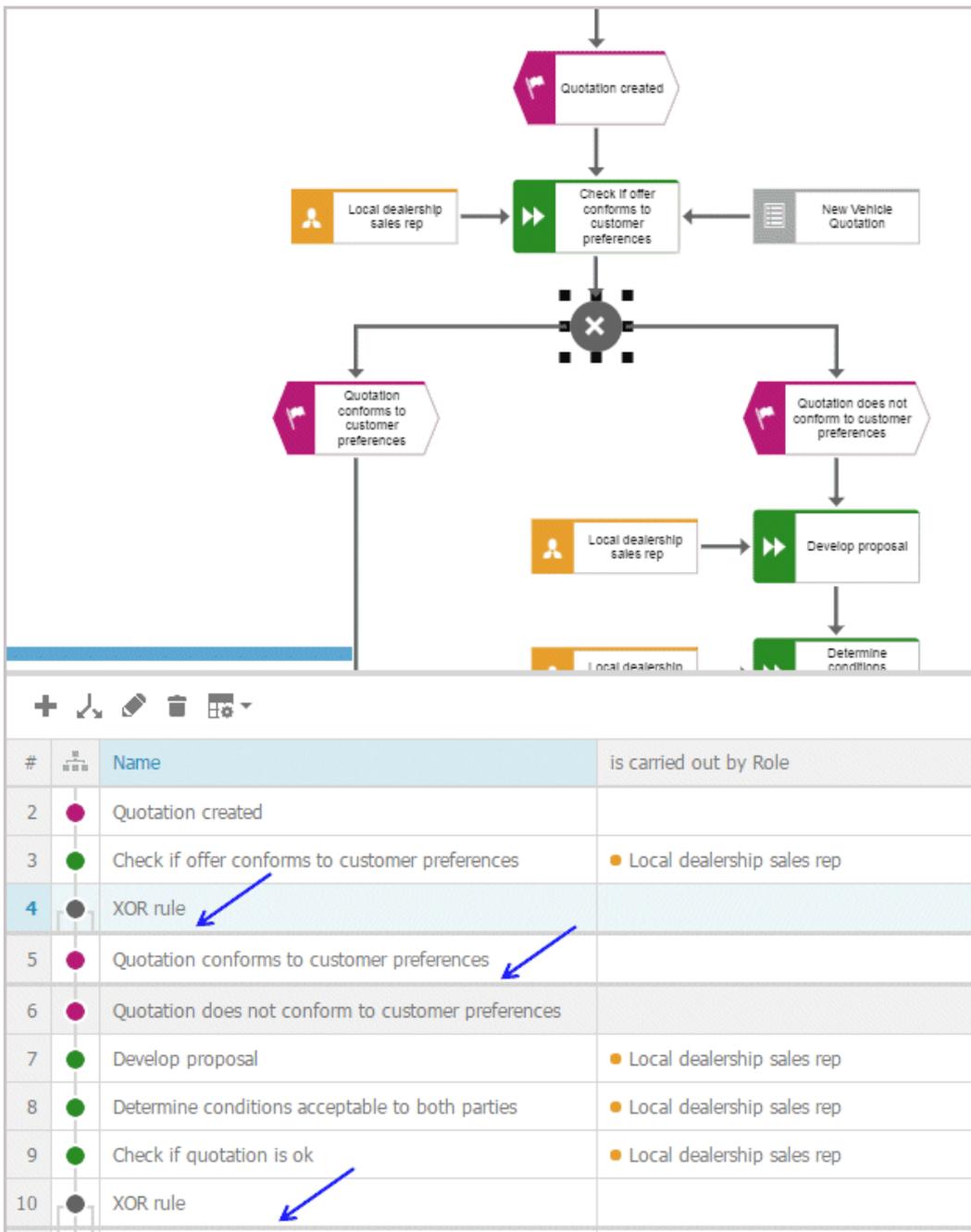
A table for a model of the **EPC** type contains, for example, green highlighting for functions because functions are displayed in green in the model. In a table for a BPMN diagram, a task appears in blue, as in the diagram.



A flashing cursor in an empty row indicates that entries can be made.

A gray background indicates that no entries can be specified.

Split paths are outlined by a thicker line.



In BPMN models, lanes are outlined by a thicker line.

4.5.2.4.5.17.4 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.

4.5.2.4.5.17.5 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.

4.5.2.4.5.17.6 What attribute values and processing types are available?

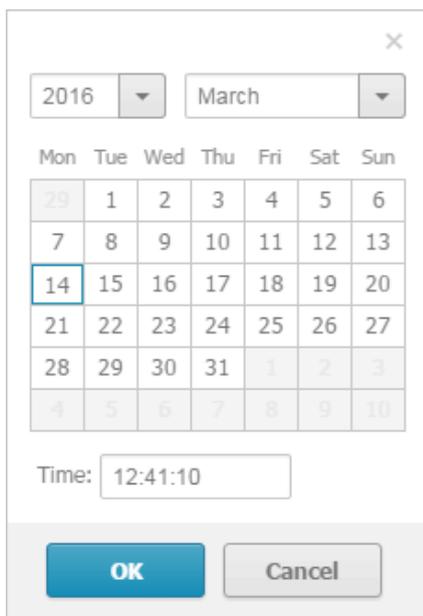
You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, for example, Creation date. System attribute columns have a gray background.

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 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, there are two buttons: "OK" and "Cancel".

Boolean

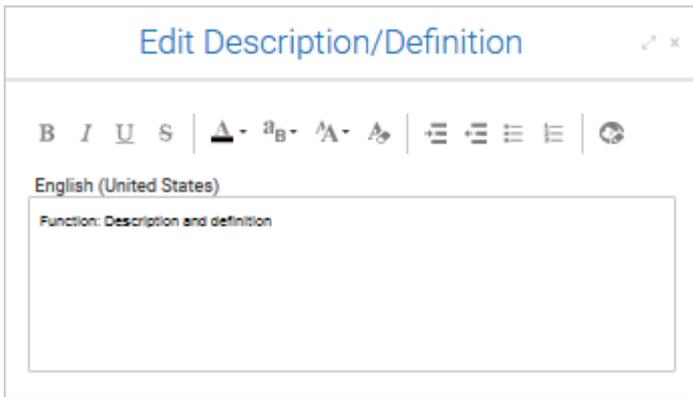
You can change the attribute value by enabling (true:) or disabling (false:) the check box. The check box for an attribute value that is not specified is shaded in color ().

Text attributes

You can change the attribute value directly in the cell.

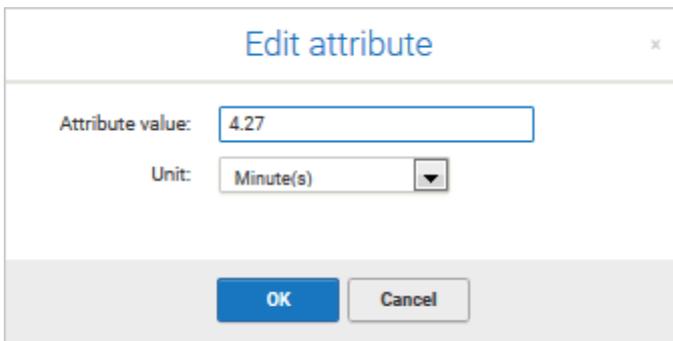
Formatable text attributes

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.

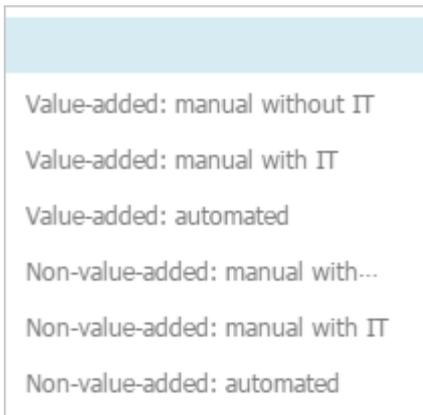


Numerical attributes

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.



4.5.2.4.6 Use BPMN modeling support

ARIS Connect Designer can assist you in modeling BPMN (page 1051) 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.

4.5.2.4.6.1 Enable and disable Guided Modeling

You can enable or disable Guided Modeling (page 849), which uses lines and arrows to help you place objects or connections (page 833) in the modeling area.

Procedure

1. Activate the **Model** (page 844) tab bar.
2. Click  **Modeling area** > **Show guides**. The check box is enabled () and the guides for placing items are shown in the modeling area.
3. To disable the guides, click  **Modeling area** > **Show guides**. The check box is disabled.

You have enabled or disabled the guides for Guided Modeling.

Set up default distance for Guided Modeling

What is Guided Modeling for?

4.5.2.4.6.2 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 798) 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 847) 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.

Tip

Select the object and click  **Edit** to select the relevant symbol.

4.5.2.4.6.3 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 847) 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.

4.5.2.4.6.4 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 847) 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.

4.5.2.4.6.5 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.

Prerequisite

The lane or pool into which a lane is to be inserted contains no flow objects.

Procedure

1. Activate the BPMN (page 847) 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.

4.5.2.4.6.6 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 847) 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.

4.5.2.4.6.7 Delete pool or lane

You can easily delete a lane or pool.

Prerequisite

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 847) tab bar.
2. Select the pool or lane you want to delete.
3. Click  **Delete pool or lane.**

The pool or lane is deleted.

If the lane to be deleted contains objects, these are placed in an automatically created lane with the name **Automatically generated lane**. If the top container is deleted, the objects are retained.

4.5.2.4.6.8 Delete pool or lane from the repository

You can easily delete a lane or pool from the repository.

Prerequisite

Flow objects and lanes must not be located side by side in the same pool, otherwise the lane cannot be deleted.

Procedure

1. Click  **Repository.**
2. In the database, select the group containing the relevant model. The content of the selected group is listed.
3. Move the mouse cursor over the pool or the lane you want to delete and click  **Delete.**

The pool or lane is deleted.

If the lane to be deleted contains objects, these are retained.

4.5.2.4.6.9 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 847) 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.

