



ARIS Connect **DESIGNER USER MANUAL**

Version 10.0

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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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Contents

| | | |
|-----------|--|----|
| 1 | ARIS Connect | 1 |
| 2 | Basics..... | 2 |
| 2.1 | Text conventions | 2 |
| 2.2 | Help content shown | 2 |
| 2.3 | Select language..... | 3 |
| 2.4 | Edit your user account | 3 |
| 2.5 | Change password | 4 |
| 2.6 | Switch your profile..... | 4 |
| 2.7 | Start search..... | 4 |
| 2.8 | Show tasks in ARIS Process Board | 5 |
| 2.9 | Open ARIS Download Client page | 5 |
| 2.10 | Open Help | 5 |
| 2.11 | Forward a page of the online help..... | 6 |
| 2.12 | Open Administration | 6 |
| 2.13 | Play videos | 7 |
| 2.14 | Open information window | 7 |
| 2.15 | Known issues..... | 7 |
| 2.16 | Log out of ARIS Connect..... | 8 |
| 2.17 | What profiles include which content?..... | 9 |
| 3 | Use ARIS Connect | 10 |
| 3.1 | Work in the portal..... | 10 |
| 3.1.1 | Views | 10 |
| 3.1.1.1 | Classic view..... | 11 |
| 3.1.1.1.1 | Home..... | 13 |
| 3.1.1.1.2 | Groups..... | 14 |
| 3.1.1.1.3 | Glossary..... | 26 |
| 3.1.1.2 | Default view | 29 |
| 3.1.1.2.1 | Processes | 30 |
| 3.1.1.2.2 | Organization | 41 |
| 3.1.1.2.3 | IT systems..... | 42 |
| 3.1.1.2.4 | Glossary..... | 45 |
| 3.1.2 | Use the portal..... | 48 |
| 3.1.2.1 | Select database | 48 |
| 3.1.2.2 | Navigate | 49 |
| 3.1.2.3 | Navigate step by step | 50 |
| 3.1.2.4 | Choose glossary items starting with the same letter..... | 50 |
| 3.1.2.5 | Filter glossary items based on name, description, and responsibility | 51 |
| 3.1.2.6 | Remove glossary filter | 51 |
| 3.1.2.7 | Change the glossary page | 52 |
| 3.1.2.8 | Switch from Steps to Diagram | 52 |
| 3.1.2.9 | Print the graphic of the current model | 53 |
| 3.1.2.10 | Display the current method filter..... | 53 |
| 3.1.2.11 | Generate report | 54 |
| 3.1.2.12 | Use the Favorites tab in the portal | 56 |
| 3.1.2.13 | Show where object occurrences are used | 57 |
| 3.1.2.14 | Submit change request..... | 57 |
| 3.1.2.15 | Comment on portal content..... | 58 |
| 3.1.2.16 | Start governance process..... | 59 |
| 3.1.2.17 | Follow processes in the portal..... | 59 |
| 3.1.2.18 | Request feedback on processes | 60 |

| | | |
|-------------|---|----|
| 3.1.3 | Use roles..... | 61 |
| 3.1.3.1 | Assign roles..... | 61 |
| 3.1.3.2 | Activate role filter | 62 |
| 3.1.4 | Use models | 63 |
| 3.1.4.1 | Open assignment | 63 |
| 3.1.4.2 | Open placed link attributes..... | 63 |
| 3.1.4.3 | Switch from Steps to Diagram | 64 |
| 3.1.4.4 | Print the graphic of the current model | 64 |
| 3.1.4.5 | Ask for model approval | 65 |
| 3.1.4.6 | Share model..... | 66 |
| 3.1.4.7 | Inform owner of change..... | 67 |
| 3.1.4.8 | Generate report | 68 |
| 3.1.4.9 | Create model..... | 69 |
| 3.1.4.10 | Edit models | 70 |
| 3.1.4.11 | Use matrix models | 71 |
| 3.1.4.11.1 | Open a matrix model in ARIS Connect..... | 71 |
| 3.1.4.11.2 | Display use of connections for a matrix model in ARIS Connect | 71 |
| 3.1.4.11.3 | Show/Hide hierarchies in a matrix model in ARIS Connect | 72 |
| 3.1.4.11.4 | How are connections displayed? | 72 |
| 3.1.5 | Handle documents | 73 |
| 3.1.5.1 | Propose document | 73 |
| 3.1.5.2 | Link new documents to a model or object | 74 |
| 3.1.5.3 | Add existing documents to a model or object..... | 75 |
| 3.1.5.4 | Submit a change request for a document | 76 |
| 3.1.5.5 | Have document approved | 78 |
| 3.1.5.6 | Share document | 79 |
| 3.1.5.7 | Find a document | 81 |
| 3.1.5.8 | Rename document | 81 |
| 3.1.5.9 | Show links of a document | 82 |
| 3.1.5.10 | Remove document from a model or object | 82 |
| 3.1.5.11 | Show version of a document..... | 83 |
| 3.1.5.12 | Handle document versions | 84 |
| 3.1.5.12.1 | Show version of a document | 84 |
| 3.1.5.12.2 | Show version history..... | 84 |
| 3.1.5.12.3 | Delete version of a document..... | 85 |
| 3.1.5.13 | Handle document with Document administrator privilege | 86 |
| 3.1.5.13.1 | Add documents to ARIS document storage | 86 |
| 3.1.5.13.2 | Open/Download document..... | 86 |
| 3.1.5.13.3 | Select document manager | 87 |
| 3.1.5.13.4 | Upload multiple documents..... | 87 |
| 3.1.5.13.5 | Upload version of a document | 88 |
| 3.1.5.13.6 | Sort versions of a document | 88 |
| 3.1.5.13.7 | Download multiple documents..... | 89 |
| 3.1.5.13.8 | Move document..... | 89 |
| 3.1.5.13.9 | Move multiple documents | 89 |
| 3.1.5.13.10 | Browse ARIS document storage | 90 |
| 3.1.5.13.11 | Lock document | 90 |
| 3.1.5.13.12 | Unlock document | 91 |
| 3.1.5.13.13 | Delete document from ARIS document storage | 91 |
| 3.1.5.13.14 | Delete multiple documents from ARIS document storage | 92 |
| 3.1.5.13.15 | Delete documents from the repository | 92 |

| | | |
|------------|--|-----|
| 3.1.6 | Search content | 93 |
| 3.1.6.1 | Start quick search | 93 |
| 3.1.6.2 | Open Search area with term to be searched for | 94 |
| 3.1.6.3 | Open Search area directly | 94 |
| 3.1.6.4 | Find using the Search area | 95 |
| 3.1.6.5 | Use search context and filters | 96 |
| 3.1.6.6 | Save filter settings as a favorite | 97 |
| 3.1.6.7 | Use a favorite in the Search area | 97 |
| 3.1.6.8 | Use a favorite in the Favorites area | 98 |
| 3.1.6.9 | Clear filters | 99 |
| 3.1.6.10 | Open search result on separate tab | 100 |
| 3.1.6.11 | Valuable information | 101 |
| 3.1.6.11.1 | How is the quick search structured? | 101 |
| 3.1.6.11.2 | How is the Search area structured? | 102 |
| 3.1.6.11.3 | How is the Favorites area structured? | 103 |
| 3.1.6.11.4 | How can search results be influenced? | 103 |
| 3.1.7 | Contribute as a viewer | 104 |
| 3.1.7.1 | Change values of items | 104 |
| 3.1.7.2 | Create or reuse items in a table | 105 |
| 3.1.7.3 | Create or reuse items in a list | 106 |
| 3.1.7.4 | Delete items from tables | 107 |
| 3.1.7.5 | Delete items from lists | 108 |
| 3.1.7.6 | Valuable information | 109 |
| 3.1.7.6.1 | Requirements for Contribution | 109 |
| 3.1.7.6.2 | How to identify whether the edit mode is active | 109 |
| 3.1.7.6.3 | Which items are you allowed to change using the Contribution privilege? | 110 |
| 3.1.7.6.4 | Which attributes are you able to edit? | 111 |
| 3.1.7.6.5 | Which editing options are available? | 112 |
| 3.1.7.6.6 | Where to save new items | 115 |
| 3.1.8 | Manage SAP Solutions | 116 |
| 3.1.8.1 | Run SAP® transaction | 116 |
| 3.1.8.2 | Reset SAP® logon data | 117 |
| 3.1.8.3 | Download SAP® documents | 117 |
| 3.1.8.4 | Configure ARIS Online Guide | 118 |
| 3.1.8.5 | Start ARIS Online Guide | 119 |
| 3.1.9 | Use RACI matrix | 120 |
| 3.1.9.1 | Create process model for RACI matrix | 120 |
| 3.1.9.2 | Display RACI matrix | 121 |
| 3.1.9.3 | Valuable information | 122 |
| 3.1.9.3.1 | Which diagrams can be used for a RACI matrix? | 122 |
| 3.1.9.3.2 | Which objects can be used for a RACI matrix? | 122 |
| 3.1.9.3.3 | Which connections can be used for a RACI matrix? | 123 |
| 3.1.10 | Use Mini workflows | 124 |
| 3.1.10.1 | Edit models | 124 |
| 3.1.10.2 | Share model | 124 |
| 3.1.10.3 | Submit change request | 125 |
| 3.1.10.4 | Ask for model approval | 126 |
| 3.1.10.5 | Request feedback on processes | 127 |
| 3.1.10.6 | Inform owner of change | 128 |
| 3.1.11 | Use dashboards | 129 |
| 3.1.11.1 | Open a dashboard in ARIS Connect | 129 |
| 3.1.11.2 | Create a dashboard in ARIS Connect | 129 |
| 3.1.11.3 | Open a data feed in ARIS Connect | 130 |

| | | |
|---------------|--|-----|
| 3.1.11.4 | Create a data feed in ARIS Connect..... | 131 |
| 3.1.11.5 | Show dashboards..... | 132 |
| 3.1.12 | Valuable information | 133 |
| 3.1.12.1 | In which order are object occurrences displayed?..... | 133 |
| 3.1.12.2 | What is the portal view? | 133 |
| 3.1.12.3 | What is the structure of the classic view?..... | 134 |
| 3.1.12.4 | What is the structure of the default view? | 136 |
| 3.1.12.5 | When can UML content be displayed? | 137 |
| 3.1.12.6 | Where is UML content displayed? | 137 |
| 3.1.12.7 | What is the context for executable processes? | 137 |
| 3.1.12.8 | What are role filters? | 138 |
| 3.1.12.9 | What is ARIS Viewer Contribution?..... | 139 |
| 3.1.12.10 | What is the breadcrumb navigation?..... | 141 |
| 3.1.12.11 | What reports are available?..... | 141 |
| 3.1.12.11.1 | Create process manual | 142 |
| 3.1.12.11.2 | Export graphic as PDF..... | 143 |
| 3.1.12.11.3 | Generate job description | 144 |
| 3.1.12.11.4 | Output functions across multiple assignment levels | 146 |
| 3.1.12.11.5 | Output functions with connected objects | 148 |
| 3.1.12.11.6 | Output model information | 149 |
| 3.1.12.11.7 | Output model information considering various aspects..... | 150 |
| 3.1.12.11.8 | Output object information | 151 |
| 3.1.12.11.9 | Process manual (example) | 151 |
| 3.1.12.11.10 | RA(S)CI - Output organizational participations in processes | 152 |
| 3.1.12.12 | What report output formats exist?..... | 154 |
| 3.1.12.13 | What is ARIS Aware (Dashboards)? | 154 |
| 3.1.12.14 | What are the ARIS Aware fields?..... | 155 |
| 3.1.12.15 | What is an alias of a URL?..... | 156 |
| 3.1.12.16 | What dashboards are available by default?..... | 156 |
| 3.1.12.16.1 | Based on Center of Excellence (CoE) | 156 |
| 3.1.12.16.1.1 | CoE - Aggregated Maturity Overview | 156 |
| 3.1.12.16.1.2 | CoE - Aggregated Maturity Diagram | 158 |
| 3.1.12.16.1.3 | CoE - Local Maturity # Dashboard | 159 |
| 3.1.12.16.1.4 | CoE - Global Maturity..... | 160 |
| 3.1.12.16.1.5 | CoE - Process Change Management..... | 162 |
| 3.1.12.16.1.6 | CoE - Human Task | 164 |
| 3.1.12.16.2 | Based on Customer Experience (CXM) | 166 |
| 3.1.12.16.2.1 | Customer experience | 166 |
| 3.1.12.16.2.2 | Responsibilities | 170 |
| 3.1.12.16.2.3 | Customer journey map | 173 |
| 3.1.12.16.3 | Based on Piwik..... | 176 |
| 3.1.12.16.3.1 | Piwik - Publications..... | 176 |
| 3.1.12.16.3.2 | Piwik - Technical KPIs | 178 |
| 3.1.12.16.4 | Based on EA | 180 |
| 3.1.12.16.4.1 | EA dashboard for organizational units | 180 |
| 3.1.12.16.4.2 | EA dashboard for IT systems | 184 |
| 3.1.12.16.4.3 | EA dashboard for objectives | 187 |
| 3.2 | Collaborate with users..... | 189 |
| 3.2.1 | Getting started | 189 |
| 3.2.2 | Open Collaboration..... | 189 |
| 3.2.3 | Create or edit a user profile..... | 189 |
| 3.2.4 | Find users and groups and follow their feeds | 190 |
| 3.2.5 | Follow and comment on content in the portal as a user..... | 191 |

| | | |
|------------|---|-----|
| 3.2.6 | Publish posts | 192 |
| 3.2.7 | Comment on, share, flag posts, etc. | 193 |
| 3.2.8 | Add documents to posts..... | 194 |
| 3.2.9 | View notifications and specify settings | 194 |
| 3.2.10 | Define filters..... | 195 |
| 3.2.11 | Use tags | 195 |
| 3.2.12 | Filter feeds by means of tags..... | 196 |
| 3.2.13 | Use hashtags..... | 196 |
| 3.2.14 | Find help..... | 196 |
| 3.2.15 | Work with groups..... | 197 |
| 3.2.15.1 | Create, edit or delete a group..... | 197 |
| 3.2.15.2 | Invite other users to join a group..... | 198 |
| 3.2.15.3 | Follow portal contents as a group..... | 198 |
| 3.2.16 | Edit requests to join private groups as a coordinator | 199 |
| 3.2.17 | Grant/revoke group users coordinator privileges | 199 |
| 3.2.18 | Valuable information | 200 |
| 3.2.18.1 | What is a feed?..... | 200 |
| 3.2.18.2 | Which target groups can be assigned to posts?..... | 200 |
| 3.2.18.3 | What does following posts mean?..... | 201 |
| 3.2.18.4 | What does Like mean?..... | 201 |
| 3.2.18.5 | What is a timestamp?..... | 201 |
| 3.2.18.6 | What is a tag? | 201 |
| 3.2.18.7 | What is a hashtag?..... | 201 |
| 3.2.18.8 | What does flagging a post mean?..... | 202 |
| 3.2.18.9 | Which group types exist? | 202 |
| 3.2.18.10 | Which access rights of ARIS Architect are relevant to Collaboration? | 202 |
| 3.3 | Use the repository | 203 |
| 3.3.1 | Create and edit models..... | 203 |
| 3.3.1.1 | Create/Import a model | 203 |
| 3.3.1.1.1 | Create new model | 203 |
| 3.3.1.1.2 | Create a new model using an assignment | 204 |
| 3.3.1.1.3 | Create group..... | 205 |
| 3.3.1.1.4 | Import ARIS Express model | 205 |
| 3.3.1.1.5 | Import BPMN file | 206 |
| 3.3.1.2 | Customize Model Editor | 206 |
| 3.3.1.2.1 | Show and hide bars | 206 |
| 3.3.1.2.2 | Show/Hide header | 207 |
| 3.3.1.2.3 | Customize Symbols bar | 207 |
| 3.3.1.2.4 | Customize Attributes tab | 208 |
| 3.3.1.2.5 | Show and hide mini toolbar | 209 |
| 3.3.1.2.6 | Configure mini toolbar..... | 209 |
| 3.3.1.2.7 | Change grid width | 210 |
| 3.3.1.2.8 | Show formatting toolbar..... | 210 |
| 3.3.1.2.9 | Assign model template | 210 |
| 3.3.1.2.10 | Reset model template | 211 |
| 3.3.1.3 | Model | 212 |
| 3.3.1.3.1 | Open model for editing..... | 212 |
| 3.3.1.3.2 | Change database language of a model | 213 |
| 3.3.1.3.3 | Show and hide grid | 213 |
| 3.3.1.3.4 | Set grid width | 214 |
| 3.3.1.3.5 | Place object symbols..... | 214 |
| 3.3.1.3.6 | Place occurrence copy | 216 |
| 3.3.1.3.7 | Paste copied object as an occurrence copy..... | 217 |

| | | |
|-----------------|--|-----|
| 3.3.1.3.8 | Paste copied object as a definition copy..... | 217 |
| 3.3.1.3.9 | Change object symbol..... | 218 |
| 3.3.1.3.10 | Place graphic objects | 218 |
| 3.3.1.3.11 | Paste copied graphic objects | 220 |
| 3.3.1.3.12 | Modeling using the mini toolbar..... | 220 |
| 3.3.1.3.13 | Edit attributes | 221 |
| 3.3.1.3.14 | Directly format placed attributes | 221 |
| 3.3.1.3.15 | Create connections | 222 |
| 3.3.1.3.16 | Place text | 223 |
| 3.3.1.3.17 | Adjust size of appearance..... | 223 |
| 3.3.1.3.18 | Delete model items..... | 223 |
| 3.3.1.3.19 | Save model | 224 |
| 3.3.1.3.20 | Change BPMN object symbol..... | 224 |
| 3.3.1.3.21 | Change loop type | 224 |
| 3.3.1.3.22 | Add lane..... | 225 |
| 3.3.1.3.23 | Insert lane into a pool or lane | 225 |
| 3.3.1.3.24 | Move lane..... | 225 |
| 3.3.1.3.25 | Delete pool or lane | 226 |
| 3.3.1.3.26 | Transform communication into call conversation..... | 226 |
| 3.3.1.3.27 | Change type of sequence flow | 226 |
| 3.3.1.3.28 | Collapse subprocess..... | 227 |
| 3.3.1.3.29 | Expand subprocess | 227 |
| 3.3.1.3.30 | Edit subprocess | 227 |
| 3.3.1.3.31 | Assign global reference to call activity..... | 228 |
| 3.3.1.3.32 | Model table-based | 228 |
| 3.3.1.3.32.1 | Hide/Show modeling table..... | 228 |
| 3.3.1.3.32.2 | Switch full-screen mode on/off | 229 |
| 3.3.1.3.32.3 | Show/Hide BPMN container | 229 |
| 3.3.1.3.32.4 | Create object..... | 229 |
| 3.3.1.3.32.5 | Create object with special object symbol..... | 230 |
| 3.3.1.3.32.6 | Use existing object..... | 230 |
| 3.3.1.3.32.7 | Rename structurally relevant object | 230 |
| 3.3.1.3.32.8 | Edit the Description/Definition column | 231 |
| 3.3.1.3.32.9 | Create split paths..... | 231 |
| 3.3.1.3.32.10 | Remove object from model..... | 232 |
| 3.3.1.3.32.11 | Model satellites | 232 |
| 3.3.1.3.32.12 | Add object column | 233 |
| 3.3.1.3.32.13 | Add attribute column | 233 |
| 3.3.1.3.32.14 | Edit attribute | 234 |
| 3.3.1.3.32.15 | Arrange columns..... | 234 |
| 3.3.1.3.32.16 | Remove column | 235 |
| 3.3.1.3.32.17 | Valuable information..... | 236 |
| 3.3.1.3.32.17.1 | What models can be edited using a table? | 236 |
| 3.3.1.3.32.17.2 | How to control the table using the keyboard | 236 |
| 3.3.1.3.32.17.3 | What do different colors mean in table-based modeling? | 237 |
| 3.3.1.3.32.17.4 | What default columns are available?..... | 239 |
| 3.3.1.3.32.17.5 | What are the special features of BPMN diagrams? | 240 |
| 3.3.1.3.32.17.6 | What attribute values and processing types are there? | 241 |
| 3.3.1.4 | Extended editing..... | 244 |
| 3.3.1.4.1 | Find objects in an open model..... | 244 |
| 3.3.1.4.2 | Show where object occurrences are used | 245 |
| 3.3.1.4.3 | Place an object in an object | 245 |
| 3.3.1.4.4 | Place an object on an object | 246 |
| 3.3.1.4.5 | Upload documents..... | 246 |

| | | |
|------------|---|-----|
| 3.3.1.4.6 | Assign documents..... | 247 |
| 3.3.1.4.7 | Link documents | 248 |
| 3.3.1.4.8 | Use the Documentation attribute | 249 |
| 3.3.1.4.9 | Format painter | 251 |
| 3.3.1.4.10 | Color model items | 251 |
| 3.3.1.4.11 | Color model items with a user-defined color..... | 252 |
| 3.3.1.4.12 | Color model items with a gradient | 252 |
| 3.3.1.4.13 | Display model items without color | 253 |
| 3.3.1.4.14 | Reset object symbol color..... | 253 |
| 3.3.1.4.15 | Color borders and lines | 253 |
| 3.3.1.4.16 | Reset border and line color | 254 |
| 3.3.1.4.17 | Change line style..... | 254 |
| 3.3.1.4.18 | Change line weight | 254 |
| 3.3.1.4.19 | Change item appearance | 255 |
| 3.3.1.4.20 | Place attributes at fixed positions | 255 |
| 3.3.1.4.21 | Place attributes at any position | 256 |
| 3.3.1.4.22 | Place attributes from Attributes tab | 257 |
| 3.3.1.4.23 | Display names of placed attributes | 257 |
| 3.3.1.4.24 | Select placed attributes | 257 |
| 3.3.1.4.25 | Edit placed attributes | 258 |
| 3.3.1.4.26 | Directly format placed attributes | 258 |
| 3.3.1.4.27 | Move placed attribute..... | 258 |
| 3.3.1.4.28 | Display placed attributes as a symbol..... | 259 |
| 3.3.1.4.29 | Remove placed attribute..... | 259 |
| 3.3.1.4.30 | Remove multiple placed attributes | 259 |
| 3.3.1.4.31 | Assign a model to an object..... | 260 |
| 3.3.1.4.32 | Place model items one behind the other | 260 |
| 3.3.1.4.33 | Group model items | 261 |
| 3.3.1.4.34 | Ungroup | 261 |
| 3.3.1.4.35 | Align model items..... | 261 |
| 3.3.1.4.36 | Match size of items | 262 |
| 3.3.1.4.37 | Select object or model in Explorer | 262 |
| 3.3.1.4.38 | Map Alfabet objects to ARIS objects..... | 262 |
| 3.3.2 | Create Alfabet object | 263 |
| 3.3.2.1.1 | Unmap Alfabet object..... | 263 |
| 3.3.2.2 | Valuable information | 264 |
| 3.3.2.2.1 | How is the Model Editor structured? | 264 |
| 3.3.2.2.2 | What model types are available in ARIS Connect?..... | 269 |
| 3.3.2.2.3 | Which method filter is used? | 272 |
| 3.3.2.2.4 | What are tab bars for? | 273 |
| 3.3.2.2.5 | What general buttons are available? | 274 |
| 3.3.2.2.6 | What buttons does the Start tab bar have? | 275 |
| 3.3.2.2.7 | What buttons does the Model tab bar have?..... | 276 |
| 3.3.2.2.8 | What buttons does the Format tab bar have? | 277 |
| 3.3.2.2.9 | What buttons does the BPMN tab bar have?..... | 278 |
| 3.3.2.2.10 | What is the mini toolbar for?..... | 279 |
| 3.3.2.2.11 | How are object relationships displayed by symbols?..... | 279 |
| 3.3.2.2.12 | What placed attribute does an object have? | 279 |
| 3.3.2.2.13 | What to consider when placing objects in/on objects..... | 280 |
| 3.3.2.2.14 | What does place attribute as a symbol mean?..... | 280 |
| 3.3.2.2.15 | What does place attribute as a symbol mean?..... | 281 |
| 3.3.2.2.16 | What happens to placed attributes that have no attribute value? .. | 281 |
| 3.3.2.2.17 | What is the difference between occurrence copy and definition copy?..... | 282 |
| 3.3.2.2.18 | Which items can be copied from one model to another? | 283 |
| 3.3.2.2.19 | Which formats are copied to which items? | 283 |

| | | |
|--------------|--|-----|
| 3.3.2.2.20 | Which formats are not copied? | 284 |
| 3.3.2.2.21 | How are formats copied to identical and different items? | 284 |
| 3.3.2.2.22 | How is the format copied to placed attributes? | 285 |
| 3.3.2.2.23 | How to import a BPMN file | 286 |
| 3.3.2.2.24 | What is Alfabet? | 286 |
| 3.3.2.2.25 | How do ARIS and Alfabet interact? | 286 |
| 3.3.2.2.26 | When is the Alfabet button shown? | 286 |
| 3.3.2.2.27 | What reports are available? | 287 |
| 3.3.2.2.27.1 | Create process manual | 287 |
| 3.3.2.2.27.2 | Export graphic as PDF..... | 288 |
| 3.3.2.2.27.3 | Generate job description | 289 |
| 3.3.2.2.27.4 | Output functions across multiple assignment levels | 291 |
| 3.3.2.2.27.5 | Output model information | 293 |
| 3.3.2.2.27.6 | Output model information considering various aspects..... | 294 |
| 3.3.2.2.27.7 | Output object information | 295 |
| 3.3.2.2.27.8 | Process manual (example) | 295 |
| 3.3.2.2.27.9 | RA(S)CI - Output organizational participations in processes | 296 |
| 3.3.2.2.28 | What report output formats exist? | 298 |
| 3.3.3 | Version models | 299 |
| 3.3.3.1 | Version models | 299 |
| 3.3.3.2 | Show versions | 300 |
| 3.3.3.3 | Open version..... | 300 |
| 3.3.4 | Lock models and objects | 301 |
| 3.3.4.1 | Lock models | 301 |
| 3.3.4.2 | Lock objects | 302 |
| 3.3.4.3 | Unlock models | 302 |
| 3.3.4.4 | Unlock objects | 303 |
| 4 | Glossary | 304 |
| 5 | Support information | 319 |
| 5.1 | Support..... | 319 |
| 5.2 | Disclaimer | 319 |
| 6 | Index | i |

1 ARIS Connect

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

As a designer, you can create new models (page 69), edit existing models (page 70), and version models. You can assign documents (page 247) to models and objects from ARIS document storage. In addition, you can create groups in databases in order to store your models in a structured way and to version selected models.

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

2 Basics

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

2.1 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 (e.g., 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 Help content shown

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

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

2.3 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 your user name. The menu opens.
2. Click **Languages**. The available languages are listed.
3. Click the language in which the interface language, Help, and model content are to be displayed.

The language is changed.

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

2.4 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 dialog opens.
5. Click **Select file** to navigate to the picture file you want to upload.
6. In the **File Upload** dialog, select the picture file and click **Open**. The picture is displayed in the preview of the **Change picture** dialog.
7. Click **Upload**. The picture is added to your user account. If a different picture is uploaded in ARIS Connect or in Collaboration, it is automatically transferred to the other application.

You have changed your user account.

2.5 Change password

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

Procedure

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

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

2.6 Switch your profile

You can switch between profiles (page 9) if more than one profile is assigned to you in ARIS Administration. Profiles provide you a profile based view of the portal. Depending on the profile, you have access to different content and functionality. Only one profile can be active at a time.

Procedure

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

The content and functionality of the selected profile is displayed.

2.7 Start search

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

Procedure

1. Click your user name. The menu opens.
2. Click **Search**.

The Search area (page 102) opens.

2.8 Show tasks in ARIS Process Board

In ARIS Connect you can show new tasks in ARIS Process Board 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**.

ARIS Process Board opens.

2.9 Open ARIS Download Client page

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

Prerequisite

Your administrator has enabled the use of download clients.

Procedure

1. Click your user name. The menu opens.
2. Click **Download clients**.

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

2.10 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 your user name. The menu opens.
2. Click **Help**.

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

2.11 Forward a page of the online help

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

Prerequisite

The person you are sending the link to can access the server on which the online help is located.

Procedure

1. Open the page of the online help that you want to refer to.
2. Click  **E-mail this page**.

An e-mail opens, in which the link to the current page is already inserted.

If this does not happen, check whether the following setting has been made on your computer. The example shows the setting for the Windows 7 operating system. If you are using a different operating system, the terminology may differ from that in this example.

Procedure

1. Click **Start > Default Programs**.
2. Click **Associate a file type or protocol with a program** in the dialog.
3. Navigate to the **mailto** entry.
4. Double-click **mailto**. The **Open with** dialog opens.
5. Select the e-mail program you want to use to forward the online help page.
6. Click **OK**. The dialog closes.
7. Close the remaining Windows panes.

If you now click  **E-mail this page**, an e-mail containing the link to the current page opens.

2.12 Open Administration

You can open Administration, e.g., 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 your user name. The menu opens.
2. Click **Administration**.

The administration areas such as Configuration and User management will be open for editing.

2.13 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 empty pages are displayed after opening a video page, please press F5 to refresh the page.

2.14 Open information window

You can view information about ARIS Connect.

Procedure

1. Click your user name. The menu opens.
2. Click **About**.

Information about ARIS Connect will be displayed.

2.15 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 the Model Editor as a pop-up. In this case, no new tab is created and no model opens.

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

PERFORMANCE

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

2.16 Log out of ARIS Connect

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

Procedure

1. Click your user name. The menu opens.
2. Click **Log out**.

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

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

2.17 What profiles include which content?

Profiles provide users a profile based view of the portal. Depending on the profile, users have access to different content and functionalities. 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 > <profilexy>**. 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 selecting a model in the  Portal . |
| Contributor | The Steps fact sheet is displayed when selecting a model in the  Portal . If the Steps area is not available, the Overview area is displayed. |
| Designer | The Diagram fact sheet is displayed when selecting a model in the  Portal . |
| Manager/Owner | The Dashboards fact sheet is displayed when selecting a model in the  Portal . |
| Viewer | <ul style="list-style-type: none"> ▪ The Steps fact sheet is displayed when selecting a model in the  Portal. If the Steps area is not available, the Overview area 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 selecting a model in the  Portal. If the Steps area is not available, the Overview area is displayed. ▪ The Tasks area is not available. ▪ The  Contribute function is not available. ▪ ARIS document storage and Process Governance are not available. |

3 Use ARIS Connect

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

3.1 Work in the portal

ARIS Connect is an integrated environment in which you can create, display, and change processes, as well as discuss and improve them jointly with other ARIS Cloud users. When you open ARIS Connect in your Web browser you receive 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 134) and the default view (page 134) are described.

3.1.1 Views

The portal shows specific information for each user. Different views display information in different ways. By default, ARIS comes with two different views. The classic view (page 11) and the default view. These views are defined in configuration sets, which cannot be changed. However, administrators can define multiple modified modification sets, based on these templates.

3.1.1.1 Classic view

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

- Home (page 13)
- Groups (page 14)
- Glossary (page 26)

If your administrator has published multiple databases, these are available for selection

 . You can switch between the published databases as required.

You only see information in the portal that is relevant to you. This is controlled in user management by administrators.

You can activate role filters (page 62) to further restrict this content. Role filters are available only if roles are assigned (page 61) to your user in models and the portal has been configured for the use of role filters.

Overview

The Overview gives you access to some tabs that allow you to start working with ARIS Connect rapidly.

Start

Find people

Activates  Collaboration where you find people (page 190) you want to discuss with, for example.

Start discussion

Activates  Collaboration where you can start a new discussion (page 190).

Process Board

Opens ARIS Process Board, where you can edit tasks that are assigned to you.

Navigation

Enables you to browse the ARIS Connect content for models and objects.

Show profile 

Opens your profile page. You can edit your data or add an image.

Search

Opens the Search (page 102) area where you can search for ARIS Connect content. You can use filters, for example, to display just the model and objects, UML content, or Collaboration entries.

Recent changes

Shows all links to models that were changed recently.

My content

Shows the current activities you are following in Collaboration (page 191) or in the portal (page 59).

Favorites

Provides direct access to saved filter criteria (Seite 56) of the **Favorites** area of the search and to models a user selected as a favorite element.

Contacts

Lists your contacts.

My activities

Shows the current activities you are following in Collaboration or in the portal (page 191).

3.1.1.1.1 Home

The **Overview** and **My activities** areas provide a well-structured entry point for accessing the portal.

START

The following links are available on the tab:

Create model ()

Opens the **Create model** dialog that you use for easily creating models (page 69).

Find people ()

Activates  Collaboration where you find people (page 190) you want to discuss with, for example.

Start discussion ()

Activates  Collaboration where you can start a new discussion (page 190).

Process Board ()

Opens ARIS Process Board, where you can edit tasks that are assigned to you.

Navigation ()

Enables you to browse the ARIS Connect content for models and objects.

Show profile ()

Opens your profile page. You can edit your data or add an image.

Search ()

Opens the Search (page 102) area where you can search for ARIS Connect content. You can use filters, for example, to display just the model and objects, UML content, or Collaboration entries.

RECENT CHANGES

Shows all links to models that were changed recently.

MY CONTENT

Shows the current activities you are following in Collaboration (page 191) or in the portal (page 59).

FAVORITES

Provides direct access to saved filter criteria (Seite 56) of the **Favorites** area of the search and to models a user selected as a favorite element.

CONTACTS

Lists your contacts.

MY ACTIVITIES

Shows the current activities you are following in Collaboration or in the portal (page 191).

3.1.1.1.2 Groups

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

Depending on the contents selected and the model type, different functions are available.

Using the bar panel buttons  **Comment** and  **Navigation**, you can show or hide the Collaboration functions **Follow** (page 59) and **Comment** (page 58), as well as the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

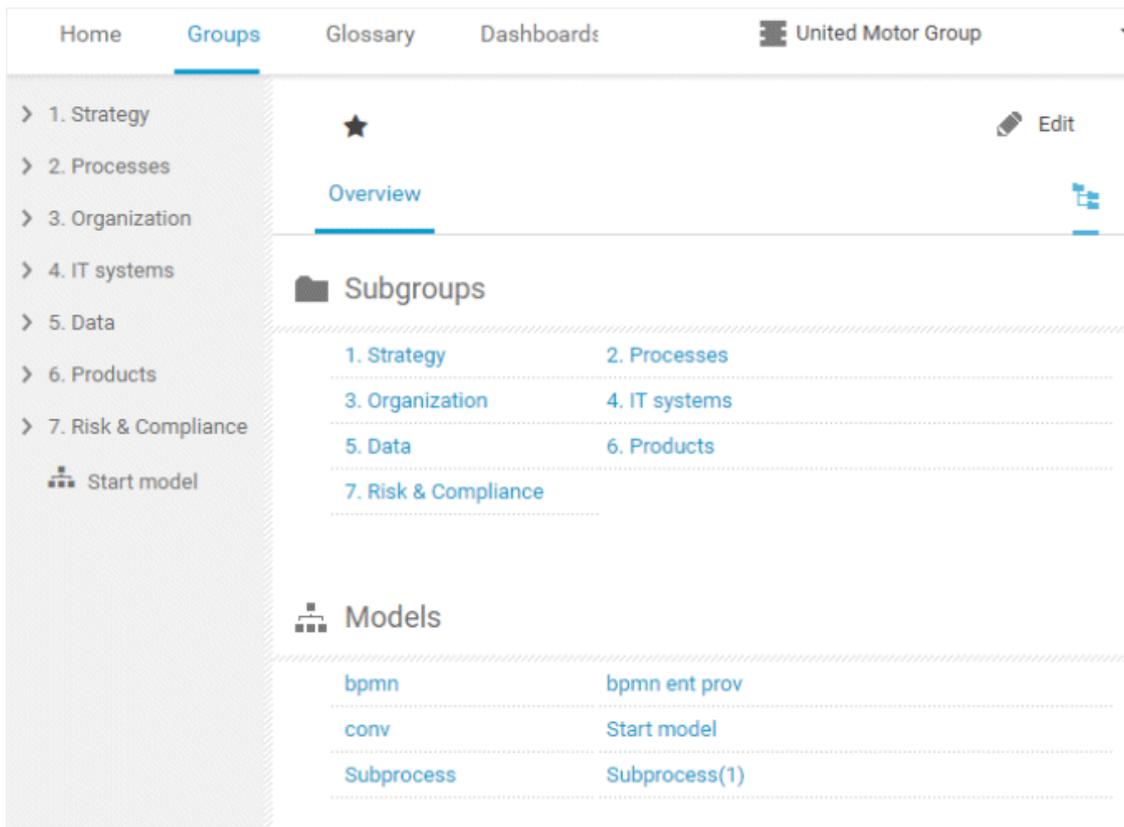
Click  **Share model** to share models with other users (page 66). Click  **Submit change request** to send change requests to the process manager (page 57). The function  **Start governance process** (page 59) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes (page 70) using the  **Edit** button.

If you have both the **ARIS Connect Viewer** and **Contribution** license privileges, you can use the  **Edit** button to change values of specific items (page 110), create new or reuse existing items (page 105), as well as delete items (page 107).

GROUP ITEMS OF ARIS MODELS

Overview

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



The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.

Sales order processing

Main group > < > > 2.1.1 Core processes > 2.1.1.4a Marketing & sales > 2.1.1.4a.3 Sales order management > Sales order processing

Overview Steps Table RACI Diagram More

Activities

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

Steps

Transparently displays all steps of a process (EPC) (page 50). 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.

Overview Steps Table RACI Diagram Documents

Predecessors

- Enter broker ID and password
- Broker ID and password entered

Current

- Select credit application type

Successors

exactly one path is relevant

- New application selected
- Allocate application number
- Previous application selected
- Open old application number

Select credit application t...

Description

The "Local dealership sales rep" selects the credit application type in the BIWEV system dependent on the sales rep data as input and gets the credit application data as output to make a decision about [...]

Roles

- Local dealership sales rep

IT systems

- BIWEV

Table

Shows the functions that the process (EPC) contains, as well as the roles assigned to them.

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

You can sort the functions alphabetically by clicking the column title.

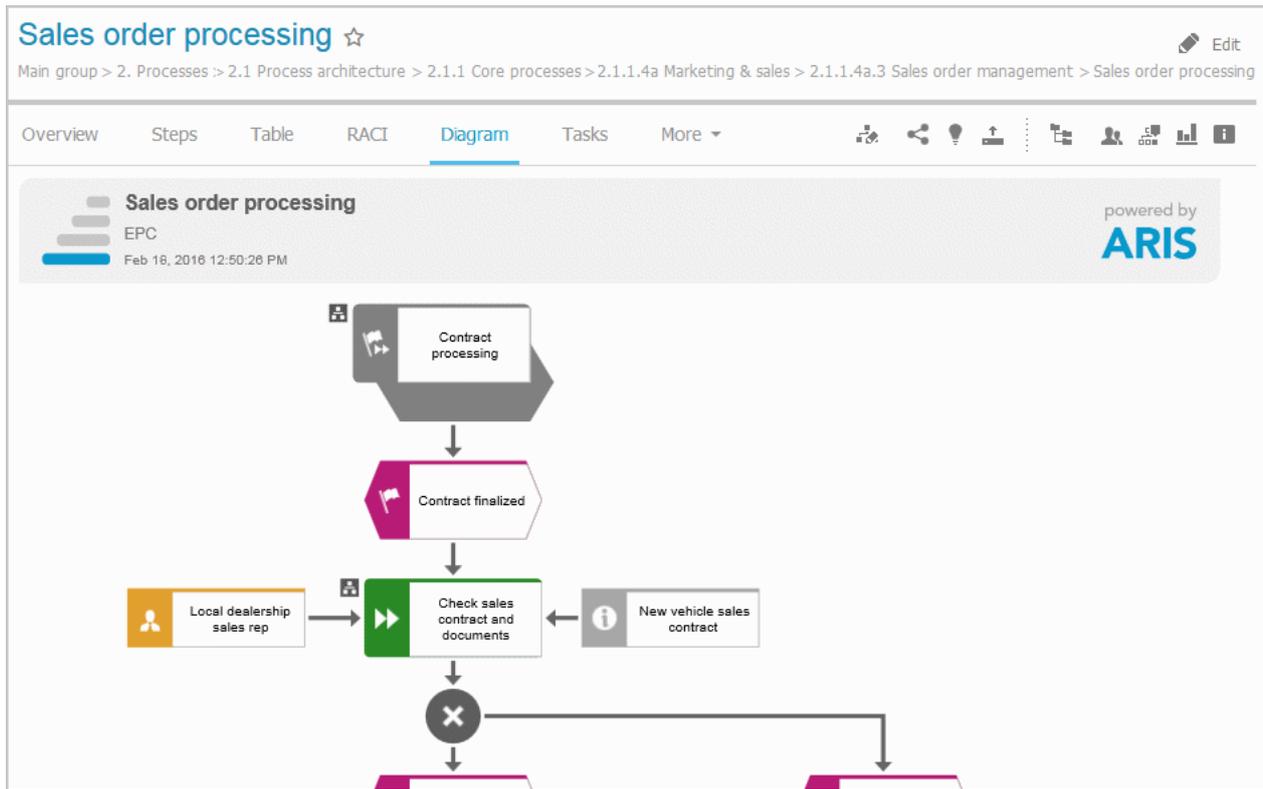
Clicking **Matrix** transparently displays the interrelations between the individual roles and functions.