4.5.2.4.6.10 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 847) 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.

4.5.2.4.6.11 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 847) 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 898) and can be opened by double-clicking the assignment icon.

4.5.2.4.6.12 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 847) tab bar.
3. Click  **Expand subprocess**.

The process contained is displayed as embedded in the subprocess. (page 898) The process remains assigned to the subprocess (page 898).

4.5.2.4.6.13 Edit subprocess

You can edit a subprocess.

Procedure

1. Activate the BPMN (page 847) tab bar.
2. Select the relevant subprocess symbol with an assigned model.
3. Click  **Edit subprocess**.

The assigned model is opened for editing.

4.5.2.4.6.14 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 847) 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.

4.5.2.4.6.15 How to import a BPMN file

The following applies when importing (page 743) 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 (page 1054). Occurrence copies (page 1059) 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.

4.5.2.4.7 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.

4.5.2.4.7.1 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 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 421)** area. The corresponding dialog opens.
4. Click the **Model type** box and enter part of the model type name. All model types (page 793) 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.

4.5.2.4.7.2 Create matrix model from new objects

Using models of type **Matrix model** you can show existing connections between objects in a table.

Prerequisite

- You have the **ARIS Connect Designer** license privilege.
- The classic configuration set or modification set based on it is selected for the portal.

Procedure

1. Open a matrix model (page 962).
2. Double-click in the row or the column header. If no symbols are specified (page 964) yet, the **Add/Remove symbols** dialog opens (page 964).
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 964), 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.

4.5.2.4.7.3 Create matrix model from existing objects

Using models of type **Matrix model** you can show existing connections between objects in a table.

Prerequisite

- You have the **ARIS Connect Designer** license privilege.
- The classic configuration set or modification set based on it is selected for the portal.

Procedure

1. Open a matrix model (page 962).
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.

4.5.2.4.7.4 Open a matrix model

You can open models in different ways.

Prerequisite

- You have a **Designer** license.
- The model type of the model is allowed (page 799) by the method filter (page 798) in use.

Procedure

From Groups or the Processes area

1. If you are authorized to use multiple databases, select the database (page 411) containing the contents you want to access.
2. Click **Groups** (page 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
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.

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, select the database (page 411) containing the contents you want to access.
2. Click the **Search** box (page 1044) and enter a term that is included in the model name. All models containing this term are listed immediately.
3. In the **Models** 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, select the database (page 411) containing the contents you want to access.
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.

4.5.2.4.7.5 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.

4.5.2.4.7.5.1 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 792)
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.

4.5.2.4.7.5.2 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 792)
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.

4.5.2.4.7.5.3 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 792)
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.

4.5.2.4.7.5.4 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 792)
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 984) at definition level only.

6. Click **Apply**.

You have specified abbreviations for connections in a matrix model.

4.5.2.4.7.5.5 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 792)
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.

4.5.2.4.7.6 Create connections

4.5.2.4.7.6.1 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 962).
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 984) 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.

4.5.2.4.7.6.2 Draw connections using keyboard

You can draw connections between objects with the keyboard if you have defined abbreviations (page 965) for these connections.

Procedure

1. Open a matrix model (page 962).
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 984) 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.

4.5.2.4.7.6.3 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 962).
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 964) these connections again.

4.5.2.4.7.6.4 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 962).
2. Click the relevant cells in the matrix model and click  **Delete** or click the **Backspace** key. All connections except those that are used in other models are deleted.

The connections are deleted.

4.5.2.4.7.6.5 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 962).
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.

You can use the filter to reduce the number of connections displayed. If you have entered a filter and change the selection, the filter is reset.

The connection is deleted.

You can delete all connections except those that are used in other models.

4.5.2.4.7.7 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 962).
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.

4.5.2.4.7.8 Edit objects

4.5.2.4.7.8.1 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 962).
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 975) it from the matrix model.

4.5.2.4.7.8.2 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 962).
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.

4.5.2.4.7.8.3 Move objects in a matrix model

You can move objects within a matrix model.

Procedure

1. Open a matrix model (page 962).
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.

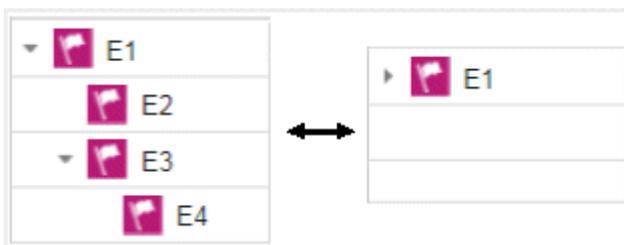
4.5.2.4.7.8.4 Group objects hierarchically

You can hierarchically group any objects both in rows and in columns.

Procedure

1. Open a matrix model (page 962).
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.

4.5.2.4.7.8.5 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 962).
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.

4.5.2.4.7.8.6 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 792)
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.

4.5.2.4.7.8.7 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 798) 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 842) 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.

4.5.2.4.7.8.8 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 962) 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 (page 1059).

COPY AND PASTE HIERARCHICALLY GROUPED OBJECTS

Procedure

1. Open (page 962) 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 (page 1059).

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.

4.5.2.4.7.8.9 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 962) a matrix model.
2. Open (page 800) 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 (page 1059).

4.5.2.4.7.8.10 Delete objects from a matrix model

You can delete objects from a matrix model.

Procedure

1. Open a matrix model (page 962).
2. Click the relevant cells in the matrix model and click  **Delete** or click the **Backspace** key.

The objects are deleted from the matrix model.

4.5.2.4.7.9 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 962).
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.

4.5.2.4.7.10 Apply color to row or column

You can apply a color background to entire rows or columns.

Procedure

1. Open a matrix model (page 962).
2. Activate the Start (page 842) tab bar.
3. 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.

4. Click  **Fill color**. The color palette opens.
5. Click the relevant color. The color palette closes.

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.

4.5.2.4.7.11 Color columns or rows with a user-defined color

You can assign your own color to row or column headers that contain objects.

Procedure

1. Open a matrix model (page 962).
2. Activate the Start (page 842) tab bar.
3. 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.

4. Click  **Fill color**. The color palette opens.
5. Click **Choose your own color**. The **Define color** dialog opens.
6. 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**.

7. Click **OK**.

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.

4.5.2.4.7.12 Reset color

You can reset the color of a row or a column if you have changed the color.

Procedure

1. Open a matrix model (page 962).
2. Activate the Start (page 842) tab bar.
3. 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.

4. Click  **Fill color**. The color palette opens.
5. Click  **Reset**.

You have reset the color of the selected rows or columns to their original color.

4.5.2.4.7.13 Change size of row or column

You can change the size of a row or a column.

Procedure

1. Open a matrix model (page 962).
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.

4.5.2.4.7.14 Change text orientation of row or column header

You can change the text orientation of a row or a column header.

Procedure

1. Open a matrix model (page 962).
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  **Text orientation** >  **Horizontal**.

If you want a vertical text orientation, click the row or column header and click  **Text orientation** >  **Vertical**.

The text is oriented accordingly.

Example

Column header title Row header title	 Function 1	Column header title Row header title	Function 1 
 Event 1		Event 1 	

4.5.2.4.7.15 Align text of row or column horizontally

You can align the text of a row or a column horizontally.

Procedure

1. Open a matrix model (page 962).
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	

4.5.2.4.7.16 Align text of row or column vertically

You can align the text of a row or a column vertically.

Procedure

1. Open a matrix model (page 962).
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	

4.5.2.4.7.17 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 962).
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.

4.5.2.4.7.18 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 962).
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.

4.5.2.4.7.19 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.

4.5.2.4.7.20 Valuable information

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

4.5.2.4.7.20.1 What is a 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

4.5.2.4.7.20.2 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.

4.5.2.4.7.20.3 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.

4.5.2.4.7.20.4 How to control the matrix using the keyboard

You can control the matrix using the keyboard:

Shortcut	Selection	Action
Arrow keys	In the list of symbols	Moves to the next/previous symbol in arrow direction.
	In the matrix	Moves to next column/row in arrow direction.
Enter	Cell	Opens the Display connection type dialog
Esc key	Dialog opened	Cancels the dialog.
F2	Cell of the row or column header	Opens the list of symbols available.
+ key	Matrix	Zooms in the matrix.
- key	Matrix	Zooms out the matrix.
0	Matrix	Zooms to 100 %

4.5.2.5 Check single models

You can use the semantic checks provided or use your own to check whether the open model or its 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.

The semantic check results (page 989) of the checks used in ARIS Connect Designer can be downloaded in the format selected.

You can also run semantic checks in the repository (page 996).

4.5.2.5.1 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 800).
2. Click  **Semantic checks** to open the **Semantic checks** (page 779) 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 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 993) in the model. The result can be downloaded (page 989) in the selected format (page 988).

4.5.2.5.2 Rerun a semantic check

You can rerun the last executed semantic check to ensure that your adjustments have fixed previous errors.

Procedure

1. Run a semantic check (page 985).
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.

4.5.2.5.3 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 800).
2. If you want to run a semantic check for the model, ensure that no model item 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 993) in the model. The result can be downloaded (page 989) in the selected format (page 988).

4.5.2.5.4 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 779) 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.

4.5.2.5.5 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 779) bar. The number of errors, warnings and notes is displayed.

26 errors **10 warnings** **10 notes**

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**.

26 errors Show all

4.5.2.5.6 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 854) in the model and in the **Semantic checks** bar.

4.5.2.5.7 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.

4.5.2.5.8 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 779) 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 988).

4.5.2.5.9 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 779) 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.

4.5.2.5.10 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.

4.5.2.5.11 Valuable information

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

4.5.2.5.11.1 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 733) or the content of a group (page 733) in the repository or for an opened model (page 985) and its objects (page 986) 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.

4.5.2.5.11.2 What semantic checks are available?

You can run the following semantic checks. Depending on your selection, only the semantic checks that can be applied to the selected models are available. For example, the semantic check **Validation of a BPMN model (BPMN 2.0)** is only available if you have selected models of type **BPMN 2.0**, such as **BPMN process diagram (BPMN 2.0)**.

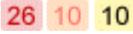
Name	Description
Allocation rules for EPC	This profile contains allocation rules for object types of EPCs.
Automation	These rules check whether the relationships and the structure of models are correct (modeling conventions) in order to enable automation. They also check whether all required items and information are available. You can start the semantic check for Value-added chain diagrams and EPCs. Optionally, you can specify the scope of the check.
BO semantic check rules	This profile contains BO semantic check rules for objects in process models, as well as BO attribute rules for cost category and cost driver diagrams.
Consistency of service allocation	This profile contains rules that check whether the business services assigned to functions match the required capabilities and whether the software services and their operations which are assigned to the business services provide at least the same capabilities as the business services.
General structure rules for all model types	This profile contains rules for checking the structure of your models.
Mandatory semantic checks	<p>This profile contains all relevant checks for models/objects. You can call it as a predefined macro.</p> <p>The macro specifies the following attributes for checked models/objects:</p> <ul style="list-style-type: none"> ▪ Time of last semantic check ▪ Semantic check successful <p>If an error is found in a model/object: Boolean = FALSE. If no error is found or the model/object cannot be checked because the rule does not apply to the model/object: Boolean = TRUE.</p>
Rules at design specification level	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Existence rules for model types of the design specification level ▪ Allocation rules for object types of the design specification level

Name	Description
Rules for data elements	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Rules for checking the existence of clusters, entity types, relationship types, ERM attributes, and technical terms ▪ Rules for checking the assignments of data view elements (relationship type, entity type, generalization type, etc.) ▪ Object attribute rules for objects in the data view ▪ Allocation rules for object type ERM attribute
Rules for functions	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Rules for checking the existence of functions ▪ Rules for checking assignments of functions to which a model of type Function tree, EPC, PCD, or Function allocation diagram is assigned ▪ Allocation rules for object type Function
Rules for organizational elements	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Rules for checking the existence of Organizational units, Positions, Groups, and Persons ▪ Object attribute rules for objects in the organization view ▪ Allocation rules for object types Organizational unit, Position, Group, and Person
Structure rules for hierarchy models	This profile contains structure rules for hierarchy models (function trees, organizational charts, etc.).
Structure rules for models of type 'eERM'	This profile contains rules for checking the structure of eERM models.
Structure rules for process models	This profile contains rules for checking the structure of process models (EPC, Process chain diagram, etc.).
Structure rules for specific hierarchy models	This profile contains structure rules for specified hierarchy models.
Validate process schedule	This profile contains structure rules for time-based modeling.
Validation for an EPC-to-BPMN transformation	This profile contains semantic check rules for models of type EPC .
Validation of a BPMN diagram (BPMN 2.0)	Validation of a BPMN diagram (BPMN 2.0)
Validation of a service-oriented BPMN model	Validation of a service-oriented BPMN model

Name	Description
Validation of a service-oriented EPC	This profile contains structure rules for service-oriented EPCs.

4.5.2.5.11.3 What icons symbolize the semantic check results?

Results of semantic checks are also displayed graphically.

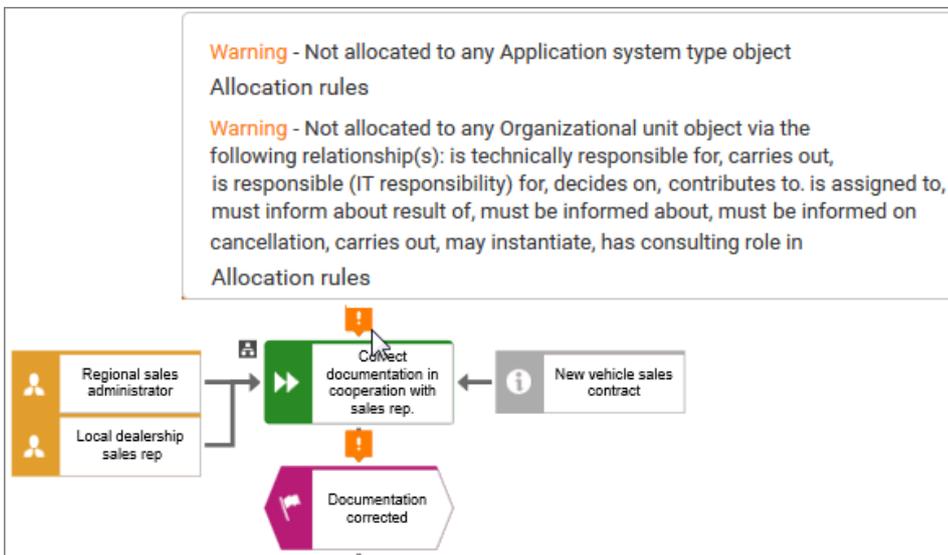
Icons	Description
	If a semantic check is executed in the  Repository without finding a rule violation, this is indicated by a green symbol.
	If a semantic check is executed in the  Repository and it finds rule violations, the number and type of rule violations are displayed. The number with a dark red background indicates the errors, the number with a light red background displays the warnings, and the number with a yellow background displays the notes.
	If a semantic check is executed using ARIS Connect Designer without finding a rule violation, this is indicated by a green symbol.
	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.
	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 .

4.5.2.5.11.4 How are errors, warnings, and notes marked in the model?

If a semantic check detects errors, warnings, or notes, the corresponding object is marked in the model.

Severity	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 marker, additional information about the warning is displayed.



You can show detailed information in the **Semantic checks** bar by expanding an entry.

#	Item	Finding type	Description
32	 Correct documentation in cooperation with sales rep.	 Allocation rules	Not allocated to any Organizational unit object via the following relationship(s): is technically responsible for, carries out
33	 Correct documentation in cooperation with sales rep.	 Allocation rules Warning	Not allocated to any Application system type object Rule: Function can be supported by application system type (1:n) This rule checks whether at least one application system type is allocated to each function.

4.5.2.5.12 Layout options dialog

Specifies the values based on which models are layouted.

Top margin

Specifies the distance to the top margin of the modeling area in millimeters.

Left margin

Specifies the distance to the left margin of the modeling area in millimeters.

Horizontal item spacing

Specifies the horizontal distance in millimeters that the items in the model should have next to each other after the layout process, and sets the default horizontal distance for Guided Modeling (page 849) and Smart Modeling (page 776).

Vertical item spacing

Specifies the vertical distance in millimeters that the items in the model should lie below each other after the layout process, and sets the default vertical distance for Guided Modeling (page 849) and Smart Modeling (page 776).

Layout orientation

Specifies the model orientation, either vertical or horizontal.

Arrange satellites

Specifies the arrangement of satellites, that is, of the objects that are assigned to structurally relevant objects (page 1061). When arranging satellites, different connection types are also included. Satellites that are connected to an object via the same connection type will be grouped together in one space.

Horizontally

The satellites are arranged from left to right. Satellites that are linked with the structurally relevant object by the same connection type are placed directly next to one another.

Quadratic

Satellites are arranged inside a square if possible. Satellites that are linked with the structurally relevant object by the same connection type are grouped together within a common space.

Vertically

The satellites are arranged from top to bottom. Satellites that are linked with the structurally relevant object by the same connection type are placed directly beneath one another.

Minimize connection anchor points

Reduces the number of anchor points in the layout. If you use the grid at the same time, you can obtain the effect of superimposing several outgoing or incoming connections.

Use as default

Transfers your layout settings.

When you start laying out models of this type, the settings you specify here will be reused and you will not have to reenter them.

4.5.3 Check models and objects

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 733), multiple models, and multiple objects (page 733). Errors, warnings, and notes are indicated in the **Semantic checks** bar.

The semantic check results (page 998) of the checks used in the repository can be downloaded in the format selected.

You can also run semantic checks for open models.

4.5.3.1 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.

4.5.3.2 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. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. Select the database group containing the models and/or objects you want to check.
5. In the detailed view, enable the check boxes of the relevant models and/or objects.
6. 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.
7. Click in the semantic check list box. The relevant semantic checks are listed.
8. Select the required semantic check.
9. 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 998) in the selected format (page 988).

4.5.3.3 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. Click the ► arrow of  **Databases** on the left to display the available databases.
3. Select the relevant database.
4. 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.
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 998) in the selected format (page 988).

4.5.3.4 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.

4.5.3.5 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 988).

4.5.3.6 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 987).

4.5.3.7 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.

4.5.3.8 Valuable information

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

4.5.3.8.1 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 733) or the content of a group (page 733) in the repository or for an opened model (page 985) and its objects (page 986) 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.

4.5.3.8.2 What semantic checks are available?

You can run the following semantic checks. Depending on your selection, only the semantic checks that can be applied to the selected models are available. For example, the semantic check **Validation of a BPMN model (BPMN 2.0)** is only available if you have selected models of type **BPMN 2.0**, such as **BPMN process diagram (BPMN 2.0)**.