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

Clicking **Add column** will extend the table. You can delete added columns at any time.

Diagram

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

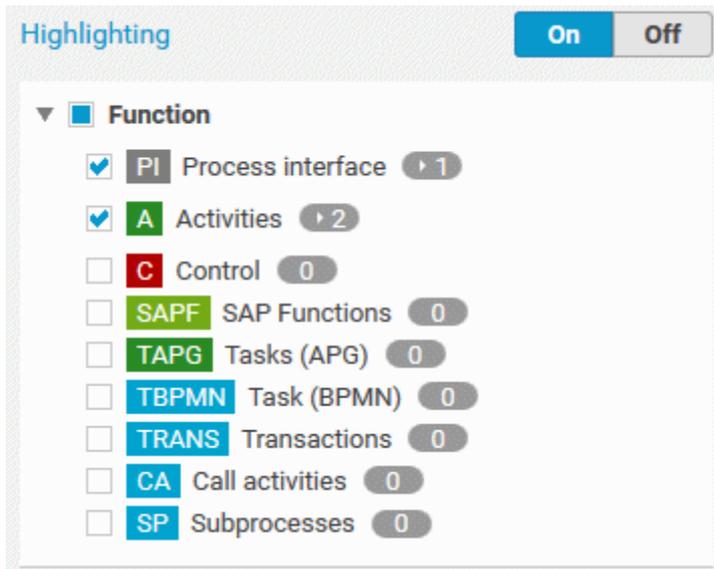


Using the functions of the view bar you can change the size of appearance. Navigate in the model using the small frame of the thumbnail view above the slider. Clicking the ▼ arrow head will hide the bar.

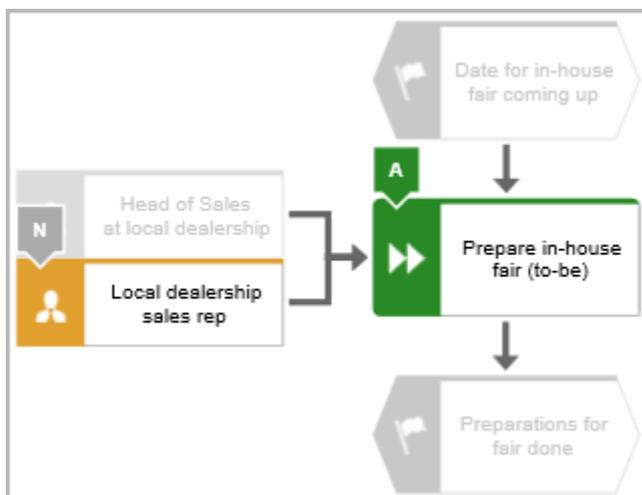
Click **i Properties** to view all attributes specified. If you have selected an object, the attributes for that object are displayed. Click **More** to view related objects or occurrences. The model properties are shown if no object is selected.

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

To highlight objects in the diagram that meet a defined condition, click  **Highlight** and **On**, and enable the criteria to be met.



The objects are then highlighted in the diagram. In this example the activity is highlighted because its check box is activated in the categories. All other objects are displayed in grayscale.



ASSIGNMENTS

If you click the  assignment icon of an object in the diagram, or double-click an object with the  assignment icon, all diagrams assigned are offered in a dialog for selection. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

Tasks

Shows your tasks, e.g., mini workflows or APG processes and opens them for editing in ARIS Process Board (page 5).

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

Transactions

Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured in the portal.

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

You can start (page 116) the ▶ transaction automatically via the default server in each row displaying a transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.



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

SAP logon

Client:

User:

Password:

Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 117). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next transaction start you need to log on to the SAP system again.

If you click a transaction on the **Transactions** page, such as **SDQ1**, its fact sheet including detailed information is displayed. If documents are available, you will be able to download (page 117) them.

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

Documents

Lists documents assigned to models or objects, for example, by the **Link 1 - Link 4** attributes. ARIS document storage enables you to manage and temporarily or permanently save documents.

Access restriction on folder level is possible in ARIS document storage. The documents saved there can be used during runtime of an executable process, e. g., attached to an e-mail.

All file formats are allowed for documents.

Temporary documents are deleted automatically after the executable process is terminated.

Permanent documents are kept until they are deleted explicitly.

Depending on your license, you have read-access from ARIS to documents managed in third-party document management systems.

Note: You can view 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>).

If you want to use the full range of functions of a document management system, including archiving and audit compliance, or you want to use very large numbers of documents, you can link Microsoft® Sharepoint 2013 to ARIS.

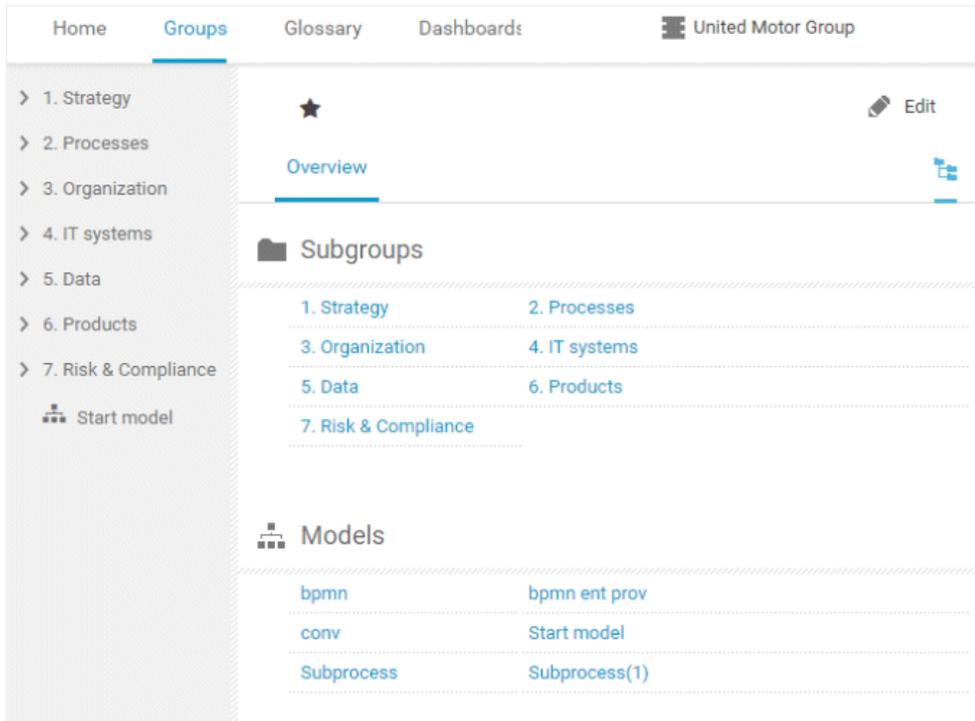
ARIS document storage as standalone component should be used for administrative purposes only. End users should access documents in the repository in ARIS Connect.

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

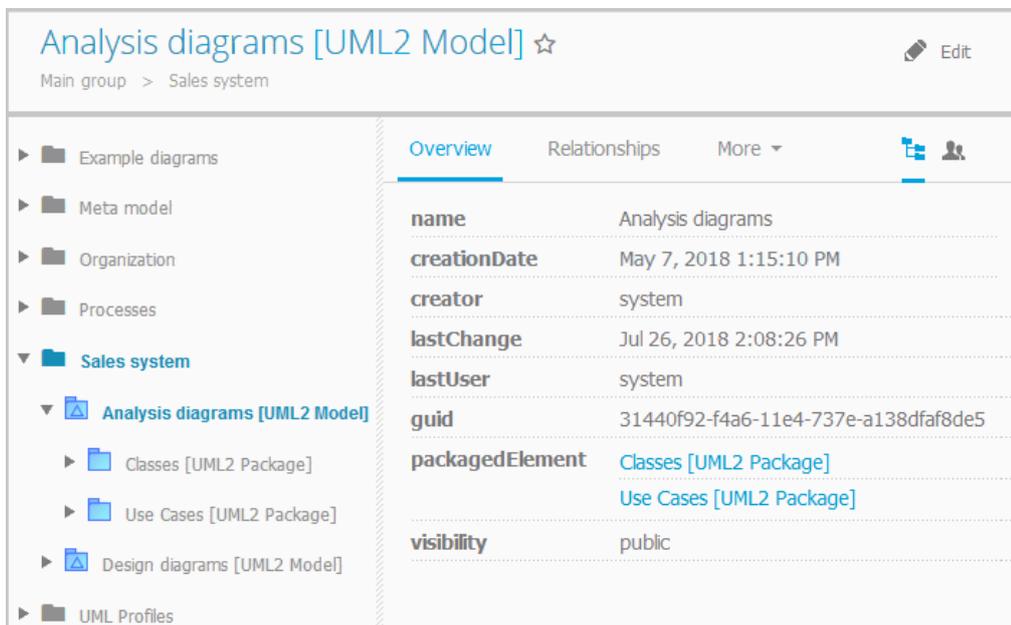
GROUP ITEMS OF UML ELEMENTS

Overview

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



For example, if you have selected a UML element, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



Relationships

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

Reused objects

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

Linked diagrams

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

Presentations

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

Stereotypes

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

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, highlighted in the tree, and the breadcrumb navigation adjusted.

Diagram

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

3.1.1.1.3 Glossary

The **Glossary** page 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.

If you have both the **ARIS Connect Viewer** and **Contribution** license privileges, you can use the  **Edit** button to change values of specific items (page 110), create new or reuse existing items (page 105), as well as delete items (page 107).

| Home Groups <u>Glossary</u> | | | |
|-------------------------------|--|---|--|
| Glossary | | |  Edit |
| Business process | Name   | Description  | Responsible |
| Role | Acquire and implement | Acquire and implement consists of: | ethan.owner |
| Document | | <ul style="list-style-type: none"> ▶ Identify automated solutions ▶ Acquire and maintain application software ▶ Acquire and maintain technology infrastructure | |
| System | | Billing consists of: | |
| | Billing | <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 |

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

You can reduce the number of items shown in the list or change the glossary page:

Choose items starting with the same letter

You can reduce the number of items shown in the glossary list.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
2. Click  **Glossary letters** in the **Name** cell of the table header. The **Glossary letters** bar opens.

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

3. Click on the relevant letter.
Only items starting with the same letter are shown.

Filter items based on name, description, and responsibility

You can reduce the number of items shown in the glossary list.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
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.

Change the glossary page

If not all glossary entries fit on one page, you can switch to the page that contains the relevant glossary entry.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
2. Click the relevant page number at the bottom of the page.

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

All items of the selected page are listed.

3.1.1.2 Default view

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

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

- Processes (page 30)
- Organization (page 41)
- IT systems (page 42)
- Glossary (page 45)

If your administrator has published multiple databases, these are available for selection

 **United Motor Group** ▾ . You can switch between the published databases as required.

You only see information in the portal that is relevant to you. This is controlled in user management by administrators.

You can activate role filters (page 62) to further restrict this content. Role filters are available only if roles are assigned (page 61) to your user in models and the portal has been configured for the use of role filters.

Important for me

Displays processes in which the user logged in or their group is modeled, as well as application systems for which the user or user group is responsible. Processes are models of the **EPC** type (event-driven process chain).

My activities

Shows the current activities you are following in Collaboration or in the portal (page 191).

3.1.1.2.1 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 ARIS Connect Designer interface. The top navigation bar includes 'Processes', 'Organization', 'IT systems', and 'Glossary', with 'United Motor Group' selected. The left sidebar shows a hierarchical tree view of processes, with 'Customer services process' selected. The main content area shows the 'Customer services process' details, including a description and a table of activities.

Description

Customer services process consists of:

- ▶ Contact customer
- ▶ Determine requirements
- ▶ Make appointment
- [...]

Activities

| Name | Description | Subordinate value-added chains | Subordinate business processes |
|--------------------------|-------------|--------------------------------|--------------------------------|
| Customer service process | | Customer services process | |
| Contact customer | | | |

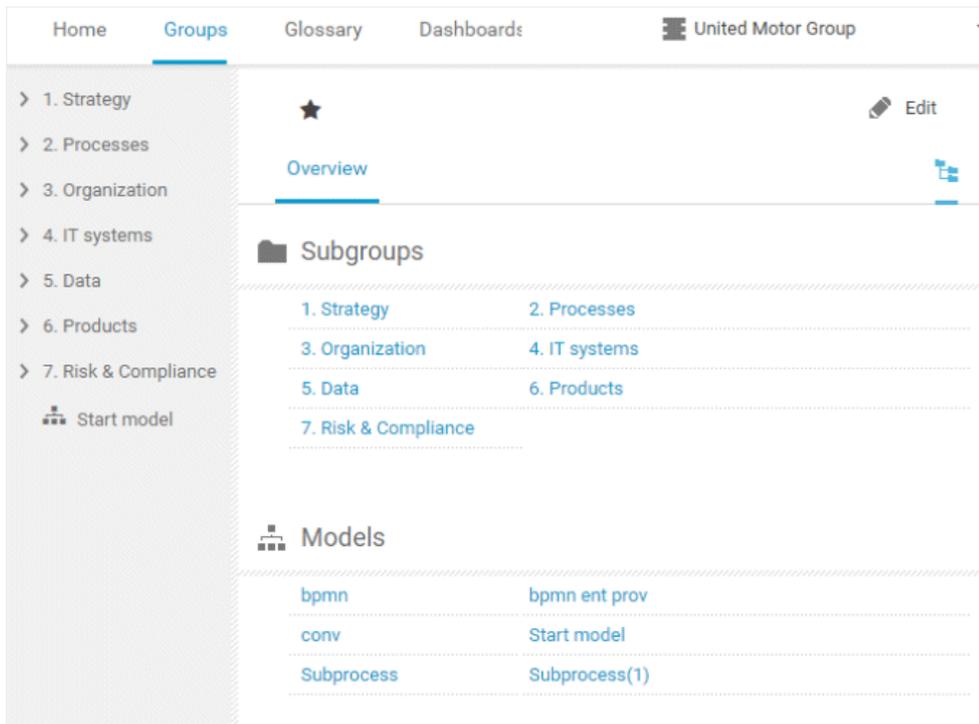
Depending on the contents selected and the type of a diagram, different functions are available.

Using the bar panel buttons **Comment** and **Navigation**, you can show or hide the Collaboration functions **Follow** (page 59) and **Comment** (page 58), as well as the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

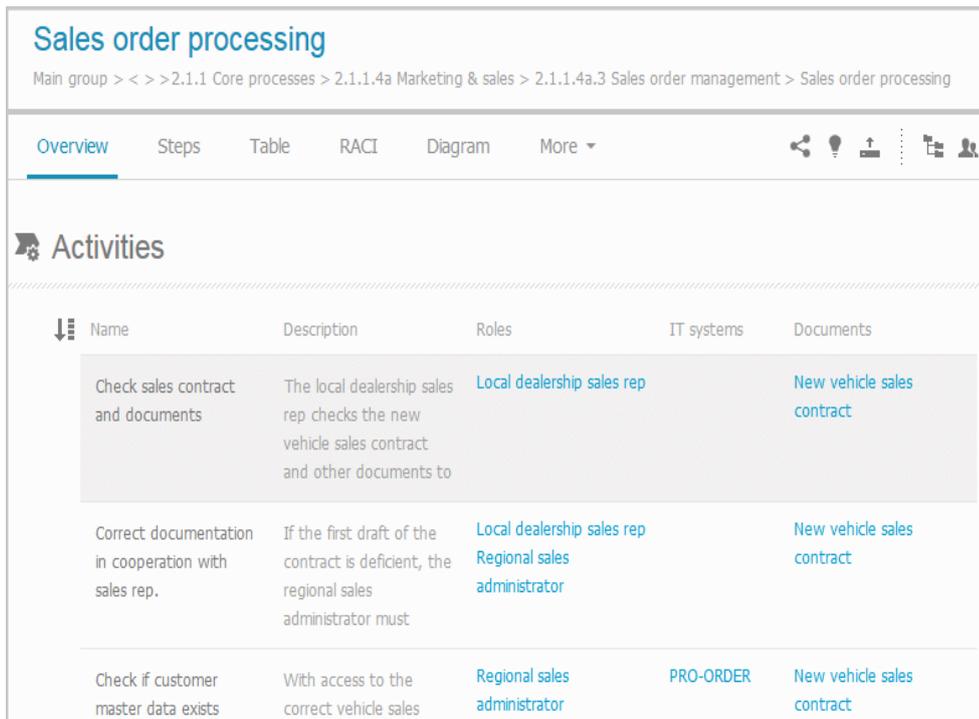
Click **Share model** to share models with other users (page 66). Click **Submit change request** to send change requests to the process manager (page 57). The function **Start governance process** (page 59) is provided only if an executable process is available. Users with the function privilege **ARIS Connect Designer** can change processes using the **Edit** button (page 70).

Overview

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



The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



Steps

Transparently displays all steps of a process (EPC) (page 50). 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.

The screenshot displays the 'Steps' view of a process designer. The interface is divided into three main sections: Predecessors, Current, and Successors. The 'Current' step is highlighted and expanded to show detailed information.

Predecessors:

- Step: Enter broker ID and password
- Output: Broker ID and password entered

Current:

- Step: Select credit application type

Successors:

exactly one path is relevant

- Step: New application selected
- Step: Previous application selected
- Step: Allocate application number
- Step: Open old application number

Right-hand Panel (Details for 'Select credit application type...'):

- Description:** The "Local dealership sales rep" selects the credit application type in the BIWEV system dependent on the sales rep data as input and gets the credit application data as output to make a decision about [...]
- Roles:** Local dealership sales rep
- IT systems:** BIWEV

Table

Shows the functions that the process (EPC) contains, as well as the roles assigned to them.

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

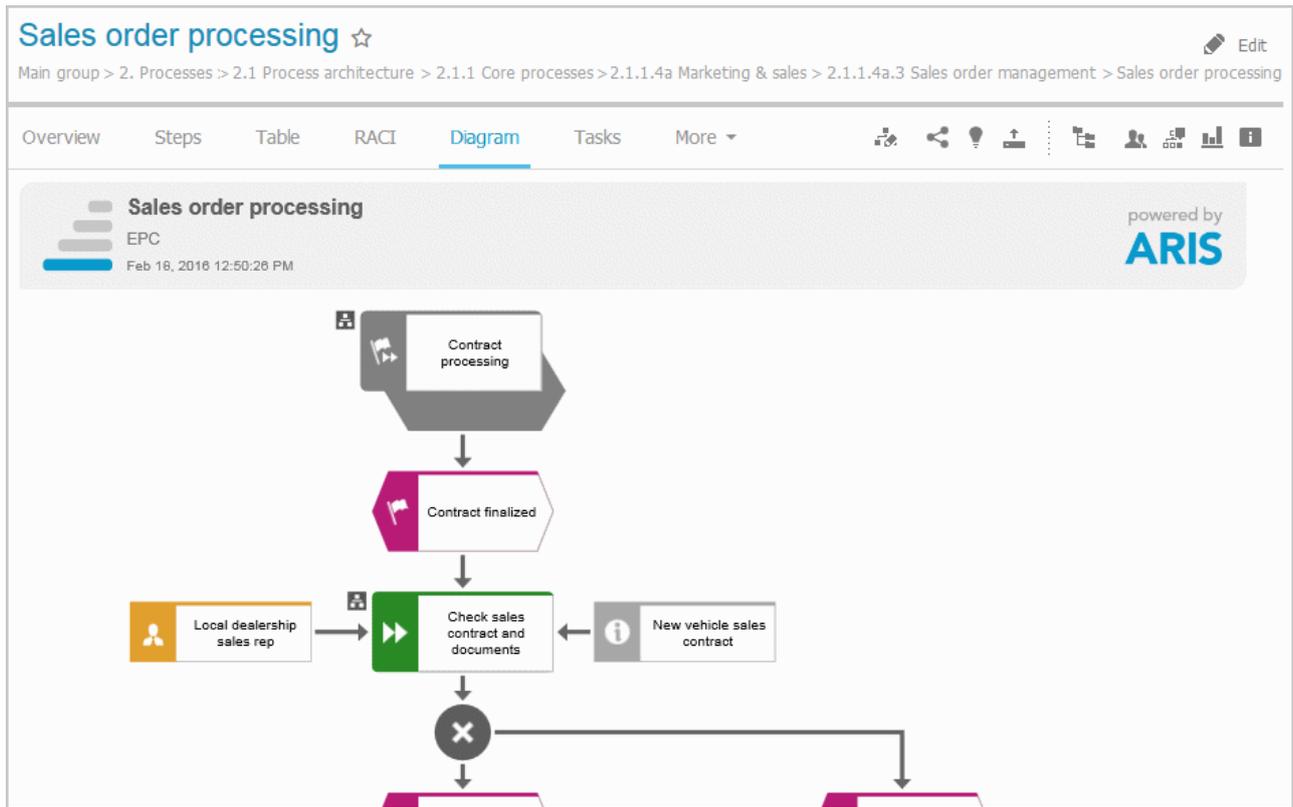
You can sort the functions alphabetically by clicking the column title.

Clicking **Matrix** transparently displays the interrelations between the individual roles and functions.

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

Diagram

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

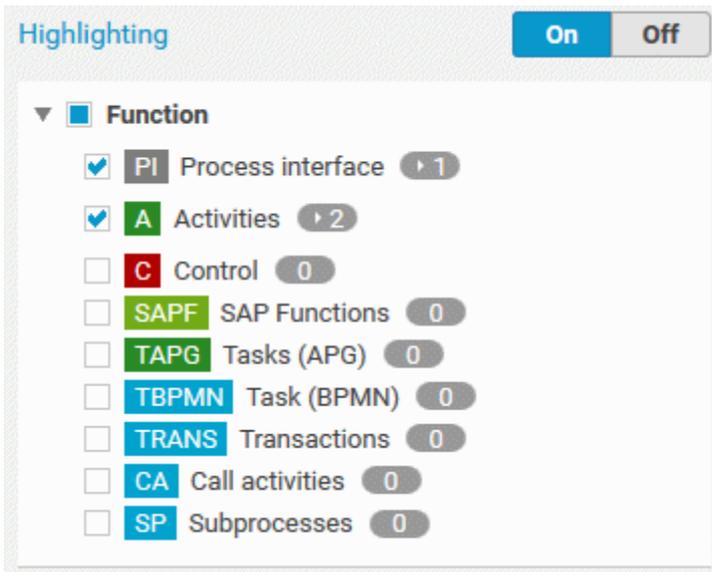


Using the functions of the view bar you can change the size of appearance. Navigate in the model using the small frame of the thumbnail view above the slider. Clicking the ▼ arrow head will hide the bar.

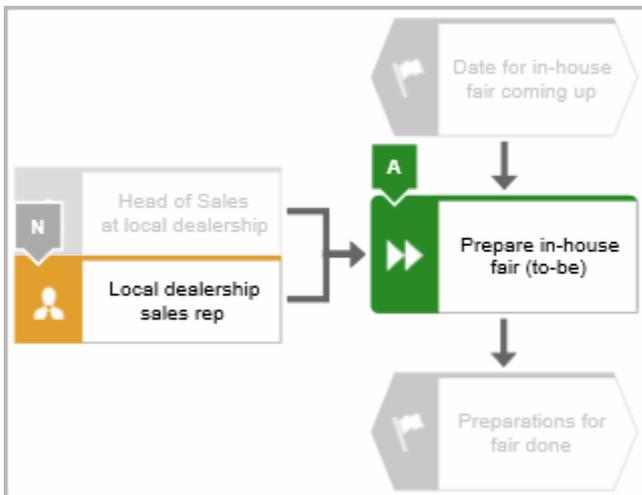
Click **i Properties** to view all attributes specified. If you have selected an object, the attributes for that object are displayed. Click **More** to view related objects or occurrences. The model properties are shown if no object is selected.

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

To highlight objects in the diagram that meet a defined condition, click  **Highlight** and **On**, and enable the criteria to be met.



The objects are then highlighted in the diagram. In this example the activity is highlighted because its check box is activated in the categories. All other objects are displayed in grayscale.



ASSIGNMENTS

If you click the  assignment icon of an object in the diagram, or double-click an object with the  assignment icon, all diagrams assigned are offered in a dialog for selection. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

Tasks

Shows your tasks, e.g., mini workflows or APG processes and opens them for editing in ARIS Process Board (page 5).

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

Transactions

Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured in the portal.

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

You can start (page 116) the ▶ transaction automatically via the default server in each row displaying a transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.



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

SAP logon

Client:

User:

Password:

Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 117). To delete the current SAP logon data, click the ▼ arrow head and then **Reset logon data**. For the next transaction start you need to log on to the SAP system again.

If you click a transaction on the **Transactions** page, such as **SDQ1**, its fact sheet including detailed information is displayed. If documents are available, you will be able to download (page 117) them.

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

Documents

Lists documents assigned to models or objects, for example, by the **Link 1 - Link 4** attributes. ARIS document storage enables you to manage and temporarily or permanently save documents.

Access restriction on folder level is possible in ARIS document storage. The documents saved there can be used during runtime of an executable process, e. g., attached to an e-mail.

All file formats are allowed for documents.

Temporary documents are deleted automatically after the executable process is terminated.

Permanent documents are kept until they are deleted explicitly.

Depending on your license, you have read-access from ARIS to documents managed in third-party document management systems.

Note: You can view 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>).

If you want to use the full range of functions of a document management system, including archiving and audit compliance, or you want to use very large numbers of documents, you can link Microsoft® Sharepoint 2013 to ARIS.

ARIS document storage as standalone component should be used for administrative purposes only. End users should access documents in the repository in ARIS Connect.

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

ARIS video tutorial

ARIS Connect - Process improvement

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

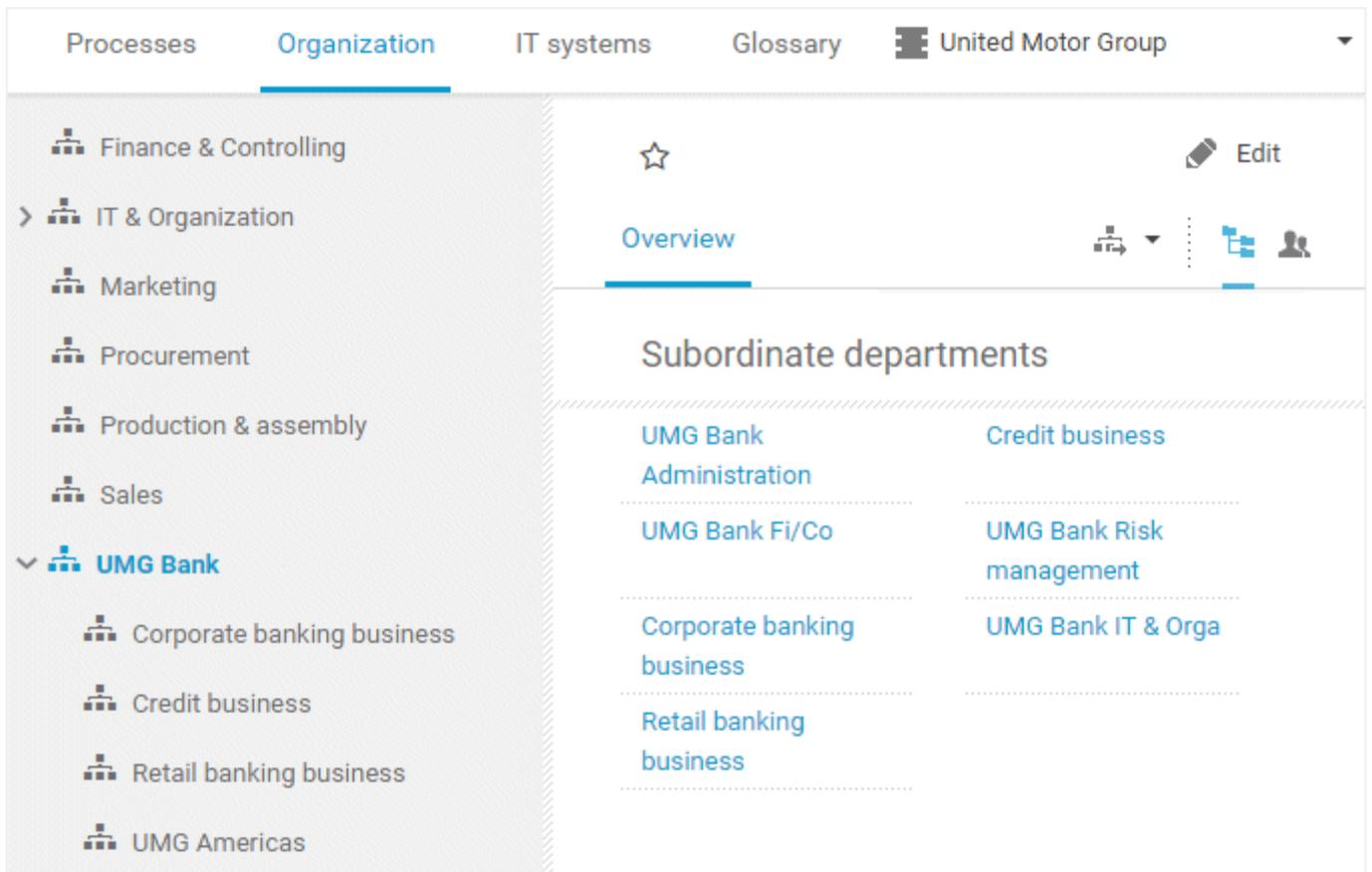
3.1.1.2.2 Organization

Quickly gain an overview of the organizational structure. Navigate to all organizational elements of the portal selected. Breadcrumbs simplify navigation to superior elements.

The Overview gives you access to the relevant information. For example, if you click a supported process, the process information (page 30) is displayed. IT information (page 42) is available when clicking a system in use.

Using the bar panel buttons  **Comment** and  **Navigation**, you can show or hide the Collaboration functions **Follow** (page 59) and **Comment** (page 58), as well as the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

The function  **Start governance process** (page 59) is provided only if an executable process is available.



The screenshot displays the 'Organization' tab in the United Motor Group portal. The top navigation bar includes 'Processes', 'Organization' (selected), 'IT systems', 'Glossary', and 'United Motor Group'. The left sidebar shows a tree view of organizational units, with 'UMG Bank' expanded to show 'Corporate banking business', 'Credit business', 'Retail banking business', and 'UMG Americas'. The main content area is titled 'Overview' and features a section for 'Subordinate departments' with a grid of department names: 'UMG Bank Administration', 'Credit business', 'UMG Bank Fi/Co', 'UMG Bank Risk management', 'Corporate banking business', 'UMG Bank IT & Orga', and 'Retail banking business'. The interface includes various icons for navigation and editing.

3.1.1.2.3 IT systems

Quickly obtain an overview of the IT landscape. Use the Explorer tree to navigate to all IT systems of the portal. Breadcrumbs simplify navigation to selected elements.

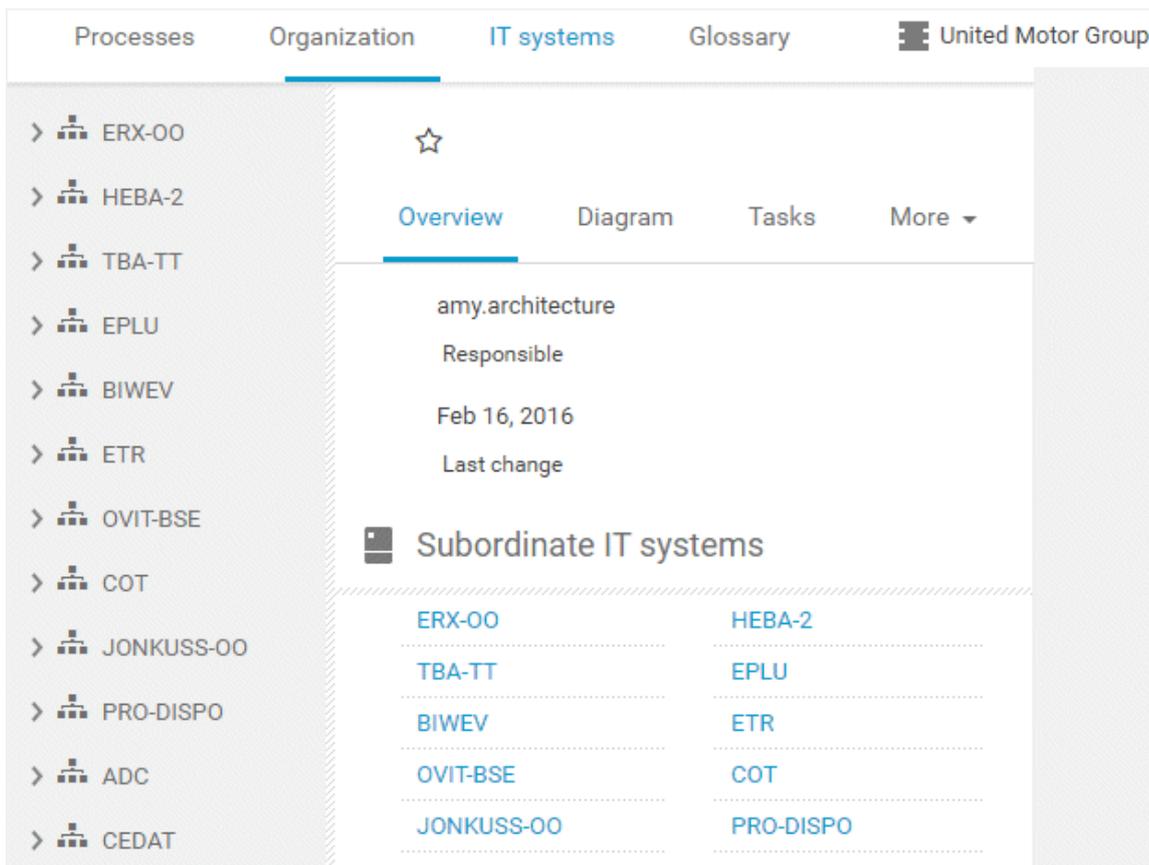
Depending on the contents selected, different functions are available.

Using the bar panel buttons  **Comment** and  **Navigation**, you can show or hide the Collaboration functions **Follow** (page 59) and **Comment** (page 58), as well as the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

Click  **Share model** to share models with other users (page 66). Click  **Submit change request** to send change requests to the process manager (page 57). The function  **Start governance process** (page 59) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes (page 70) using the  **Edit** button. If you have both the **ARIS Connect Viewer** and **Contribution** license privileges, you can use the  **Edit** button to change values of specific items (page 110), create new or reuse existing items (page 105), as well as delete items (page 107).

Overview

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



| Processes | Organization | IT systems | Glossary | United Motor Group |
|--|---|-----------------|----------|--------------------|
| >  ERX-00 |  | Overview | Diagram | Tasks |
| >  HEBA-2 | | | | More ▾ |
| >  TBA-TT | | | | |
| >  EPLU | | | | |
| >  BIWEV | | | | |
| >  ETR | | | | |
| >  OVIT-BSE | | | | |
| >  COT | | | | |
| >  JONKUSS-00 | | | | |
| >  PRO-DISPO | | | | |
| >  ADC | | | | |
| >  CEDAT | | | | |

| Subordinate IT systems | |
|------------------------|-----------|
| ERX-00 | HEBA-2 |
| TBA-TT | EPLU |
| BIWEV | ETR |
| OVIT-BSE | COT |
| JONKUSS-00 | PRO-DISPO |

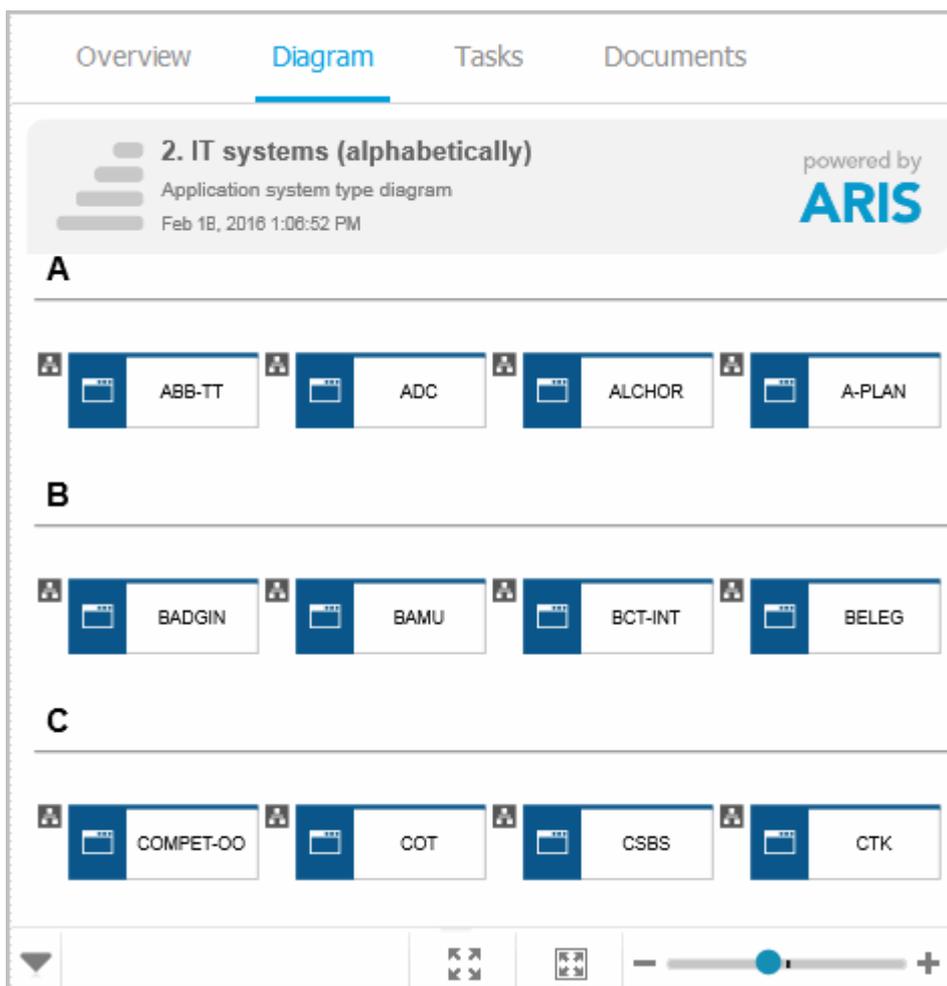
Diagram

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

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

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

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



IT system fact sheet

If you click an IT system in the Explorer tree or Overview, the IT system fact sheet provides you with important information at a glance.

The screenshot shows the 'IT systems' tab in the Designer application. The main header includes 'Processes', 'Organization', 'IT systems', and 'Glossary', along with the 'United Motor Group' logo. The system name 'A-PLAN' is displayed with a star icon and an 'Edit' button. Below the name, it indicates '2. IT systems (alphabetically)'. A left-hand navigation pane lists various IT systems, with 'A-PLAN' selected. The main content area is titled 'Overview' and contains several key metrics: 'Up to 10000' users, 'Non-standard' status, and 'Between 4 hours and 24 hours' maximum downtime. It also identifies the responsible person as Peter Brown, with contact details for telephone and email. The 'Supported roles' section lists Logistics administrator, Regional sales administrator, Local dealership sales rep, and Warehouse coordinator. The 'Business processes (context information)' section lists Billing, Order processing (as-is), Process system map, Contract negotiation and conclusion (as-is), Quotation processing (as-is), Receive and condition vehicle, Inspection of delivered goods, and Goods receipt/service receipt. The unit responsible is identified as APL.

3.1.1.2.4 Glossary

The **Glossary** page 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.