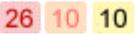
Name	Description
Allocation rules for EPC	This profile contains allocation rules for object types of EPCs.
Automation	These rules check whether the relationships and the structure of models are correct (modeling conventions) in order to enable automation. They also check whether all required items and information are available. You can start the semantic check for Value-added chain diagrams and EPCs. Optionally, you can specify the scope of the check.
BO semantic check rules	This profile contains BO semantic check rules for objects in process models, as well as BO attribute rules for cost category and cost driver diagrams.
Consistency of service allocation	This profile contains rules that check whether the business services assigned to functions match the required capabilities and whether the software services and their operations which are assigned to

Name	Description
	the business services provide at least the same capabilities as the business services.
General structure rules for all model types	This profile contains rules for checking the structure of your models.
Mandatory semantic checks	<p>This profile contains all relevant checks for models/objects. You can call it as a predefined macro.</p> <p>The macro specifies the following attributes for checked models/objects:</p> <ul style="list-style-type: none"> ▪ Time of last semantic check ▪ Semantic check successful <p>If an error is found in a model/object: Boolean = FALSE. If no error is found or the model/object cannot be checked because the rule does not apply to the model/object: Boolean = TRUE.</p>
Rules at design specification level	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Existence rules for model types of the design specification level ▪ Allocation rules for object types of the design specification level
Rules for data elements	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Rules for checking the existence of clusters, entity types, relationship types, ERM attributes, and technical terms ▪ Rules for checking the assignments of data view elements (relationship type, entity type, generalization type, etc.) ▪ Object attribute rules for objects in the data view ▪ Allocation rules for object type ERM attribute
Rules for functions	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Rules for checking the existence of functions ▪ Rules for checking assignments of functions to which a model of type Function tree, EPC, PCD, or Function allocation diagram is assigned ▪ Allocation rules for object type Function
Rules for organizational elements	<p>This profile contains the following rules:</p> <ul style="list-style-type: none"> ▪ Rules for checking the existence of Organizational units, Positions, Groups, and Persons ▪ Object attribute rules for objects in the organization view ▪ Allocation rules for object types Organizational unit, Position, Group, and Person

Name	Description
Structure rules for hierarchy models	This profile contains structure rules for hierarchy models (function trees, organizational charts, etc.).
Structure rules for models of type 'eERM'	This profile contains rules for checking the structure of eERM models.
Structure rules for process models	This profile contains rules for checking the structure of process models (EPC, Process chain diagram, etc.).
Structure rules for specific hierarchy models	This profile contains structure rules for specified hierarchy models.
Validate process schedule	This profile contains structure rules for time-based modeling.
Validation for an EPC-to-BPMN transformation	This profile contains semantic check rules for models of type EPC .
Validation of a BPMN diagram (BPMN 2.0)	Validation of a BPMN diagram (BPMN 2.0)
Validation of a service-oriented BPMN model	Validation of a service-oriented BPMN model
Validation of a service-oriented EPC	This profile contains structure rules for service-oriented EPCs.

4.5.3.8.3 What icons symbolize the semantic check results?

Results of semantic checks are also displayed graphically.

Icons	Description
	If a semantic check is executed in the  Repository without finding a rule violation, this is indicated by a green symbol.
	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.
	If a semantic check is executed using ARIS Connect Designer without finding a rule violation, this is indicated by a green symbol.
	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.
	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 .

4.5.4 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

4.5.4.1 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.

4.5.4.2 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.

4.5.4.3 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.

4.5.4.4 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.

4.5.5 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 (page 1051) 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.

4.5.5.1 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.

4.5.5.2 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.

4.5.5.3 Open version

You can open versions of a model for information purposes.

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.
4. Click the name of the version you want to open write-protected in ARIS Connect Designer.

The write-protected version of the model opens on a new tab and you can obtain information on the model's contents. Furthermore, you can view reports on the model or selected objects (page 910).

Tip

You can click on two or more versions. They are opened on separate tabs. Switching between the tabs shows you the differences between the versions in a simple way.

4.5.6 Use dashboards

If you have an ARIS Aware (page 587) license, you can use predefined dashboards that are supplied with the software, or create your own dashboards.

4.5.6.1 Open a dashboard

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 for details.
- You have the **View** permission for the assigned data feeds. See Manage data feed permissions 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 currently opened, provided you have the **Dashboard administrator** function privilege. Click  **Edit dashboard** in the main menu.

4.5.6.2 Create a dashboard

ARIS Connect allows you to create your own dashboards.

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.
7. Click  **Refresh**.

Your dashboard is created and available in the **Dashboards** list in the  Repository of ARIS Connect.

4.5.6.3 Delete a dashboard

You can delete an existing dashboard from the  Repository of ARIS Connect.

Warning

Deleted dashboards cannot be restored.

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. To delete a dashboard, move the mouse pointer over a dashboard in the dashboard list and click the  **Delete** icon in the corresponding row.
6. To delete one or more dashboards, select the dashboards you want to delete and click the  **Delete** icon on the toolbar.
7. Click **Yes** to confirm the deletion.

The selected dashboards are deleted.

4.5.6.4 Specify dashboard privileges in the Repository

You can specify dashboard view privileges in the  Repository of ARIS Connect. You can assign view privileges to individual users or to user groups. If you assign privileges to a user group, the privileges are automatically assigned to all members of that group.

All users and user groups with the **View** privilege for the dashboard are listed in the **Associated users/user groups** box. Initially, only the creator of the dashboard has the **View** privilege for the dashboard. All not yet assigned users and user groups are listed in the **Available users/users groups** box.

All users and user groups with the **View** privilege for the dashboard has automatically the **View** privilege for all associated assets of the dashboard, such as data feeds and aliases.

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. To specify dashboard privileges, move the mouse pointer over a dashboard in the dashboard list and click the  **Specify privileges** icon in the corresponding row.
6. Enter a term in the  filter box to filter the list of available users and user groups.
7. In the **Available users/users groups** box, select the users and user user groups you want to assign to the dashboard and click **Add**.
8. Click **Add all** to assign all available users and user groups to the dashboard.
9. In the **Associated users/user groups** box, select the users and user user groups from whom you want to revoke the **View** privilege and click **Remove**.
10. Click **Remove all** to revoke the **View** privilege of all users and user groups.
11. Click **OK**.

The selected users and user groups have now the **View** privileges for the dashboard and the associated assets.

4.5.6.5 Open a data feed

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, provided you have the **Dashboard administrator** function privilege.

4.5.6.6 Create a data feed

ARIS Connect allows you to create your own data feeds.

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.
7. Click  **Refresh**.

Your data feed is created and available in the **Data feeds** list in the  Repository of ARIS Connect.

4.5.6.7 Delete a data feed

You can delete an available data feed in the  Repository of ARIS Connect.

Warning

Deleted data feeds cannot be restored.

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 delete a data feed, move the mouse pointer over a data feed in the data feed list and click the  **Delete** icon in the corresponding row.
6. To delete one or more data feeds, select the data feeds you want to delete and click the  **Delete** icon on the toolbar.
7. Click **Yes** to confirm the deletion.

The selected data feeds are deleted.

4.5.6.8 Specify data feed privileges

You can specify data feed view privileges in the  Repository of ARIS Connect. You can assign view privileges to individual users or to user groups. If you assign privileges to a user group, the privileges are automatically assigned to all members of that group.

All users and user groups with the **View** privilege for the data feed are listed in the **Associated users/user groups** box. Initially, only the creator of the data feed has the **View** privilege for the dashboard. All not yet assigned users and user groups are listed in the **Available users/users groups** box.

All users and user groups with the **View** privilege for the data feed has automatically the **View** privilege for all associated assets of the data feed, such as other data feeds and aliases.

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 specify data feed privileges, move the mouse pointer over a data feed in the data feed list and click the  **Specify privileges** icon in the corresponding row.
6. Enter a term in the  filter box to filter the list of available users and user groups.
7. In the **Available users/users groups** box, select the users and user user groups you want to assign to the data feed and click **Add**.
8. Click **Add all** to assign all available users and user groups to the data feed.
9. In the **Associated users/user groups** box, select the users and user user groups from whom you want to revoke the **View** privilege and click **Remove**.
10. Click **Remove all** to revoke the **View** privilege of all users and user groups.
11. Click **OK**.

The selected users and user groups have now the **View** privileges for the data feed and the associated assets.

4.5.7 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.

4.5.7.1 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 382) in the Classic view (page 419) or **Processes** (page 396) in the Default view (page 420).
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 (page 800).
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.

4.5.7.2 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 (page 800).
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.

4.5.7.3 Have document, assigned to a model, 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 487) 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**.

4.5.7.4 Share document assigned to a model

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 487) 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**.

4.5.7.5 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 487) 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.

4.5.7.6 Have document approved in ARIS document storage

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**.

4.5.7.7 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**.

4.5.7.8 Rename document

You can rename a document.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.
5. Click  **Edit**.
6. Enter the new name in the **File name** box.
7. Click **Save**.

The name is changed.

4.5.7.9 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.

4.5.7.10 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.

4.5.7.11 Find a document

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

Procedure

1. Click in the **Search** box.



2. Enter the relevant term.
A list with the first results (page 1044) will be shown as you enter the term. As you complete the term, the list will be updated.
3. In the list, click the entry to which you want to navigate.
4. Select **Open with** in your browser.

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

4.5.7.12 Find document using the extended search

You can use the extended search to find items in ARIS document storage.

Procedure

1. In the **Search** area (page 1036), click the context field and select **Documents**.
2. Enter the relevant term.
A list with the first results (page 1044) will be shown as you enter the term. As you complete the term, the list will be updated.
3. 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.

4. Click additional criteria. The selected criteria will be displayed in the Search area and restrict the search result.
 - d. Selected filter criteria are listed.
 - e. You will be offered different input options depending on the property type. A calendar opens so you can select a date:

The screenshot shows a search filter configuration window. The main area contains the text "Property Created on" followed by a dropdown menu currently set to "Less than or equal to". To the right of this dropdown is a text input field containing the date "2019 Jan 14". Below this, a calendar popup is displayed, showing the month of January 2019. The date "14" is selected and highlighted in blue. The calendar grid shows days from 31 to 10. At the bottom of the calendar popup are two buttons: "OK" (in a blue box) and "Cancel" (in a grey box).

5. Select whether **Selected filter criteria are listed** or **One of the following criteria met** should be used.
6. To clear a selected filter criterion, click **×** **Clear** in the line of the relevant filter criterion. The filter criterion will be cleared and the search result updated.
7. In the list, click the entry to which you want to navigate.
8. To see more search criteria, click **Show more** in the **Filters** area. The list will be extended.
9. To clear all filter criteria for an area, click **Clear subordinate filters**.
10. 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.

4.5.7.13 Handle document versions

4.5.7.13.1 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 administrator** 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.

<input type="checkbox"/>	Name	File type	Status	
<input type="checkbox"/>	 Customer acquisition.gif Last change: 28.02.2019, 16:03:00 by system	Graphics interchange format	New	    
<input type="checkbox"/>	 Customer acquisition.pdf Last change: 28.02.2019, 16:03:36 by system	Portable document format	New	

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.