If you have both the **ARIS Connect Viewer** and **Contribution** license privileges, you can use the  **Edit** button to change values of specific items (page 110), create new or reuse existing items (page 105), as well as delete items (page 107).

| Processes Organization IT systems <u>Glossary</u> | | | |
|---|--|---|--|
| Glossary | | |  Edit |
| Business process | ▲ Name  ▼ | Description ▼ | Responsible |
| Role Document System | Acquire and implement | Acquire and implement consists of: ▶ Identify automated solutions ▶ Acquire and maintain application software ▶ Acquire and maintain technology infrastructure | ethan.owner |
| | Billing | Billing consists of: ▶ Vehicle billing ▶ Accounts receivable management ▶ Pay cash | ethan.owner |
| | Billing (to-be) | Billing (to-be) consists of: ▶ Vehicle billing (to-be) ▶ Account receivable management ▶ Pay cash | ethan.owner |

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

You can reduce the number of items shown in the list or change the glossary page:

Choose items starting with the same letter

You can reduce the number of items shown in the glossary list.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
2. Click  **Glossary letters** in the **Name** cell of the table header. The **Glossary 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 on the relevant letter.
Only items starting with the same letter are shown.

Filter items based on name, description, and responsibility

You can reduce the number of items shown in the glossary list.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
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.

Change the glossary page

If not all glossary entries fit on one page, you can switch to the page that contains the relevant glossary entry.

Procedure

4. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
5. Click the relevant page number at the bottom of the page.

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

All items of the selected page are listed.

3.1.2 Use the portal

ARIS Connect is an integrated environment in which you can create, display, and change processes, as well as discuss and improve them jointly with other ARIS Cloud users. When you open ARIS Connect in your Web browser you receive 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 134) and the default view (page 134) are described.

3.1.2.1 Select database

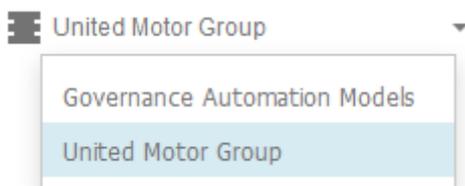
You can select one of the databases offered in the portal to access its content.

Prerequisite

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

Procedure

1. Click the name of the current database that follows the  database symbol:



In the standard ARIS Connect configuration sets, database selection is located top right of the screen.

The list of available databases opens.

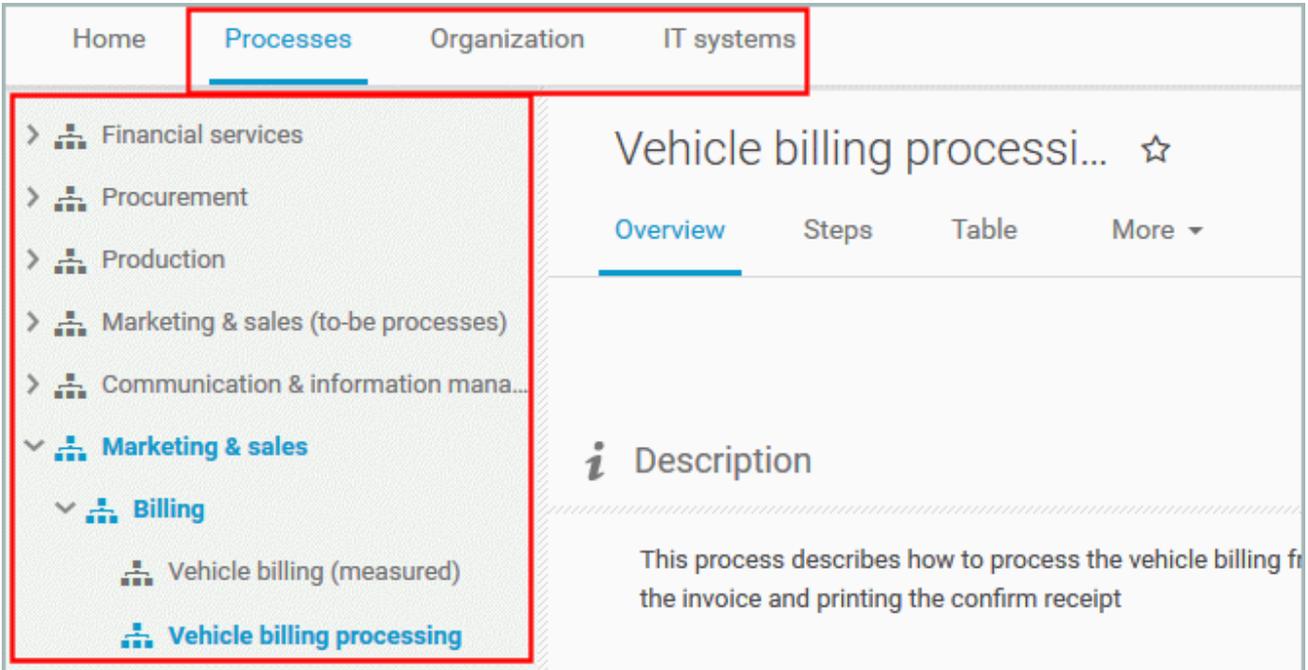
2. Click the name of the database you want to use.

The name of the selected database is displayed. The **Recent changes** area is updated according to the selected database. A search is performed based on the current database.

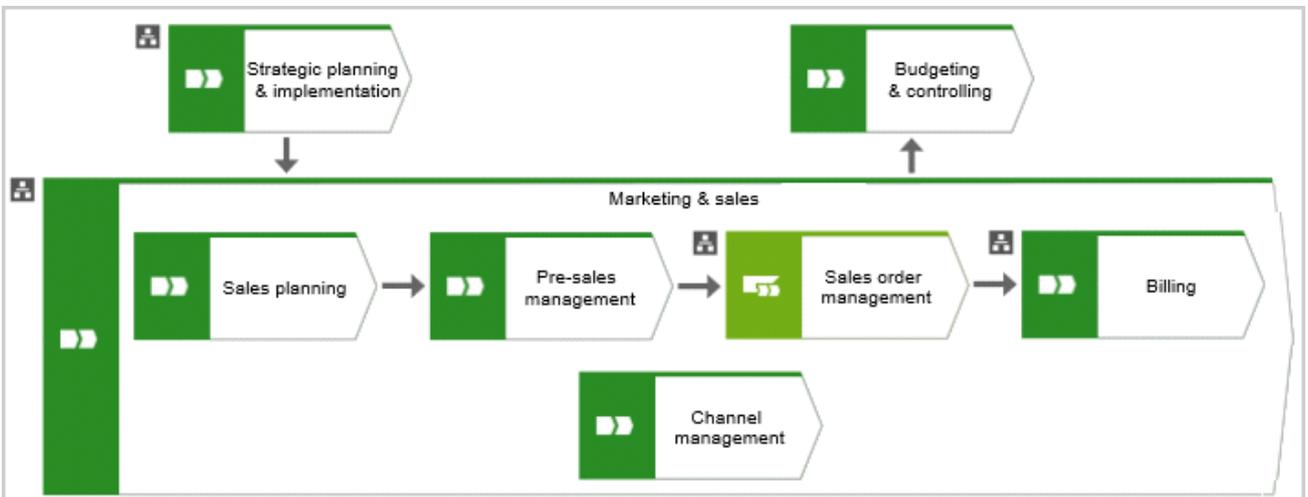
3.1.2.2 Navigate

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 example for the **default** view, the **Processes**, **Organization**, and **IT systems** hierarchies are defined. All processes subordinate to the current process are displayed in the colored area.



In the diagrams, navigate to assigned diagrams by clicking an object's  assignment icon, or by double-clicking an object with the  assignment icon. All assigned diagrams are offered for selection in a dialog. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.



3.1.2.3 Navigate step by step

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

Procedure

1. In the Groups area (page 14), select a model of the **EPC** type. You are offered the steps of the EPC.
2. Click the steps. The first event of the process is shown at the top. It does not have a predecessor, therefore, no object is placed in this field. Below, the event's successor is output. To the right, the attributes are shown.
3. Click the successor. The event as a predecessor is moved to the field above, the succeeding object is placed in the middle, and its successors are visible in the lower field. The attributes of this object are now visible.

If event and function precede or succeed each other, they are displayed together.

You navigate through a process step by step.

3.1.2.4 Choose glossary items starting with the same letter

You can reduce the number of items shown in the glossary list.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
2. Click  **Glossary letters** in the **Name** cell of the table header. The **Glossary 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 on the relevant letter.

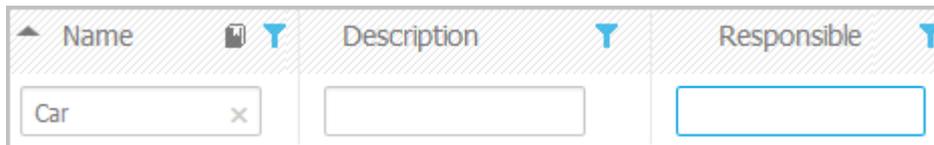
Only items starting with the same letter are shown.

3.1.2.5 Filter glossary items based on name, description, and responsibility

You can reduce the number of items shown in the glossary list.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
2. Click **Filter** in the table header. The text boxes to filter the list are opened.



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

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

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

3.1.2.6 Remove glossary filter

You can easily remove the glossary filter.

Prerequisite

You have filtered the glossary content (page 51).

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 glossary filter.

3.1.2.7 Change the glossary page

If not all glossary entries fit on one page, you can switch to the page that contains the relevant glossary entry.

Procedure

1. In the Classic configuration set (page 26) or the Default configuration set (page 45) of the portal, click **Glossary**.
2. Click the relevant page number at the bottom of the page.

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

All items of the selected page are listed.

3.1.2.8 Switch from Steps to Diagram

You can switch from the Steps fact sheet to the **Diagram** fact sheet where the current object symbol is selected.

Procedure

1. Click Groups (page 14) in the classic view (page 134) or Processes (page 30) in the default view (page 134).
2. Select the required model in the navigation. The fact sheets are shown.
3. Activate the **Steps** fact sheet and navigate to the relevant step.
4. Click  **Show in model** next to the step.

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

3.1.2.9 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 14) in the classic view (page 134) or Processes (page 30) in the default view (page 134).
2. Select the required model in the navigation. The fact sheets are shown.
3. Click  **Print graphic as PDF**. The **Select output options** dialog opens.
4. Specify your settings.
5. Click **OK**. After report generation, the **Print graphic as PDF** dialog opens.
6. 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 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 PDF.

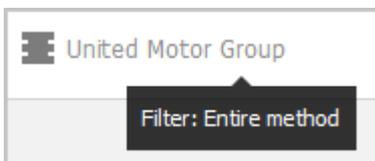
3.1.2.10 Display the current method filter

You can display the method filter that you use for the current database.

Procedure

1. Drag the mouse cursor over the database name located at the top right of the screen.
2. Leave the mouse cursor above the database name for a short time.

The filter name is displayed:

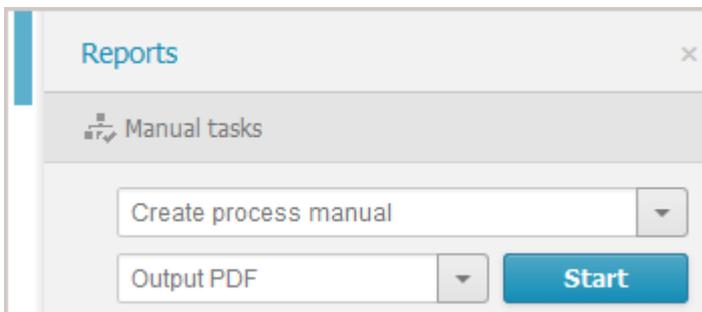


3.1.2.11 Generate report

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

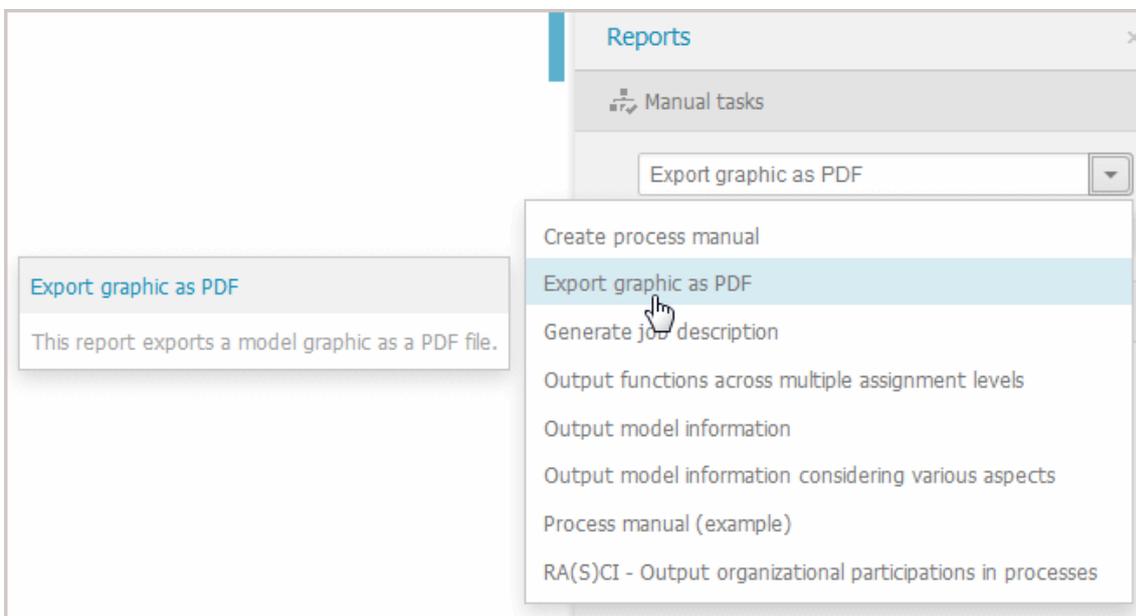
Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click the model for which you want to create a report.
6. Click **Diagram** if not enabled yet.
7. Click **Reports**. The **Reports** bar opens showing the name of the item for which the report is generated.



All reports you can start for this diagram are displayed.

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



10. Select the output format.



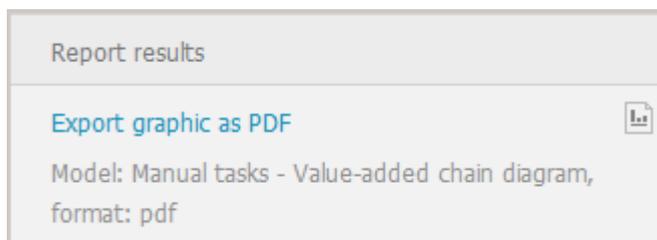
11. Click the output format, e.g., **Output PDF**.

12. Click **Start**. The report is started and a progress bar is displayed. After the report is complete, the **Output object information** dialog is opened.

13. Click **Download result** if you want to download the report immediately. You can choose whether to open or to save the report.

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

The report is shown in the **Report results** link list for downloading.



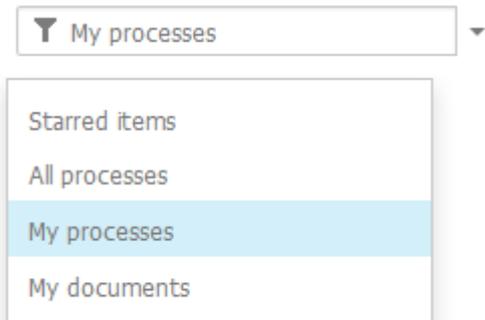
If you click the link, the report output opens.

3.1.2.12 Use the Favorites tab in the portal

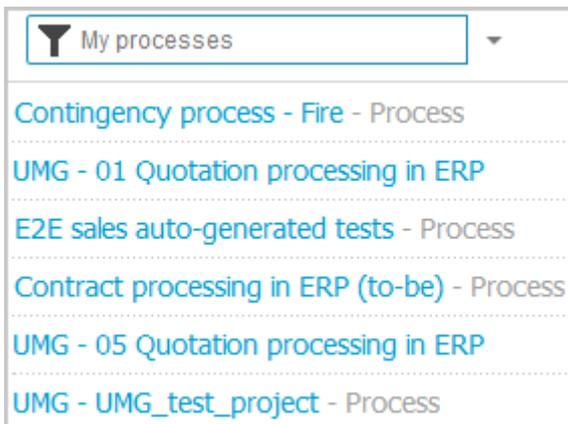
In the portal, you have direct access to all saved filter settings (page 97) to filter the content of the selected database.

Procedure

1. If you have access to more than one database, select the database you want to work with.
2. Activate the **Favorites** tab.
3. Click the ▼ **down arrow** of the **Filter selection** field.



4. Click the favorite setting of the context caption, e. g., **My processes**. 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.

3.1.2.13 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 **Navigation**. The **Groups** area opens.
2. Open the group where the required model is stored.
3. Click the name of the model. The factsheet of the model opens.
4. Click **Diagram**. The **Diagram** view opens.
5. Select the required object in the **Diagram** view.
6. Click  **Properties**. The Properties bar opens.
7. 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.
8. Click the left or right arrow to navigate to the next occurrence in the model. The next occurrence is selected and its number updated.
9. To directly select an occurrence, expand the drop-down list and click the occurrence number.
10. 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 view for the occurrence, the first fact sheet tab is shown, e.g., **Overview**.

In the **In other models** area, all models are displayed to which you have at least read access. You have switched between the occurrences of an object using the navigation controls.

3.1.2.14 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.
- 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.

5. Click the model for which you want to submit a change request.
6. Click  **Submit change request**. The 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 ARIS Process Board.

Once the person responsible has processed the request, the applicant receives a message by e-mail.

As soon as the first change request is made, the **ARIS Connect Governance Inbox** database is automatically created in ARIS. It contains a Requirements inbox for each person responsible with a model of the **Requirements tree** type. An object of the **Requirement** type is created for each change request. As the process continues, the realization status of the object is automatically changed depending on which status the person responsible has selected (**Approve, Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

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

3.1.2.15 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 202) in ARIS Architect.

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 201) in the tag input box, e.g., 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 the Enter key after each keyword.
6. Click  **Link**.
7. Insert a link to a Web site that contains more detailed information.

8. Click **Add link**. The link is checked and added.
9. Click  **File**. The **Select document** dialog is displayed.
10. Click  **Upload new document** to upload one of your own documents. The dialog opens.
11. Select the file you want to upload and enter the relevant additional information.
12. Click **Upload**.
13. Enable the check box of the document you want to add to your post.
14. Click **OK**.

Your comment is posted.

3.1.2.16 Start governance process

You can start governance processes from the portal.

Prerequisite

The  **Start governance process** function is provided only if an executable process is available, and if the item for which the governance process is to be started is defined as the execution context (page 137).

Procedure

1. Navigate to the process or object for which you want to start the governance process.
2. Click  **Start governance process**. If multiple processes are available, they will be displayed for selection.
3. Click the executable process.

The executable process will start.

3.1.2.17 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**.

3.1.2.18 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want feedback.
6. Click  **Comment** if the **Comment** bar is not open yet.
7. Enter your comment in the box provided.
8. Click  **Tag**.
9. Enter the words to be used as keywords (page 201) in the tag input box, e.g., 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 the Enter key after each keyword.
10. Click  **Link**.
11. Insert a link to a Web site that contains more detailed information.
12. Click **Add link**. The link is checked and added.
13. Click  **File**. The **Select document** dialog is displayed.
14. Click  **Upload new document** to upload one of your own documents. The dialog opens.
15. Select the file you want to upload and enter the relevant additional information.
16. Click **Upload**.
17. Enable the check box of the document you want to add to your post.
18. Click **OK**.

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

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

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

3.1.3 Use roles

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 61) to your user in models and the portal has been configured for the use of role filters.

3.1.3.1 Assign roles

In order to enable users to use role filters (page 138) in the portal, you must assign the corresponding roles to the users.

Prerequisites

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

Procedure

1. Click  **Portal**.
2. Open a diagram containing an occurrence of the relevant role, e.g., **Regional sales department specialist**.
3. Click  **Edit**. The diagram opens on a separate tab for editing.
4. Select the **Role** type object and click  **Properties**. The attributes are displayed.
5. Move the mouse pointer to the **User/User group association** attribute.
6. Click  **Select user**. The **Select user(s)/user group(s)** dialog opens.
7. Enter the user name in the  **Filter** box.
8. Enable the check box for the user, and click **OK**.
9. Save the changes and close the diagram.

The role has been assigned to the user.

If this user activates (page 62) the role filter, only information from models in which the selected role occurs will be displayed.

3.1.3.2 Activate role filter

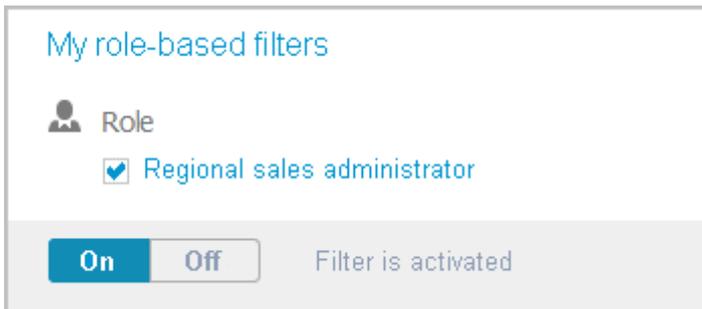
Using role filters, you restrict the content in such a way that you only see information from processes in which certain roles are involved.

Prerequisite

A role has been assigned (page 61) to your user.

Procedure

1. Click  **Select role filter** to the left of your user name.
2. Click **On** and activate the relevant role.



In the portal, you now see information only for the models in which the selected role occurs. Models of the **Value-added chain diagram** type are always shown with an active role filter regardless of whether or not the model contains the role. When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 50), all steps are displayed. The detailed information about the satellites is filtered according to the selected role. Tables, fact sheets, and RACI matrices contain only role-specific information. You only access filtered information via the search and the navigation.

If you click **Off**, the role filter is deactivated and you see your entire content again.

3.1.4 Use models

3.1.4.1 Open assignment

In Model Viewer, you can quickly open models assigned to objects.

Procedure

1. Click Groups (page 14) in the classic view (page 134).
2. Select the required model in the navigation. The fact sheets are shown.
3. Click **Diagram** if you have not already selected this fact sheet before. The diagram as well as all objects with assigned models are displayed in the Model Viewer.
4. Click the relevant  assignment icon, or double-click the object at which the relevant  assignment icon is shown.

All assigned diagrams are offered for selection in a dialog. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

3.1.4.2 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click Groups (page 14) in the classic view (page 134).
2. Select the required model in the navigation. The fact sheets are shown.
3. Click **Diagram** if you have not already selected this fact sheet before. The diagram as well as all placed link attributes are displayed in the Model Viewer.



4. Click the relevant link attribute.

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

3.1.4.3 Switch from Steps to Diagram

You can switch from the Steps fact sheet to the **Diagram** fact sheet where the current object symbol is selected.

Procedure

1. Click Groups (page 14) in the classic view (page 134) or Processes (page 30) in the default view (page 134).
2. Select the required model in the navigation. The fact sheets are shown.
3. Activate the **Steps** fact sheet and navigate to the relevant step.
4. Click  **Show in model** next to the step.

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

3.1.4.4 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 14) in the classic view (page 134) or Processes (page 30) in the default view (page 134).
2. Select the required model in the navigation. The fact sheets are shown.
3. Click  **Print graphic as PDF**. The **Select output options** dialog opens.
4. Specify your settings.
5. Click **OK**. After report generation, the **Print graphic as PDF** dialog opens.
6. 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 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 PDF.

3.1.4.5 Ask for model approval

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

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in the Model Editor on an individual tab.
7. Make the required changes.
8. Click  **Collaboration** if it is not activated yet.
9. 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.
10. Click **OK**. The model reopens read-only and the **Request approval** dialog is displayed.
11. If required, select a person in charge to approve the model if the **Person responsible** attribute has not been specified at the model.
12. Enter a comment to explain the approval request.
13. Click **Send**. A completion message is displayed.
14. Click **OK**.

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

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

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

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

3.1.4.6 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model you want to send to another user.
6. Click  **Share model**. The dialog opens.
7. Select the user you want to share the model with.
8. Enable **Send copy to me** to receive a copy of the message, if required.
9. You can also enter a subject and a comment.
10. Click **Send**.

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

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

3.1.4.7 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 104). 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Navigate to the items and change the relevant attributes (page 104). Depending on the attributes, various editing options (page 112) are available.
6. Click  **Inform owner of change**. The **Inform of change** dialog opens.
7. Insert a change description
8. Click **Submit**. The **Information** dialog opens.
9. Enable the **Do not show this message again** check box if you do not want to be informed again by the dialog when executing the mini workflow more than once during the current session.
10. Click **OK**.

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

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

3.1.4.8 Generate report

You can generate and download a report for the open model.

Procedure

1. Show the Reports bar ()
2. Click the drop-down list box to display the list of available reports.
3. Leave the mouse pointer on the name of a report if you want to display its description.
4. Click the name of the relevant report.
5. Click the report output format, e.g., **Output PDF** if you want to output the report in the first available format (page 154).
To select a different report format, click the ▼ **Down arrow** next to **Output PDF** and select the format you want to use. The **Output PDF** button is given the name of the selected report format.
6. Click the button. The report is created and listed in the  Reports bar (page 264).
7. Click the name of the listed report to download and open the report.

You generated the report for the open model.

3.1.4.9 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.
- The relevant model type must be included in the database filter. If this is not the case, the portal page is displayed again after the **Create model** dialog closes.

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 model** on the **Home** tab. The 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 269) 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 and opens in a new tab (page 212).

3.1.4.10 Edit models

You can edit models in ARIS Connect.

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in the Model Editor on an individual tab.
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the model.

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

3.1.4.11 Use matrix models

You can display a matrix model in ARIS Connect.

3.1.4.11.1 Open a matrix model in ARIS Connect

You can display a matrix model in ARIS Connect.

Prerequisite

You have a valid license for either Designer or ARIS Architect.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Click **Groups**.
4. Navigate to the group containing the relevant model.
5. Click the matrix model.
6. Click **Matrix** to display the matrix model.

The matrix model is displayed.

3.1.4.11.2 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 71)
2. Place the mouse cursor over a connection cell.

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

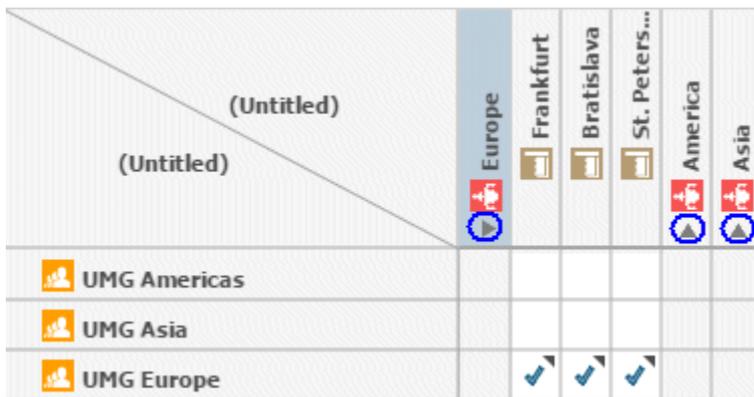
3.1.4.11.3 Show/Hide hierarchies in a matrix model in ARIS Connect

You can show or hide hierarchies in a matrix model.

Procedure

1. Open a matrix model in ARIS Connect. (page 71)
2. Click the little arrow to expand or collapse the hierarchy. The hierarchy is shown or hidden accordingly.

The hierarchy is shown/hidden.



3.1.4.11.4 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 in Designer or ARIS Architect, this abbreviation is displayed instead of the check mark.

3.1.5 Handle documents

ARIS document storage enables you to manage and temporarily or permanently save documents.

3.1.5.1 Propose document

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.

Prerequisites

- 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. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click a model or object.
6. Click  **Propose document**. The **Submit new document** dialog opens.
7. Select the documents you want to submit.
8. Click **Send**.

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

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

3.1.5.2 Link new documents to a model or object

You can link new documents with a model or object.

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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in the Model Editor on an individual tab.
7. Click  **Properties**. The **Properties** bar opens.
8. Activate the **Documents** tab.
9. Click in the model background to add a document to the model or the relevant object to add a document to the object.
10. Click  **Add document**. The dialog opens.
11. Navigate to the target folder.
12. Click  **Upload new document**. The **Select new document** dialog opens.
13. Click **Select file** and select a document.
14. Enter a title and, if required, specify further document properties.
15. Click **Upload**.
16. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

3.1.5.3 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. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Navigate to a group and click a model.
4. Click **Diagram** if not enabled yet.
5. Click  **Edit**. The model opens in the Model Editor on an individual tab.
6. Click  **Properties**.
7. Activate the **Documents** tab.
8. Click in the model background or an object.
9. Click  **Add document**.
10. Click the folder containing the relevant documents.
11. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

3.1.5.4 Submit a change request for a document

You can send change requests for documents to the document manager for documents in ARIS Connect.

'DOCUMENTS' TAB

Prerequisites

- 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. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click a model or object.
6. Activate the **Documents** tab.
7. Select the document for which you want to submit a change request.
8. Click  **Submit change request**. The dialog opens.
9. Enter a title and a description for your request.
10. Select the priority with which the request is to be handled.

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 ARIS Process Board.

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 ARIS Process Board 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**.

IN A MODEL

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 70) the model that contains the document you want to submit a change request for.
4. Click **Diagram** if not enabled yet.
5. Click  **Edit** >  **Contribute**.
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 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 ARIS Process Board.

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 ARIS Process Board and the information added. After processing and approval - or rejection -, the applicant receives an e-mail including the information that the change requests have been implemented - or rejected.

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

3.1.5.5 Have document approved

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

'DOCUMENTS' TAB

Prerequisites

- 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. Open ARIS Connect and log in with your user name and password.
2. Click  **Repository** if it is not activated yet.
3. Activate the **Documents** tab.
4. Click the document you want to have approved.
5. Click  **Request approval**. The dialog opens.
6. Enter a comment describing what you changed.
7. Click **Send**.

The person responsible receives an e-mail with the relevant information and a link to the associated task in ARIS Process Board. 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**.

IN A MODEL

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 70) 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 dialog opens.
8. Click **Send**.

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

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

3.1.5.6 Share document

You can share documents with other users.

'DOCUMENTS' TAB

Prerequisites

- 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. Open ARIS Connect and log in with your user name and password.
2. Open ARIS Connect and log in with your user name and password.
3. Click  **Portal** if it is not activated yet.
4. Depending on the view in use, click **Groups** or **Processes**.
5. Click  **Navigation** if the navigation bar is not shown.
6. Click a document.
7. Activate the **Documents** tab.
8. Click the model you want to share.
9. Click  **Share document**. The dialog opens.
10. Select the user you want to share the document with.
11. Enable **Send copy to me** to receive a copy of the message, if required.
12. You can also enter a subject and a comment.
13. 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**.

IN A MODEL

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

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

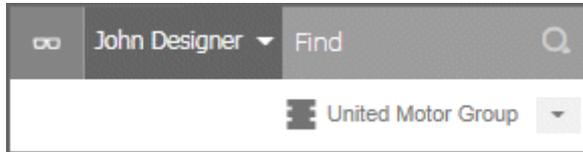
This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect**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

3.1.5.7 Find a document

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

Procedure

1. If necessary, select the database (page 48) your search is to be based on.
2. Click in the **Find** box.



3. Enter the relevant term.
A list with the first results (page 101) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

The document will open.

3.1.5.8 Rename document

You can rename a document.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Enter the new name in the **File name** box.
6. Click **Save**.

The name has been changed.

3.1.5.9 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. Open ARIS document storage.
2. Click a folder in the navigation.
3. Click the relevant document.
4. Click  **Open properties**.
5. Click **Relationships**.

The properties of the document are displayed.

3.1.5.10 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. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Open (page 70) the model you want to remove the document from.
4. Click **Diagram** if not enabled yet.
5. Click  **Edit** >  **Contribute**.
6. Click  **Properties**.
7. Activate the **Documents** tab.
8. Click  **Remove selected document**.

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

3.1.5.11 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. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Versions**.
6. In the row of the relevant version, click  **Open version**.
7. Select **Open with** in your browser.

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

3.1.5.12 Handle document versions

3.1.5.12.1 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. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Versions**.
6. In the row of the relevant version, click  **Open version**.
7. Select **Open with** in your browser.

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

3.1.5.12.2 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. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Versions**.

The different versions of the document are displayed. The change description is in the **Comment** column.

3.1.5.12.3 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. Open ARIS document storage.
 2. In the navigation, click the arrow next to **ARIS document storage**.
 3. Click a folder in the navigation.
 4. Click the relevant document.
 5. Click **Versions**.
 6. In the row of the relevant version, click  **Delete**.
 7. Click **Delete version**.
 8. A confirmation prompt is displayed. Click **OK**.
- You have deleted this version of the document from ARIS document storage.

3.1.5.13 Handle document with Document administrator privilege

3.1.5.13.1 Add documents to ARIS document storage

You can manage documents in your ARIS document storage. You can add more documents to your ARIS document storage.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
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.

3.1.5.13.2 Open/Download document

You can open and edit documents in the ARIS document storage as long as they are not locked.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.

Click  **Download** in the document row.

| | | | |
|---|--|--|---|
|  | 1.gif Last change 2012.12.20, 08:37:19 by system Document | | |
|  | 1.txt Last change 2012.12.20, 08:37:02 by system Document | |     |

4. Select **Open with** in your browser.

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

3.1.5.13.3 Select document manager

You can edit the properties of a document.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click  **Open properties**.
6. Click  **Edit** >  **Contribute**.
7. Next to the **Person responsible** box, click  **Edit**.

The **Select person responsible** dialog opens.

You can select the person responsible for the document.

3.1.5.13.4 Upload multiple documents

You can upload multiple documents.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click  **Upload new version of this document** in the document row.

The dialog for uploading a document opens.

5. Enter the relevant optional additional information, and click **OK**.

You have uploaded documents.

Administrators can import all documents in a directory to ARIS document storage.

3.1.5.13.5 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.

Prerequisite

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

The document has the same name and document type as the first uploaded version of this document.

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click  **Upload new version of this document** in the document row.



The dialog for uploading a document opens.

5. Enter the relevant optional additional information, and click **OK**.

You have updated an existing document in ARIS document storage. This works for Microsoft® SharePoint 2013 as well.

3.1.5.13.6 Sort versions of a document

You can sort versions of a document.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click a document.
5. Click **Versions**.
6. Click a column title.

The document versions are sorted.

You can reverse the sort order by clicking the column title again.

3.1.5.13.7 Download multiple documents

You can download multiple documents.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Enable the check boxes in front of the relevant documents.
5. Click  **Download selected documents**.

The selected documents are packed in a ZIP archive and then downloaded.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

3.1.5.13.8 Move document

You can move a document to another folder.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click  **Move to another folder** in the **Actions** bar of the relevant document. The **Move document** dialog opens.
5. Select the relevant folder, and click **OK**.

You have moved the document to another folder.

3.1.5.13.9 Move multiple documents

You can move documents to another folder.

Prerequisite

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

You have access to ARIS document storage and/or the relevant third-party document management system.

Procedure

1. Open ARIS document storage.

2. In the navigation, click the arrow next to **ARIS document storage**.
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 document to another folder.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

3.1.5.13.10 Browse ARIS document storage

You can search for a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage.
2. 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.
3. Enter the search term.

Possible hits are displayed as soon as you enter the first few letters.

3.1.5.13.11 Lock document

You can lock documents that are in your ARIS document storage to prevent them from being edited by other users.

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click  **Lock document**.

The document is locked for editing by other users. Only you or a Process Governance administrator can unlock the document.

3.1.5.13.12 Unlock document

You can unlock documents that are locked and thus make them available to other users for editing.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click  **Unlock document**.

The document can be edited by other users.

3.1.5.13.13 Delete document from ARIS document storage

You can remove documents from ARIS document storage.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the arrow to navigate in the structure, and select the folder containing the relevant document.
5. Click  **Delete** in the **Actions** bar of the relevant document. A confirmation prompt is displayed.
6. Click **OK**.

The document is no longer displayed within ARIS document storage.

Tip

Enable the check box in front of the **Name** column to select all documents in a directory at once.

3.1.5.13.14 Delete multiple documents from ARIS document storage

You can remove multiple documents from ARIS document storage in one operation.

Prerequisite

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

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click in 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.

3.1.5.13.15 Delete documents from the repository

You can delete documents permanently from ARIS document storage. You should do this regularly to clean up the repository.

Procedure

1. Open ARIS document storage.
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click  **Administrative actions**.
5. Click  **Permanently delete deleted documents from document storage**. A confirmation prompt is displayed.
6. Click **OK**.

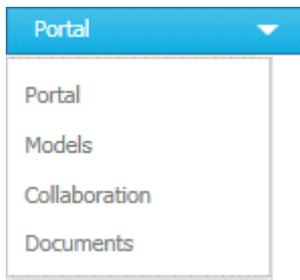
All documents already deleted in this folder are deleted permanently.

3.1.6 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 93) on the start page to access items directly. Or you can use the Search area (page 95) to define the search context beforehand and filter the search results.

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



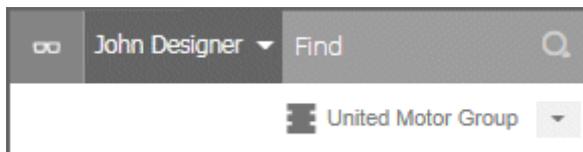
If you use an **ARIS Connect Viewer** license, the **Models** search context is not available. Models found can be opened for editing, but users with **ARIS Connect Viewer** licenses have read-only access to models.

3.1.6.1 Start quick search

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

Procedure

1. If necessary, select the database (page 48) your search is to be based on.
2. Click in the **Find** box.



3. Enter the relevant term.
A list with the first results (page 101) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

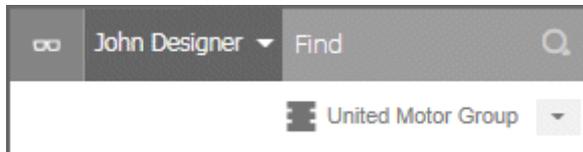
The item opens. For example, if you click the name of an object, it is displayed in the portal. If you click a comment, it is output in Collaboration. If you click the name of a model, the model opens in Model Editor.

3.1.6.2 Open Search area with term to be searched for

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

Procedure

1. If necessary, select the database (page 48) your search is to be based on.
2. Click in the **Find** box.



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

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

3.1.6.3 Open Search area directly

You can open the Search area directly.

Procedure

Open Search area using the menu

1. If necessary, select the database (page 48) your search is to be based on.
2. Click the ▼ **down arrow** beside your user name. The menu opens.
3. Click **Search**.

Open Search area in the portal

1. If necessary, select the database (page 48) your search is to be based on.
2. If you are not in the portal, click  **Portal**.
3. Click  **Search**.

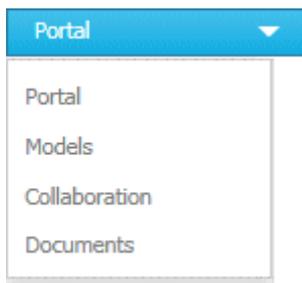
The Search area opens and you can browse ARIS Connect for the relevant terms.

3.1.6.4 Find using the Search area

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

Procedure

1. If necessary, select the database (page 48) your search is to be based on.
2. If you are not in the portal, click  **Portal**.
3. Click  **Search**.
4. Enter the term you want to find. The items found will be presented in a list.
5. Click the down arrow that follows the term you entered and select the search context, e.g., **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.

6. In the **Filters** area, click the relevant filters and adjust the filter properties as necessary (page 96).

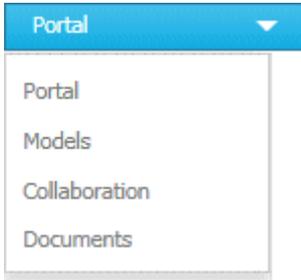
The result of the search will be updated to reflect the search context and filter criteria you specified.

3.1.6.5 Use search context and filters

You can restrict the result in the Search area (page 95) to the items you want to find by using the search context and filters.

Procedure

1. In the Search area, click the down arrow that follows the term you entered, and select, e.g., **Portal, Models, Collaboration, or Documents.**



The search result will be restricted to the range you selected. If the search result can be filtered, filter criteria will be listed in the **Filters** area.