4.5.7.13.2 Sort versions of a document

You can sort versions of a document.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click 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.

4.5.7.13.3 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.

4.5.7.13.4 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.

4.5.7.13.5 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.

4.5.7.14 Handle document with Document administrator privilege

4.5.7.14.1 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 administrator** function privilege.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click  **Upload**. The **Upload document** 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.

4.5.7.14.2 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 administrator** function privilege.

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.

Click  **Download** in the document row.

<input type="checkbox"/>	Name	File type	Status	
<input type="checkbox"/>	 Customer acquisition.gif <small>Last change: 28.02.2019, 16:03:00 by system</small>	Graphics interchange format	New	    
<input type="checkbox"/>	 Customer acquisition.pdf <small>Last change: 28.02.2019, 16:03:36 by system</small>	Portable document format	New	

4. Select **Open with** in your browser.

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

4.5.7.14.3 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 administrator** 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.

4.5.7.14.4 Select document owner or responsible

You can edit the properties of a document.

Prerequisite

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

Procedure

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

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

You can select the person responsible for the document.

4.5.7.14.5 Move document

You can move a document to another folder.

Prerequisite

You have the **Document administrator** 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.

4.5.7.14.6 Move multiple documents

You can move documents to another folder.

Prerequisite

- You have the **Document administrator** 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.

4.5.7.14.7 Browse ARIS document storage

You can search for a document.

Prerequisite

You have the **Document administrator** 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.

4.5.7.14.8 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.

4.5.7.14.9 Unlock document

You can unlock documents that are locked and thus make them available to other users for editing.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the relevant document. The **Document details** page opens.
5. Click  **Unlock document**.

The document can be edited by other users.

4.5.7.14.10 Delete document from ARIS document storage

You can remove documents from ARIS document storage.

Prerequisite

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

Procedure

1. Click  **Repository**.
2. Click **Documents**.
3. Click a folder in the navigation.
4. Click the 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.

4.5.7.14.11 Delete multiple documents from ARIS document storage

You can remove multiple documents from ARIS document storage in one operation.

Prerequisite

You have the **Document administrator** 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.

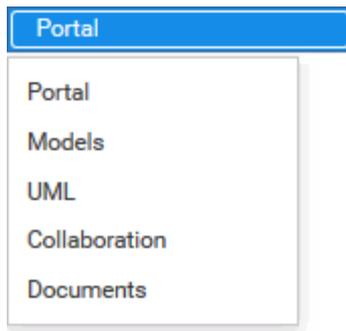
4.6 Search content



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 359) on the start page to access items directly. Or you can use the Search area (page 1036) to define the search context beforehand and filter the search results (page 1046).

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:



Models found in the **Models** search context can be opened for editing. Models found in the **Portal** search context can be opened read-only. Since users with **ARIS Connect Viewer** license have only read access to models, the **Models** search context is not available to them.

4.6.1 Open Search area

You can open the **Search** area (page 1045) to search for items based on filter criteria.

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.

You have opened the **Search** area and you can browse ARIS Connect for the relevant terms.

4.6.2 Open Search area with term

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

Procedure

1. If more than one database is provided, select the database (page 411) your search is to be based on.
2. Click in the  **Search** box.
3. Enter the term you want to find.



A list with first results (page 1044) is shown as you enter the term. As you complete the term, the list will be updated.

4. Click **Show all** at the end of the list.

The Search area opens with the results for the term you entered and you can restrict the result in the **Search** area (page 1036) to the items you want to find by using the search context and filters.

4.6.3 Start quick search

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

Procedure

1. If more than one database is provided, select the database (page 411) your search is to be based on.
2. Click in the  **Search** box.
3. Enter the relevant term.



A list with first results (page 1044) is shown as you enter the term. As you complete the term, the list will be updated.

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

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

4.6.4 Find using the Search area

You can use the **Search** area (page 1045) to find items. The Search area offers a wide range of filter options.

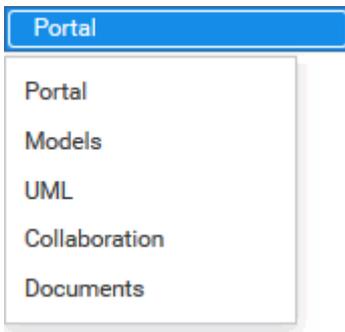
Procedure

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



If more than one database is provided, select the database (page 411) your search is to be based on.

2. Enter the term you want to find in the **Search** field of the **Search** area. The items found will be presented in a list.
3. Click the down arrow that follows the term you entered and select the search context, for example, **Portal** or **Documents**.



The search results are updated according to the search context. If filters are available for the selected context, they are listed in the **Filters** area.

4. In the **Filters** area, click the relevant filters and adjust the filter properties as necessary (page 1038).

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

4.6.5 Jump to an item found

You can use jump to items that are listed in the **Search** area (page 1045).

Procedure

1. Perform a search (page 1036) and filter the search result (page 1038) if necessary.
2. Click the name of the relevant item, for example, the name of a model. If you performed the search in the **Model** context (page 1038), the model is opened on a new tab for editing (page 800). If you performed the search in the **Portal** context (page 1038), the fact sheets (page 1055) of the model are opened.
3. When you reopen the **Search** area, the search result is still available and you can jump to another item.

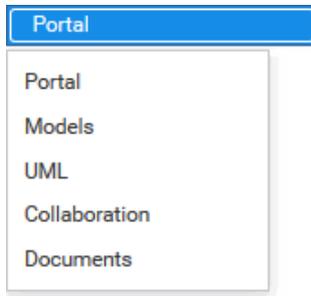
You navigated from the search result to a found item.

4.6.6 Use search context and filters

You can restrict the result in the **Search** area (page 1036) to the items you want to find by using the search context and filters.

Procedure

1. In the **Search** area, click the context field that follows the term you entered, and select, for example, **Portal**, **Models**, or **Documents**.



The search result will be restricted to the range you selected. If the search result can be filtered, filter criteria will be listed in the **Filters** area.

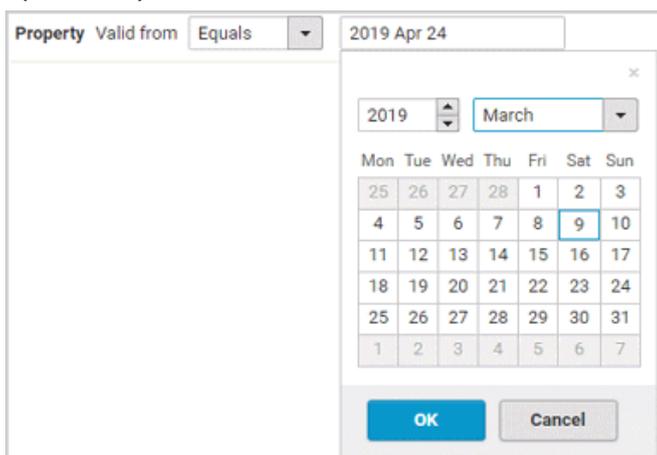
2. Click one or more filter criteria. The selected filter criteria will be listed and the search result updated. If you have selected a filter criterion that you can define more precisely, another area with subordinate filter criteria will be added to the **Filters** area.
3. Click additional criteria. The selected criteria will be displayed in the Search area and restrict the search result.
 - f. Selected filter criteria are listed:

Item **Process** × **Activity** ×

- g. You can enter properties as the search criterion for certain filter criteria, for example, **Responsible**:

Property Responsible Contains ethan

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.

4.6.7 Save search settings as a favorite

In the **Search** area (page 1045), you can save your search settings. Thus, you can search the content based on specific settings at any time.

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.
3. Select the filter criteria (page 1038) to define your search.
4. Click **☆ Save search query as a favorite**. The corresponding dialog opens.
5. Enter a name.
6. Click **OK**.

The search settings are saved in the **★ My Favorites** area. You can filter the content based on these settings (page 449) at any time from various devices.

4.6.8 Use a favorite in the Search area

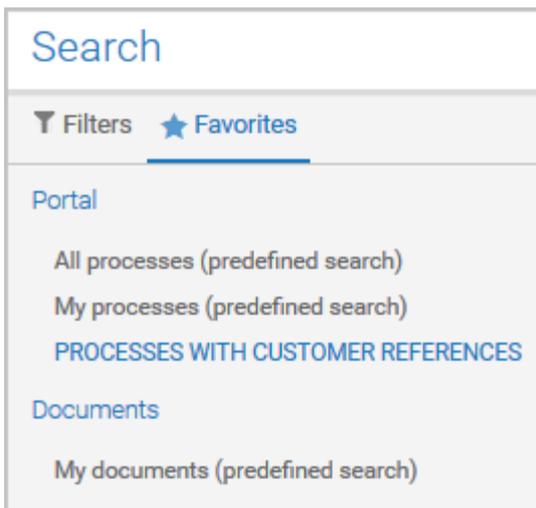
In the **Search** area (page 1045), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

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



2. If more than one database is provided, select the database (page 411) your search is to be based on.
3. Click ★ **Favorites** in the **Filters** bar.



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

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

4.6.9 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.

The filter criterion is cleared and the list of filter results updated.

Clear criteria from the main filter area

You can clear all filter criteria from the main filter area. The main filter area is the upper part of the filter bar located to the left of the list of results.

Procedure

Click **Show all** in the **Filter** bar.

All filter criteria are cleared and the list of filter results is updated.

Clear filter criteria from the subordinate filter area

You can clear the filter criteria from the subordinate filter area. If you have selected the **Models** context for filtering, the subordinate filter criteria for models are located in the **Filter** access bar below the main filter area.

Procedure

Click **Clear subordinate filters** in the **Filter** bar under **Attribute types**.

The filter criteria of the subordinate filter area are removed and the list of filter results is updated.

Clear all filter criteria

You can clear all filter criteria.

Procedure

Click **Clear all filters** at the top right.

All filter criteria are cleared and the list of filter results is updated.