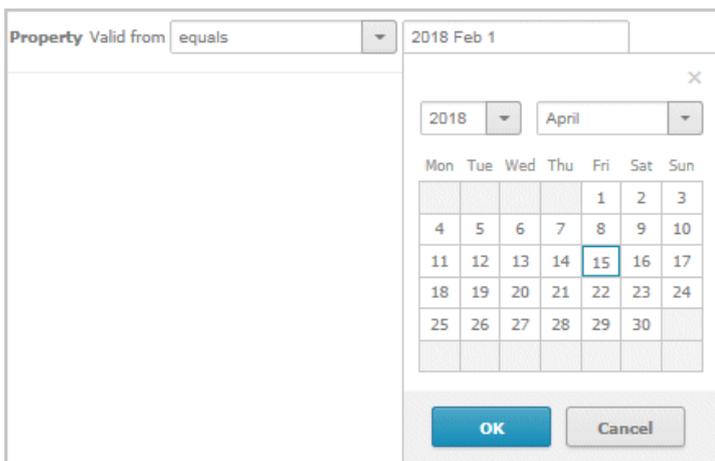
2. Click one or more filter criteria. The selected filter criteria will be listed and the search result updated. If you have selected a filter criterion that you can define more precisely, another area with subordinate filter criteria will be added to the **Filters** area.
3. Click additional criteria.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



- b. You can enter properties as the search criterion for certain filter criteria, e.g., the file name:



You will be offered different input options depending on the property type. A calendar opens so you can select a date:



4. If necessary, specify the property of the search criterion.
5. To clear a selected filter criterion, click **✕ Clear**. The filter criterion will be cleared and the search result updated.
6. To see more search criteria, click **Show more** in the **Filters** area. The list will be extended.
7. To clear all filter criteria for an area, click **Clear subordinate filters**.
8. To clear all filters and base your search on other search criteria, click **Clear all filters** in the **Filters** area. All previously selected search criteria will be cleared.

The list of results will be updated according to the search context and the selected criteria.

3.1.6.6 Save filter settings as a favorite

In the Search area (page 102), you can save your filter settings. Thus, you can filter the content based on specific filters at any time.

Procedure

1. Select the filter criteria (page 96) to define your filter.
2. Click **☆ Save filters as favorites**. The dialog opens.
3. Enter a name.
4. Click **OK**.

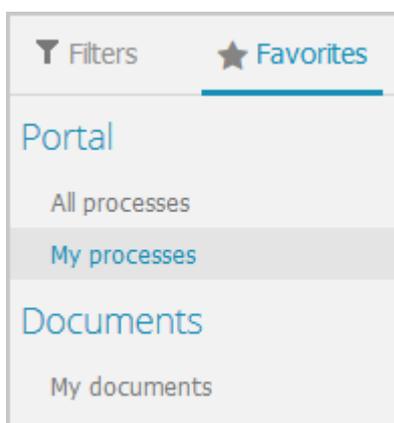
The filter settings are saved in the **Favorites** area. You can filter the content based on these settings (Seite 97) at any time from various devices.

3.1.6.7 Use a favorite in the Search area

In the Search area (page 102), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

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



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

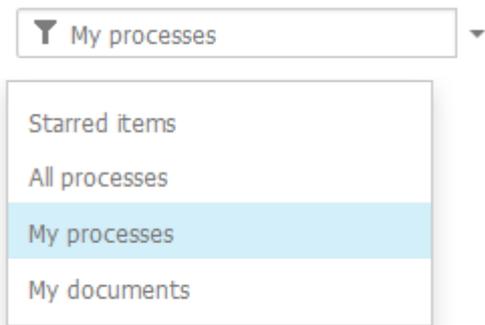
The filter criteria of the selected favorite setting are immediately applied and the list of filter results is updated.

3.1.6.8 Use a favorite in the Favorites area

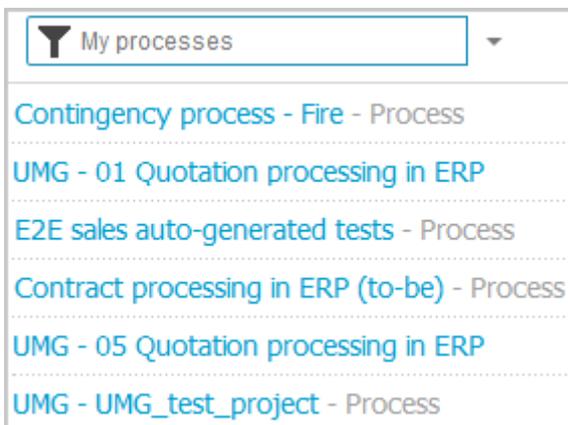
In the Favorites area (page 103), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

1. In the Portal, activate the **Favorites** tab.
2. Click the ▼ **down arrow** of the **Filter selection** field.



3. Click the favorite setting of the context caption, e. g., **My processes**. The content of the selected database is filtered.



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

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

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

3.1.6.9 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

To the left of the result list, click a selected filter criterion again or click **×** **Clear** for a filter criterion.

A screenshot of a filter criterion 'EPC (column display)' with a close button 'x'.

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.

The filter criteria of the subordinate filter area are removed and the the list of filter results is updated.

Clear all filter criteria

You can clear all filter criteria.

Procedure

Click **×** **Clear all filters** at the top right.

All filter criteria are cleared and the list of filter results is updated.

You have cleared filter criteria.

3.1.6.10 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 using the Search area (page 95).
2. Hold down the **Ctrl** key, and click the name of the relevant item.

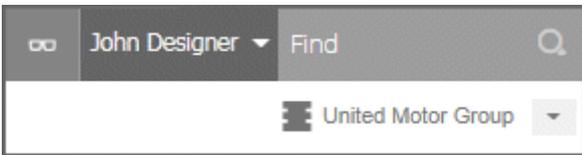
The item will open on a separate tab.

3.1.6.11 Valuable information

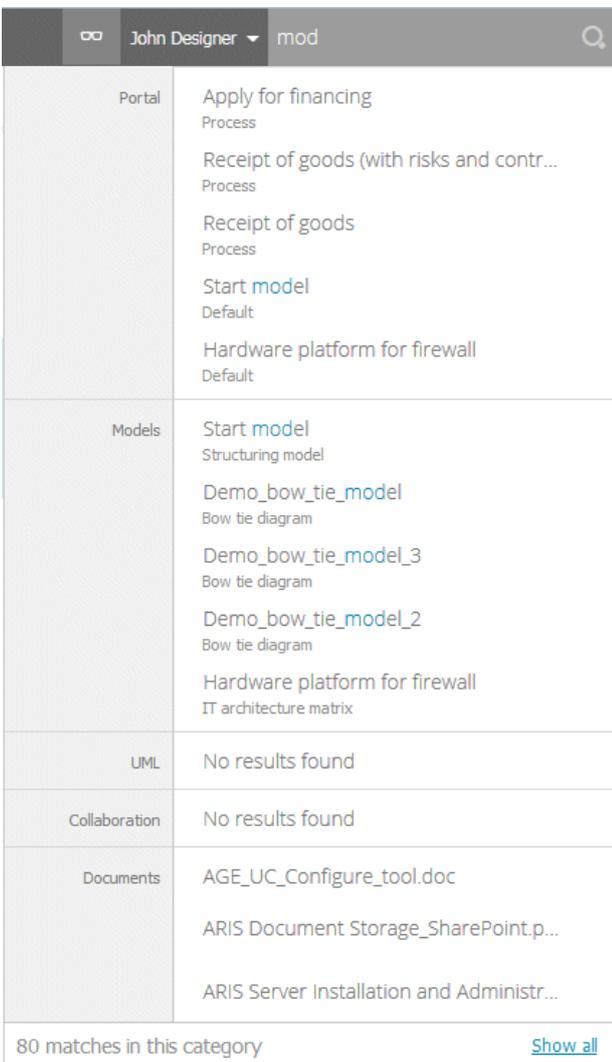
This section provides background information to assist you in carrying out the relevant procedures.

3.1.6.11.1 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 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 102).

3.1.6.11.2 How is the Search area structured?

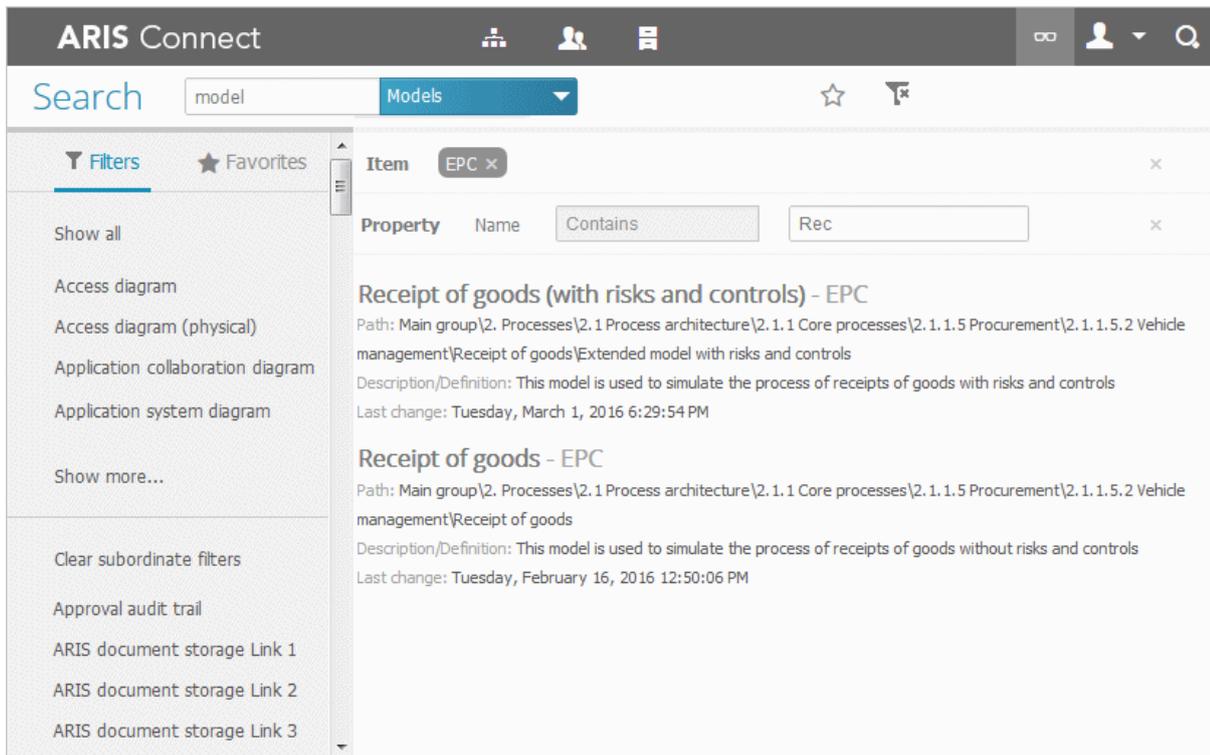
The Search area (page 94) includes a list of all matches.

To the right of the search term you entered, you can select the search context, e.g., **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.

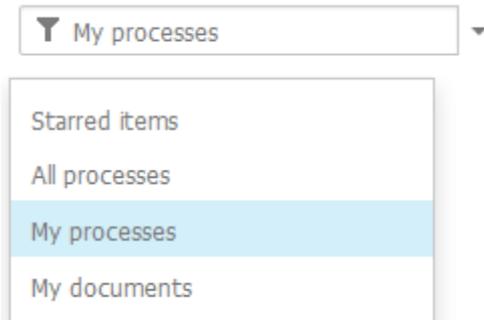
For certain filter criteria, such as the file name, you can enter properties as the search criterion, e.g., a term that should be present in the name.

If there are too many matches to display all at once, page numbers appear at the end of the list of results. If you click one of these numbers, the matches on that page will be output.



3.1.6.11.3 How is the Favorites area structured?

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



3.1.6.11.4 How can search results be influenced?

If you use quick search (page 93) or the Search area (page 95) to find items, the list of results will be influenced by the selected database (page 48) 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 the Model Editor, will not be displayed. This area is displayed to users with the **ARIS Connect Designer** license. These users are allowed to open models for editing.

3.1.7 Contribute as a viewer

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you can change values of specific items (page 110), create new or reuse existing items (page 105), as well as delete items (page 107) in the portal.

Please note that the description is based on the sample configuration supplied with the classic view of ARIS Connect. In your installation other items may have been configured to be editable and the editing options for items may be different.

3.1.7.1 Change values of items

You can change values of items (page 110) 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. The edit mode (page 109) is enabled.
6. Navigate to the group containing the relevant item.
7. Select the item you want to edit.
8. Activate the **Overview** area if it is not activated yet.
9. Change the relevant attribute. Depending on the attribute, various editing options (page 112) are available.
10. Confirm your changes.

Your changes are saved.

Text formatting is ignored and cannot be assigned. If you are expected to enter numbers, the field is colored red (page 112) if you do not enter a numerical value.

3.1.7.2 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 112). 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. The edit mode (page 109) is enabled.
6. Navigate to the required diagram and select it.
7. Click the object to which you want to assign additional roles. To add objects of the **Role** type to the **Groups** table, you can select a risk from the sample configuration supplied.
8. In the **Activities** area, click the  **plus sign**. The input box opens.
9. Enter the name of the role.
If a role with the same name already exists, it is offered to you for selection. In addition, this name is listed with **(new item)** added to it.
10. To create a new role and assign the risk to it, click the entry with **(new item)** added to it.
To reuse an existing role and assign the risk to it, click the other entry.
11. Click  **Change**. A completion message is displayed.

The new role was created (page 115) and added to the list, or the existing role will be reused. If you selected a role to which the risk was already assigned, no new entry is added to the table.

3.1.7.3 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 112). 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 Model Editor.

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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. The edit mode (page 109) is enabled.
6. Navigate to the required diagram and select it.
To add objects of the **Application system type** type to the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
7. Activate the **Overview** area if it is not activated yet.
8. Click the **Subordinate IT systems** edit box. Existing objects are displayed one next to the other and the option **Insert item** is shown.
9. Enter the name of the required application system type.
If an application system type with the same name already exists, it is offered to you for selection. In addition, this name is listed with **(new item)** added to it.
10. To create a new application system, click the entry with **(new item)** added to it.
To reuse an existing application system type, click the other entry.
11. Enter other names for additional application system types.
12. Click  **Change**. A confirmation prompt is shown listing all new application system types for confirmation.
13. Click **OK**.

New application system types (page 115) are added to the list, or existing application system types will be reused. Occurrences of new application system types are placed in the diagram window.

3.1.7.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 112). 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. The edit mode (page 109) is enabled.
6. Navigate to the required diagram and select it.
7. Click the object whose associated item you want to delete. To delete objects of the **Role** type from the **Groups** table, you can select a risk from the sample configuration supplied.
8. In the **Groups** area, click  **Delete** for the role from which you want to remove the risk assignment. A confirmation prompt is shown.
9. Click **OK** to confirm the prompt if you really want to delete the assignment to the role.

The assignment to the role is then deleted. If the assignment was represented as a connection in diagrams, this connection will be deleted from these diagrams. Definitions are retained in the database.

3.1.7.5 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 112). 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 Model Editor.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click  **Edit** >  **Contribute**. The edit mode (page 109) is enabled.
6. Navigate to the required diagram and select it. To delete objects of the **Application system type** type from the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
7. Activate the **Overview** area if it is not activated yet.
8. Click the edit box in the **Subordinate IT systems** area. Existing objects are displayed one next to the other with a delete sign (x) added to them.
9. Click the delete sign for the application system types you want to delete from the diagram.
10. Click  **Change**. A confirmation prompt is displayed listing all application system types to be deleted.
11. Click **OK**.

The application system types are deleted from the list, and also from the application system type diagram together with their connections. Definitions are retained in the database.

3.1.7.6 Valuable information

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

3.1.7.6.1 Requirements for Contribution

For a user to be able to work with ARIS Viewer Contribution the following requirements must be met:

- The user has the **ARIS Connect Viewer** and **Contribution** license privileges.
- The **Workspace** database content was published for versionable databases.
- The user has at least the **Write** access privilege for the group content of the database to be edited. Deleting items requires the **Delete** access privilege.
- The administrator has activated the classic view, default view, or a view derived from these views.

3.1.7.6.2 How to identify whether the edit mode is active

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

 Edit

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

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

 Edit mode  Exit edit mode

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

The availability of various edit boxes (page 112) is another clear indication that the edit mode is active.

3.1.7.6.3 Which items are you allowed to change using the Contribution privilege?

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you are able to change items and values for the following predefined items in the portal. 'Predefined' means that these items and their values were configured to be editable in the program by default.

This means that not all items of the following model and object types can be changed. Only those can be changed that were designed to be editable by the underlying concept and were set up accordingly by the configuration.

Please note that this is a sample configuration, which means that other items may have been configured to be editable in your installation.

MODEL TYPES

- Application system type diagram
- BPMN collaboration diagram (BPMN 2.0)
- BPMN process diagram (BPMN 2.0)
- Business controls diagram
- Enterprise BPMN collaboration diagram
- Enterprise BPMN process diagram
- EPC
- EPC (material flow)
- EPC (column display)
- EPC (table display)
- EPC (horizontal table display)
- EPC (row display)
- Function allocation diagram
- Organizational chart
- Process schedule
- Risk diagram
- KPI allocation diagram

OBJECT TYPES

- Application system
- Application system class
- Application system type
- Cluster/Data model
- Entity type
- Event
- Technical term

- Function
- Information carrier
- KPI instance
- Class
- Lane
- List
- Message
- Organizational unit
- Participant
- Person
- Risk
- Risk category
- Role
- Location
- Position
- System organizational unit
- System organizational unit type
- Test definition

3.1.7.6.4 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 112) 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 112) if you do not enter a numerical value.

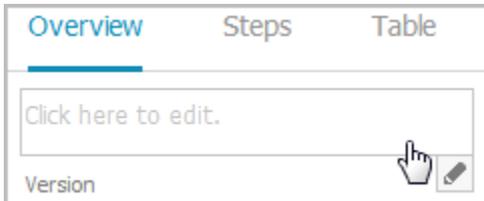
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

3.1.7.6.5 Which editing options are available?

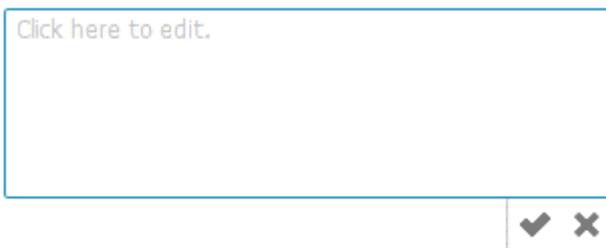
Depending on the attribute (page 111), various editing options are available.

Edit box

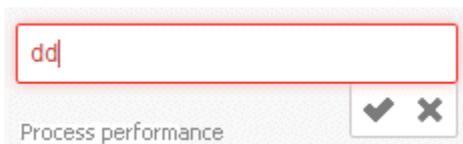
If the edit mode is active (page 109), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 104), the hint **Click here to edit.** is displayed:



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:

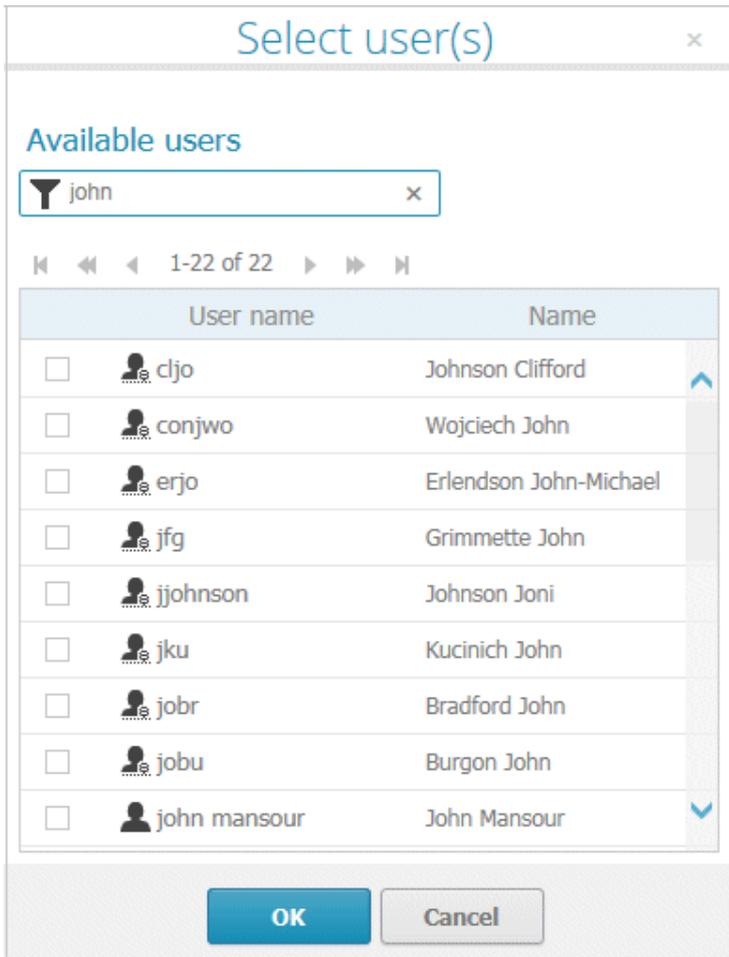


If the entry is correct, the field is displayed without a special characteristic:



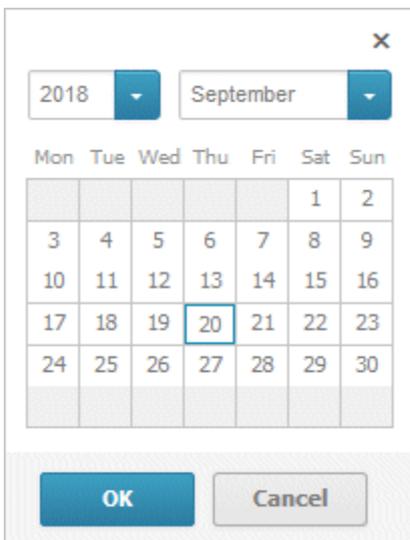
Select user(s)

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, e.g., for the **Responsible** attribute:



Date input

You can enter dates using the calendar. It opens when you click in the edit box:

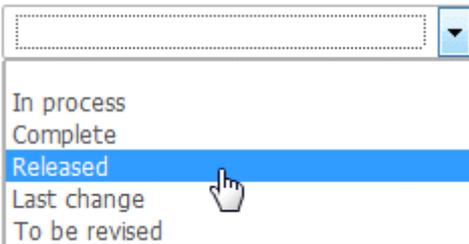


Drop-down list box

For attributes that require the entry of specific values or of Boolean attributes, you can select the appropriate entry, e.g., for the **Model status** attribute:



Clicking in the field will offer possible values for selection:



CREATE AND REUSE OBJECTS

Table

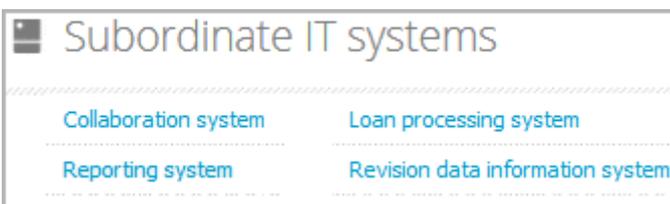
Existing objects are listed in a table. Additional information is displayed in the individual rows:

| Groups | | |
|-----------------------------|-----------------|---|
| Name | Role | |
| Risk manager group Finance | Risk manager_3 | X |
| Risk owner group Finance | Risk owner_3 | |
| Risk reviewer group Finance | Risk reviewer_3 | |

You can add individual objects to the table (page 105) or remove objects from the table (page 107).

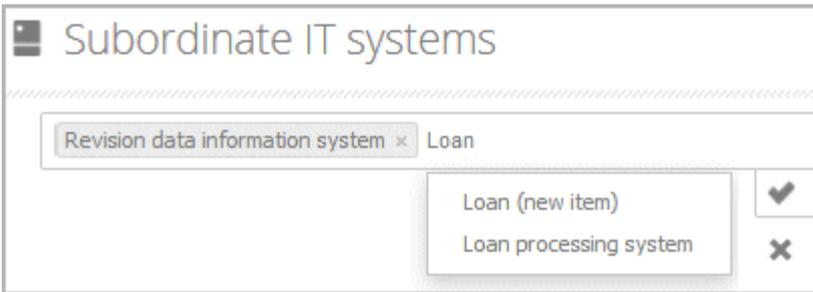
List

Existing objects are displayed in a list:



You can create new or reuse existing objects. It is possible to add multiple items at once. Click in the field and enter the names for the required items. Once your input is complete, click ✓

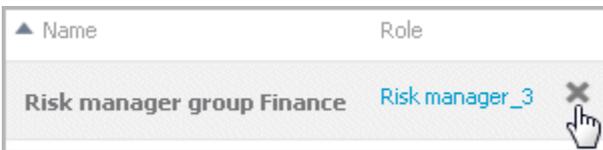
Change:



DELETE OBJECTS

You can delete objects from tables (page 107) and lists (page 108):

Table



List



3.1.7.6.6 Where to save new items

When a new item is created by a user with the **Contribution** license privilege, its definition is saved to the **Contribution** subgroup of the main group.

Contribution is further divided into other groups. For example, functions are saved to **Contribution/Activities**, while organizational units will be stored under **Contribution/Departments**.

Any group that does not yet exist in the database is automatically created.

3.1.8 Manage SAP Solutions

Process-Driven Management for SAP® Solutions is available, if you have selected this topic in the Perspective Wizard.

You can refine and evaluate your business processes in ARIS. This enables you to optimize your business processes.

Depending on the SAP Solution Manager® version in use, you need to configure the system differently (see Using SAP Solution Manager 7.2 and Using SAP Solution Manager 7.1. All other procedures are version-independent.

ARIS video tutorial

Process-Driven SAP Management Two-Minute Explainer

(http://www.softwareag.com/corporate/rc/rc_perma.asp?id=tcm:16-97174)

Connectivity for SAP Solutions in ARIS, 4 minutes

(http://www.softwareag.com/corporate/rc/rc_perma.asp?id=tcm:16-116500)

3.1.8.1 Run SAP® transaction

Run transactions in the connected SAP system.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using Process-driven Management for SAP.
- Your administrator has configured the portal for the use of SAP content.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Navigate to the relevant model of the EPC type, where transactions are available.
6. Click **Transactions**. You can start the  transaction automatically via the default server in each row displaying a transaction code. Click the  arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.
7. Run the transaction. The **SAP logon** dialog opens.
8. Enter the number of the SAP client and the user name, and click **OK**. Depending on your browser settings, the **Run SAP transaction** dialog opens.
9. Enter the password and click **Log on**.

The transaction is run in the current language. The logon remains active until you log out of the portal, enter different logon data, or close the SAP system. To delete the current SAP logon data, click the  arrow head and then **Reset logon data**. For the next transaction start you need to log on to the SAP system again.

3.1.8.2 Reset SAP® logon data

Change the logon information for running transactions.

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using Process-driven Management for SAP.
- This function has been configured in the portal.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Open the relevant model.
6. Click **Transactions**.
7. In the last column of a transaction code, click the ▼ arrow head and then **Reset logon data**.

For the next transaction start (page 116) you need to log on to the SAP system again.

3.1.8.3 Download SAP® documents

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

Prerequisite

- You have at least the **ARIS Connect Viewer** license privilege.
- You are using Process-driven Management for SAP.
- Documents are available.
- This function has been configured in the portal.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Open the relevant model.
6. Click **Transactions**.
7. Click the relevant transaction code. The fact sheet opens.
8. Next to the relevant document, click  **Download document**.

The document is downloaded.

3.1.8.4 Configure ARIS Online Guide

If the ARIS Online Guide is used for making documents that were created in the SAP® system specially for your business processes available across the company, configure your custom settings to call the ARIS Online Guide.

Prerequisite

ARIS and the SAP® system have been configured for using the ARIS Online Guide.

Procedure

1. Log on to the SAP system.
2. Start the **/n/IDS/AOG_USER** transaction. The **ARIS Online Guide - User-specific settings** dialog opens.
3. Enable the **Use ARIS Online Guide** check box.
4. Select the **Connect** option to display the ARIS Online Guide in the portal in ARIS Connect.
5. If you also want to use the F1 help from the SAP system in addition to the ARIS Online Guide, enable the **Also show default help** check box.
6. Enter the required connection data for ARIS Server and tenant on which the database was published as a portal. You administrator might already have specified default entries that you do not need to edit.

Base URL for Connect

URL for the relevant ARIS Server:

http://<server name>

Tenant

Tenant that manages the database published as a portal.

7. Save your changes.

The settings have been applied.

If you changed the default values set by your administrator and want to restore them, click **Restore defaults**.

3.1.8.5 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 transactions are shown there in relation to the process. Details are summarized in corresponding fact sheets.

Prerequisites

- This function has been configured in the portal.
- You have configured the help call (page 118).

Procedure

Press the F1 key in the open screen. The corresponding portal page opens (link syntax: `http://<server name:port>/?tcode=<transaction code>#<tenant>/onlineguide`)

All information pertaining to this transaction is available on the open page.

3.1.9 Use RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process (page 122). RACI is short for **R**esponsible, **A**ccountable, **S**upportive, **C**onsulted, and **I**nformed. The matrix shows which organizational unit participates in activities of a process and in what manner:

- **Responsible** indicates who assumes execution responsibility. It shows who is responsible for performing an activity and who actually performs it, but also who assumes the disciplinary responsibility. Execution responsibility must be assigned to at least one role, although others (see **Supportive**) can be delegated to assist in the work required.
- **Accountable** identifies the person ultimately answerable for the correct and thorough completion of a task. Thus, 'Accountable' may be the one in charge of managing the costs, i.e., the one who assumes project budget responsibility. The **decides on** and **accepts** connections are evaluated in order to mark this responsibility.
- **Supportive** relates to the person supporting the person responsible (see 'Responsible') in performing the activity.
- **Consulted** shows who has a consulting role. This organizational unit - typically a group of subject matter experts - is asked for advice prior to a final decision being made or a final action being taken.

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

3.1.9.1 Create process model for RACI matrix

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

Prerequisite

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

Procedure

1. Create a process model (page 122).
2. Use objects (page 122) 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 121).

3.1.9.2 Display RACI matrix

A RACI matrix can display the activities of a process and the associated organizational responsibilities.

Procedure

1. Activate the  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**.
4. Show the  **Navigation** bar if it is not visible yet.
5. In the  **Navigation**, open the group in which the required process (page 122) 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 14) and default view. You can configure the representation as RASCI matrix. Please contact your local Software AG sales organization (<http://softwareag.com>).

You can use the RA(S)CI - Output organizational participations in processes (page 152) report to output the RACI matrix in Microsoft® Excel format from an open process model (page 212). By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g_bRASCI** variable to **true**.

3.1.9.3 Valuable information

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

3.1.9.3.1 Which diagrams can be used for a RACI matrix?

A RACI matrix can be based on the following diagrams:

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

3.1.9.3.2 Which objects can be used for a RACI matrix?

The following objects are evaluated by a RACI matrix:

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

3.1.9.3.3 Which connections can be used for a RACI matrix?

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

RESPONSIBLE (R)

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

ACCOUNTABLE (A)

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

CONSULTED (C)

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

INFORMED (I)

- must be informed about (API name: CT_MUST_BE_INFO_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)

3.1.10 Use Mini workflows

3.1.10.1 Edit models

You can edit models in ARIS Connect.

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in the Model Editor on an individual tab.
7. Make the required changes.
8. Click  **Save**.

Your changes are saved in the model.

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

3.1.10.2 Share model

You can share models with other users.

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model you want to send to another user.

6. Click  **Share model**. The dialog opens.
7. Select the user you want to share the model with.
8. Enable **Send copy to me** to receive a copy of the message, if required.
9. You can also enter a subject and a comment.
10. Click **Send**.

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

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

3.1.10.3 Submit change request

You can send change requests for models to the person responsible.

Prerequisites

- You have at least the **ARIS Connect Viewer** license privilege.
- The **Person responsible** model attribute must be specified for the relevant model with a user name that exists in the user management.
- 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want to submit a change request.
6. Click  **Submit change request**. The 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 ARIS Process Board.

Once the person responsible has processed the request, the applicant receives a message by e-mail.

As soon as the first change request is made, the **ARIS Connect Governance Inbox** database is automatically created in ARIS. It contains a Requirements inbox for each person responsible with a model of the **Requirements tree** type. An object of the **Requirement** type is created for each change request. As the process continues, the realization status of the object is automatically changed depending on which status the person responsible has selected (**Approve, Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

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

3.1.10.4 Ask for model approval

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

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the name of the model you want to edit.
6. Click  **Edit** >  **Edit model**. The model opens in the Model Editor on an individual tab.
7. Make the required changes.
8. Click  **Collaboration** if it is not activated yet.
9. 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.
10. Click **OK**. The model reopens read-only and the **Request approval** dialog is displayed.
11. If required, select a person in charge to approve the model if the **Person responsible** attribute has not been specified at the model.
12. Enter a comment to explain the approval request.
13. Click **Send**. A completion message is displayed.
14. Click **OK**.

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

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

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

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

3.1.10.5 Request feedback on processes

You can request feedback on processes from other users.

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click  **Portal** if it is not activated yet.
3. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Click the model for which you want feedback.
6. Click  **Comment** if the **Comment** bar is not open yet.
7. Enter your comment in the box provided.
8. Click  **Tag**.
9. Enter the words to be used as keywords (page 201) in the tag input box, e.g., 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 the Enter key after each keyword.
10. Click  **Link**.
11. Insert a link to a Web site that contains more detailed information.
12. Click **Add link**. The link is checked and added.
13. Click  **File**. The **Select document** dialog is displayed.
14. Click  **Upload new document** to upload one of your own documents. The dialog opens.
15. Select the file you want to upload and enter the relevant additional information.
16. Click **Upload**.
17. Enable the check box of the document you want to add to your post.
18. Click **OK**.

The comment is displayed below the process and can be commented on by other users. All users can select the language to be used for the notification in their profile in ARIS Connect. This workflow is a part of ARIS Connect. It can be customized, if required. For example, you can change e-mail texts, add notifications, make changes to dialogs, etc. The integration of complex workflows (standard RCM, change management, etc.) requires the **ARIS Design Server** license or **ARIS Connect** Server extension pack: **Process Governance**.

3.1.10.6 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 104). 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. Depending on the view in use, click **Groups** or **Processes**.
4. Click  **Navigation** if the navigation bar is not shown.
5. Navigate to the items and change the relevant attributes (page 104). Depending on the attributes, various editing options (page 112) are available.
6. Click  **Inform owner of change**. The **Inform of change** dialog opens.
7. Insert a change description
8. Click **Submit**. The **Information** dialog opens.
9. Enable the **Do not show this message again** check box if you do not want to be informed again by the dialog when executing the mini workflow more than once during the current session.
10. Click **OK**.

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

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

3.1.11 Use dashboards

Based on a ARIS Aware (page 154) license, you can create and display predefined dashboards that are delivered by default or self-provided dashboards.

3.1.11.1 Open a dashboard in ARIS Connect

You can open a dashboard available in ARIS Connect. The dashboard is displayed in view mode of the dashboard editor.

The dashboards and the relevant data feeds are provided in the ARIS Connect **Repository** (🏠).

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 detail.

Procedure

1. Start ARIS Connect.
2. Activate the 🏠 **Repository**.
3. Activate the **Dashboard & Data feeds** tab.
4. Click 📊 **Dashboards**.
5. To open a dashboard click the relevant dashboard name.

The dashboard selected is opened 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 the 📝 **Edit dashboard** icon in the main menu.

3.1.11.2 Create a dashboard in ARIS Connect

ARIS Connect enables you to create your own dashboards.

By default, dashboards and the relevant data feeds are provided in the ARIS Connect Repository (🏠).

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Activate the 🏠 **Repository**.
3. Activate the **Dashboard & Data feeds** tab.
4. Click 📊 **Dashboards**.

5. Click  **New**.

The dashboard editor is opened in edit mode.

6. Configure and save your dashboard by using the dashboard editor.

7. Click  **Refresh**.

Your dashboard is created and available in the **Dashboards** list in the ARIS Connect Repository ().

3.1.11.3 Open a data feed in ARIS Connect

You can open a data feed available in ARIS Connect. The data feed is opened in the data feed editor.

The dashboards available and the relevant data feeds are provided in the ARIS Connect **Repository** (.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Activate the  **Repository**.
3. Activate the **Dashboard & Data feeds** tab.
4. Click  **Data feeds**.
5. To open a data feed click the relevant data feed name.

The data feed selected is opened in the data feed editor.

By using the data feed editor you can edit the data feed currently opened, provided you have the **Dashboard administrator** function privilege.

3.1.11.4 Create a data feed in ARIS Connect

ARIS Connect enables you to create your own data feeds.

By default, dashboards available and the relevant data feeds are provided in the ARIS Connect Repository (.

Prerequisite

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

Procedure

1. Start ARIS Connect.
2. Activate the  **Repository**.
3. Activate the **Dashboard & Data feeds** tab.
4. Click  **Data feeds**.
5. Click  **New**.
The data feed editor is opened.
6. Configure and save your data feeds by using the data feed editor.
7. Click  **Refresh**.

Your data feed is created and available in the **Data feeds** list in the ARIS Connect Repository (.

3.1.11.5 Show dashboards

You can show dashboards for various items. The following example is based on predefined dashboards by default that are contained in the supplied **United Motor Group** database and the Classic view (page 11).

Prerequisite

Dashboards are configured for the items selected.

Procedure

1. In the Portal, select (page 48) the **United Motor Group** database.
2. Click **Groups**. The Group tree opens.
3. Click **Processes > 2.1 Process architecture >  Enterprise process map**. The **Overview** fact sheet of the **Enterprise process map** model opens and shows the CoE - Local Maturity (page 159) dashboard.
4. Click **2.1.1 Core processes > 2.1.1.1 Customer services > 2.1.1.1.1 Customer services process >  Customer services process**. The **Overview** fact sheet of the **Enterprise process map** model opens and shows the CoE - Local Maturity (page 159) dashboard.
5. Click the **Dashboards** fact sheet. The model's dashboards are shown. You can switch between the Process Change Management (page 162) and the CoE - Local Maturity (page 159) dashboards.

You have shown different dashboards by default.

3.1.12 Valuable information

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

3.1.12.1 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.

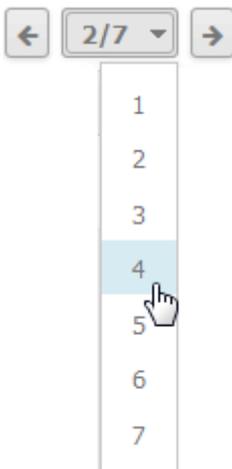
The navigation controls include arrows and a drop-down list:



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:



3.1.12.2 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 11) and the default view. These views are defined in configuration sets, which cannot be changed. However, administrators can define multiple modified modification sets, based on these templates.

3.1.12.3 What is the structure of the classic view?

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

- Home (page 13)
- Groups (page 14)
- Glossary (page 26)

If your administrator has published multiple databases, these are available for selection

 United Motor Group ▾. You can switch between the published databases as required.

You only see information in the portal that is relevant to you. This is controlled in user management by administrators.

You can activate role filters (page 62) to further restrict this content. Role filters are available only if roles are assigned (page 61) to your user in models and the portal has been configured for the use of role filters.

Overview

The Overview gives you access to some tabs that allow you to start working with ARIS Connect rapidly.

Start

Find people

Activates  Collaboration where you find people (page 190) you want to discuss with, for example.

Start discussion

Activates  Collaboration where you can start a new discussion (page 190).

Process Board

Opens ARIS Process Board, where you can edit tasks that are assigned to you.

Navigation

Enables you to browse the ARIS Connect content for models and objects.

Show profile 

Opens your profile page. You can edit your data or add an image.

Search

Opens the Search (page 102) area where you can search for ARIS Connect content. You can use filters, for example, to display just the model and objects, UML content, or Collaboration entries.

Recent changes

Shows all links to models that were changed recently.

My content

Shows the current activities you are following in Collaboration (page 191) or in the portal (page 59).

Favorites

Provides direct access to saved filter criteria (Seite 56) of the **Favorites** area of the search and to models a user selected as a favorite element.

Contacts

Lists your contacts.

My activities

Shows the current activities you are following in Collaboration or in the portal (page 191).

3.1.12.4 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, this view shows all content relevant to you in a clear structure:

- Processes (page 30)
- Organization (page 41)
- IT systems (page 42)
- Glossary (page 45)

If your administrator has published multiple databases, these are available for selection

 **United Motor Group** ▾. You can switch between the published databases as required.

You only see information in the portal that is relevant to you. This is controlled in user management by administrators.

You can activate role filters (page 62) to further restrict this content. Role filters are available only if roles are assigned (page 61) to your user in models and the portal has been configured for the use of role filters.

Important for me

Displays processes in which the user logged in or their group is modeled, as well as application systems for which the user or user group is responsible. Processes are models of the **EPC** type (event-driven process chain).

My activities

Shows the current activities you are following in Collaboration or in the portal (page 191).

3.1.12.5 When can UML content be displayed?

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

- You use the classic configuration set.
- The database with UML content you are using has been assigned a filter 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.

3.1.12.6 Where is UML content displayed?

UML content is displayed in the same way as other ARIS content. You can use the groups (page 14) to navigate in the database.

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

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

3.1.12.7 What is the context for executable processes?

The execution context determines from which items (database, group, model/object type, document), in which applications (e.g., ARIS Connect), and by which users a governance process can be started. The context 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.

3.1.12.8 What are role filters?

You only see information in the portal that is relevant to you. This is controlled in user management by administrators.

You can activate role filters (page 62) to further restrict this content. Role filters are available only if roles are assigned (page 61) to your user in models and the portal has been configured for the use of role filters.

WHAT INFORMATION IS FILTERED BY A ROLE FILTER?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 50), all steps are displayed. The detailed information about the satellites is filtered according to the selected role.

Tables, fact sheets, and RACI matrices contain only role-specific information. You only access filtered information via the search and the navigation.

If you click **Off**, the role filter is deactivated and you see your entire content again.

3.1.12.9 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 (page 112) 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 112) if you do not enter a numerical value.

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

3.1.12.10 What is the breadcrumb navigation?

Text line that displays the path to the selected object within the database structure. The individual path elements are available as a link. By clicking a path element, you jump directly to the relevant place in the structure.

Procurement
Main group > 2. Processes > 2.1 Process architecture > 2.1.1 Core processes > 2.1.1.5 Procurement

3.1.12.11 What reports are available?

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

Create process manual (page 142)

Export graphic as PDF (page 143)

Generate job description (page 144)

Output functions across multiple assignment levels (page 146)

Output functions with connected objects (page 148)

Output model information (page 149)

Output model information considering various aspects (page 150)

Output object information (page 151)

Process manual (example) (page 151)

RA(S)CI - Output organizational participations in processes (page 152)

3.1.12.11.1 Create process manual

USE

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

CONTEXT

Models of type:

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

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

3.1.12.11.2 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

3.1.12.11.3 Generate job description

USE

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

The following information can be output for each function:

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

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

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

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

Script administrators can change the content of the output.

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

CONTEXT

MODELS OF TYPE

- EPC
- FAD
- Office process
- VACD

OBJECTS OF TYPE

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

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

OUTPUT FORMAT

- DOC
- XLS
- PDF
- DOCX
- ODT

3.1.12.11.4 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, e.g., based on the model type. In turn, all functions are analyzed for the assigned model.

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

OUTPUT

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

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

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

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

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

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

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

CONTEXT

Model

OUTPUT FORMAT

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

3.1.12.11.5 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
- XLS

3.1.12.11.6 Output model information

USE

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

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

CONTEXT

Models

OUTPUT FORMAT

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

3.1.12.11.7 Output model information considering various aspects

USE

Outputs model information including group structure as an Excel table.

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

The following aspects can be output:

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

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

CONTEXT

Models and groups

OUTPUT FORMAT

- XLS
- XLSX

3.1.12.11.8 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
- DOCX
- ODT

3.1.12.11.9 Process manual (example)

USE

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

CONTEXT

Objects

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

3.1.12.11.10 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 with the modeling conventions required.

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

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

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

- **Responsible** indicates who assumes execution responsibility. It shows who is responsible for performing an activity and who actually performs it, but also who assumes the disciplinary responsibility. Execution responsibility must be assigned to at least one role, although others (see **Supportive**) can be delegated to assist in the work required.
- **Accountable** identifies the person ultimately answerable for the correct and thorough completion of a task. Thus, 'Accountable' may be the one in charge of managing the costs, i.e., the one who assumes project budget responsibility. The **decides on** and **accepts** connections are evaluated in order to mark this responsibility.
- **Supportive** relates to the person supporting the person responsible (see 'Responsible') in performing the activity.
- **Consulted** shows who has a consulting role. This organizational unit - typically a group of subject matter experts - is asked for advice prior to a final decision being made or a final action being taken.
- **Informed** specifies who must be informed. It indicates who is kept up to date on the progress or completion of a task.

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

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

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

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

CONTEXT

- Individual process
- List of processes
- Process hierarchy

OUTPUT FORMAT

- XLS

3.1.12.12 What report output formats exist?

When you click the output button in the Reports bar, for example, **Output PDF**, the report is output in the selected format. You can change the output format by clicking the down arrow. The selection of output formats may be restricted based on the report. Possible output formats are:

PDF

DOC

DOCX

ODT

RTF

HTML

TXT

XLS

XLSX

XML

3.1.12.13 What is ARIS Aware (Dashboards)?

You can use the product ARIS Aware as visualizing component of ARIS Connect. Using ARIS Aware you combine information from many sources and visualize data as KPIs in charts on dashboards. ARIS Aware supports users in different departments across the enterprise with dashboards for evaluating a wide variety of data. It improves the transparency of the business and allows you to make the best decisions based on reliable data analytics. ARIS Aware is equipped with ready-to-go templates for common scenarios in the context of business process management, including Center of Excellence (CoE) (page 156), Business Usage Monitoring (page 176), Enterprise Architecture Management (page 180), Customer Experience Management (CXM) (page 166), Process Performance Management and Governance, Risk and Compliance Management. These templates can be extended and customized according to the individual needs of a company.

3.1.12.14 What are the ARIS Aware fields?

ARIS Aware can be divided into the fields **Create dashboards and data feeds**, **store data**, **read data**, **configure dashboards**, and **show dashboards**.

In the following the data collection via reports is described. Naturally, other kinds of data collection are possible, e. g., via data files that are manually uploaded to ARIS document storage (page 86).

CREATE DASHBOARDS AND DATA FEEDS

There, dashboards (page 129) and data feeds (page 131) are created and connected. Dashboards and data feeds are stored on the defined server.

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

If the data are requested to show dashboards, they are loaded from the ARIS document storage database and combined with extracted ARIS attributes of 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 portal and 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 132).

3.1.12.15 What is an alias of a URL?

An alias is always recommended to shorten the link used in dashboards and data feeds. You have to enter the path where the data are stored only, and not the complete URL.

This also enables the import of such data to a different server. In this case, you have to adapt the alias only .

3.1.12.16 What dashboards are available by default?

ARIS Aware offers many demo dashboards by default. Dashboards consist of charts that offer different visual analyses of the **United Motor Group** database content.

3.1.12.16.1 Based on Center of Excellence (CoE)

Here you can find information about Center of Excellence dashboards delivered by default. Consequently, the dashboards provide information about leadership and best practice for the focus area business concept via Business Process Modeling.

3.1.12.16.1.1 CoE - Aggregated Maturity Overview

The dashboard is shown on the **Overview** fact sheet of process models. It shows an aggregated view of all process models, considering the connect hierarchy as defined in the configuration, starting from the top level model, e.g., a Value-added chain diagram, down to the last level process model, e.g., level 4 EPC. The progress of the models in the hierarchy (subordinated models), is weighted by 70 % by default.

CHARTS

Aggregated maintaining progress

Shows the percentage of maintaining progress.

Data source

Model/Database content

Calculation

Calculates the aggregated percentage of the mandatory properties to be maintained, such as person responsible, validity date, etc.

Aggregated model count

Shows the count of involved process models.

Data source

Model/Database content

Calculation

Counts the processes modeled in the corresponding hierarchy level.

Aggregated release progress

Shows the percentage of processes that are not completed (not set), completed, and released.

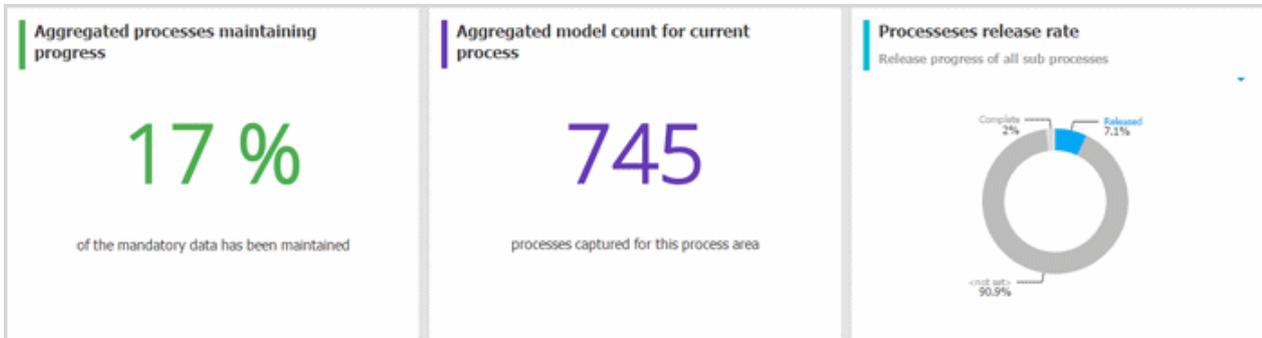
Data source

Model/Database content

Calculation

Determines the percentage of processes that are not completed (not set), completed, and released.

EXAMPLE



3.1.12.16.1.2 CoE - Aggregated Maturity Diagram

The dashboard is shown on the **Diagram** fact sheet of process models. It shows an aggregated view of all process models, considering the connect hierarchy as defined in the configuration, starting from the top level model, e.g., a Value-added chain diagram, down to the last level process model, e.g., level 4 EPC. The progress of the models in the hierarchy (subordinated models), is weighted by 70 % by default.

CHARTS

Aggregated maintaining progress

Shows the count of maintaining progress concerning models.

Data source

Model/Database content

Calculation

Aggregates the count of the mandatory properties to be maintained, such as person responsible, validity date, etc.

Aggregated summary of mandatory properties

Shows the mandatory properties and lists the number of not yet maintained properties.

Data source

Model/Database content

Calculation

Counts the properties that are not yet maintained.

Aggregated model age distribution

Shows in percentage terms how long processes have not been changed.

Data source

Model/Database content

Calculation

Evaluates the **Last change** attribute of the models as basis of the percentage that shows how long models are not changed. Unchanged models are categorized in time frames like **3-12 Months** or **> 1 Year**.

EXAMPLE



3.1.12.16.1.3 CoE - Local Maturity # Dashboard

The dashboard is shown for selected process models and organizational charts.

CHARTS

Number of change requests for the model

Shows the number of change requests that has been submitted for the model by using the **Submit change request** mini workflow.

Data source

Model/Database content

Calculation

Counts and evaluates the number of submitted change requests.

Result of the semantic check

Shows the result of the **Mandatory semantic check** semantic check as symbol.

Data source

Model/Database content

Calculation

Accesses the result of the **Mandatory semantic check** semantic check.

Status of mandatory properties

Shows the maintained and total number of mandatory properties.

Data source

Model/Database content

Calculation

Evaluates how many mandatory properties are maintained compared to the total number of mandatory properties. The mandatory properties by default are **Model status**, **Person responsible**, **Version**, **Validity**, and **Activities**.

EXAMPLE



3.1.12.16.1.4 CoE - Global Maturity

The dashboard is shown for all process models and organizational charts within the database.

CHARTS

Validity date status

Shows, based on the property **Validity**, when the models will expire.

Data source

Model/Database content

Calculation

Evaluates the **Validity** attribute of all process models and organizational charts within the database.

Validity date overview

Lists the process models and organizational charts together with their **Validity** attributes in a table.

Data source

Model/Database content

Calculation

Evaluates the **Validity** attribute of all process models and organizational charts within the database.

Most shared processes

Shows the number of model sharing based on the **Share model** mini workflow.

Data source

Model/Database content

Calculation

Counts and evaluates the number of model sharings.

Owners with process responsibilities

Shows how often persons are assigned to process models as owner.

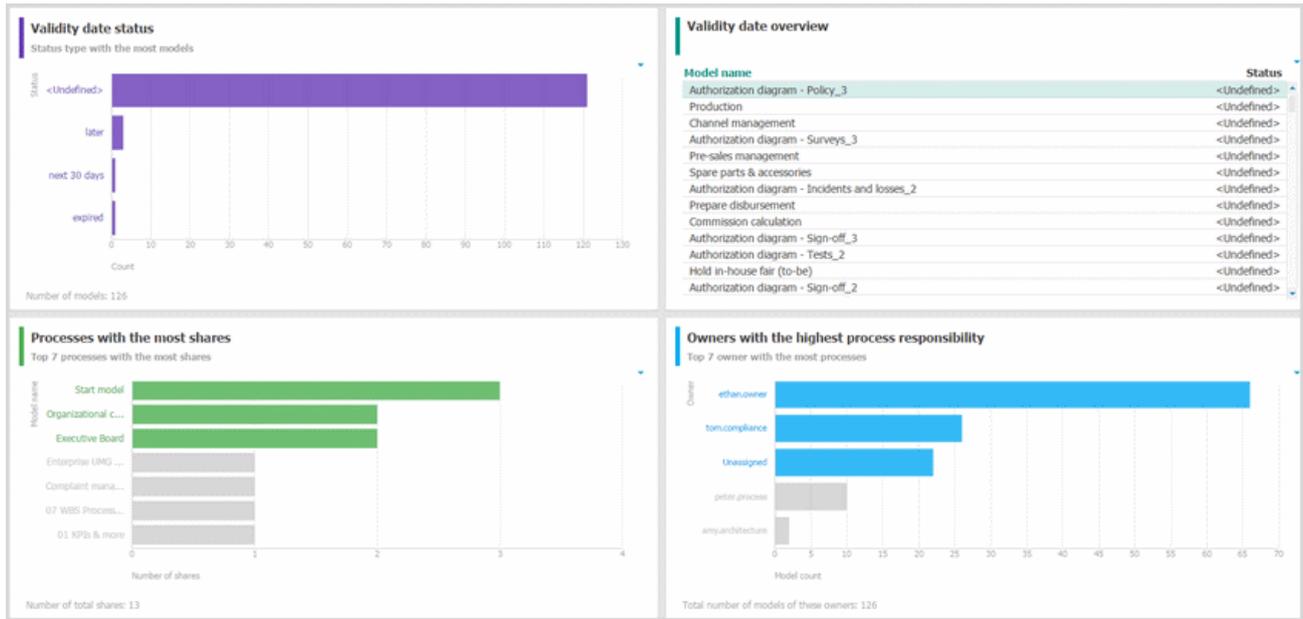
Data source

Model/Database content

Calculation

Evaluates the **Person responsible** attribute of all process models in the database.

EXAMPLE



3.1.12.16.1.5 CoE - Process Change Management

The dashboard shows governance information based on Process Governance.

CHARTS

Processes with change request

Shows the number of open change requests and the percentage of running and completed change requests that have been submitted for the models by using the **Submit change request** mini workflow.

Data source

Model/Database content

Calculation

Counts and evaluates the number of submitted change requests.

Number of overall change requests

Shows the total number of change requests that have been submitted for the models within three months by using the **Submit change request** mini workflow and how many of them are completed.

Data source

Model/Database content

Calculation

Counts and evaluates the number of submitted change requests.

Change requests over time

Shows the development of change requests within three months for the models based on the submission date of the change requests of the **Submit change request** mini workflow.

Data source

Model/Database content

Calculation

Evaluates the submission date of the change requests.

Processes with pending change requests

Shows seven models with the most open change requests.

Data source

Model/Database content

Calculation

Evaluates the state of the change requests.

Process owners with most change requests

Shows seven process owners with the most open change requests.

Data source

Model/Database content

Calculation

Evaluates the states and assignments of the change requests.

Processes in realization step

Shows the percentage of realized and evaluated change requests and in addition the number of open and the number of total change requests.

Data source

Model/Database content

Calculation

Evaluates the states of the change requests.

Change request overview

Shows the single change requests in the current steps with dates, owner, and status in a table.

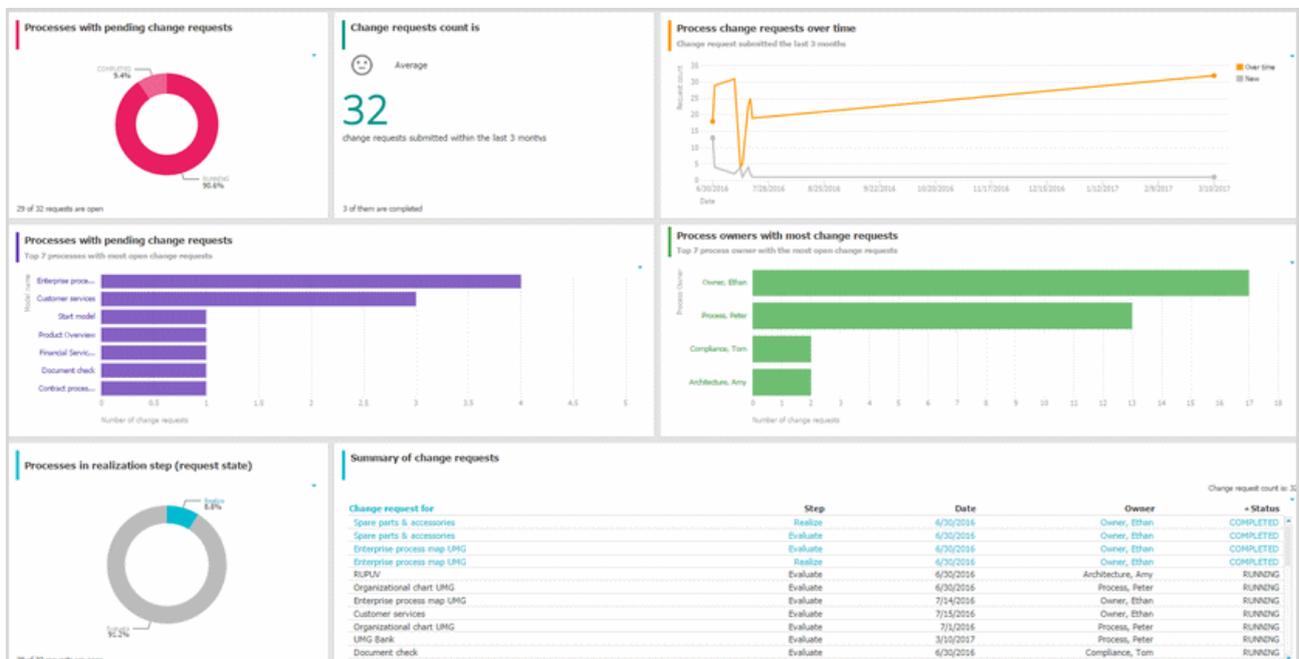
Data source

Model/Database content

Calculation

Lists all change requests with data.

EXAMPLE



3.1.12.16.1.6 CoE - Human Task

The dashboard shows overall governance information about the human tasks submitted by Process Governance.

CHARTS

Number of all human tasks

Shows the number of all human tasks independent from the Process Governance process. The human tasks include, e. g., change requests, approvals, and custom Process Governance workflows. The Dashboard **CoE - Human tasks** can be filtered by using database and model context as well as by task information such as status and priority.

Data source

Model/Database content

Calculation

Counts all human tasks.

Human tasks over time

Shows when the most human tasks are submitted and assigned over time. The Dashboard **CoE - Human tasks** can be filtered by using database and model context as well as by task information such as status and priority.

Data source

Model/Database content

Calculation

Counts the number of human tasks that are daily submitted and assigned within a period selected.

Human tasks details

Lists the human tasks with details such as **Priority**, **Creation date**, **Status**, and **Participant**. The Dashboard **CoE - Human tasks** can be filtered by using database and model context as well as by task information such as status and priority.

Data source

Model/Database content

Calculation

Lists all human task including details in a table.

EXAMPLE

Date

From

To

Task

Task name

Task status

Priority

Context

Item Name

Database

Human task count is

34

Average

1 of them have a high priority

5 of them are completed

Human tasks over time

List of human tasks

| Human task | Priority | Created | Status | Participant | Item | Description | Database |
|---|----------|------------|-----------|-------------------|----------------------------|-----------------------------------|--------------------|
| Realize change request for model [Spare parts & accessories] Process int... | NORMAL | 2016-06-30 | COMPLETED | Owner, Ethan | Spare parts & accessories | please adapt | United Motor Group |
| Change request for model [Spare parts & accessories] Process interfaces ... | NORMAL | 2016-06-30 | COMPLETED | Owner, Ethan | Spare parts & accessories | please adapt | United Motor Group |
| Change request for model [Enterprise process map UMG] Missing unit in ... | NORMAL | 2016-06-30 | COMPLETED | Owner, Ethan | Enterprise process map UMG | Please adapt to the current state | United Motor Group |
| Realize change request for model [Enterprise process map UMG] Missing... | NORMAL | 2016-06-30 | COMPLETED | Owner, Ethan | Enterprise process map UMG | Please adapt to the current state | United Motor Group |
| Change request for model [Product Overview] Financial Services should b... | NORMAL | 2016-06-30 | COMPLETED | Owner, Ethan | Product Overview | please change | United Motor Group |
| Change request for model [RUPUV] Typos in descriptions | NORMAL | 2016-06-30 | ACTIVE | Architecture, Amy | RUPUV | please correct | United Motor Group |
| Change request for model [Enterprise process map UMG] Missing attribu... | NORMAL | 2016-07-14 | ACTIVE | Owner, Ethan | Enterprise process map UMG | have to be maintained | United Motor Group |

3.1.12.16.2 Based on Customer Experience (CXM)

Dashboards based content that is collected from Customer Experience (CXM) models.

3.1.12.16.2.1 Customer experience

Dashboard with an overall overview about the Customer experience and charts that show Customer experience from different angles.

CHARTS

Number of affected internal processes

Number of internal processes affected by customer touchpoints with bad experience.

Data source

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Collects all Customer journeys reachable from the current Customer journey landscape by following the Customer journey maps assigned. For each Customer journey map:

- Checks for all Customer touchpoint if there is a connection to an internal process.
- Counts all Customer touchpoints that have a connection to an internal process.
- Checks for every Customer touchpoint if the **Pain point** attribute is specified.
- Counts the Customer touchpoints with an activated **Pain point** attribute type (value **true**).
- Checks for every Customer touchpoint if the **Moment of truth** attribute is specified.
- Counts the Customer touchpoints with an activated **Moment of truth** attribute type (value **true**).
- Checks for every Customer touchpoint if the **Best practice** attribute is specified.
- Counts the Customer touchpoints with an activated **Best practice** attribute type (value **true**).

Data feed

CXM - Analyze customer experience

Calculation

Aggregated number of internal processes affected by customer touchpoints with bad experience.

Percentage of critical customer touchpoints

Overview of the percentage of critical customer touchpoints.

Data source

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

-.-

Data feed

CXM - Analyze customer experience

Calculation

Aggregated number of Customer touchpoints for which the **Pain point** attribute type is specified over the aggregated number of Customer touchpoints multiplied by 100.

Overall customer experience

Distribution of customer feelings over the whole customer journey landscape.

Data source

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Data are collected from all reachable Customer journeys via the current **Customer journey landscape** model type.

All contained **Customer touchpoint** occurrences of each Customer journey map are collected. The following data is count:

- 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 **Customer feeling** values (positive, neutral, negative).

Customer journeys with good customer experience

Top seven customer journeys with good customer experience.

Data source

Report: CXM - Analyze customer experience (TOP7)

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Data are collected from all reachable Customer journeys via the current **Customer journey landscape** model type.

All contained **Customer touchpoint** occurrences of each Customer journey map are collected and all Customer touchpoints are count for which the **Customer feeling** attribute type is set to **Positive**.

Data feed

CXM - Analyze customer journeys

Calculation

Number of customer touchpoints for which the **Customer feeling** attribute type is specified with the value **Positive** over number of customer touchpoints per customer journey.

Customer journeys with bad customer experience

Top seven customer journeys with bad customer experience.

Data source

Report: CXM - Analyze customer experience (TOP7)

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Data are collected from all reachable Customer journeys via the current **Customer journey landscape** model type.

All contained **Customer touchpoint** occurrences of each Customer journey map are collected and all Customer touchpoints are count which have an activated **Pain point** attribute type (value **true**).

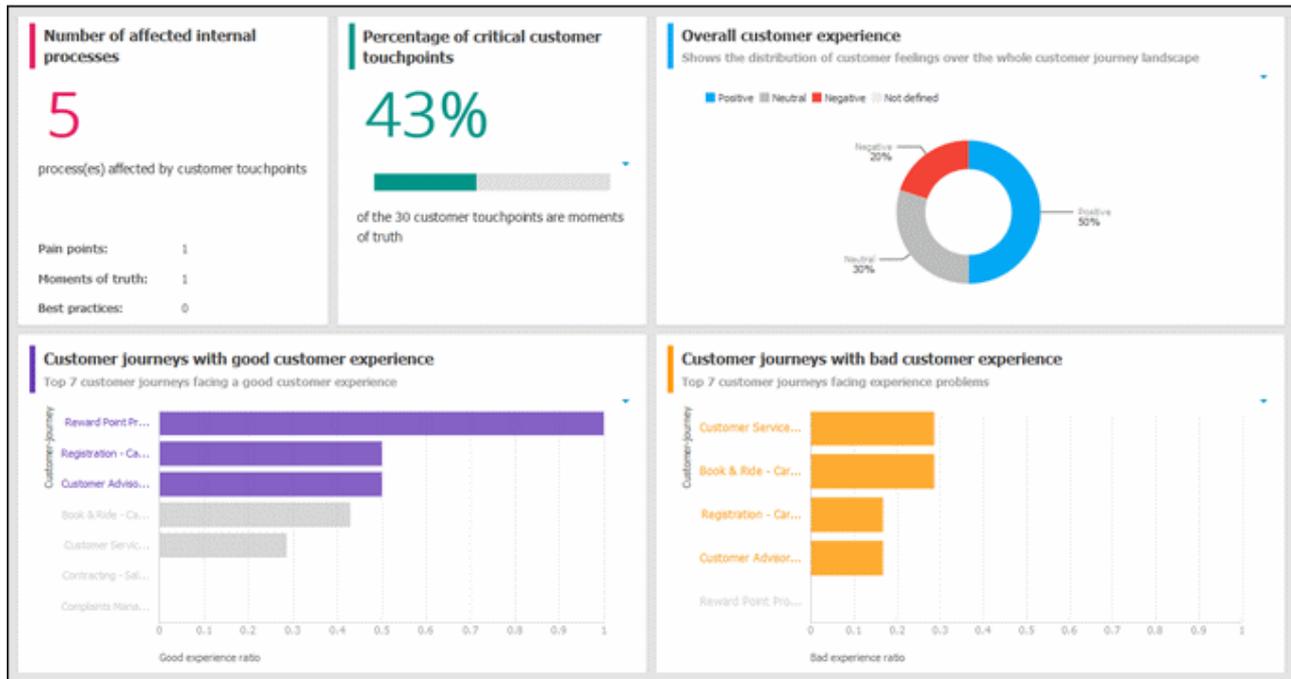
Data feed

CXM - Analyze customer journeys

Calculation

Number of Customer touchpoints for which the **Pain point** attribute type is activated over number of Customer touchpoints per Customer journey.

EXAMPLE



3.1.12.16.2 Responsibilities

Customer experience dashboard with business units and channel evaluations.

CHARTS

Business units with good experience

Top seven business units with good customer experience.

Data source

Report: CXM - Responsibility (Ownership)

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the current Customer journey landscape, all contained **Ownership** occurrences of the **Ownership** row and the associated Customer touchpoints of each Customer journey map are collected. Checks every Customer touchpoint and counts it, if the **Customer feeling** attribute is specified as **Positive**.

Data feed

CXM - Responsible owner

Calculation

Good experience ratio: **Number of positive feelings** divided by **Number of customer touchpoints**.

Business units with bad experience

Top seven business units with bad customer experience.

Data source

Report: CXM - Responsibility (Ownership)

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the current Customer journey landscape, all contained **Ownership** occurrences of the **Ownership** row and the associated Customer touchpoints of each Customer journey map are collected. Checks every Customer touchpoint and counts, if the **Pain point** attribute is activated (value **true**).

Data feed

CXM - Responsible owner

Calculation

Bad experience ratio: **Number of pain points** divided by **Number of customer touchpoints**.

Channels with good experience

Top seven channels with good customer experience.

Data source

Report: CXM - Responsibility (Channel)

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the current customer journey landscape, all contained occurrences of the **Channel** row and the associated touchpoints of each customer journey map are collected. Checks every Customer touchpoint and counts it, if the **Customer feeling** attribute is specified as **Positive**.

Data feed

CXM - Responsible channel

Calculation

Good experience ratio: **Number of positive feelings** divided by **Number of customer touchpoints**.

Channels with bad experience

Top seven channels with bad customer experience.

Data source

Report: CXM - Responsibility (Channel)

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Starting from the current customer journey landscape, all contained occurrences of the **Channel** row and the associated touchpoints of each customer journey map are collected. Checks every Customer touchpoint and counts, if the **Pain point** attribute is activated (value **true**).

Data feed

CXM - Responsible channel

Calculation

Bad experience ratio: **Number of pain points** divided by **Number of customer touchpoints**.

EXAMPLE



3.1.12.16.2.3 Customer journey map

Customer journey map dashboard with customer touchpoint evaluation and market potential.

CHARTS

Number of affected internal processes

Number of internal processes affected by customer touchpoints with bad experience.

Data source

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

Context: **Customer journey landscape** model type.

Collects all Customer journeys reachable from the current Customer journey landscape by following the Customer journey maps assigned. For each Customer journey map:

- Checks for all Customer touchpoint if there is a connection to an internal process.
- Counts all Customer touchpoints that have a connection to an internal process.
- Checks for every Customer touchpoint if the **Pain point** attribute is specified.
- Counts the Customer touchpoints with an activated **Pain point** attribute type (value **true**).
- Checks for every Customer touchpoint if the **Moment of truth** attribute is specified.
- Counts the Customer touchpoints with an activated **Moment of truth** attribute type (value **true**).
- Checks for every Customer touchpoint if the **Best practice** attribute is specified.
- Counts the Customer touchpoints with an activated **Best practice** attribute type (value **true**).

Data feed

CXM - Analyze customer experience

Calculation

Aggregated number of internal processes affected by customer touchpoints with bad experience.

Percentage of bad customer feelings

Overview of the percentage of negative customer touchpoints.

Data source

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

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

-.-

Data feed

CXM - Analyze customer experience

Calculation

Aggregated number of Customer touchpoints for which the **Pain point** attribute type is specified over the aggregated number of Customer touchpoints multiplied by 100.

Percentage of good customer feelings

Overview of the percentage of positive customer touchpoints.

Data source

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

-.-

Data feed

CXM - Analyze customer experience

Calculation

Number of customer touchpoints with value **Positive** for the **Customer feeling** attribute divided by the Number of customer touchpoints multiplied by 100.

Customer touchpoints with high market potential

Customer touchpoints with high market potential related to the transformation costs.

Data source

Report: CXM - Analyze customer experience

Report configurable

No

Data collection

-.-

Data feed

CXM - Analyze customer experience

Calculation

Values from the **Market potential** attribute and **Transformation costs** attribute from customer touchpoints.

Importance and feelings of customer touchpoints

Importance and feelings that a customer associates with a customer touchpoint.

Data source

Report: CXM - Analyze customer experience (TOP7)

Report configurable

No

Data collection

-.-

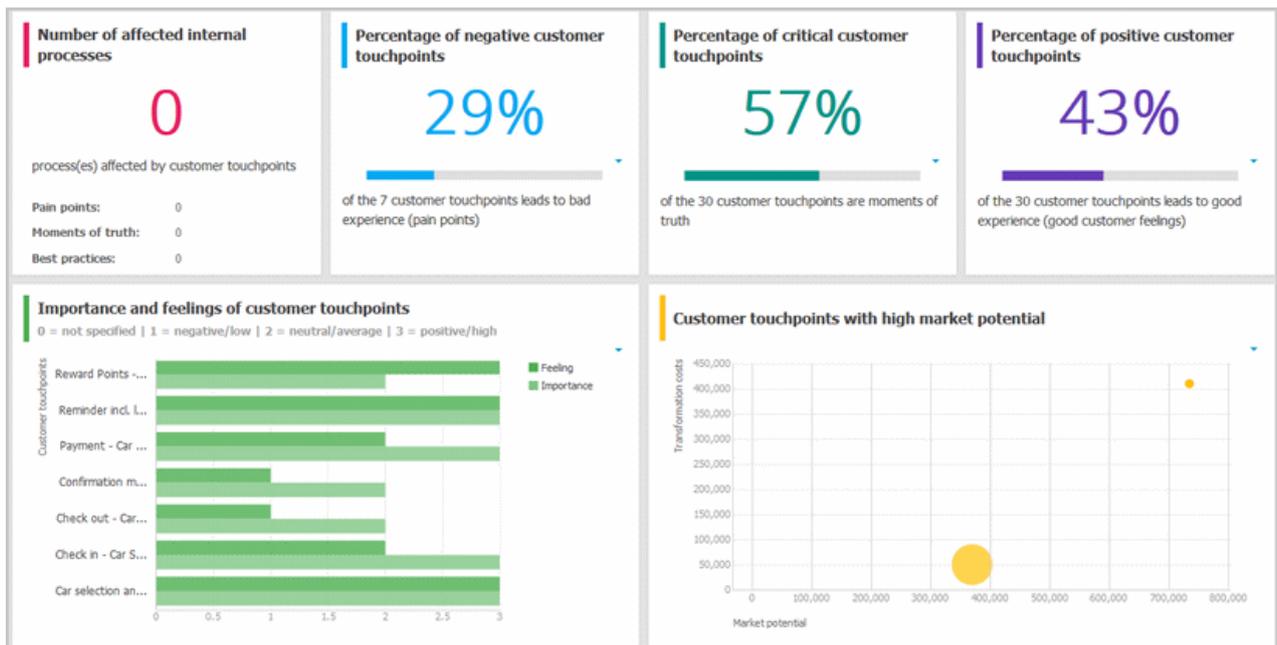
Data feed

CXM - Importance vs. feelings

Calculation

Values from the **Customer feeling** attribute and **Importance to customer** attribute from customer touchpoints.

EXAMPLE



3.1.12.16.3 Based on Piwik

Dashboards based on information that is collected by ARIS reports that access to Piwik data. Piwik is an open source analytics platform.

3.1.12.16.3.1 Piwik - Publications

Dashboard that includes an overall overview of the ARIS usage/consumption and six different charts for which you can select various evaluation periods such as last week, last month, and last year.

CHARTS

Number of visits over time

Top seven business units with good customer experience.

Data source

Piwik - Global reports: VisitsSummary report

Data feed

Piwik - Visit summary over time

Most viewed item types

Top seven item types most viewed over the selected time period, e.g. process.

Data source

Piwik - Database-specific reports: CustomDimension report

Data feed

Piwik - Most viewed item types

Most viewed items

Top seven items most viewed over the selected time period.

Data source

Piwik - Database-specific reports: PageTitles report

Data feed

Piwik - Most viewed item

Most searched keywords

Top seven searched keywords most viewed over the selected time period.

Data source

Piwik - Database-specific reports: SiteSearchKeywords report

Data feed

Piwik - Most searched keywords

Most viewed item types list

List of top fifty item types most viewed over the selected time period, e.g. process.

Data source

Piwik - Database-specific reports: CustomDimension report

Data feed

Piwik - Most viewed items types

Most viewed items list

List of top fifty items most viewed over the selected time period.

Data source

Piwik - Database-specific reports: PageTitles report

Data feed

Piwik - Most viewed items

Most searched keywords list

List of top fifty searched keywords most viewed over the selected time period.

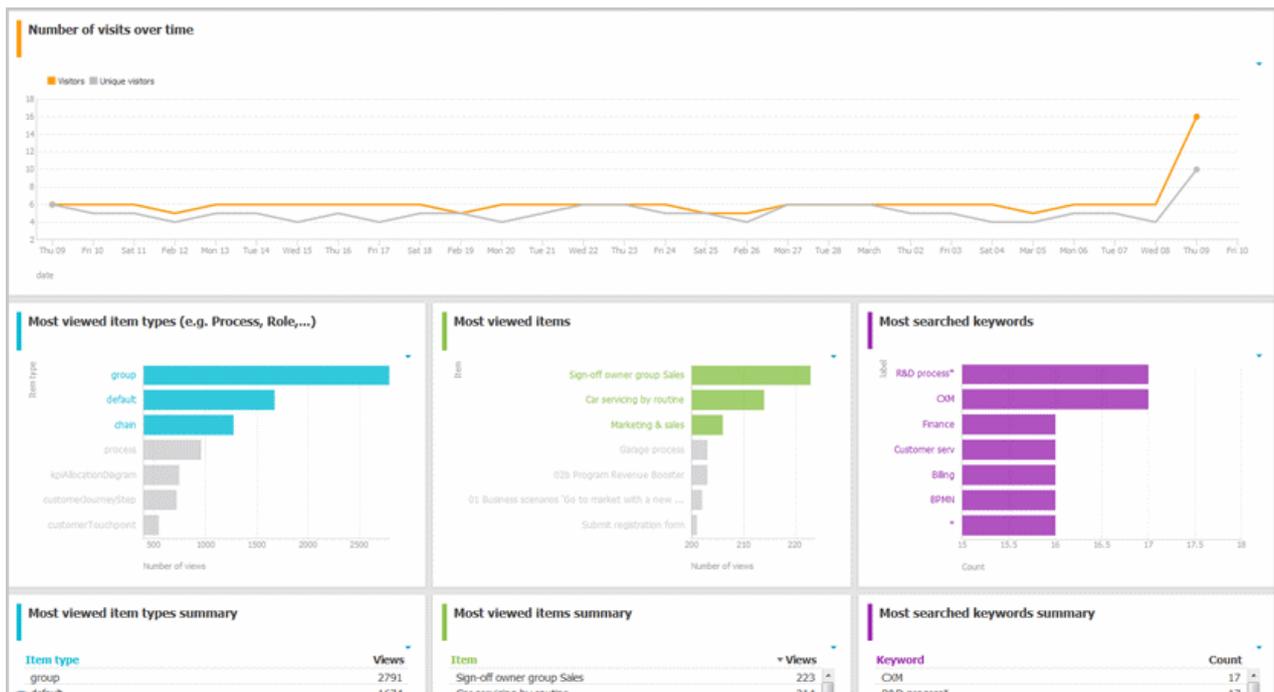
Data source

Piwik - Database-specific reports: SiteSearchKeywords report

Data feed

Piwik - Most searched keywords

EXAMPLE



3.1.12.16.3.2 Piwik - Technical KPIs

Dashboard that shows technical KPIs regarding the ARIS usage/consumption in four charts for which you can select various evaluation periods such as last week, last month, and last year.

CHARTS

Browse engine distribution

Number of visits over the selected time period: visitors, unique visitors.

Data source

Piwik - Global reports: BrowserEngines report

Data feed

Piwik - Browser engines

Most used operation systems

Operation systems most used over the selected time period.

Data source

Piwik - Global reports: OsVersions report

Data feed

Piwik - Operating system version

Browser version summary

Browser versions most used over the selected time period.

Data source

Piwik - Global reports: BrowserVersions report

Data feed

Piwik - Browser version

Portal language summary

Portal language most used over the selected time period.

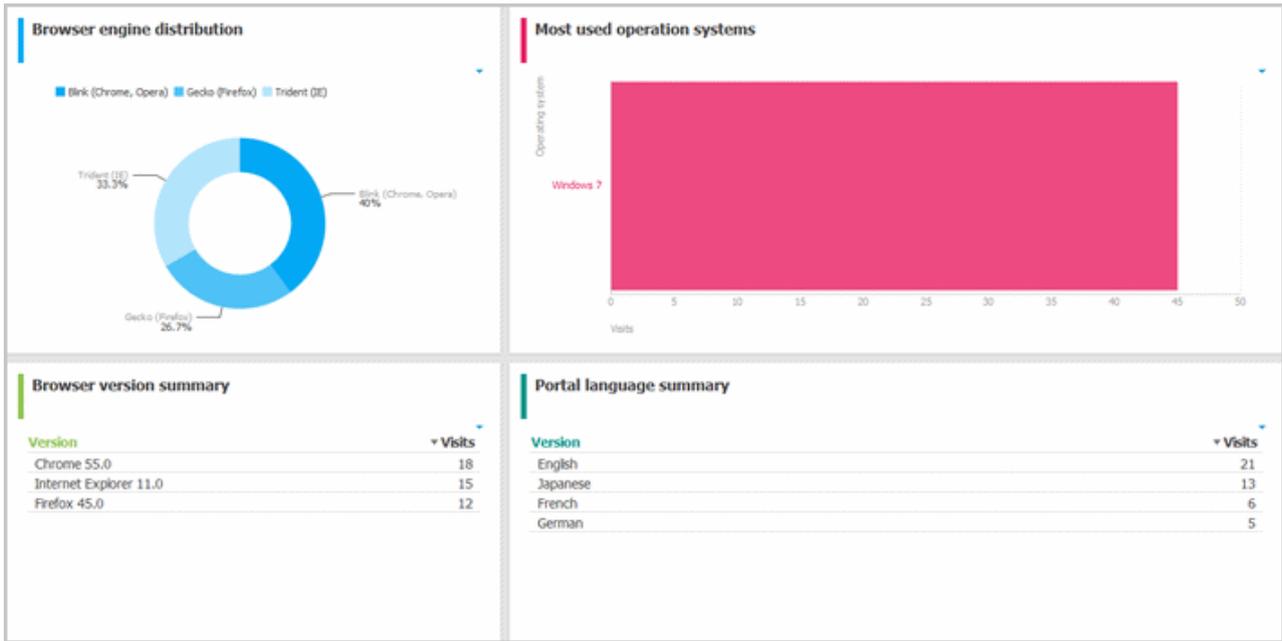
Data source

Piwik - Global reports: Language report

Data feed

Piwik - Portal language

EXAMPLE



3.1.12.16.4 Based on EA

Dashboards based on Enterprise Architecture (EA) information.