You have cleared filter criteria.

4.6.10 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 (page 1036) using the **Search** area (page 1045).
2. Hold down the **Ctrl** key and click the name of the relevant item in the result list.

The item opens on a separate tab.

4.6.11 Filter using My Favorites

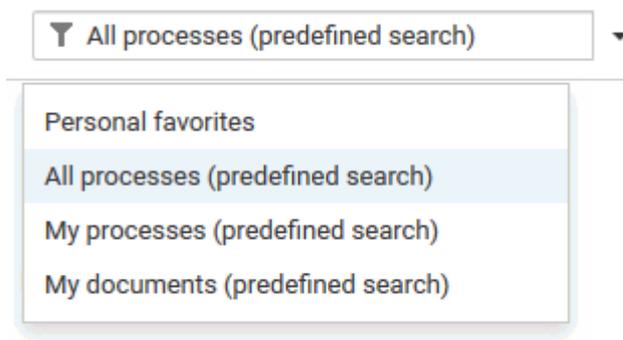
In the portal, you have direct access to all saved filter settings (page 447). The filters output the content of the selected database, while the personal favorites (page 446) of all published databases are listed and can be accessed.

Procedure

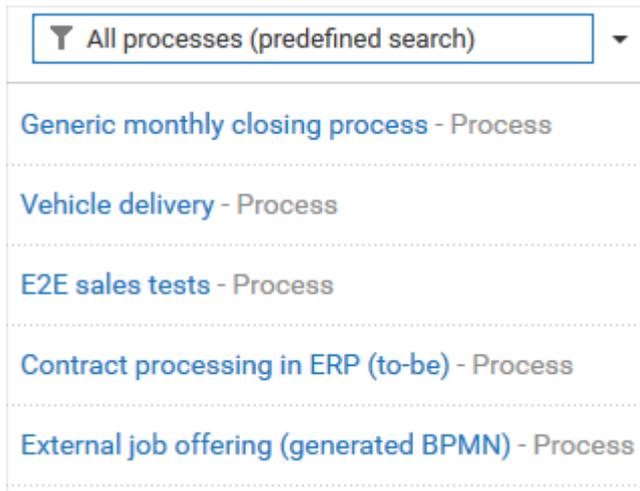
1. If you have access to more than one database, select the database you want to work with.
2. Click  **My favorites** in **Home** (page 380)

Provides direct access to saved filter criteria (Seite 415) of the **Favorites** area of the search as well as to models and groups a user selected as personal favorites (page 446).

3. Click the  **down arrow** of the **Filter selection** field.



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



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

5. Click the page numbers to display the content of the corresponding pages.
6. 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.

4.6.12 Delete a favorite setting

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

Procedure

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



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

The filter setting is deleted.

4.6.13 Valuable information

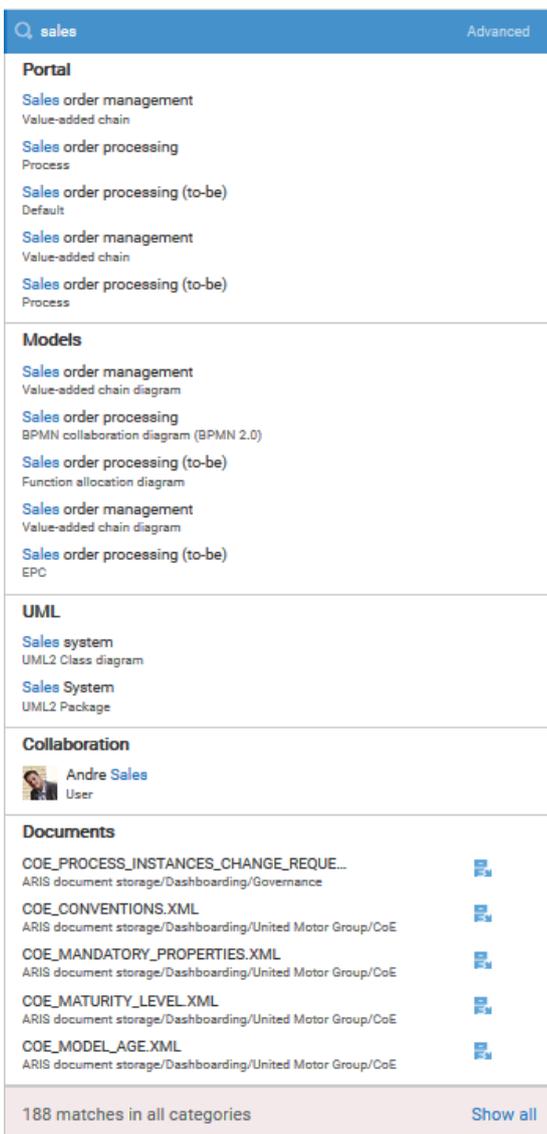
This section provides background information to assist you in carrying out the relevant procedures.

4.6.13.1 How is the quick search structured?

Quick search consists of a single input box:



A search list is compiled and displayed as soon as you have entered a search term. The first matches are output by category. The categories displayed depend on the license you are using. If you use a **Designer** license, the following categories are displayed.



The total number of matches is output at the end of the search list.

To access all matches, click **Show all**. The Search area opens (page 1045).

4.6.13.2 How is the Search area structured?

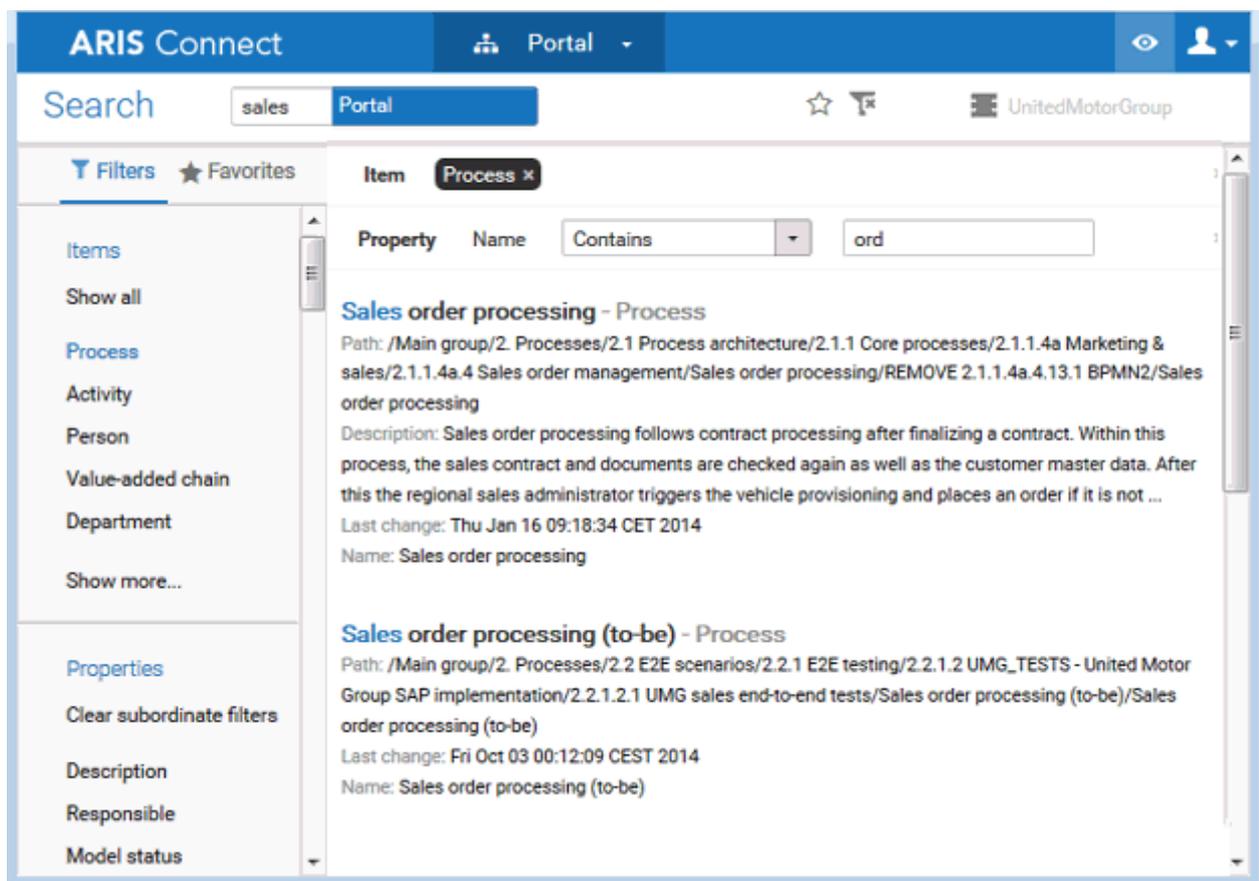
The **Search** area (page 1034) includes a list of all matches.

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 1041) in several ways. You can save filter settings (page 447) and access saved filter settings (page 449) 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.

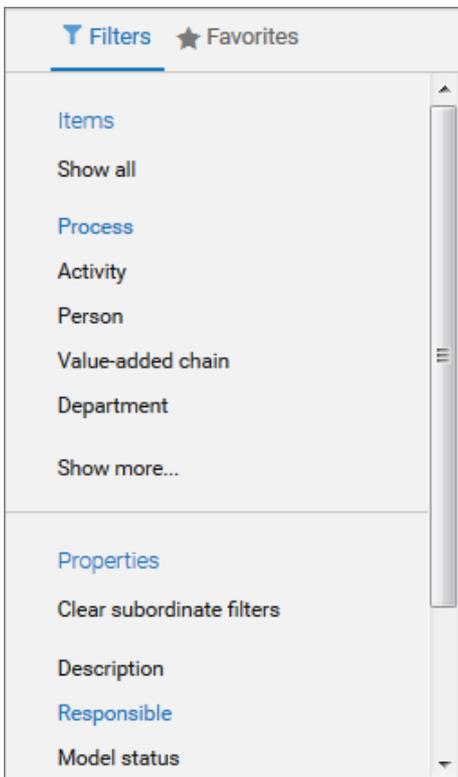


4.6.13.3 Which filter criteria are available?

If you perform a search, the search result is displayed in a specific context. The following description is based on the **Portal** context.