3.1.12.16.4.1 EA dashboard for organizational units

Shows a separate tab for organizational units, i. e. for object of type **Organizational unit** and **Organizational unit type**.

CHARTS

Systems having expired

Number of systems used by the selected organizational unit which are no longer standard.

Data source

ARIS or ARIS and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Data feed

- EA - Organizational unit - Systems expired
uses **EA - Organizational unit (Systems with lifecycle data)** as a sub-feed
- EA - Organizational unit - Systems with lifecycle data

Calculation

Checks via the **End** attribute if a system has expired

- that supports an organizational unit via function or optionally via position or role or
- that lies under the responsibility of an organizational role.

Systems phasing in

Number of systems used by the selected organizational unit which will become standard within the next twelve months.

Data source

ARIS or ARIS and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Data feed

- EA - Organizational unit (systems phasing in)
uses **EA - Organizational unit (Systems with lifecycle data)** 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

- that supports an organizational unit via function or optionally via position or role or
- 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 or ARIS and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Data feed

- EA - Organizational unit (systems phasing out) uses **EA - Organizational unit (Systems with lifecycle data)** 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

- that supports an organizational unit via function or optionally via position or role or
- 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 or ARIS and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Data feed

- EA - Organizational unit (standard systems expiring) uses **EA - Organizational unit (Systems with lifecycle data)** as a sub-feed
- EA - Organizational unit - Systems with lifecycle data

Calculation

Checks via the **Start** attribute if a system is expiring

- that supports an organizational unit via function or optionally via position or role or
- that lies under the responsibility of an organizational role.

Usage of non-standard systems

Distribution of standard and non-standard systems used by the selected organizational unit.

Data source

ARIS or ARIS and Alfabet:

- Report: EA - Relations between organizational units and systems
- Report: EA/Alfabet - Systems with lifecycle data

Data feed

EA - Organizational unit (standard versus non-standard systems)

uses **EA - Organizational unit (Systems with lifecycle data)** as a sub-feed

Calculation

Checks via the **Standardization status** attribute if a system used is non-standard

- that supports an organizational unit via function or optionally via position or role or
- 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

Data feed

EA - Organizational unit - Systems with data

Calculation

Compares systems via the **Costs per unit** and **Critically** attributes

- that supports an organizational unit via function or optionally via position or role or
- that lies under the responsibility of an organizational role.

System replacement candidates by capability redundancy

Seven pairs of systems used by the selected organizational unit with the greatest overlap of capabilities.

Data source

ARIS:

- Report: EA - Relations between organizational units and systems
- Report: EA - Systems redundancies

Data feed

EA - System - System redundancies

Calculation

Compares systems regarding their common capabilities

- that supports an organizational unit via function or optionally via position or role or
- 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

Report: EA/Alfabet - CAPEX/OPEX for organizational units

Data feed

EA - OrgUnit - CAPEX/OPEX

Calculation

Lists the capital expenses (CAPEX) and operational expenses (OPEX) over time for all organizational units of the database that also exist in a connected Alfabet system.

EXAMPLE



3.1.12.16.4.2 EA dashboard for IT systems

Shows a separate tab for IT systems, i. e. for object of type **Application system type**.

CHARTS

Organizational units with most system supports

Based on process support maps, seven organizational units with most processes actively supported by the selected system.

Data source

ARIS Architect:

Report: EA - System support

Data feed

EA - System - Supported organizational units

Calculation

Lists all supported objects, that are **Application system type** object types. These objects are identified via the **Process support unit**, the **Organizational unit**, and **Function** objects connected to the IT system.

Support distribution by organizational units

Based on process support maps, all organizational units supported by the selected system and their distribution.

Data source

ARIS Architect:

Report: EA - System support

Data feed

EA - System - Supported organizational units

Calculation

Shows the distribution of supported objects, that are **Application system type** object types. These objects are identified via the **Process support unit**, the **Organizational unit**, and **Function** objects connected to the IT system.

Processes with most system supports

Seven processes with most functions actively supported by the selected system - not based on process support maps.

Data source

ARIS Architect:

Report: EA - System support for VACDs

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 via the connection type **supports** in event process chain diagrams (EPCs) that are assigned to VACDs.

Support distribution by processes

All processes supported by the selected system and their distribution - not based on process support maps.

Data source

ARIS Architect:

Report: EA - System support for VACDs

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 via the connection type **supports** in event process chain diagrams (EPCs) that are assigned to VACDs.

System replacement candidates by capability overlap

Seven replacement possibilities involving the selected system as source or target with the most capability overlap.

Data source

ARIS Architect:

Report: EA - System redundancies

Data feed

EA - System - System redundancies

Calculation

Compares systems regarding their common capabilities.

Operating costs by cost type

Operating costs for the selected IT system by different cost types over time.

Data source

ARIS Architect:

EA/Alfabet - System costs

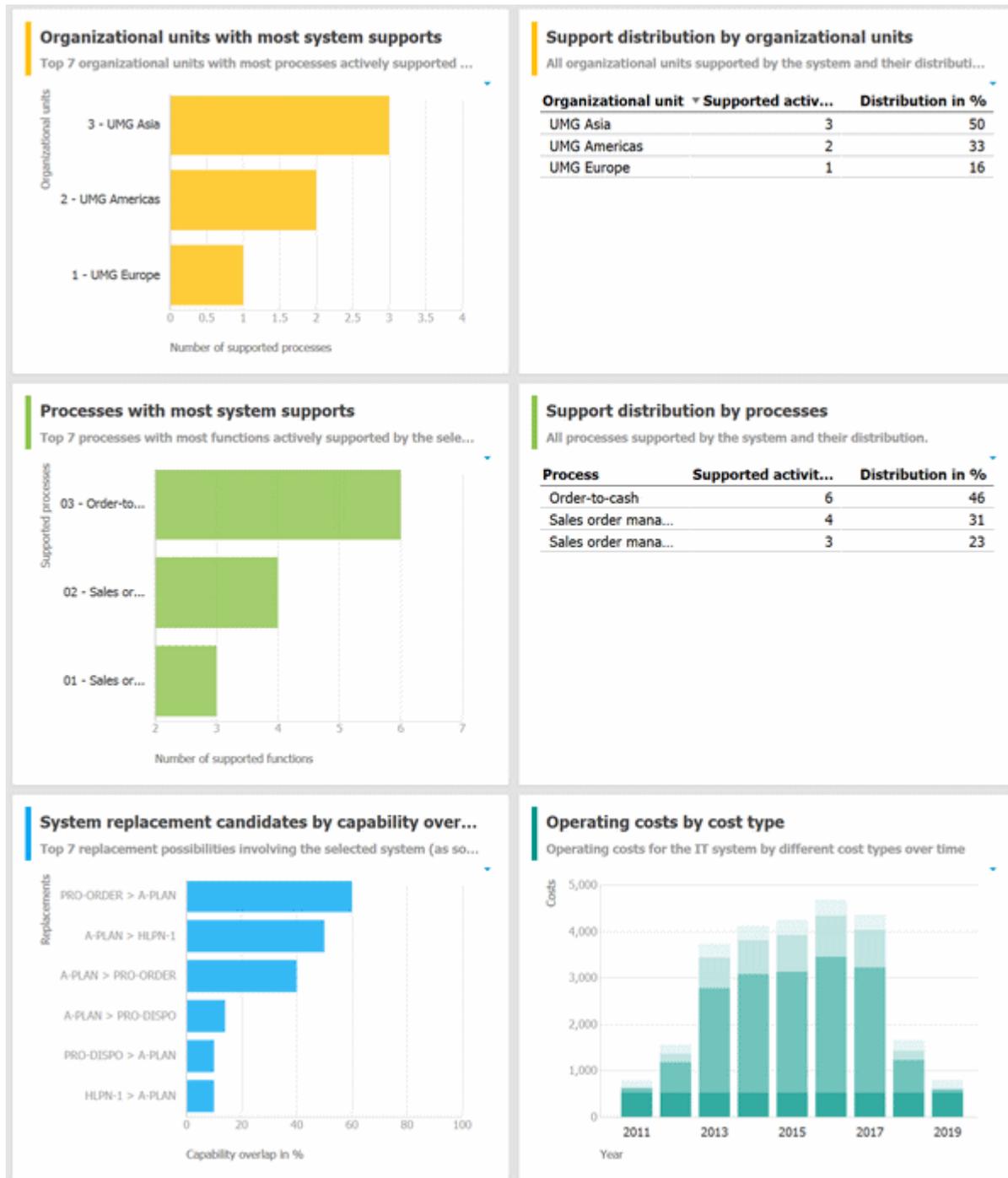
Data feed

EA - System (costs over time)

Calculation

Lists all IT systems of the database that also exist in Alfabet. Per system and year all cost values for the various cost types specified are listed.

EXAMPLE



3.1.12.16.4.3 EA dashboard for objectives

Shown as side bar for the diagram view of the model types **Strategy diagram** and **Objective diagram**.

CHARTS

Objectives

Shows all objectives in the model and their goal accomplishments over all KPIs.

Data source

ARIS Architect:

- Report: EA - Models and objectives
- Report: EA - Objectives with data

Data feed

EA - Goal accomplishment (objectives)

Calculation

Lists all **Strategy diagram** and **Objective diagram** model types and the objectives contained with their goal accomplishments.

KPIs of the objective

Shows the KPIs of the objective selected in the diagram and their respective values.

Data source

ARIS Architect:

- Report: EA - Objectives and KPIs
- Report: EA - KPIs with data

Data feed

EA - Goal accomplishment (KPIs per objective)

Calculation

Lists all all objectives and their KPIs whose accomplishments are calculated according to the Balanced Scorecard methodology.

EXAMPLE

Objectives

Goal accomplishment over all KPIs

| ▲ Objective | GA |
|-------------------------------------|-----|
| Achieve annualized sales of 3... | ● ▲ |
| Acquisition of profitable niche... | ● |
| Align 100% delivery processe... | ● ☰ |
| Be the future no. 1 premium ... | ● |
| Design game changing 21st c... | ● |
| Improve operating margin to ... | ● |
| Increase efficiency of logistics... | ● ▼ |
| Increase high-profit products | ● |

KPIs of the objective

Goal accomplishment for each KPI

| ▲ KPI | GA |
|---------------------------------------|----|
| Cycle time improvement rate | ● |
| Overall process error ratio | ● |
| Overall process effectiveness (OPE) | ● |
| Process automation rate (all busin... | ● |

3.2 Collaborate with users

Collaboration is the platform for cooperation across teams. With Collaboration, information can be exchanged faster, knowledge can be shared, and cooperation across borders is improved.

3.2.1 Getting started

These five steps are an optimal start to Collaboration:

1. Create (page 189) a user profile.
2. Search (page 190) for groups and people who provide interesting content.
3. Create filters and check (page 195) for new information.
4. Comment on (page 193), share, flag posts, etc.
5. Invite (page 198) others to Collaboration.

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

3.2.2 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 202) in ARIS Architect.

Procedure

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

Collaboration opens.

3.2.3 Create or edit a user profile

Specify your user profile to provide other users with information about your areas of activity and your interests.

Procedure

1. Click your user name on the left, then click **Edit profile** on the right. Your profile page for Collaboration is displayed.
2. Upload a picture in JPG, PNG, or GIF format, with the specified maximum size.
If your user profile in ARIS Administration already includes a picture, it is also displayed in Collaboration. If a different picture is uploaded in ARIS Connect or in Collaboration, it is automatically transferred to the other application.
3. Click **Edit** to specify the trimming and size of the picture for Collaboration.
4. Select the preferred picture trimming by dragging the picture with the mouse.

5. Enlarge (+) or reduce (-) the picture.
6. Click **OK**.
7. Enter the title of your position in the company.
8. Describe your activities.
9. Specify keywords that will enable colleagues looking for particular information or expertise to find you. Use a comma as the separator.
10. Enter your telephone number.
11. Specify whether colleagues should be able to post information (**Allow others to post to my feed**) and submit comments (**Allow others to comment on activities in my feed**) in your feeds. To do this, enable the check box for the relevant option.
12. Click **OK**.

Your profile is changed. The information is now available to other users.

3.2.4 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 **Find** 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 needs to 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.

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 (**Global Search > User XY > Following**).
- You can also use the global search to search for keywords, in order to find interesting feeds, users, and groups.

3.2.5 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 202) 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 201) in the tag input box, e.g., 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 the Enter key after each keyword.
7. Click  **Link**.
8. Insert a link to a Web site that contains more detailed information.
9. Click **Add link**. The link is checked and added.
10. Click  **File**. The **Select document** dialog is displayed.
11. Click  **Upload new document** to upload one of your own documents. The dialog opens.
12. Select the file you want to upload and enter the relevant additional information.
13. Click **Upload**.
14. Enable the check box of the document you want to add to your post.
15. Click **OK**.
16. Click **Post**.

Your comment is posted, and the processes you follow are displayed under  **My portal feeds** in Collaboration. To stop following content, click **Unfollow** in the row of the relevant content.

3.2.6 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 202) 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 input field. 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 201) in the tag input box, e.g., 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 the Enter key 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 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 200) 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 have published something in your feed, the text is also displayed in the company feeds. If you have posted something to another user's feed, this post is also displayed in the company feed and if you are following the other user's feed, this post is displayed

in your feed as well. If you published a post in a private group you are a member of, the post is shown only to group members.

To remove the post from your feeds, click **Delete**. Administrators can delete posts made by all users.

3.2.7 Comment on, share, flag posts, etc.

Depending on whether a post is your own or from another user, you can perform different actions.

Prerequisites

- The Like button, commenting on and sharing content, creating bookmarks, and flagging posts are activated in ARIS Administration configuration.
- You have the required access privilege (page 202) 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 feeds. To remove the post from your feeds, click **Delete**. Administrators can delete posts made by all users.
5. Click  **More > Bookmark** to add a post to your filters, so that you can easily find it again (**Filters >  My bookmarks**).
6. Click  **Edit** or  **More > Edit** to change or correct a post or comment you already published. Editing is possible as long as no other user has liked or commented on your post or comment yet.
7. Click  **More > Flag** if you want the Collaboration administrator to review a post you think is inappropriate.

Depending on the selected action, the affected users receive a message by e-mail.

3.2.8 Add documents to posts

You can use documents from ARIS document storage in your posts. Use documents that have already been uploaded to ARIS document storage or upload new documents yourself.

Prerequisite

Using documents from ARIS document storage is activated in the ARIS Administration configuration.

Procedure

1. Add your post (page 192) 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 dialog opens.
4. Select the file you want to upload and enter the relevant additional information.
5. Click **Upload**.
6. Enable the check box of the document you want to add to your post.

You have added a document to your post.

3.2.9 View notifications and specify settings

Read your internal notifications and specify the situations in which you want to receive a notification about activities in Collaboration as well as the notification frequency.

Procedure

1. Click  **1 View notifications**. Your notifications are displayed. Various filters provide you with a better overview, e.g., **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 notification frequency, e. g., **Daily digest**. If you do not want to receive e-mail notifications, select **Never** for the relevant situation.
5. Click **OK**.

Your settings are saved. From now on, you will be notified according to your specifications. The time for daily digest e-mail and the day for weekly digest e-mail are defined by the Collaboration administrator.

3.2.10 Define filters

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

Prerequisite

Creating filters is activated in ARIS Administration configuration.

Procedure

1. Click  **Create filter**. The form for creating a filter opens.
2. Select the relevant filter criteria, e.g., whether you want all feeds or only feeds you follow to be included in the filter.
3. Enter a name for the filter.
4. Specify the keywords that can be used to find relevant posts. Use a space to separate the keywords.
5. Click **OK**.

The filter is saved and is displayed under **Filters**. Click the filter name to display the posts that contain the specified keywords.

To change a saved filter, click **Filter XY** >  **Edit filter**. To delete filters that you no longer require, click  **Delete filter**.

3.2.11 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 192) 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 201) in the tag input box, e.g., 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 the Enter key after each keyword.
4. Click **Post**.

Your post is published. The keywords entered as tags are shown below the post. You can add or delete tags at any time.

3.2.12 Filter feeds by means of tags

Use tags (page 201) to filter feeds using keywords.

Prerequisite

- Creating tags and filtering using tags are activated in the ARIS Administration configuration.
- There are tags for the feed.

Procedure

1. Open the relevant feed overview (👤 **My feed**, 👤 **All company feed**). The tags are displayed above the feeds.
2. Click the tags for which you want to see posts. You can combine multiple tags. Activated tags are indicated in color.

You are shown the posts containing the tags selected.

To cancel the filter, click the selected keywords again.

3.2.13 Use hashtags

Use hashtags (page 201) 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 192) 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, e.g., #BPM, or enter a sentence. Alternatively, select an existing hashtag from the list.
3. Publish (page 192) 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 195). You can then use the same hashtag in the filter definition, e.g., #BPM.

3.2.14 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 201) **#Help**.

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

3.2.15 Work with groups

3.2.15.1 Create, edit or delete a group

Create your own group if you cannot find any interesting groups or you need a group for your team. Groups enable users to collaborate in a team and to participate in a special interest group or a particular topic.

Prerequisite

Creating groups is activated in ARIS Administration configuration.

Procedure

1. Click **+ Create group**.
2. Enter the name of the group and the short name.
3. Describe the group's interests, so that your group can be found by other users. The best way to do this is to use keywords.
4. If necessary, specify an additional coordinator who will manage the group profile and privileges (**+ Add coordinator**). As the creator of the group, you are automatically the coordinator.
5. Enable the relevant privacy option (**Public/Private**).
6. For private groups, you can follow portal feeds (page 198).
7. Click **OK**.

Your group is created. It is displayed 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.

To edit or delete a group, click the relevant group name under **Groups**. Then click **Edit group** on the right. The group's profile page is displayed. Make the required changes or click **Delete group**.

3.2.15.2 Invite other users to join a group

Invite other users to become a member in a specific group.

Procedure

1. Activate the group you want to issue an invitation for.
2. In the **Add colleagues** box, enter the name of the person you want to invite.
3. Click **Add**.

The user receives a notification that they have been invited to join a private group. This user can then request membership of the group ( **Find groups > Send request**). If the group coordinator approves (page 199) the request, the user can read the posts, comments, etc., by this group, and can himself post content in the group.

Group coordinators can add more users to a group directly (**Add colleagues**). That user immediately becomes a member of the group and receives the posts, comments, etc., by the group ( **My feed**).

3.2.15.3 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, e.g., 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 202) in ARIS Architect.

Procedure

1. Activate the group that is to follow portal feeds.
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 the Enter key.
6. Click the required portal feed in the search result.
7. Click **OK** in both the dialog and the group.

Using the **Following** button, the group can view the portal feed. Comments, etc., are shown directly in the group. To unsubscribe a group from a portal feed, the group coordinator removes the portal feed from the list of feeds followed by the group (**Group XY > Edit group > Followed portal feeds > Delete**).

Users of the group are notified when the portal feed has changed or comments have been added to it.

3.2.16 Edit requests to join private groups as a coordinator

Edit requests for group memberships.

Prerequisite

The group is a private group you are the coordinator of.

Procedure

1. Open the group.
2. Click **Requests**. The user requests are displayed.
3. For each request, click **Approve** or **Deny**.

If the user was accepted as a group member, the user will be notified accordingly and displayed in the list of followers. If the user was denied membership the user and all other group coordinators receive a corresponding notification.

3.2.17 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, i.e., **Revoke** if the user has administrator privileges, and vice versa.

The user is granted coordinator privileges (page 202) or they are withdrawn. The user receives a notification. If a user is granted coordinator privileges all other coordinators of the group receive a notification, as well.

A coordinator can cancel group membership only if another coordinator withdraws the coordinator privileges from the user first.

Tip

The **Remove** button removes the user from the group. The **Revoke** button revokes the user's coordinator privileges.

3.2.18 Valuable information

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

3.2.18.1 What is a feed?

Feeds contain the posts (page 192) in Collaboration, which for example, can be commented (page 193) on. The posts are categorized as follows:

-  **My feed**
Shows the posts and comments by the users from Collaboration whose feeds you follow.
-  **All company feed**
Shows all posts and comments by users and public groups from Collaboration.
-  **My portal feeds**
Displays a linked list of the portal feeds you follow. Portal feeds are only available if Collaboration is used within ARIS Connect.

3.2.18.2 Which target groups can be assigned to posts?

The following target groups can be selected for posts (page 192):

-  **Private**
Only the creator can see this group. You can use it to keep your own notes.
-  **Public**
All users can see this group.
-  **Public Collaboration group**
Only members of the selected public group(s) can see this group. Multiple selection is possible.
-  **Private Collaboration group**
Only members of the selected public group(s) can see this group. Multiple selection is possible, but you can assign only groups you are a member of.
-  **ARIS user group (ARIS Administration)**
Only members of the selected ARIS user group(s) can see this group. Multiple selection is possible, but you can assign only groups you are a member of.

By default, a new post is public. Any combination of ARIS user groups, public Collaboration groups, and private Collaboration groups is possible. It is not possible to assign users.

In a post, you can move the mouse pointer over the group symbol () to view the names of assigned groups.

The Collaboration administrator can view all posts, even the private ones.

3.2.18.3 What does following posts mean?

When you follow users, you have access to the posts that they publish in their feeds. In private groups, a coordinator needs to confirm your request before you are allowed access to this group's posts, comments, etc. In public groups you have immediate access to the group.

The feeds you follow are displayed under  **My feed** and the groups you follow under **Groups**. To stop following a user or group, click **Unfollow** in the user or group profile. Users who are following your feeds are displayed under **Followers** in your profile. Users and groups you are following are displayed under **Following** in your profile.

3.2.18.4 What does Like mean?

By clicking on  **Like** under a post, you are telling other people that you are giving this post a positive rating, but without leaving a comment. Just like a comment, this is shown along with your user name below the post. To cancel your Like, click  **Unlike**.

3.2.18.5 What is a timestamp?

A timestamp (page 193) indicates when a post was last updated in Collaboration. Example: Last update was 2 hours ago. Timestamp = **2 h**.

3.2.18.6 What is a tag?

Tags are used to categorize posts using keywords, making them easier to find (page 196). The keywords entered as tags are shown below the post. Tags are automatically created for hashtags so that they can be used to filter feeds.

3.2.18.7 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 195). You can then use the same hashtag in the filter definition, e.g., #BPM.

A hashtag consists of the **#** character followed by a keyword or phrase. There is no space after the **#** and the phrase does not contain any punctuation marks.

Examples

#BPM

#Optimize your processes using social collaboration

3.2.18.8 What does flagging a post mean?

You can send (page 193) posts you deem inappropriate to the Collaboration administrator for review. The administrator decides whether the post will be deleted or not.

3.2.18.9 Which group types exist?

Groups can be created (page 197) 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 199) to the group.

3.2.18.10 Which access rights 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 <aba>. You can synchronize the privileges in Collaboration manually, after you edited them in ARIS Architect. The following database access rights are relevant to Collaboration:

- **No access (----)**
No portal content is displayed.
- **Read (r---)**
Portal content is displayed. Users can read posts added to models, and they can like, share, bookmark, tag, and flag them. However, they cannot comment on models.
- **Read + Comment (rc--), Read + Write (rw--)** (and all other types of rw access)
Portal content is displayed. Users can use all functions of Collaboration.

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

3.3 Use the repository

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

3.3.1 Create and edit models

The Model Editor allows you to edit existing and new models (page 203) in ARIS Connect. Using the **ARIS Connect Designer** license privilege you can create new models (page 203) directly in the portal, as well as edit (page 212) or create models (page 203) in the repository.

You can access the entire modeling functionality of Model Editor via buttons and bars (page 264) that you can use to efficiently edit your models.

If you have created or opened a model, you can set up the perspective (page 206) and adjust it to your own needs. Modeling (page 212) your organization, processes, data, etc., is just as simple as extended model editing (page 244). In addition to the graphic information, you can add further information to your models using attributes (page 221) that can be placed in the model as a symbol (page 259) or a text (page 255), if necessary.

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

To use Model Editor, you need to have the **ARIS Connect Designer** license.

3.3.1.1 Create/Import a model

Model Editor allows you to create new models or use models imported from ARIS Express (<http://www.ariscommunity.com/aris-express>).

3.3.1.1.1 Create new model

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

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 model** on the **Home** tab. The 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 269) 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** if it is not activated yet.
2. Select the database group in which you want to create a new model. When you select the group, its content is displayed.
3. In the upper right, click  **Create model**. The dialog opens.
4. In the **Model name** box specify the name that the new model is to be created with in the selected group.
5. Click the **Model type** box and enter part of the model type name. All model types (page 269) are displayed whose names contain the term you entered.
6. Select the required model type.
7. Click **OK**.

The new model is created and opened in a new tab. You can set up Model Editor (page 206) and model the model.

3.3.1.1.2 Create a new model using an assignment

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

Procedure

1. In the open model, click the object to which you want to assign a new model.
2. Activate the Start (page 275) 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 in use are available for selection.
5. Enter the relevant model name. The name of the selected object is suggested as a model name.

6. Click **OK**.

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

3.3.1.1.3 Create group

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

Procedure

1. Click  **Repository** if it is not activated yet.
2. Select the database group in which you want to create a new group. When you select the group, its content is displayed.
3. In the upper right, click  **Create group**. The dialog opens.
4. Enter the required name in the **Name** box.
5. Click **OK**.

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

3.3.1.1.4 Import ARIS Express model

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

Prerequisite

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

Procedure

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

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

3.3.1.1.5 Import BPMN file

You can import (page 286) data from a BPMN file and use the BPMN diagram that was generated by the import in ARIS Connect.

Prerequisites

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

Procedure

1. Click  **Repository** if it is not activated yet.
2. Select the database group into which you want to import the BPMN diagram. When you select the group its content is displayed and a ▼ **down arrow** is shown next to the name.
3. Click the ▼ **down arrow** and select  **Import BPMN diagram**. The dialog opens.
4. Click **Select file** and navigate to the relevant BPMN file.
5. Select the BPMN file and click **Open**.

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

3.3.1.2 Customize Model Editor

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 the Model Editor is activated. You can set up the Model Editor user interface according to your requirements. In addition, you can apply templates to specify the appearance of model items. The Model Editor provides you with the functionality to

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

3.3.1.2.1 Show and hide bars

Using the bar buttons you can show or hide bars as required.

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

Procedure

Click  **Symbols**. If the **Symbols** bar is shown, it will be hidden. If it is hidden, it will be shown. Depending on your selection you either have more room to edit the model items or direct access to the relevant functionality.

3.3.1.2.2 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.

3.3.1.2.3 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 279) to create further objects.

Restore defaults

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

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

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

3.3.1.2.4 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 an additional language column for language-specific attributes. You can select an additional database language and view and edit it next to the language currently used.
4. Click **Add** on the **Attributes** tab. The **Select attribute** dialog opens.
5. Enter a search term for the attribute you want to display. A list of all attributes whose names contain the term you entered is displayed.
6. Click the relevant attribute.
7. Click **OK**. The selected attribute is added to the **Attributes** tab.
8. Click  **More** next to the attribute whose visibility you want to specify.
9. Click **Hide always** if you want to hide the attribute from the **Attributes** tab even if a value has been specified. For the attribute to be displayed at a later time you need to select it explicitly by clicking **Add**.
10. Click **Hide, if not specified** if you want the attribute to be displayed in the **Attributes** tab only if a value has been specified.
11. Click **Place attribute** and the relevant position in the model window if you want the attribute value to be displayed in the model.

12. Click **Delete attribute**, if you want to delete the attribute value. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

The attributes will be displayed in line with your settings.

3.3.1.2.5 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 279) 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 209), or click the  **Connection** symbol or object symbols.
2. If you want the mini toolbar to be hidden only temporarily while the mouse pointer is not over the object, move the mouse pointer away from the object until the mini toolbar is hidden. As soon as you move the mouse pointer back towards the object, the mini toolbar is shown again.
3. If you do not want the mini toolbar to be shown for a selected object anymore, move the mouse pointer several centimeters away from this object. The mini toolbar is hidden and is then no longer shown when you position the mouse pointer over the object.
It will be visible for the object again only if you cancel the selection and select the object again.

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

3.3.1.2.6 Configure mini toolbar

You can define which object symbols the mini toolbar (page 279) 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 209) the selected object symbols are available.

3.3.1.2.7 Change grid width

You can show a grid in the model window (page 264). Model items are aligned to the grid and inserted or moved according to the grid width. In the grid, you can specify how far apart the grid points will be.

Procedure

1. Activate the Model (page 276) tab bar.
2. Click  **Grid > Change grid width**. The dialog is displayed.
3. Enter the required grid width or click the up or down arrow to change the grid width.
4. Click **OK**.

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

3.3.1.2.8 Show formatting toolbar

The formatting toolbar is enabled for selected texts, for example, for the text of placed attributes (page 221). The formatting bar is not available for attributes that the system changes, for example, for the attribute **Creator**.

Procedure

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

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

3.3.1.2.9 Assign model template

You can assign a template (page 311) to a model and thus, change its appearance as well as its attribute placements in the model window (page 264) at once automatically.

Procedure

1. Activate the Model (page 276) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click the required template.

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

3.3.1.2.10 Reset model template

You can reset the appearance of a model that was assigned templates (page 311) to the ARIS default appearance. Color and size changes and attribute placements assigned by templates are removed.

Procedure

1. Activate the Model (page 276) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click **Reset**.

The content of the model window (page 264) is adjusted immediately.

3.3.1.3 Model

Model Editor assists you in editing models, e.g., by providing a grid (page 213), a mini toolbar (page 220), graphic objects (page 218), or in-place formatting options (page 221).

3.3.1.3.1 Open model for editing

You can open models in different ways.

Prerequisite

You have a **Designer** license.

Procedure

Using the search

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

From groups

1. Activate the **Groups** area in the portal.
2. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the portal at the top right below the search. The groups of the selected database are displayed.
3. Select the group containing the required model. The contents of the selected group are listed.
4. Click the name of the relevant model.
5. Click **Diagram** if this display is not enabled yet. The model is displayed.
6. Click  **Edit**.

From the 'Recent changes' tab

1. In the portal, activate the **Recent changes** tab of the overview. All models are listed that have recently been changed or created.
2. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the portal at the top right below the search. The display of the **Recent changes** tab is adjusted.
3. Click the name of the model you want to open. The **Groups** area opens and the model is activated.
4. Click **Diagram** if this display is not enabled yet. The model is displayed.
5. Click  **Edit**.

From the repository

1. Activate the  **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.

The model opens in a separate tab.

3.3.1.3.2 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 213), 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 207).

Procedure

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

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

3.3.1.3.3 Show and hide grid

If a grid is hidden, you can show it in the model window (page 264). When you place or move model items, they are inserted or moved according to the grid width (page 210). This facilitates the orderly placement of model items.

Procedure

1. Activate the Model (page 276) tab bar.
2. Click  **Grid** >  **Toggle grid**.

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

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

3.3.1.3.4 Set grid width

You can set the grid width. Based on the grid width, model elements are inserted or moved in the model window (page 264).

Procedure

1. Activate the Model (page 276) tab bar.
2. Click  **Grid > Change grid width**. The dialog opens.
3. Enter the required grid width in the spin box or click the up or down arrow to increase or reduce the grid width.
4. Click **OK**.

Grid settings have been changed.

3.3.1.3.5 Place object symbols

You can place object symbols in the model window (page 264) in different ways.

Procedure

Using the Symbols bar

Procedure

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

The object symbol has been inserted in the model window.

Using the selection box in the Symbols bar

Procedure

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

The object symbol has been inserted in the model window.

Using the mini toolbar

Prerequisite

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

Procedure

1. Click the placed object symbol. The mini toolbar (page 279) is shown.
2. In the mini toolbar, click the symbol you want to place in the model window. A frame is displayed for the new object.
3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. If necessary, overwrite the previous name with the name of your choice and press Enter.

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

As an occurrence copy

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

Prerequisite

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

Procedure

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

The object symbol is placed in the model window. It represents the object whose object symbol you copied as an occurrence copy. This means, for example, that the name of both object symbols is changed, i.e., 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 model window.

Procedure

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

The object symbol is placed in the model window. As a definition copy it represents a new object using the attributes of the object whose object symbol you have copied. The new object is

autonomous even though it has the same attributes as the source object. This means, e.g., that the name of the copied object does not change if you change the name of the source object. You have placed object symbols in the model window.

3.3.1.3.6 Place occurrence copy

You can place occurrence copies in the model window (page 264) in different ways.

Procedure

By placing an object symbol

Procedure

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

The occurrence copy is placed in the model window.

By copying and pasting

Procedure

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

You have placed the occurrence copy.

You have placed an occurrence copy.

3.3.1.3.7 Paste copied object as an occurrence copy

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

Prerequisite

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

Procedure

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

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

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

3.3.1.3.8 Paste copied object as a definition copy

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

Prerequisite

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

Procedure

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

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

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

3.3.1.3.9 Change object symbol

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

Prerequisite

The method filter in use 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 275) tab bar.
 3. Click  **Change symbol**. The list of object symbols available for the selected object(s) is shown.
 4. Click the symbol you want to use from now on for the selected object/s in this model.
- The symbol for the selected object is or the symbols of the selected objects are changed.

3.3.1.3.10 Place graphic objects

You can place graphic objects in the model window (page 264) in order to, for example, structure model content.

Procedure

Place circle

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

The circle is inserted in the model window. Now you can color the line (page 253) and inside (page 251), and, for example, place the graphic object behind a model area (page 260) to highlight this area.

Place square

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

The square is inserted in the model window. Now you can color the line (page 253) and inside (page 251), and, for example, place the graphic object behind a model area (page 260) to highlight this area.

Place rectangle

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Square**.
3. Click the position in the model window where you would like to place the graphic symbol, and hold down the mouse button.

4. Drag the mouse pointer in the desired direction so that the placed item receives the required form of a rectangle.
5. Release the mouse button.

The rectangle is inserted in the model window. Now you can color the line (page 253) and inside (page 251), and, for example, place the graphic object behind a model area (page 260) to highlight this area.

Place ellipse

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

The ellipse is inserted in the model window. Now you can color the line (page 253) and inside (page 251), and, for example, place the graphic object behind a model area (page 260) to highlight this area.

Place polygon

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

The polygon is inserted in the model window. Now you can color the line (page 253) and inside (page 251), and, for example, place the graphic object behind a model area (page 260) to highlight this area.

Place line

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

The line is inserted in the model window. Now you can color the line (page 253).

Specify size when placing objects

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

Procedure

1. Open the **Symbols** bar if it is not already open by clicking  **Symbols**.
2. Click the graphic object  **Circle/Ellipse** or  **Square**.
3. In the model window, click the position where you would like the graphic object to begin, and hold down the mouse button.
4. Drag the mouse pointer in the required direction until the graphic object has taken the shape that you want to place.
5. Release the mouse button.

The graphic object is placed with the required size.

You have placed graphic objects.

3.3.1.3.11 Paste copied graphic objects

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

Procedure

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

Copying and pasting graphic objects is now complete.

3.3.1.3.12 Modeling using the mini toolbar

You can model very effectively using the mini toolbar (page 279). By configuring (page 209) it you are quickly offered the object symbols (page 209) required for your model.

Procedure

1. Click a placed object symbol (page 214). The mini toolbar is shown.
2. In the mini toolbar, click the object symbol you want to place. A frame is displayed for the new object.
3. In the model window, click the position where you want to place the object symbol. The object symbol is placed together with a connection to the source object and the name field for overwriting.
4. Enter the relevant name.
5. Press **Enter**.

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

3.3.1.3.13 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. 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.
2. Click  **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Display the relevant attribute using the **Add** button 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 this dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times.
7. Click **OK**.

You have changed the attribute value.

3.3.1.3.14 Directly format placed attributes

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

Prerequisite

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

Procedure

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

You have formatted the placed attribute.

3.3.1.3.15 Create connections

You can link objects using connections in different ways in the model window (page 264).

Procedure

When placing objects using the mini toolbar

Prerequisite

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

Procedure

1. Click the placed object symbol. The mini toolbar (page 279) is shown.
 2. In the mini toolbar, click the symbol you want to place in the model window. A frame is displayed for the new object.
 3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
 4. If necessary, overwrite the previous name with the name of your choice and press Enter.
- The object symbol is placed in the model window and linked to the previously selected object symbol using a connection.

Subsequently using the Symbols bar

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

Both objects are linked by a connection.

Subsequently using the mini toolbar

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

Both objects are linked by a connection.

You have linked objects in the model window.

3.3.1.3.16 Place text

You can place text in the model window (page 264) irrespective of other model items. This way you can add additional information to your model.

Procedure

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

The text is inserted into the model window. You can format (page 221) the text in just the same way as placed text attributes.

3.3.1.3.17 Adjust size of appearance

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

Procedure

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

You have resized the model according to your requirements.

3.3.1.3.18 Delete model items

You can delete model items from the model window (page 264).

Procedure

Using the tab bar

1. Select the model items you want to delete.
2. Click  **Delete** in the tab bar.

The selected elements are deleted without prompting. As long as you have not saved the model you can undo the deletion by clicking  **Undo**.

Using the Delete key

1. Select the model items you want to delete.
2. Press the **Del** key.

The selected elements are deleted without prompting. As long as you have not saved the model you can undo the deletion by clicking  **Undo**.

You have deleted model items from the model window.

3.3.1.3.19 Save model

Save your model.

Procedure

1. Make the required changes.
2. Click  **Save** in the tab bar.

Your changes are saved. You or others can access this model status at a later time.

3.3.1.3.20 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 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 278) tab bar.
3. Click  **Change symbol**. The list of object symbols available for the selected object(s) is shown.
4. Click the symbol you want to use from now on for the selected object/s in this model.

The symbol for the selected object is or the symbols of the selected objects are changed.

3.3.1.3.21 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 278) tab bar.
3. Click  **Change symbol**.
4. Click  **Marker**.
5. Click one of the loop behaviors  **None**,  **Standard**,  **Multi-instance parallel** or  **Multi-instance sequential**.

The loop behavior of the **Task** object has been changed.

3.3.1.3.22 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 278) tab bar.
3. Click  **Add lane**. The options for adding lanes are displayed.
4. Click the corresponding option.

A lane is added to the selected lane according to your selection.

3.3.1.3.23 Insert lane into a pool or lane

You can easily insert a lane that is placed directly in the model into a pool or lane.

Prerequisites

The lane or pool in which a lane is to be inserted contains no flow objects.

Procedure

1. Activate the BPMN (page 278) tab bar.
2. Select the lane you want to insert.
3. Press **Ctrl** key and select the pool or lane you want to insert the lane.
4. Click  **Insert lane**. If you have selected a pool to insert the lane the lane is inserted immediately. If you have selected a lane to insert the lane, the **Specify which lane to insert** dialog opens.
5. Activate the options button of the lane you want to insert.
6. Click **OK**. The lane with activated options button is inserted in the other lane.

You have inserted a lane into a pool or lane.

3.3.1.3.24 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 278) tab bar.
3. Click  **Move lane** and select the required direction, such as  **Lane up**,  **Lane down**,  **Lane to the left**, or  **Lane to the right**.

The lane you selected is placed at the new position.

3.3.1.3.25 Delete pool or lane

You can easily delete a lane or pool.

Prerequisites

Due to the deletion of a lane, flow objects and lanes must not be located side by side in the same pool. If so, the lane cannot be deleted.

Procedure

1. Activate the BPMN (page 278) tab bar.
2. Select the pool or lane you want to delete.
3. Click  **Delete pool or lane.**

The pool or lane is deleted.