You can filter search results with the filter pane in the **Search** area.



If you select a filter for an item, the filter criterion is shown above the search result and the filter is applied to the search result.



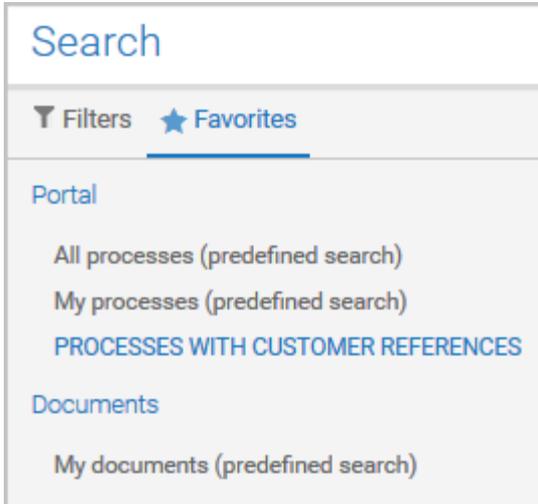
In the **Portal** context, you can further restrict the search by specifying properties.



You can remove filters by clicking the **x Clear** either behind the criterion or at the end of a property.

4.6.13.4 How are favorites structured in the search?

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



4.6.13.5 How can search results be influenced?

If you use quick search (page 359) or the Search area (page 1036) to find items, the list of results will be influenced by the selected database (page 411) 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.

4.6.13.6 What does the search find?

The search in ARIS Connect works according to the following rules.

- In general, the search can find words and numbers. Special characters, for example, **! (\$ § % &) "** are not considered.
For example, the result of the search term **ser** is **Hardware server** and **Customer service process**.
- Special characters, for example, **! (\$ § % &) "** are not considered. Items named with special characters are found using the characters of the search terms.
For example, the result of the search term **percent** is **%Percentage**.
- The search for more than one word links the words with AND. That means that every word must be present for an item to be listed.
For example, the result of the search term **customer data** is **Customer data model**, **Input customer data**, **Create customer master data**, and **Data - customer model**.
- An exact search for several words is not possible.
- The wildcard ***** is ignored.
- The wildcard **question mark (?)** searches for any character except for special characters.
For example, the result of the search term **a?a** is **a1a**, **a2a**, and **aba**. The result of the search term **?per** does not list any item whose name contains **%Percentage**.
- Untitled items cannot be found. If items are untitled in the current language, but are named in the alternative language, they are found and listed in the alternative language.

5 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.

API NAME

The API name is a unique identifier for database items. You can use the API name to address database items with the ARIS API (page 65) programming interface.

Information about API names is available on the **Administration** tab below the **Method** folder structure. Specific information from the Method help is available by selecting an item, for example, an object, a connection, or a model, and pressing **Ctrl + F1**.

ARIS ADMINISTRATION

Manages users, user groups, privileges, licenses, documents, configurations, and processes for a tenant (page 1063).

ARIS API

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

ARIS CONNECT GOVERNANCE INBOX

As soon as the first change request is made, the **ARIS Connect Governance Inbox** database is automatically created in ARIS. It contains a Requirements inbox for each person responsible with a model of the **Requirements tree** type. An object of the **Requirement** type is created for each change request. As the process continues, the realization status of the object is automatically changed depending on which status the person responsible has selected (**Approve, Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

ASSIGNMENT

A model assigned to an object by an assignment relationship (page 1051).

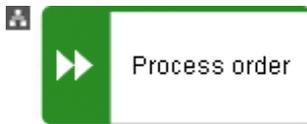
If a model is assigned to an object, this can be indicated by an assignment icon (page 1051). An assignment enables you, for example, to use a model to describe objects in detail and thus get from a rough plan to a detailed plan.

ASSIGNMENT ICON

Icon that shows that one or more models are assigned to an object by an assignment relationship (page 1051).

You can open assigned models by double-clicking the assignment icon. The assignment icon is displayed if you have disabled the **Hide assignment icons** option.

The assignment icon may look different and may be placed at different points in the object depending on the model template you are using.



You can also assign an assignment icon of your own to a database. It is displayed to the right of the icons.



ASSIGNMENT RELATIONSHIP

Relationship of an object to a model assigned (page 1050) to it.

You can create an assignment relationship using drag and drop or using the object properties dialog. The assignment relationship is displayed at the object by an assignment icon (page 1051).

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 (page 1052). 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 (page 1065))

CONFIGURATION SET

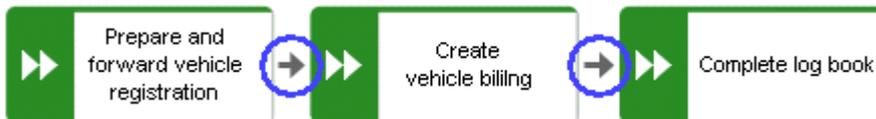
A configuration set specifies the graphical user interface of ARIS Connect. Configuration sets are based on XML files and cannot be changed within ARIS Connect, but only in the relevant XML file. By default, ARIS Connect provides the classic configuration set (page 419) and the default configuration set (page 420).

You can specify a modification set (page 1058) based on a configuration set.

CONNECTION

Visible relationship (page 1060) 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 modeling area. If a direction is relevant, the line is added an arrow. One example is the connection of the **is predecessor of** type between functions in models of the **EPC** (event-driven process chain) type.



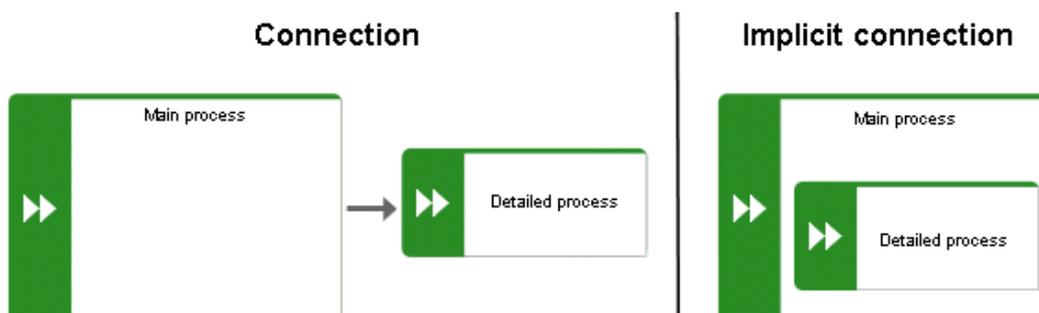
CONNECTION, IMPLICIT

Invisible connection.

Implicit connections are created if the **Create implicit connections for overlapping objects** option is enabled and objects are placed within objects. In the displayed dialog, you can decide whether to hide any connections and, if so, which connections to hide for these objects. The difference between implicit connections and implicit relationships is that an implicit connection can be represented by a line in the modeling area. This line is displayed again, for example, if you drag an object from another object down into the free area of the modeling area.

Example of implicit connections:

Place a function on another function in a model of the **EPC** type.



In a model of the **PCD** type, place a function in the **Function** column and an organizational unit in the **Organizational unit** column. An implicit connection of the 'carries out' type is automatically created from the organizational unit to the function.

Function	Organizational unit
	

This needs to be differentiated from implicit relationships (page 1060).

CRON EXPRESSION

String consisting of six to seven fields that is separated by a space and represents a time.

Normally, a CRON expression is used to define routine jobs that are executed automatically at certain times by the system.

Fields

- Seconds, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Minutes, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Hours, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Day in month, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Month, mandatory field, valid value: **0-12** or **JAN-DEC**, valid characters: ***, /, , -**.
- Day of the week, mandatory field, valid value: **0-7** or **SUN-SAT**, valid characters: ***, /, , -, ?, L, C, #**.
- Year, not a mandatory field, valid value: **1970-2010**, valid characters: ***, /, , -**.

CSS

Cascading Style Sheets is a style sheet language used for describing the presentation HTML documents.

CURRENT VERSION (VERSIONING)

Corresponds to the last versioned database content. This version includes the entire versioned content of a database. You have only read access for the content.

In principle, this is the last change list (page 1051) created for a database (versioning state (page 1065)).

D

DASHBOARDS

Dashboards (page 431) visualize database internal and database external information. Information can be runtime information, performance data, and analysis data, for example.

DEFINITION COPY

Copy of the object definition, that is of the entire object, rather than just the occurrence (page 1059) as is the case with the occurrence copy (page 1059).

The definition copy creates a new object. The occurrence, which is created when creating the definition copy, refers to the new object.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It makes sense to create a definition copy for an existing object if a new object is to have properties similar to those of the source object.

For example, you have modeled the object **Plant 1** and specified its properties. You now wish to create the object **Plant 2**, which has properties similar to Plant 1. In this case, it is advisable to create a definition copy of Plant 1. Object **Plant 2** is thus given all the properties of object Plant 1, but exists independently of it. You now simply need to change the properties that differ from those of object Plant 1, for example, by changing the name to **Plant 2**.

This involves significantly less work for you than creating the object from scratch and having to enter all the properties again.

Some attributes are not copied when the definition copy is created. For example, it does not make sense to copy the identifier of an object because the identifier represents a unique ID of an object.

E

ESCALATION MANAGER

The escalation manager is the user who is notified when a human task is not completed by any executor by the due date.

F

FACT SHEETS

Fact sheets show facts about an item in various views. Facts can be displayed in text form or graphically. Facts in text form are, for example, item descriptions or lists of elements that are structured in tables. In ARIS Connect, you can assign fact sheets to various items, such as processes, functions, events, and documents.

In the **Classic** view delivered with ARIS Connect as standard the following fact sheets are assigned to a process:

Overview (page 424)

Steps (page 426)

Table (page 428)

RACI (page 429)

Diagram (page 430)

Dashboards (page 431)

Tasks (page 432)

Documents (page 435)

FOCUS

Selection marker that marks the item that is selected. There are certain occurrences of selection markers, such as text cursors.

The focus is usually surrounded by colored frames, which can be dashed or solid.

You can often start actions for the selected items using the **Enter** key or the space bar.

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

GDPR

The **General Data Protection Regulation** (GDPR) protects the rights of individuals' personal data within the European Union. It also regulates the export of personal data outside the EU. GDPR is a regulation by the European Parliament, the Council of the European Union, and the European Commission.

GRAPHIC OBJECTS

Graphic elements without implicit semantic meaning. They can be used, for example, to indicate model areas, to specially highlight objects that are thematically linked, or to prepare models so that they are suitable for presentation.

Graphic objects include circles, ellipses, squares, rectangles, lines, and polygons.

GRID

Placement markings in the modeling area in the form of dots that you can show for modeling support (page 777).

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 900).

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 of a user in the user management for the infrastructure tenant, for example, **master**. This user must be assigned all licenses and privileges that are needed for the action.

INFOGRAPHICS

Infographics (also **information graphics**) are visual representations of content. By combining images and text, it is easy for users to understand the information contained.

Infographics can simplify complicated topics. The data is displayed quickly and clearly.

INFRASTRUCTURE TENANT

Specifies the tenant with special privileges for managing other tenants, components, and the configuration in ARIS Administration.

By default, the **master** tenant is the infrastructure tenant. The system users **system** and **superuser** have administrative privileges, that is, they can access ARIS Administration and Tenant Management.

Users with the relevant privileges can specify other infrastructure tenants in ARIS Administration.

J

JAAS

Java Authentication and Authorization Service (JAAS).

A Java interface that enables you to provide services for authentication and access privileges in Java programs. JAAS supports user-based authentication.

JSON

JavaScript Object Notation

Kompaktes Datenformat in einer einfach lesbaren Textform für den Datenaustausch zwischen Anwendungen. Jedes gültige JSON-Dokument mussl gültiges JavaScript sein und interpretiert werden können.

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 Directory Access Protocol (LDAP).

Application protocol from network technology. LDAP enables information from a distributed, location-independent and hierarchical database in a network to be queried and modified.

LESS

Leaner Style Sheets is a dynamic preprocessor style sheet language that can be compiled into Cascading Style Sheets (CSS) (page 1053).

In addition to the normal CSS instructions, LESS offers nesting of rules, which can avoid code repetitions.

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 831) 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 (page 1052) and specifies the graphical user interface of ARIS Connect.

Administrators create and enable custom modification sets for you based on the classic configuration set (page 419) or default configuration set (page 420) to change the appearance of the portal.

MY TASKS

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

O

OCCURRENCE

Graphical representation of objects, connections, and free-form texts.

It is used to represent items in a model.

With an occurrence copy (page 1059) several occurrences of an object can be created. These can differ within a model and/or in different models, that is, object symbol, size, color, and attribute placements can be set individually and thus be different.

If the placed text attributes of an occurrence are changed, the changes are applied to all occurrences at which the text attribute has also been placed. For example, if the name an object is changed, the change is displayed for all occurrences.

OCCURRENCE COPY

Copy of the occurrence (page 1059), that is, only the graphical representation of an object, rather than the entire object as with the definition copy (page 1054).

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 615) environment, a persona represents a customer segment and its main characteristics. Each persona provides a specific set of information describing that person representing a user type in more detail.

R

RELATIONSHIP

Connection that can exist between model elements and among models.

Relationships include connections (page 1052), implicit connections, implicit relationships (page 1060), assignment (page 1051), and variant relationships (page 1064). 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 1061) 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 1061).

SUPERUSER

The user **superuser** is created automatically. By default, this user is assigned the **User management, License management, and Configuration administrator** function privileges. This user can also enable this function privilege for other users. Users of the **superuser** type do not use up a license. They manage the system administration, but cannot use ARIS products due to license restrictions. The default password is **superuser**. You should change the default password to prevent unauthorized access. The password of the superuser is very important, as it is the only user who cannot be deleted. You can change all user data except for the user name.

SYSTEM USERS

System users are users who have all function and access privileges in a database and who have the required privileges 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** assumes the administrator role of the system administrator and has all function and access privileges in all databases of a tenant. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP (page 1057), 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, fonts and font formats, but also ARIS Method and all common files, report scripts, scheduled reports, semantic checks and macros.

The system database is created automatically while the first user is logging in to ARIS. The content is available to all databases of this tenant. The ARIS Service Administrator commands **backupsystemdb**, **restoresystemdb**, and **updatesystemdb** can be used to save and restore this data centrally.

T

TAG

Keyword or term assigned to an information, such as an Internet bookmark, a digital image, a database record, or a computer file. This kind of metadata helps describe an item and allows it to be found again by browsing or searching

TENANT

A tenant is a container providing its own ARIS Administration (page 1050) 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 **L**ayer **S**ecurity (**TLS**).

TLS is known under the name of its predecessor **S**ecure **S**ockets **L**ayer (**SSL**) and is an encryption protocol for the secure transfer of data on the Internet.

U

UML (UNIFIED MODELING LANGUAGE)

UML is a graphical modeling language for specifying, constructing, and documenting software, parts of software, and other systems. This "unified" modeling language specifies the notations of the modeling terms and their relationships. It also defines the graphical notation, the static structures, and the dynamic processes.

URI

String that is used to uniquely identify an abstract or physical resource.

URIs are used to describe resources (such as Web sites, other files, calls for Web services) on the Internet.

URIs can be incorporated as a string (encoded with a character set) into digital documents, particularly those in HTML format, or written by hand. A link from one Web site to another is called a hyperlink.

URL

Uniform **R**esource **L**ocator, a particular type of URI (page 1063) (**U**niform **R**esource **I**dentifier).

URLs identify a resource via the network protocol used (for example, http or ftp) and the **location** of the resource (for example, of a service) in a network.

The term URL is often used synonymously with URI because URLs were the first and are still the most frequently used type of URI.

USER NAME

Name of a user (for example, **system**) for access to a database. The user name does not necessarily have to correspond to a person's real name.

Access to a database is possible if a user logs in to it with the combination of user name and password that has previously been stored for the database. This is the case when the system administrator or a user with the **User management** function privilege creates the new user.

USER 'SYSTEM'

The system user **system** assumes the administrator role of the system administrator and has all function and access privileges in all databases of a tenant. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP (page 1057), for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page in ARIS Architect) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. Having more than one system user can avoid problems, for example, if one system user has forgotten his password. If you forgot the passwords of all your system users, the full range of functions is no longer available and full data access is no longer possible.

V

VARIANT 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 (page 1051).

The versioning state (page 1065) of the last version created is the current version (page 1053).

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 (page 1064) that represent a specific state. While Workspace (page 1065) represents a state that is editable but has not yet been versioned, the versions are included in the Current version (page 1053) state and in the revisions associated with the Change list numbers (page 1052).

W

WORKSPACE (VERSIONING)

Indicates the database content that has not yet been versioned. It can be edited. (Versioning state (page 1065))

6 Legal information

6.1 Documentation scope

The information provided describes the settings and features as they were at the time of publishing. Since documentation and software are subject to different production cycles, the description of settings and features may differ from actual settings and features. Information about discrepancies is provided in the Release Notes that accompany the product. Please read the Release Notes and take the information into account when installing, setting up, and using the product.

If you want to install technical and/or business system functions without Software AG's consulting services, you require extensive knowledge of the system to be installed, its intended purpose, the target systems, and their various dependencies. Due to the number of platforms and interdependent hardware and software configurations, we can only describe specific installations. It is not possible to document all settings and dependencies.

When you combine various technologies, please observe the manufacturers' instructions, particularly announcements concerning releases on their Internet pages. We cannot guarantee proper functioning and installation of approved third-party systems and do not support them. Always follow the instructions provided in the installation manuals of the relevant manufacturers. If you experience difficulties, please contact the relevant manufacturer.

If you need help installing third-party systems, contact your local Software AG sales organization. Please note that this type of manufacturer-specific or customer-specific customization is not covered by the standard Software AG software maintenance agreement and can be performed only on special request and agreement.

If a description refers to a specific ARIS product, the product is named. If this is not the case, names for ARIS products are used as follows:

Name	Includes
ARIS products	Refers to all products to which the license regulations of Software AG standard software apply.
ARIS Clients	Refers to all programs that access shared databases via ARIS Server.
ARIS Download clients	Refers to ARIS clients that can be accessed using a browser.

6.2 Data protection

Software AG products provide functionality with respect to processing of personal data according to the EU General Data Protection Regulation (GDPR).

Where applicable, appropriate steps are documented in the respective administration documentation.

6.3 Disclaimer

ARIS products are intended and developed for use by persons. Automated processes, such as the generation of content and the import of objects/artifacts via interfaces, can lead to an outsized amount of data, and their execution may exceed processing capacities and physical limits. For example, processing capacities are exceeded if models and diagrams transcend the size of the modeling area or an extremely high number of processing operations is started simultaneously. Physical limits may be exceeded if the memory available is not sufficient for the execution of operations or the storage of data.

Proper operation of ARIS products requires the availability of a reliable and fast network connection. Networks with insufficient response time will reduce system performance and may cause timeouts.

ARIS document storage was tested with 40.000 document items. This includes documents, document versions or folders. We recommend monitoring the number and overall size of stored document items and archiving some document items if needed.

If ARIS products are used in a virtual environment, sufficient resources must be available there in order to avoid the risk of overbooking.

The system was tested using scenarios that included 100,000 groups (folders), 100,000 users, and 1,000,000 modeling artifacts. It supports a modeling area of 25 square meters.

If projects or repositories are larger than the maximum size allowed, a powerful functionality is available to break them down into smaller, more manageable parts.

Some restrictions may apply 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 document items. This includes documents, document versions or folders. We recommend monitoring the number and overall size of stored document items and archiving some document items if needed.

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