3.3.1.3.26 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 278) tab bar.
3. Select the communication symbol of the communication object you want to transform.
4. Click  **Transform into call conversation.**

The communication object is transformed into a call conversation and the conversation symbol is marked in bold.

3.3.1.3.27 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 278) tab bar.
3. Click  **Change type of sequence flow.**
4. Click one of the available types:  **Regular sequence flow**,  **Default sequence flow** or  **Conditional sequence flow.**

You changed the sequence flow type.

3.3.1.3.28 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 278) 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 260) and can be opened by double-clicking the assignment icon.

3.3.1.3.29 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 278) tab bar.
 3. Click  **Expand subprocess**.
- The process contained is displayed as embedded in the subprocess. (page 260) The process remains assigned to the subprocess (page 260).

3.3.1.3.30 Edit subprocess

You can edit a subprocess.

Procedure

1. Activate the BPMN (page 278) tab bar.
2. Select the relevant subprocess symbol with an assigned model.
3. Click  **Edit subprocess**.

The assigned model is opened for editing.

3.3.1.3.31 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 278) tab bar.
3. Click  **Select global reference**. The **Select global process or task** dialog opens.
4. Navigate to the database group in which the relevant global process or task is stored.
5. Select the global process or task.
6. Click **OK**.

The selected global process or task is assigned to the call activity.

3.3.1.3.32 Model table-based

Table-based modeling enables rapid and comfortable modeling of EPCs and BPMN diagrams (page 236). The modeling table is shown by default.

Objects are modeled in a table and simultaneously placed in the model displayed above. Layout takes place automatically. Table-based modeling provides a quick and easy way to model processes and process frameworks at an early stage, for example, in meetings during the project planning phase.

Moreover, additional information (page 231) can be added for models and objects.

It can also be used to navigate in the model. If an object is selected in the table, it is selected in the model and the selected object is moved into the visible area. If an object is selected in the model, it is also selected in the table and the row is displayed in the visible area.

3.3.1.3.32.1 Hide/Show modeling table

You can hide or show the modeling table.

Procedure

1. Open (page 212) a model to edit or create (page 203) a new model.
2. Click  **Modeling table**.

If the modeling table is shown, it will be hidden. If it is hidden, it will be shown.

When a model is opened for the first time, the modeling table is shown. The setting made will be applied.

3.3.1.3.32.2 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 212) a model to edit or create (page 203) a new model.
2. Click  **Collapse/Expand table**. The model is hidden.
3. Click  **Collapse/Expand table**. The model is shown.

You have hidden or shown the model.

3.3.1.3.32.3 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 212) a BPMN diagram.
2. Click  **Add or remove columns**.
3. Enable the **Show BPMN container column** check box to show the **Belongs to container** column. Disable the check box to hide the **Belongs to container** column.

You have specified whether or not the **Belongs to container** column is to be displayed.

3.3.1.3.32.4 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 230) to insert lanes into the model.

Procedure

1. Open (page 212) a model.
2. Start typing the name of the object to be created.
3. Press **Ins**. Alternatively, click  **Add new object**.
4. Select a symbol from the list and enter a name.
5. Press **Enter**.

The first object you add to a BPMN diagram is automatically placed within a pool.

Click **Undo** or press **CTRL + Z** if you do not want the object to be added to a pool. The object is then placed directly in the diagram.

The object is inserted and the model items are rearranged in the model. The color of the object type is displayed before of the name.

3.3.1.3.32.5 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 212) a model.
2. Start typing the name of the object to be created. Alternatively, click **+ Add new object**.
3. 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.
4. Click **Function (target)** in the **Symbols** area. The symbol is inserted and the name is selected for overwriting.
5. Enter a name.
6. Press **Enter**.

You have created a new object using the **Function (target)** object symbol. The color of the object type is displayed before of the name.

3.3.1.3.32.6 Use existing object

You can reuse existing objects in the model.

Procedure

1. Open (page 212) a model.
2. Start typing the name of the object to be created. Alternatively, click **+ Add new object**.
3. 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.
4. Select the required object in the **Existing objects** area.
5. Press **Enter**.

The selected object is reused. The color of the object type is displayed before of the name.

3.3.1.3.32.7 Rename structurally relevant object

In the modeling table, you can edit structurally relevant objects that have already been modeled.

Procedure

1. Open (page 212) a model.
2. Select the object you want to edit.
3. Press **F2**. Alternatively, click  **Edit table cell**.
4. Rename the object.
5. Press **Enter**.

You have renamed an object.

3.3.1.3.32.8 Edit the Description/Definition column

You can specify descriptions and definitions for objects.

Procedure

1. Open (page 212) a model.
2. If the **Description/Definition** column is not shown, add (page 233) it.
3. 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.
4. Enter the description or definition. The text can be formatted.
5. Click **OK**.

The new or changed description is saved.

3.3.1.3.32.9 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, e.g., in BPMN diagrams.

Procedure

1. Open (page 212) a model.
2. Select the object row below which the operator is to be modeled.
3. Press **Ins**. Alternatively, click **+ Add new object**.
4. 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.
5. Press **Ins**. Alternatively, click **+ Add new object**. Select the first object that will follow the operator and enter a name.
6. Press **Enter**. The object is placed below the operator in EPCs, and beside the operator in BPMN diagrams.
7. Select an operator.
8. 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.
9. Press **Enter**.
10. Model (page 229) additional objects for the relevant split path.

You have modeled a split path.

The objects in a split path are outlined in the table by a thicker grid line.

3.3.1.3.32.10 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 212) a model.
2. In the table, click the object you want to remove.
3. Press the **Del** key.

The object is removed from the model without prompting for confirmation.

Connections from and to the deleted object are also deleted. The preceding object is linked to the following object using a connection.

3.3.1.3.32.11 Model satellites

A satellite is an object that can be inserted in a model or diagram but is not a structurally relevant object (page 314) 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.

Model new satellites

Procedure

1. Open (page 212) a model.
2. Double-click the cell for the satellite you want to model for an object, e.g., an **Organizational unit** object.
3. Select an object symbol.
4. Enter the name and press the **Enter** key.
5. 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.
6. Exit the cell (page 236) when you have created the required satellites.

You have modeled one or more satellites.

Model existing satellites

Procedure

1. Open (page 212) a model.
2. Double-click the cell for the satellite you want to model for an object, e.g., an **Organizational unit** object.
3. 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.
4. Select the required object in the **Existing objects** area.
5. Exit the cell (page 236) when you have created the required satellites.

You have modeled one or more existing satellites.

Tip

You can also open the dialog for the relevant column by pressing **F2**. Select an object type and press the **Enter** key. You can enter a name. Press an arrow key to exit the cell.

3.3.1.3.32.12 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 212) a model.
2. Click  **Add or remove columns**.
3. Click **Add object column**. A dialog opens.
4. Select an object and a connection from the list and click **OK**.

You have added an object.

3.3.1.3.32.13 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 212) a model.
2. In the table, click the object for which you want to specify attributes.
3. Click  **Add or remove columns**.
4. Click  **Add attribute column**. The **Add attribute** dialog opens.
5. Select an attribute.
6. Click **OK**.

The attribute column is added to the right of the selected column and you can enter an attribute value.

3.3.1.3.32.14 Edit attribute

You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, e.g., Creation date. System attribute columns have a gray background.

Procedure

1. Open (page 212) a model.
2. Select the cell for the relevant attribute.
3. Press **F2**.
4. Edit (page 241) the attribute value.
5. Exit the cell (page 236) once you have finished editing the attribute value.

You have edited an attribute.

3.3.1.3.32.15 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 212) a model.
2. Click  **Add or remove columns**.
3. Click the  **Remove symbol** for the **creates output to Information carrier** column.
4. Click the name of an object in the **Name** column.
5. Click  **Add or remove columns**.
6. Click  **Add object column**. The **Add new object column** dialog opens.
7. 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.
8. Click **OK**.

The **creates output to Information carrier** column is placed next to the **Name** column.

All columns can be re-arranged as described.

3.3.1.3.32.16 Remove column

You can remove columns for attributes or objects from the modeling table.

Procedure

1. Open (page 212) a model.
2. Click  **Add or remove columns**.
3. Click the  **Remove** symbol in front of the name of an attribute or object column.

The attribute or object column is removed from the modeling table without prompting for confirmation, while the attribute value or the object is retained.

If required, you can add both the attribute value and the object to the modeling table.

3.3.1.3.32.17 Valuable information

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

3.3.1.3.32.17.1 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 228).

3.3.1.3.32.17.2 How to control the table using the keyboard

You can control the modeling table using the keyboard:

How to model an EPC using the keyboard (video 4 min. 23 sec.)

How to model a BPMN diagram using the keyboard (video 2 min. 31 sec.)

| Key/Keyboard shortcut | Context | Action |
|-----------------------|---|--|
| Arrow keys | Table selected | Move to next column/row in direction of arrow. |
| Ctrl + End | Table selected | Activates the last cell in the modeling table. |
| Ctrl + Home | Table selected | Activates the first cell in the modeling table. |
| Ctrl + Shift + Ins | Operator selected | Create split paths. |
| Del | Object name selected | Delete object. |
| End | Table selected | Activates the last column in the current row. |
| Enter | Name column activated | To next row/End editing. |
| F2 | <ul style="list-style-type: none"> ▪ Name cell selected | <ul style="list-style-type: none"> ▪ Activates the name editing mode. |

| Key/Keyboard shortcut | Context | Action |
|-----------------------|--|---|
| | <ul style="list-style-type: none"> ▪ Description/Definition cell selected ▪ Object cell selected ▪ Attribute cell selected | <ul style="list-style-type: none"> ▪ Opens the Description/Definition dialog. The description/definition can be edited. ▪ Opens the object symbols list if symbols can be inserted. ▪ Opens the Edit attribute dialog for you to insert the attribute value. |
| Home | Table selected | Activates the first column in the current row. |
| Ins | Table selected | Adds an object row. |
| PageDown | Table selected | Scrolls one page down. |
| PageUp | Table selected | Scrolls one page up. |
| Shift + F2 | BPMN container cell | Enables renaming of the container. |
| Tab | Table cell selected | Activates the cell to the right of the cell currently selected. |
| Shift + Tab | Table cell selected | Activates the cell to the left of the cell currently selected. |

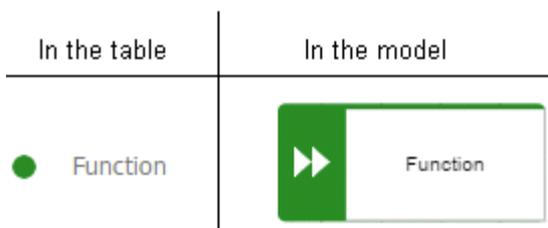
3.3.1.3.32.17.3 What do different colors mean in table-based modeling?

The colors help you to distinguish between the object types. They correspond to the object colors. A flashing cursor in an empty row indicates that entries can be made.

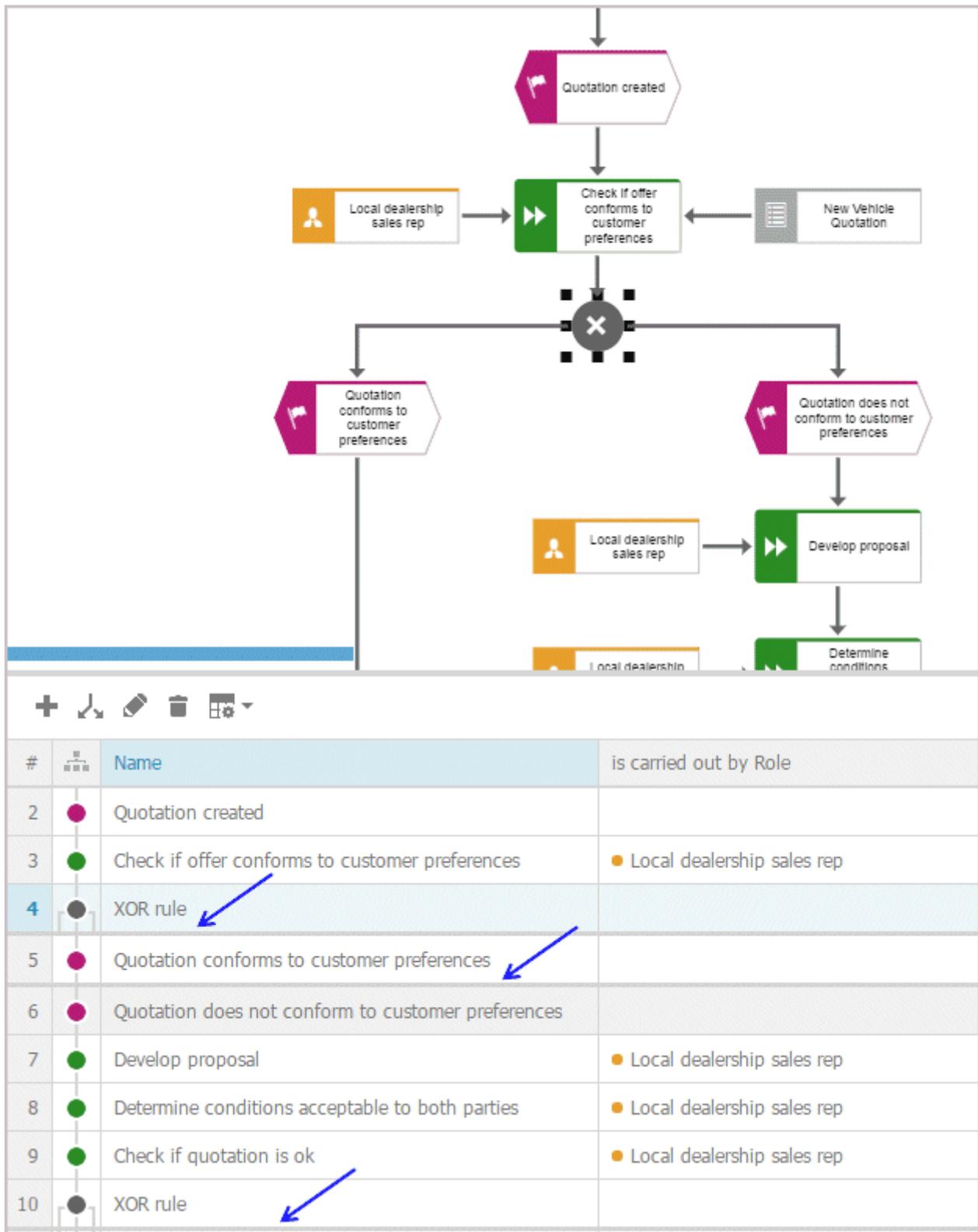
A gray background indicates that no entries can be specified.

Examples

- A table for a model of the **EPC** type contains, e.g., green highlighting for functions because functions are displayed in green in the model. In a table for a BPMN diagram, a task appears in blue, as in the diagram.



- Split paths are outlined by a thicker line.



- In BPMN models, lanes are outlined by a thicker line.

3.3.1.3.32.17.4 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, e.g., 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, e.g., 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, e.g., for an event, a message is displayed.

IN A BPMN DIAGRAM

- **Numbering**
Shows the line number.
- **Color column**
Displays the color of the object symbol.
- **Name**
The object name is entered here.
- **Description/Definition**
A description or definition of the object is entered here.

- **Belongs to container**

Shows the pool or lane to which an object belongs. This column cannot be edited.

3.3.1.3.32.17.5 What are the special features of BPMN diagrams?

For BPMN diagrams, you can specify whether or not the **Belongs to container** column is displayed. This column exists only in BPMN diagrams and is displayed by default. Lanes are automatically enlarged in table-based modeling if a new object does not fit completely into the lane.

3.3.1.3.32.17.6 What attribute values and processing types are there?

You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, e.g., 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 two dropdown menus for the year (2016) and the month (March). Below these is a calendar grid with days of the week (Mon to Sun) as headers. The date 14 is selected and highlighted with a blue border. Below the calendar, there is a text input field labeled 'Time:' containing the value '12:41:10'. At the bottom of the dialog, there are two buttons: 'OK' (blue) and 'Cancel' (gray).

Boolean

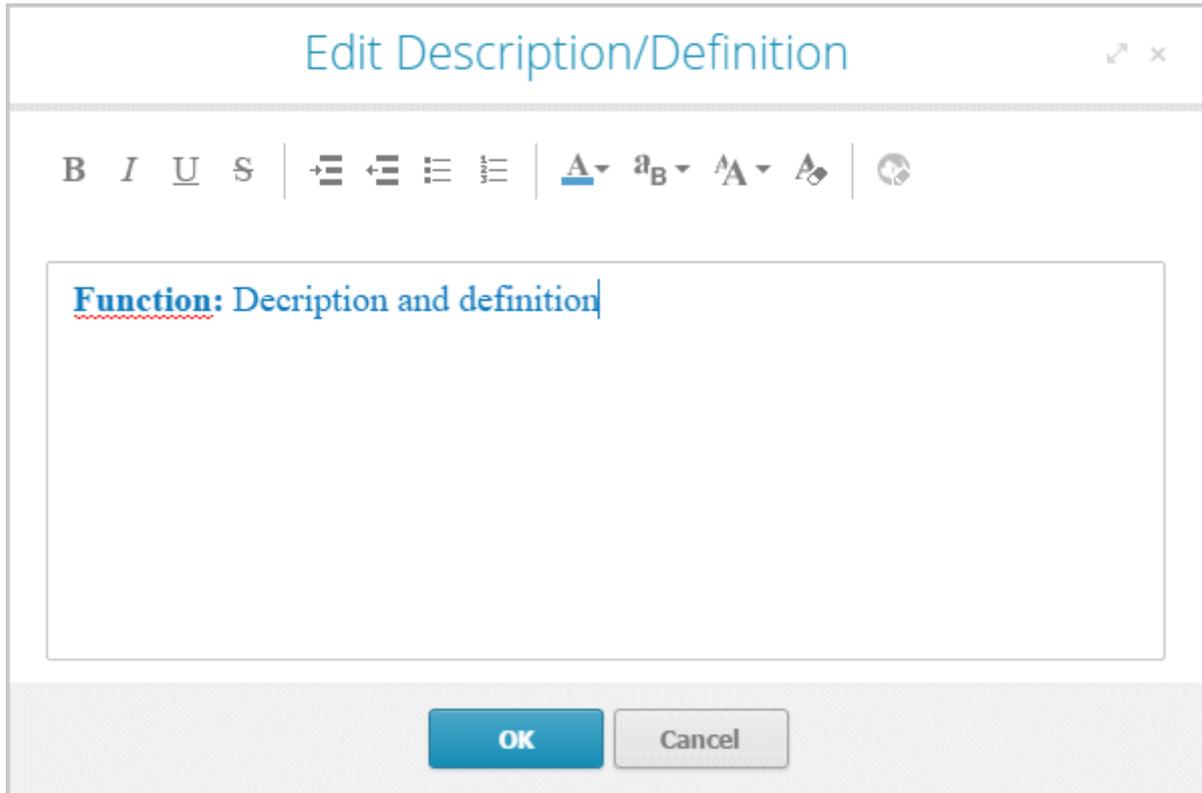
You can change the attribute value by enabling (true:) or disabling (false:) the check box. The check box for an attribute value that is not specified is shaded in color ().

Text attributes

You can change the attribute value directly in the cell.

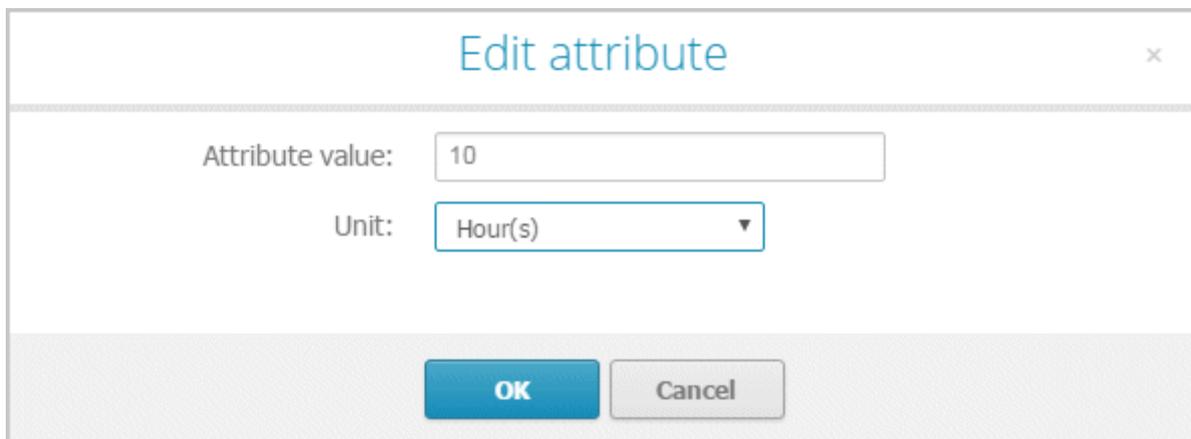
Formatable text attributes

A dialog opens. You can edit the text and formatting.



Attribute values with unit

A dialog opens. When saving the attribute value for numerical attributes, a check is made as to whether the value entered is a number. If not, you are notified.

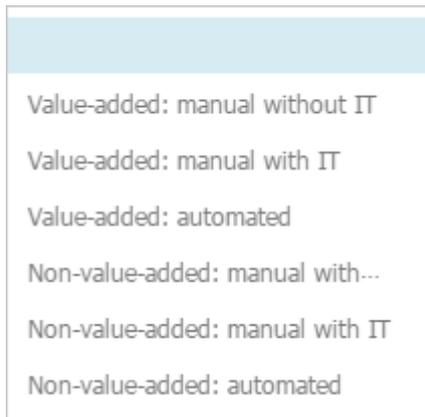


Numerical attributes

You can change the attribute value directly in the cell. When saving the attribute value, a check is made as to whether the value entered is a number. If not, you are notified.

List attributes

You can select from a list of attribute values specified by the method by clicking the relevant value.



3.3.1.4 Extended editing

Besides the basic editing options, Model Editor provides you with additional functionality, such as copying formatting (page 251), creating groupings (page 261), applying various colors (page 252), inserting user-defined descriptions (page 249), or automatic resizing of objects (page 262).

3.3.1.4.1 Find objects in an open model

You can have objects selected in the model window. If the object is not located in the visible area of the model window the visible area is moved and the object is displayed as selected in the visible area.

Procedure

1. Click the  **Find** bar button. The Find bar opens.
2. Enter a part of the name or the entire name for the object to be found.
3. Click either  **Search down** or  **Search up**, depending on the direction in which you want to search for objects. The next object whose name contains the term entered is selected. If it is located outside of the visible area it is placed in the visible area.
4. Click  **Search down** or  **Search up** again. The next object with the term in its name is selected.

Each time you click the up and down buttons the next occurrence is selected. If a corresponding object cannot be found in the one direction the first occurrence is selected again.

3.3.1.4.2 Show where object occurrences are used

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

Procedure

1. Select an object in the model.
2. Click **i 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 view for the occurrence, the first fact sheet tab is shown, e.g., **Overview**.

In the **In other models** area, all models are displayed to which you have at least read access. You switched between the occurrences of an object using the navigation controls.

3.3.1.4.3 Place an object in an object

You can place an object in another object. The object then overlaps the object in which it is placed and has an implicit connection to this object. Implicit connections are connections that are not being displayed while an object is placed in another object.

Procedure

1. Click the object you want to place in another object, and hold down the mouse button.
2. Drag the object on top of the other object, position it inside the other object's borders, and release the mouse button. If multiple connections are available between the two objects, the connection selection is displayed. A right arrow is added to the outgoing connections of the embedded object, while a left arrow is added to the incoming connections.
3. Click the connection you want to draw between these two objects. The connection created is an implicit connection, which means that it is not displayed while the object is embedded in the other object.

The object is now placed in the other object. Due to the existing implicit connection, the embedded object is also selected or moved when the object in which it was placed is selected or moved.

Tip

You can place multiple objects of one type in an object at once.

3.3.1.4.4 Place an object on an object

You can place an object on another object. The object then overlaps the object on which it is placed, but has no implicit connection to this object. Implicit connections are connections that are not being displayed while an object is placed in another object.

Procedure

1. Click the object you want to place on another object, and hold down the mouse button.
2. Drag the object on top of the other object, position it inside the other object's borders, and release the mouse button. The connection selection is displayed.
3. Click **× No connection**. Thus, no connection is created between the two objects.

The object is now placed on the other object. Due to the lack of an implicit connection, the embedded object is neither selected nor moved when the object on which it was placed is selected or moved.

3.3.1.4.5 Upload documents

You can upload documents to ARIS document storage and assign them to models and objects (page 247) in order to supplement these with detailed descriptions and graphics, for example.

Prerequisite

The filter in use allows the **ARIS document storage Link** attribute.

Procedure

1. Open (page 212) the relevant model.
2. Activate (page 208) the **Properties** bar.
3. Activate 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 247).

3.3.1.4.6 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 212) 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. Activate the **Properties** bar.
4. Activate the **Attributes** tab if it is not activated yet.
5. Show (page 208) 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 255). To ensure that the name you specify is placed in the model instead of the link, you can show the **ARIS document storage Title** attribute from the **Attributes** tab (**Properties** bar). If you specify a name for the attribute, this name is displayed in the model instead of the contents of the placed **ARIS document storage Link** attribute.

3.3.1.4.7 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 212) 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  **Properties**.
4. Activate the **Documents** bar.
5. Click  **Add**.
6. In ARIS document storage, click the folder containing the relevant document.
7. Enable the check box for the required document, and click **OK**.

The document is linked with the item.

On the **Documents** tab, a mark is shown:  for objects and  for models. If a document title was specified, it is shown, otherwise the complete link in ARIS document storage.

3.3.1.4.8 Use the Documentation attribute

You can describe database and model items (models, objects, groups, etc.) using formatted documents or other files and save these documents in the **Documentation** attribute. If you are using the Microsoft® Word file formats **DOC** and **DOCX**, a preview is available and the  **Edit** button is available. You can also create the documents directly from the **Documentation** attribute.

Procedure

Insert an external description

Prerequisite

You are using Microsoft® Word.

Procedure

1. Start ARIS Connect and open Model Editor.
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 208).
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 Model Editor.
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 208).
5. Click  **Import** in the attribute row. The **Select document** dialog opens.
6. Click **Select file** and select the newly created external description in the dialog.
7. Click **Open**.

The document is inserted in the **Documentation** attribute.

Edit an external description

If you are using the Microsoft® Word file formats **DOC** and **DOCX**, a preview is available and the  **Edit** button is available.

Warning

Due to technical restrictions external descriptions cannot be locked if they are open in the editor. Therefore, it is possible that a user deletes an external description in ARIS Connect while it is being edited by another user in the text editor. In this case, all changes of the description are deleted without the editing user being notified.

Procedure

1. If the attribute is not displayed: Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 208).
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 208).
3. Click  **Display**. Depending on your browser, you may be asked whether you want to save or open the file.
4. Select **Open**. The corresponding program launches and the file opens in read-only mode.

You can now find out about the content of the document.

If you decide to save the document, you must save it with a name that differs from its previous name. Thus, a copy is created. It is, however, not inserted into the **Documentation** attribute.

Refresh the preview of the external description

1. Select the item the description of which you want to display.
2. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 208).
3. Click  **Refresh**.

The display of the **Documentation** attribute is updated so that the changes you have made will be displayed.

You have described a database or model item with a formatted document.

3.3.1.4.9 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 275) tab bar.
3. Click  **Format painter**.
4. If you want to copy the format to one item: click the relevant item.
If you want to copy the format to more than one item: use the mouse to draw a border around the relevant items. You can also press the **Ctrl** key and click the required items one after the other.

The format of the selected items is adjusted accordingly.

3.3.1.4.10 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 275) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click the color you want to color the selected model item with. The selected model items are colored with the selected color. The color palette closes.

You have colored the selected model items.

3.3.1.4.11 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 275) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click **Choose your own color**. The **Define color** dialog opens.
5. Select your own color in one of the ways described below. Your changes will be displayed in the preview window on the right:
 - a. Click the color bar and move the line to the relevant color range to select the basic color. Then click on the relevant position in the color box to select the brightness of the basic color.
 - b. Enter the respective share of each color from 0 to 255 in the **Red, Green and Blue** boxes. 0 means that the corresponding color is absent. If you enter **0** in all three boxes you have selected the color **black**.
 - c. Enter a hexadecimal color definition in the **Color code: #** box. The hexadecimal system uses the letters A to F in addition to the numerals of the decimal system, which means that it is based on the base 16. If you enter FFFF00, this sets the color to **Yellow**.
6. Click **OK**.

You have colored the selected model items with a self-defined color.

3.3.1.4.12 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 275) 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 252) for the gradient.
7. Click the second color box and select the second color (page 252) for the gradient.
8. Click the list box and select the direction of the gradient.
9. Click **OK**.

You have colored the selected model items with a gradient.

3.3.1.4.13 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 275) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click **No fill color**.

The selected model items are displayed without color.

3.3.1.4.14 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 275) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click  **Reset**.

You have reset the color of the selected object symbols to their original color.

3.3.1.4.15 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 275) tab bar.
3. Click  **Line color**. The color palette opens.
4. Click the color you want to color the borders and lines of the selected model items with.

You have colored the borders and lines of the selected model items.

3.3.1.4.16 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 275) tab bar.
3. Click  **Line color**. The color palette opens.
4. Click  **Reset**.

You have reset the colors of the borders and lines of selected model items.

3.3.1.4.17 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 275) tab bar.
3. Click  **Line style and weight**. The style selection opens.
4. Click **Dotted**, **Dashed**, or **Solid**, depending on which style you want to assign to the selected elements.

The style of the borders and lines of the selected model items is adjusted accordingly.

3.3.1.4.18 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 275) tab bar.
3. Click  **Line style and weight**. The weight selection opens.
4. Click **0 point**, **2 point**, **4 point**, or **8 point**, depending on which weight you want to assign to the borders and lines of the selected model items.

The weight of the borders and lines of the selected model items is adjusted accordingly.

3.3.1.4.19 Change item appearance

You can change the appearance of model items in the model window.

Procedure

1. Select the model items whose appearance you want to define.
2. Activate the Start (page 275) tab bar.
3. Click  **Appearance**. The appearance selection opens.
4. Click **Shaded** if the selected items are to have a shadow. The check box is enabled. Connections cannot have a shadow.
5. Click **3-D effect** if the selected items are to be displayed in 3-D style. The check box is enabled. Connections cannot be displayed in a 3-D style.
6. Click **Active** if the selected items are to be displayed as inactive. The check box is disabled. Objects are displayed without color and with a gray border, connections are displayed in gray. Graphic objects cannot be displayed as inactive.

You have defined the appearance of model items. To change a setting again, click the relevant option again.

3.3.1.4.20 Place attributes at fixed positions

You can place any attribute of objects and connections, not just the name, visibly in the model window. For quick placement several fixed positions in and around the object are offered.

Procedure

Place new attributes at fixed positions

1. Select the object you want to place a new attribute for.
2. Activate the Start (page 275) tab bar.
3. Click  **Attribute placement**.
4. Click **Create attribute placement**. The **Select attribute** dialog opens.
5. Enable the **Show specified attributes only** checkbox. Then only the attributes with a value are made available for selection.
6. Enter the first letters of the required attribute name. All attributes are displayed whose names contain the term you entered.
7. Click the name of the attribute you want to place.
8. Click **OK**. The dialog closes and a frame for the attribute is displayed in the model window.
9. Click anywhere in the model window.
10. Click the newly placed attribute so that the handles are colored.
11. Click  **Attribute placement**.
12. Click the position of the object where the attribute is to be placed, e.g.,  **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 275) tab bar.
3. Click  **Attribute placement**.
4. Click the position of the object where the attribute is to be placed, e.g.,  **Top right**.

The attributes are placed at the objects at the position selected. You can specify that the attribute name is to be displayed for placed attributes. You can also specify for certain attributes that they are to be displayed as a symbol.

You have placed attributes at fixed positions.

3.3.1.4.21 Place attributes at any position

You can place any attribute of objects and connections, not just the name, visibly in the model window. These cannot only be placed at fixed positions (page 255), but also freely.

Procedure

Place new attribute freely

Select the object you want to place a new attribute for.

1. Activate the Start (page 275) tab bar.
2. Click  **Attribute placement**.
3. Click **Create attribute placement**. The **Select attribute** dialog opens.
4. Enable the **Show specified attributes only** checkbox. Then only the attributes with a value are made available for selection.
5. Enter the first letters of the attribute name. All attributes are displayed whose names contain the term you entered.
6. Click the name of the attribute you want to place.
7. Click **OK**. The dialog closes and a frame for the attribute is displayed in the model window.
8. In the model window, click the position where you want to place the attribute.

The attribute is placed in the selected position in the model window.

Reposition a placed attribute

1. Click the placed attribute you want to reposition. The handles will be colored.
2. Hold down the mouse button.
3. Drag the attribute to the position in the model window where you want to place it and release the mouse button.

The attribute is placed in the selected position in the model window.
You have placed attributes at any positions.

3.3.1.4.22 Place attributes from Attributes tab

Use the **Attributes** tab to quickly place an attribute.

Procedure

1. Select the object you want to place a new attribute for.
2. Click  **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Behind the attribute you want to place, click  **More**.
5. Click  **Place attribute**.
6. Move the mouse pointer to the model window. A frame is displayed.
7. Drag the frame in the model window to the position where you want to place the attribute.
8. Click the relevant position.

The attribute is placed.

3.3.1.4.23 Display names of placed attributes

You can specify that the attribute name of placed attributes is to be displayed in the model window.

Procedure

1. Select the placed attribute whose attribute name you want to display in the model window.
2. Activate the Start (page 275) tab bar.
3. Click  **Attribute placement**.
4. Enable the **With name** check box.

The attribute value is placed in front of the attribute name.

3.3.1.4.24 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 259).

Procedure

1. Click a placed attribute in the model window. The attribute is marked by a colored handle.
2. Press the **Ctrl** key, and click additional placed attributes you want to reposition or remove.

You can now delete or reposition (page 255) the selected attributes.

3.3.1.4.25 Edit placed attributes

You can edit placed text attributes of models, objects, and connections in the model window. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Click the placed attribute. It now has handles.
2. Click on the text attribute again. The attribute is selected for editing.
3. Change the text attribute as necessary.
4. Press the Enter key or click in the model background.

The text attribute is changed.

3.3.1.4.26 Directly format placed attributes

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

Prerequisite

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

Procedure

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

You have formatted the placed attribute.

3.3.1.4.27 Move placed attribute

You can move placed attributes of objects and connections.

Procedure

1. Click the placed attribute and hold down the mouse button. The attribute now has handles.
2. Drag the attribute to the required position and release the mouse button.

The attribute is placed at the new position.

3.3.1.4.28 Display placed attributes as a symbol

You can display certain attributes as a symbol (page 280) 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 275) tab bar.
3. Click  **Attribute placement**.
4. Enable the **As a symbol** check box.

The placed attribute is represented as a symbol.

3.3.1.4.29 Remove placed attribute

You can remove placed attributes from the model window. Of course, only the attribute placement is deleted and not the value that was placed. To change the attribute value, edit the attribute (page 221) on the **Attributes** tab of the  Properties bar.

Procedure

1. Select the placed attribute (page 257) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

3.3.1.4.30 Remove multiple placed attributes

You can remove multiple placed model, object, or connection attributes from the model window in only one step. Of course, only the attribute placement is deleted and not the value that was placed.

Procedure

Remove directly

1. Use the Ctrl key to select the placed attributes you want to delete in the model window directly.
2. Press the **Del** key.

The placements of the selected attributes are removed without prompting for confirmation.

Use a dialog

1. Select the object or connection whose attribute placements you want to remove.
2. Activate the Start (page 275) tab bar.
3. Click  **Attribute placement > Delete attribute placement**. The dialog is displayed.

4. Enable the check boxes for the placed attributes whose attribute placement you want to delete. You can enable all check boxes at once by enabling the superior check box **Attribute name**.
5. Click **OK**.

The placements of the selected attributes are removed without prompting for confirmation.

You have removed multiple placed attributes.

3.3.1.4.31 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 275) 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 in use are available for selection.
5. Enter the relevant model name. The name of the selected object is suggested as a model name.
6. Click **OK**.

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

3.3.1.4.32 Place model items one behind the other

You can specify in which order overlapping model items are placed one behind the other in the model window.

In the example below, it is assumed that you have created the three objects **1**, **2**, and **3** in sequence. As the most recently placed objects are created at the highest level, object **3** is at the highest level and object **1** is at the lowest level. You want to reverse this sequence.

Procedure

1. Activate the Start (page 275) tab bar.
2. Select the object **3** and click  **Arrange** >  **Send backward**.
3. Select the object **1** and click  **Arrange** >  **Bring forward**.

Now, when you place the objects one behind the other they are placed in the order 1, 2, and 3.

In the same manner, you can place graphic objects such as squares or circles behind parts of objects to highlight these areas separately.

3.3.1.4.33 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 275) tab bar.
3. Click  **Group/Ungroup > Group**. The selected model items are combined in a group (page 308). The handles are placed around the grouping.

To select all items in a group, click one of the previously independent items. You can now move them all together, for example.

3.3.1.4.34 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 275) tab bar.
3. Click  **Group/Ungroup > Ungroup**. The grouping is ungrouped. Each item has its own handles.

When you click one of the previously grouped items, it is now selected separately once again and can be moved separately.

3.3.1.4.35 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 275) tab bar.
3. Click  **Align** and then the relevant alignment, for example **Align left** or **Distribute vertically**.

The selected model items are aligned accordingly.

3.3.1.4.36 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 275) tab bar.
3. Click  **Match size of items** and then the relevant size change, for example,  **Same height (maximum)**.

The height of the selected model items is matched to that of the tallest item.

3.3.1.4.37 Select object or model in Explorer

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 275) tab bar.
3. Click  **Go to occurrence in Explorer**.

A new tab showing the repository opens. The group structure of the database expands and the check box in front of the selected object or model is enabled in the detail view.

3.3.1.4.38 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 275) tab bar, click  **Alfabet** >  **Map Alfabet object**. The **Select Alfabet object** dialog opens.
4. Select the Alfabet table, e.g., **Application**. You will see only those Alfabet objects you have the privileges to use. If you start typing the object name into the **Filter** field, the number of entries will decrease.
5. Click the Alfabet object you want to map to the ARIS object. The option button is activated.

6. Click **OK**.

The mapping between the Alfabet object and the ARIS object has been created. The name of the Alfabet object is now used for the ARIS object. Additional attributes have been entered for this object in the **Alfabet** attribute type group in ARIS.

3.3.2 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 275) tab bar, click  **Alfabet** >  **Map Alfabet object**. The **Select Alfabet object** dialog opens.
4. Select the Alfabet table, e.g., **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 the Model Editor, click  **Refresh**.

The new object is listed in the table.

3.3.2.1.1 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 262).
2. Select the relevant **Application system type** object.
3. In the Start (page 275) tab bar, click  **Alfabet** >  **Unmap Alfabet object**.

The mapping between the selected ARIS object and the Alfabet object is removed without prompting. All attributes in the **Alfabet** attribute type group are deleted. The name of the Alfabet object continues to be used for the ARIS object.

3.3.2.2 Valuable information

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

3.3.2.2.1 How is the Model Editor structured?

The Model Editor 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, 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

Using the bar buttons you can show or hide the **Search** and the **Comment, Properties, Reports, and Symbols** bars. You can also hide or show the header, depending on whether you need more space for the model window or want to be able to see the information provided in the header.



Tab bars

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

All tab bars contain frequently used buttons (page 274). 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 275).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 276).

FORMAT TAB BAR

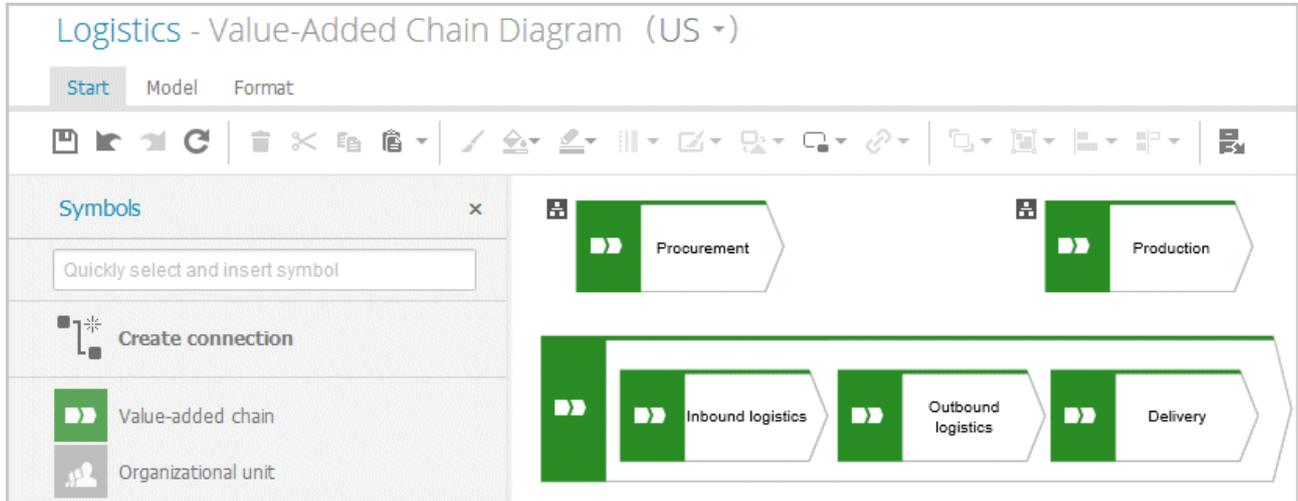
The **Format** tab bar groups the functions related to the presentation of written data in models (page 277).

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 278).

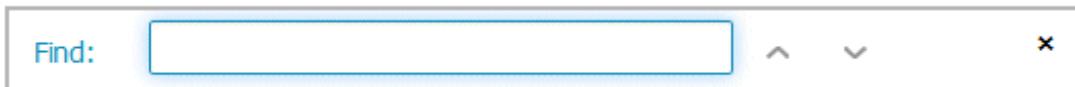
Model window

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



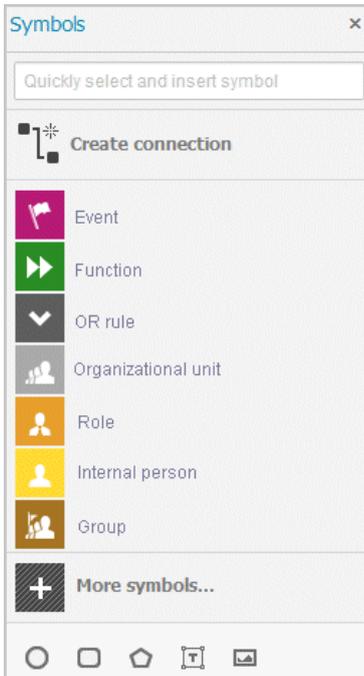
Find bar

Click  **Find** in the bar buttons to show the **Find** bar that you can use to have objects selected in the model.



Symbols bar

The **Symbols** bar provides object symbols (page 214), graphic objects (page 218), and text (page 223) for insertion into the model window. It also allows you to filter the available object symbols by entering names and create connections between (page 222) objects.



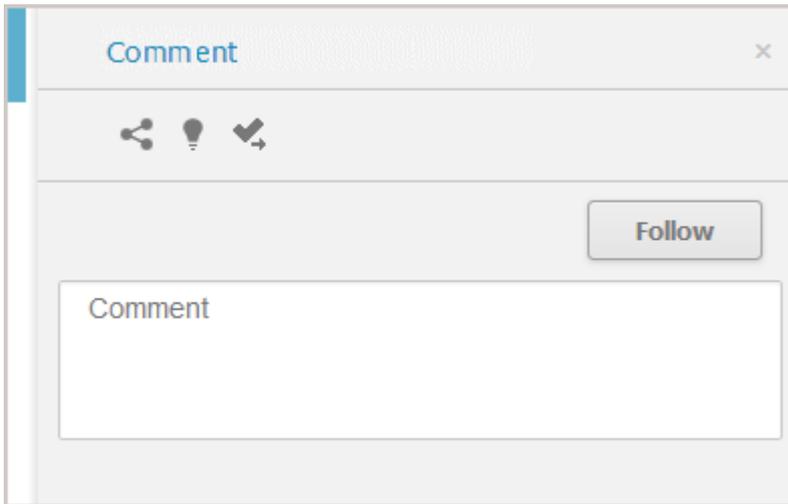
Properties bar

Click **i Properties** in the bar buttons to show the Properties bar where you can edit attributes (page 221), or view occurrences and relationships of objects, for example.

| Attributes | |
|-------------------------|----------------------|
| Name | Value |
| Name | Procedure |
| Time of generation | 2019 Apr 11 13:44:26 |
| Creator | system |
| Minimum processing time | 2 hours |
| Last change | 2019 May 15 14:59:22 |
| Type | EPC |
| Last user | system |
| More attributes... | |

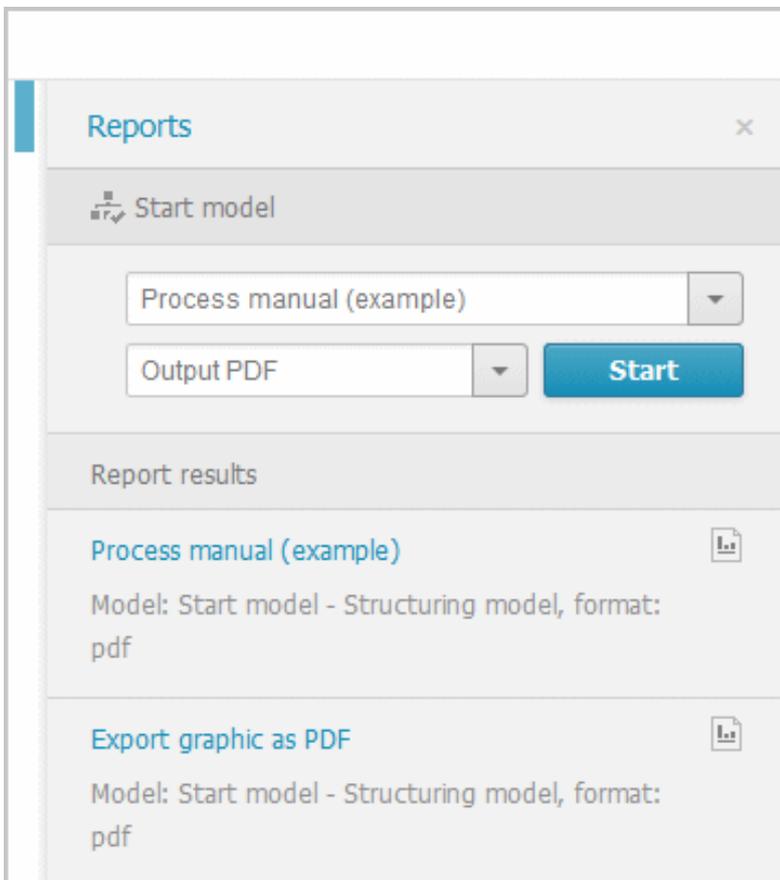
Comment bar

Click  **Comment** in the bar buttons to show the **Comment** bar that you can use to enter notes, improvement proposals, questions, etc., pertaining to the model.



Reports bar

Click  **Reports** in the bar buttons to show the **Reports** bar and generate reports.



Display bar

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

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



3.3.2.2.2 What model types are available in ARIS Connect?

The following model types are available. Depending on the filter you are using not all model types are available.

| |
|--|
| Access diagram |
| Access diagram (physical) |
| Application collaboration diagram |
| Application collaboration diagram (physical) |
| Application system diagram |
| Application system type diagram |
| ArchiMate model |
| Attribute allocation diagram (Solution Design) |
| 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 |
| Bow tie diagram |
| Business controls diagram |
| Business footprint diagram |
| Business rule allocation diagram |
| Business rule architecture diagram |
| Business segment matrix |
| Class diagram |
| CtX-tree |
| Data type diagram (Solution Design) |
| Data Warehouse model |
| Document structure (Solution Design) |
| DW structure |
| eERM |
| eERM attribute allocation diagram |

| |
|--|
| Enterprise BPMN collaboration diagram |
| Enterprise BPMN process diagram |
| EPC |
| EPC (column display) |
| EPC (horizontal table display) |
| EPC (material flow) |
| EPC (row display) |
| EPC (table display) |
| Fishbone diagram |
| Function allocation diagram |
| Function mapping |
| Functions mapping (SAP Solution Manager) |
| Function tree |
| IE Data model |
| Information carrier diagram |
| IT architecture mapping |
| IT architecture matrix |
| Knowledge map |
| Knowledge structure diagram |
| KPI allocation diagram |
| KPI tree |
| Network diagram |
| Network topology |
| Objective diagram |
| Organizational chart |
| Process selection diagram |
| Process selection matrix |
| Product allocation diagram |
| Product selection matrix |
| Product/Service exchange diagram |
| Product/Service tree |

| |
|---|
| Product tree |
| Program flow chart |
| 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 data flow model |
| SAP NetWeaver Business Warehouse mapping multi provider |
| SAP NetWeaver Business Warehouse structure |
| SAP NetWeaver Business Warehouse transformation |
| SAP Solutions allocation diagram |
| SAP Solutions organizational elements mapping |
| Screen design |
| Screen design (Solution Design) |
| Screen diagram |
| Screen navigation |
| Service allocation diagram |
| Service architecture diagram |
| Service collaboration diagram |
| SIPOC |
| Strategy allocation diagram |
| Strategy diagram |
| Structuring model |
| Survey management |
| SWOT diagram |
| System environment |

| |
|---------------------------|
| Table diagram |
| Task allocation diagram |
| Technical resources |
| Technical terms model |
| TOGAF diagram |
| Value-added chain diagram |
| Value stream map |
| Work breakdown structure |
| XML model |

3.3.2.2.3 Which method filter is used?

When you open and edit models, your work is based on method filters (page 311).

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 **Entire method** is used.
 - If the **Entire method** filter also does not exist, the first method filter of the alphabetically sorted list is used.

Database administrators specify which method filter a user may use in ARIS Cloud. To do this, a database administrator assigns the relevant method filter to the database and user in ARIS Cloud Administration.

3.3.2.2.4 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 274). 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 275).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 276).

FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 277).

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 278).

3.3.2.2.5 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 282) is inserted. Click the arrow next to the **Paste** icon if you want to paste a definition copy.

3.3.2.2.6 What buttons does the Start tab bar have?

The **Start** tab bar provides the following buttons.



Format painter: Transfers the format (page 251) from one item to another.



Fill color: Colors the item in the selected color (page 251).



Line color: Colors the line of the item in the selected color (page 253).



Equation 1: Edit

Line style and weight: Assigns selected items a different style (page 254) (**Dotted**, **Dashed**, or **Solid**) and defines the weight (page 254).



Appearance: Assigns other properties to or removes properties from selected items (page 255), such as **Shaded**, **3-D effect**, and in addition, **Active** for objects.



Change symbol: Changes the symbol (page 218) of a selected object or the symbols of all selected objects of a type.



Place attribute: Places text attributes at the preset positions.



Assignments: Assigns a new model to the selected object (page 260). The type and name of the new model can be selected.



Arrange: Positions selected items (page 260) behind or in front of other items.



Group/Ungroup: Groups selected items (page 261), so that they can be treated like a single item or ungroups them (page 261).



Align: Aligns selected items on the modeling area with regard to each other (page 261).



Match size of items: Matches the size of selected model items with each other (page 262).



Go to occurrence in Explorer: Opens a new tab showing the repository for the selected object or model and enables the relevant check box.



Alfabet: Provides functionality for establishing connections (page 262) with Alfabet.

3.3.2.2.7 What buttons does the Model tab bar have?

The **Model** tab bar provides the following buttons.



Optimize layout: Automatically creates a new layout for the model.



Horizontal space: Inserts space in your model from left to right.



Vertical space: Inserts space in your model from top to bottom.



Export graphic: Exports the graphic of the model to your download area.



Grid: Shows and hides (page 213) the grid in the model windows and sets the grid width (page 214).



Template: Provides the available model templates for selection (page 210).

3.3.2.2.8 What buttons does the Format tab bar have?

The **Format** tab bar provides the following buttons.



Format painter: Transfers the format (page 251) from one item to another.



Font format: Provides the available font formats for selection.



Bold: Applies bold formatting to a text.



Italic: Applies italic formatting to a text.



Underline: Applies underline formatting to a text.



Strikethrough: Applies strikethrough formatting to a text.



Font color: Opens the color palette for you to change the color of the selected text.



Font: Provides all fonts available for the selected text.



Font size: Enables you to change the font size for the selected text.



Reset character formatting: Undoes all formatting changes.



Increase indent: Increases the text indent from the left margin.



Decrease indent: Decreases the text indent from the left margin.



Bullets: Applies a bullet to each paragraph of the selected text.



Numbering: Turns the paragraphs of the selected text into a numbered list, starting at 1.



Align left: Aligns selected text to the left.



Centered: Aligns selected text to the center.



Align right: Aligns selected text to the right.

3.3.2.2.9 What buttons does the BPMN tab bar have?

The **BPMN** tab bar provides the following buttons.



Change symbol: Changes the symbol (page 218) of a selected object or the symbols of all selected objects of a type.



Add lane: Adds a new lane (page 225) to a pool or lane.



Insert lane: Inserts a selected lane in the selected pool or lane (page 225).



Delete pool or lane: Deletes the selected pool or lane (page 226).



Move lane: Moves the selected lane (page 225) in the required direction.



Transform into call conversation: Transforms communication elements into call conversations (page 226).



Change type of sequence flow: Specifies the type of a sequence flow (page 226).



Collapse subprocess: Collapses a subprocess object (page 227).



Expand subprocess: Expands a subprocess object (page 227).



Figure 1: Edit

Edit: Opens the assigned model contained in the subprocess (page 227) 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 228).

3.3.2.2.10 What is the mini toolbar for?

The mini toolbar provides you with exactly the object symbols that can be linked to the selected object using a connection.



When you place an object symbol from the mini toolbar in the model window a connection between the selected object and the new object symbol is created at the same time. In addition, you can use the mini toolbar to create connections to existing objects.

The mini toolbar is configured for each object type. When you click an object, the mini toolbar provides the object symbols you selected for the underlying object type.

3.3.2.2.11 How are object relationships displayed by symbols?

The relationships are identified by the following symbols:



Symbol for relationships for which an occurrence or an implicit connection exists in the current model.



Symbol for assignment relationships (implicit relationships).



Symbol for relationships for which no occurrences exist in the current model and that are not implicit either.

For example, if a connection was created between objects **A** and **B** and object **B** has been deleted, the relationship is displayed when object **A** is selected.

3.3.2.2.12 What placed attribute does an object have?

If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window.

If you want to place more attributes, it is useful to place them near the object to which they belong. It can however occur that in the layout objects are positioned very close to one another making it difficult to say which object a placed attribute belongs to. In addition, it is also possible to place attributes freely. If an attribute was placed farther away from its object it may be difficult to assign the placed attribute after the layout is changed.

By clicking on an object it is given colored handles as a marker and its attributes are given handles that are not colored. This enables you to identify which placed attributes an object has.

This also applies to placed attributes that do not have an attribute value. They are invisible in the model window until you assign a value to them. If the associated object is selected the "invisible" placed attribute also receives attribute handles.

3.3.2.2.13 What to consider when placing objects in/on objects

You can place objects on other objects (page 246) or in other objects (page 245). 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 modeling area. The connections linking the objects are then displayed.

3.3.2.2.14 What does place attribute as a symbol mean?

Attributes of objects can be placed in the model window which allows them to emphasize additional, important aspects in the model.

A symbol can be placed instead of a value for some attributes, which allows the attribute value to be identified immediately.

If such an attribute was specified and placed, e. g., the **Existence** attribute, the **As a symbol** check box becomes available. If you enable the check box, a plus sign is placed in the modeling area instead of **Yes** for the **Existence** attribute, and a minus sign instead of **No**.

3.3.2.2.15 What does place attribute as a symbol mean?

There are attributes for which a default symbol is defined.

If such an attribute was specified and placed, e. g., the **Existence** attribute, the **As a symbol** check box becomes available. If you enable the check box, a plus sign is placed in the modeling area 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 Cloud Administration.

3.3.2.2.16 What happens to placed attributes that have no attribute value?

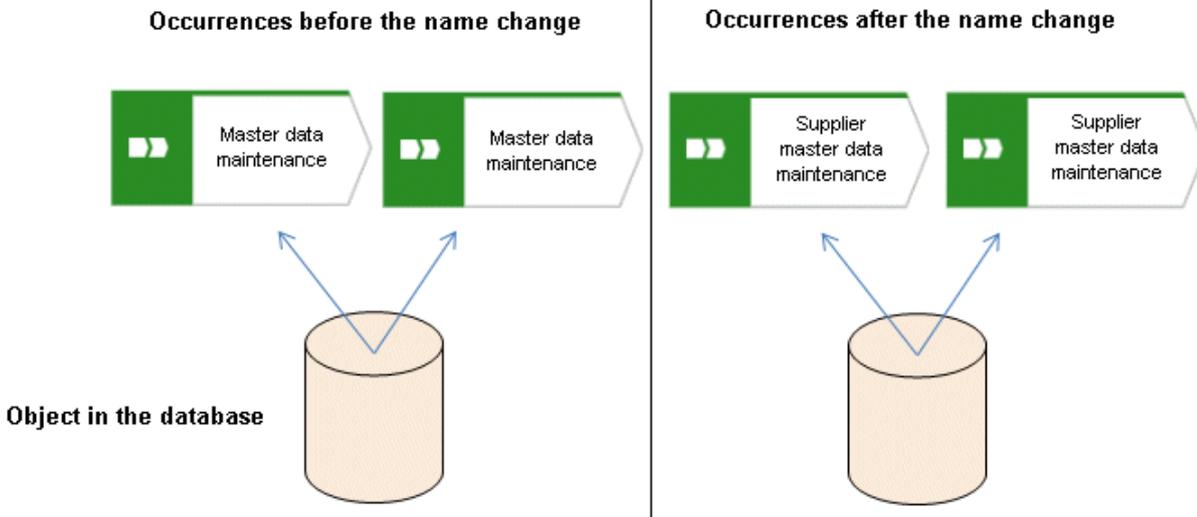
If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window. The usual procedure is to place attributes with an attribute value that can be seen directly in the model.

However, it may be useful to place attributes that are assigned a value at a later point in time. If, for example, it was defined that, as a rule, the maximum processing time is to be placed to the upper left of the **Function** object type this may happen even if the attribute value of this attribute has not been entered for all functions. If the value is entered later it is automatically displayed in the model window.

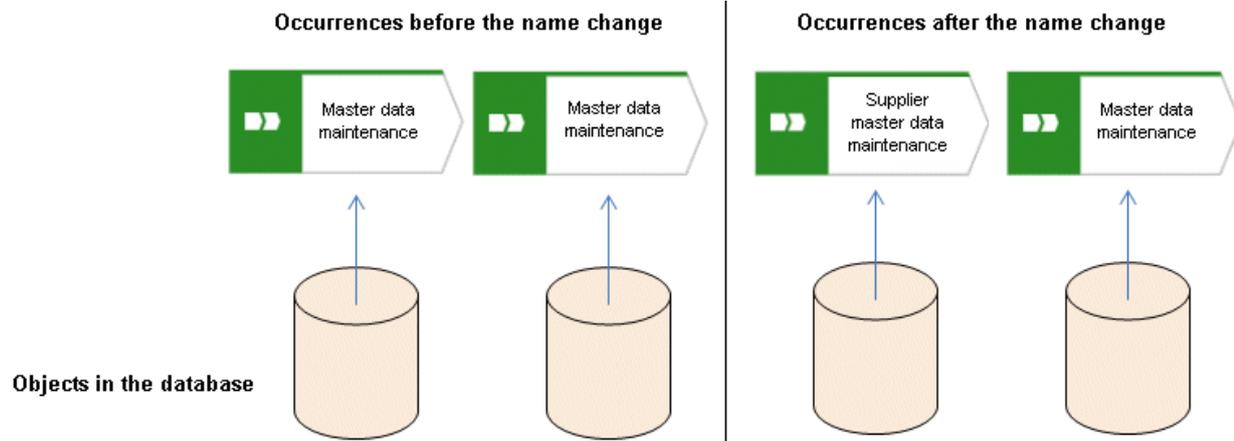
If a placeholder is to be used to make the placement of attributes without a value visible in the model window, you can define that they are to be placed with an attribute name. In our example, **Max. processing time:** would then be output for the relevant functions, and a value entered would appear behind the colon.

3.3.2.2.17 What is the difference between occurrence copy and definition copy?

An occurrence copy is only the copy of a graphical representation of an object. Thus, when you create an occurrence copy, a graphic is created that references the copied object:



When you create a definition copy, an entirely new object is created whose attributes are identical with those of the copied object:



If attributes of an object are changed, this change also applies to the corresponding attributes in all occurrences of the object. This becomes clear when changing the **Name** attribute:

| | Source object | Occurrence copy | Definition copy |
|------------------------|---------------|-----------------|-----------------|
| Before the name change | | | |
| After the name change | | | |

3.3.2.2.18 Which items can be copied from one model to another?

You can copy graphic objects, such as circles, free-form texts, graphics, and objects, from one model to another.

However, for an object to be pasted in the target model it has to be allowed there by the method. For example, if you copy functions and organizational units in the source model, only the organizational units will be pasted into a model of the **Organizational chart** type because functions are not allowed in this model type. The corresponding information is provided by the preview frames of the copied functions, showing as crossed out with an X when they are pasted into the organizational chart.

3.3.2.2.19 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, e.g., circle, square, etc.
- Free-form texts and placed model attributes
- Groupings (as the target, with the formats being copied to all items in the grouping as if the items were selected individually)

FORMAT COPYING AFFECTS THE FOLLOWING ATTRIBUTE PLACEMENT CHARACTERISTICS:

- Placement and sorting
- Font formats and individual characters as well as paragraph formatting for attribute definitions if the formatting includes the entire text.
- Alignment
- **With attribute name** and **As a symbol** settings

WHEN A FORMAT IS COPIED, IT AFFECTS THE FOLLOWING CHARACTERISTICS OF FREE-FORM TEXTS/PLACED MODEL ATTRIBUTES/ATTRIBUTE OCCURRENCES:

- Font formats
- Alignment
- **As a comment** setting
- **Character formatting** setting
- General character formatting.

3.3.2.2.20 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, e.g., background color, grid, and print settings, and the **New connections only right-angled** setting are not copied for models.
- In terms of attribute placements, the text area size is not copied.
- The size is not copied for objects, free-form text/placed model attributes/attribute occurrences in order not to destroy the layout of models.

3.3.2.2.21 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, e.g., 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 for 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 modeling areas and copy the format without having to consider whether object occurrences will be changed unintentionally.

PLACED SOURCE AND TARGET ATTRIBUTES DIFFER

The copy format function copies the formats only from placed attributes that exist in both the source and target object occurrences. The position is not copied. If the source and target attributes have different placements, the attribute placements are not deleted or created

3.3.2.2.22 How is the format copied to placed attributes?

You can copy the formats of a selected item to another item or to several other items.

The following applies to placed attributes and free-form texts:

- If object or connection occurrences are the target, all of the placed attributes of the target are modified. The position is not changed.
- If placed attributes or free-form texts are the target, the target text is modified. The position is not changed.

3.3.2.2.23 How to import a BPMN file

The following applies when importing (page 206) a BPMN 2.0 diagram:

- You can import BPMN diagrams of the **BPMN collaboration diagram (BPMN 2.0)** and **BPMN process diagram (BPMN 2.0)** type.
- **<bpmn:import>** elements are not supported (see chapter 15.3.1 **Document Structure** of the BPMN specification (<http://www.bpmn.org/>)).
- Existing ARIS objects are not reused. Importing the same file multiple times results in new models and definition copies. Occurrence copies of objects are not generated.
- XSD ID references are supported. QNames that can contain namespaces are not supported (see chapter 15.3.2 **References within the BPMN XSD** of the BPMN specification (<http://www.bpmn.org/>)). The BPMN file is validated against the official XML schema of the BPMN 2.0 specification and imported if validation is successful. If errors are found, these are displayed in a dialog.
- There are character limits for attributes in ARIS. For example, the Name (AT_NAME) attribute can have a maximum of 250 characters. If the BPMN import exceeds this number of characters, the first 250 characters are used and the remaining characters are cut off.

3.3.2.2.24 What is Alfabet?

Alfabet is an IT planning and portfolio management system. Based on answering the questions, when, where, how and why to make changes in the IT portfolio, it is used to increase IT investment returns and reduce transformation risks.

3.3.2.2.25 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. By default, data from applications can be transferred from Alfabet to the ARIS database, while processes and functions can be transferred from ARIS to the Alfabet database.

It is easy to navigate between the systems. For example, from a business process in Alfabet, you can jump to the corresponding function or to a model in ARIS Connect that contains the function.

3.3.2.2.26 When is the Alfabet button shown?

When Alfabet is configured with ARIS Architect, the Alfabet button is available in the Start (page 275) tab bar. You can find the complete configuration description in the ARIS Architect online help.

3.3.2.2.27 What reports are available?

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

Create process manual (page 142)

Export graphic as PDF (page 143)

Generate job description (page 144)

Output functions across multiple assignment levels (page 146)

Output functions with connected objects (page 148)

Output model information (page 149)

Output model information considering various aspects (page 150)

Output object information (page 151)

Process manual (example) (page 151)

RA(S)CI - Output organizational participations in processes (page 152)

3.3.2.2.27.1 Create process manual

USE

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

CONTEXT

Models of type:

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

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

3.3.2.2.27.2 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

3.3.2.2.27.3 Generate job description

USE

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

The following information can be output for each function:

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

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

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

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

Script administrators can change the content of the output.

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

CONTEXT

MODELS OF TYPE

- EPC
- FAD
- Office process
- VACD

OBJECTS OF TYPE

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

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

OUTPUT FORMAT

- DOC
- XLS
- PDF
- DOCX
- ODT

3.3.2.2.27.4 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, e.g., based on the model type. In turn, all functions are analyzed for the assigned model.

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

OUTPUT

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

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

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

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

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

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

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

CONTEXT

Model

OUTPUT FORMAT

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

3.3.2.2.27.5 Output model information

USE

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

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

CONTEXT

Models

OUTPUT FORMAT

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

3.3.2.2.27.6 Output model information considering various aspects

USE

Outputs model information including group structure as an Excel table.

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

The following aspects can be output:

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

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

CONTEXT

Models and groups

OUTPUT FORMAT

- XLS
- XLSX

3.3.2.2.27.7 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
- DOCX
- ODT

3.3.2.2.27.8 Process manual (example)

USE

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

CONTEXT

Objects

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

3.3.2.2.27.9 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 with the modeling conventions required.

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

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

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

- **Responsible** indicates who assumes execution responsibility. It shows who is responsible for performing an activity and who actually performs it, but also who assumes the disciplinary responsibility. Execution responsibility must be assigned to at least one role, although others (see **Supportive**) can be delegated to assist in the work required.
- **Accountable** identifies the person ultimately answerable for the correct and thorough completion of a task. Thus, 'Accountable' may be the one in charge of managing the costs, i.e., the one who assumes project budget responsibility. The **decides on** and **accepts** connections are evaluated in order to mark this responsibility.
- **Supportive** relates to the person supporting the person responsible (see 'Responsible') in performing the activity.
- **Consulted** shows who has a consulting role. This organizational unit - typically a group of subject matter experts - is asked for advice prior to a final decision being made or a final action being taken.
- **Informed** specifies who must be informed. It indicates who is kept up to date on the progress or completion of a task.

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

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

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

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

CONTEXT

- Individual process
- List of processes
- Process hierarchy

OUTPUT FORMAT

- XLS

3.3.2.2.28 What report output formats exist?

When you click the output button in the Reports bar, for example, **Output PDF**, the report is output in the selected format. You can change the output format by clicking the down arrow. The selection of output formats may be restricted based on the report. Possible output formats are:

PDF

DOC

DOCX

ODT

RTF

HTML

TXT

XLS

XLSX

XML

3.3.3 Version models

In ARIS Connect you can version models and thus store different model states.

The different model versions can be opened for information, while the workspace model is the only one available for editing.

Within the scope of Release Cycle Management (RCM) you can identify and explain specific model versions. The change lists are used to continuously document the changes to models, which means that the documentation can be used both internally and externally.

The permanent locking and versioning functions support key aspects of Release Cycle Management.

Versioning is not performed automatically when saving; it is performed when the content is suitable for versioning. "Suitable for versioning" means that a model has reached a state that is to be archived.

3.3.3.1 Version models

You can version models, for example, to use them in Release Cycle Management (RCM).

Prerequisite

- You have opened a versionable database.
- You have the **Version** access privilege.

Procedure

1. In the  repository, navigate to the database group containing the models you want to version. When you select the group, its content is displayed.
2. If you want to version a model, move the mouse pointer to the row with the model and click  **More**.
If you want to version multiple models, enable the check boxes for the relevant models and click  **More** above the item list. The menu is displayed.
3. Click  **Versioning**. The **Enter description** dialog opens.
4. Enter a change description. This description informs users of the changes made since the last version and why they were made.
5. Click **OK**.

The model/s is/are saved as a version and a change list including the description is created.

3.3.3.2 Show versions

You can display a list of versions of a model.

Procedure

1. In the  repository, navigate to the database group containing the model whose versions you want to view. When you select the group, its content is displayed.
2. Move the mouse pointer to the row with the relevant model and click  **More**. The menu is displayed.
3. Click  **Show versions**. The **Version overview** dialog opens.

All versions of the model are displayed. The date it was saved, its change list numbers, and the version descriptions are shown.

3.3.3.3 Open version

You can open a version of a model for information purposes.

Procedure

1. In the  repository, navigate to the database group containing the model whose version you want to open. When you select the group, its content is displayed.
2. Move the mouse pointer to the row with the relevant model and click  **More**. The menu is displayed.
3. Click  **Show versions**. The **Version overview** dialog opens.
4. Click the name of the version you want to open.

The write-protected version of the model opens in Model Editor and you can obtain information on the model's contents. Furthermore, you can view reports on the model or selected objects (page 68).

3.3.4 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

3.3.4.1 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 not be opened by any user, not even by yourself.
- 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 unlock them again.

3.3.4.2 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.

3.3.4.3 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 not be opened by any user, not even by yourself.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the  repository, navigate to the database group containing the content you want to unlock. When you select the group, its content is displayed.
2. If you want to unlock a model, move the mouse pointer to the row with the model and click  **More**.
If you want to unlock multiple models, enable the check boxes of the relevant models and click  **More** above the item list. The menu is displayed.
3. Click  **Unlock**. The lock is removed and you will be informed of the result. If it was impossible to unlock one or multiple objects of a model, you will be informed of the items that were unlocked and those that could not be unlocked.

The dialog closes and the models (and objects, if applicable) are unlocked.

3.3.4.4 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 not be opened by any user, not even by yourself.
- 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 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 + 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 + Write + Version (rw-v)

The group content is displayed. Users can change models and objects, add new items, delete object occurrences from models, and version models. Object definitions cannot be deleted.

Read + Write + Delete + Version (rwdv)

The group content is displayed. Users can modify models and objects, add and delete items, and version models.

Alternative language

Database language in which database content is displayed if attribute values are not specified in the database language used. When you create a database, **English (United States)** is selected automatically. On the **Administration** tab, you can change the alternative language.

ARIS Administration

Manages users, user groups, privileges, licenses, documents, configurations, and processes for a tenant (page 316).

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.

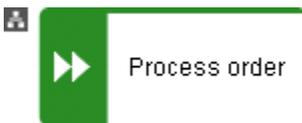
If a model is assigned to an object, this can be indicated by an assignment icon. An assignment enables you, e.g., to use a model to describe objects in detail and thus get from a rough plan to a detailed plan.

Assignment icon

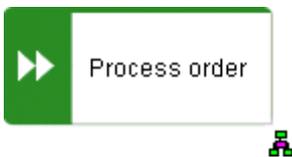
Icon that shows that one or more models are assigned to an object by an assignment relationship.

You can open assigned models by double-clicking the assignment icon. The assignment icon is displayed if you have disabled the **Hide assignment icons** option.

The assignment icon may look different and may be placed at different points in the object depending on the model template you are using.



You can also assign an assignment icon of your own to a database. It is displayed to the right of the icons.



Assignment relationship

Relationship of an object to a model assigned to it.

You can create an assignment relationship using drag and drop or using the object properties dialog. The assignment relationship is displayed at the object by an assignment icon.

B

BPMN

Business Process Model and Notation (BPMN) is a graphical notation used to describe business processes.

C

Change list (versioning)

Includes selected content of a database. This may comprise individual models, multiple models without interdependencies, related models, group content, or the entire database contents. They will be versioned together and saved under one change list number. Change lists are sorted in ascending order.

A description of the change list characterizes the versioned contents. The change list description records who versioned which database content, when, and why. Opening a change list displays the database content you selected for versioning. This can be a model, or the entire database content.

Change list number (versioning)

Number and description of a version of the database content. Change list numbers can be used to select particular versions for viewing. You have only read access for the content.

Change lists are sorted in ascending order. (Versioning state)

CRON expression

String consisting of six to seven fields that is separated by a space and represents a time.

Normally, a CRON expression is used to define routine jobs that are executed automatically at certain times by the system.

Fields

- Seconds, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Minutes, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Hours, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Day in month, mandatory field, valid value: **0-59**, valid characters: ***, /, , -**.
- Month, mandatory field, valid value: **0-12** or **JAN-DEC**, valid characters: ***, /, , -**.
- Day of the week, mandatory field, valid value: **0-7** or **SUN-SAT**, valid characters: ***, /, , -, ?, L, C, #**.
- Year, not a mandatory field, valid value: **1970-2010**, valid characters: ***, /, , -**.

Current version (versioning)

Corresponds to the last versioned database content. This version includes the entire versioned content of a database. You have only read access for the content.

In principle, this is the last change list created for a database (versioning state).

D

Definition copy

Copy of the object definition, i.e. of the entire object, rather than just the occurrence as is the case with the occurrence copy.

The definition copy creates a new object. The occurrence, which is created when creating the definition copy, refers to the new object.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It makes sense to create a definition copy for an existing object if a new object is to have properties similar to those of the source object.

For example, you have modeled the object **Plant 1** and specified its properties. You now wish to create the object **Plant 2**, which has properties similar to Plant 1. In this case, it is advisable to create a definition copy of Plant 1. Object **Plant 2** is thus given all the properties of object Plant 1, but exists independently of it. You now simply need to change the properties that differ from those of object Plant 1, for example, by changing the name to **Plant 2**.

This involves significantly less work for you than creating the object from scratch and having to enter all the properties again.

Some attributes are not copied when the definition copy is created. For example, it does not make sense to copy the identifier of an object because the identifier represents a unique ID of an object.

E

Escalation manager

The escalation manager is the user who is notified when a human task is not completed by any executor by the due date.

F

Fully-qualified host name (FQHN)

The fully-qualified host name (FQHN) is the host name that is specified as the IP address of a computer or as a fully-qualified domain name (FQDN) in the following form:

my.department.example.com.

Function privilege

Controls tasks that users can perform.

You can use function privileges to provide users with specific functionality and thus control their authorizations across a database in ARIS Architect. Function privileges are assigned on the properties pages of users or user groups. In ARIS Administration, administrators manage users, user groups, cross-database and cross-product privileges and licenses for all ARIS products.

G

Graphic objects

Graphic elements without implicit semantic meaning. They can be used, for example, to indicate model areas, to specially highlight objects that are thematically linked, or to prepare models so that they are suitable for presentation.

Graphic elements include circles, squares, and polygons.

Grid

Placement markings in the model window in the form of dots that you can show for modeling support (page 213).

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 261).

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, e.g., backup and restore tenants. This requires the creation of a user in the user management for the infrastructure tenant, e.g., **master**. This user must be assigned all licenses and privileges that are needed for the action.

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, i.e., they can access ARIS Administration and Tenant Management.

Users with the relevant privileges can specify other infrastructure tenants in ARIS Administration.

J

JAAS

Java **A**uthentication and **A**uthorization **S**ervice (**JAAS**).

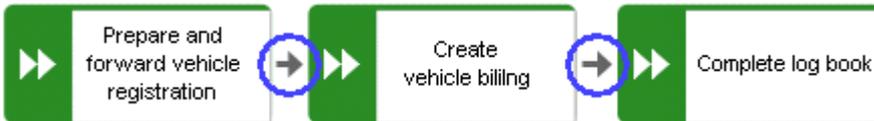
A Java interface that enables you to provide services for authentication and access privileges in Java programs. JAAS supports user-based authentication.

K

Connection

Visible relationship between objects, which is created during modeling. It is thus a graphical representation of a relationship.

A connection is usually represented by lines in the model window. If a direction is relevant, the line is added an arrow. One example is the connection of the **is predecessor of** type between functions in models of the **EPC** (event-driven process chain) type.



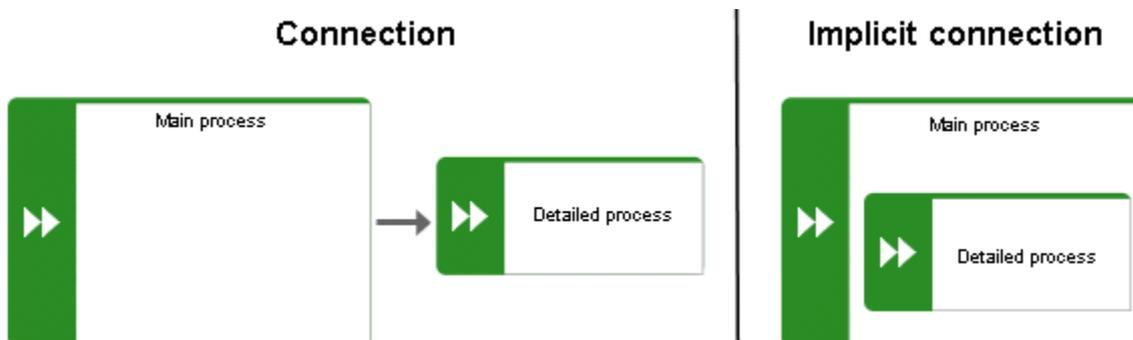
Connection, implicit

Invisible connection.

Implicit connections are created if the **Create implicit connections for overlapping objects** option is enabled and objects are placed within objects. In the displayed dialog, you can decide whether to hide any connections and, if so, which connections to hide for these objects. The difference between implicit connections and implicit relationships is that an implicit connection can be represented by a line in the model window. This line is displayed again, for example, if you drag an object from another object down into the free area of the model window.

Example of implicit connections:

Place a function on another function in a model of the **EPC** type.



In a model of the **PCD** type, place a function in the **Function** column and an organizational unit in the **Organizational unit** column. An implicit connection of the 'carries out' type is automatically created from the organizational unit to the function.

| Function | Organizational unit |
|---|---|
|  |  |

This needs to be differentiated from implicit relationships (page 313).

L

Lane 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.

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 220) 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.

O

Occurrence

Graphical representation of objects, connections, and free-form texts.

It is used to represent items in a model.

With an occurrence copy several occurrences of an object can be created. These can differ within a model and/or in different models, i.e., 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, i.e., only the graphical representation of an object, rather than the entire object as with the definition copy.

All of the occurrence copies of an object represent the underlying object definition.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It is helpful to create a copy of the object symbol for an existing object - i.e., 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

ARIS Process Board

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

R

Relationship

Connection that can exist between model elements and among models.

Relationships include connections, implicit connections, implicit relationships, assignment, and variant relationships. Therefore, the term **relationship** is a superordinate term for all links that can exist between objects and models.

Relationship, implicit

Assignment relationship, i.e., 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 314) 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)

The advantage of using SSO is that users need to remember only one password when logging in to the network. After entering the password at their workspace, they have access to all computers, services and programs for which they have the required privileges, without having to enter the password again.

SSL

Secure **S**ocket **L**ayer (**SSL**).

Security software for encrypting data that is exchanged between programs.

Structurally relevant objects

Basic model objects.

These are objects that indicate the distinctive feature of a model. For a model of the **Organizational chart** type, the objects **Organizational unit**, **Role**, and **Person** are structurally relevant objects, for example. Using these items, you can build the typical hierarchy of an organizational chart.

The **Event** and **Function** objects are typical for the **EPC** model type and are thus structurally relevant to a business process. You can use these to establish the typical control flow. The **Organizational unit**, **Role**, and **Person** objects can also be inserted into an **EPC**. However, these objects do not constitute the distinctive feature of a business process. As structurally irrelevant objects, they act as satellites, and add more detailed information to the process model. For example, you can insert **organizational units** and link them to functions to illustrate who carries out those functions.

An object that can be inserted in a model or diagram but is not a structurally relevant object is known as a satellite (page 314).

superuser

The user **superuser** is created automatically. By default, this user is assigned the **User management, License management, and Configuration administrator** function privileges. This user can also activate this function privilege for other users. The **superuser** user does not use up a license. The **superuser** user manages 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. You can change all user data except for the user name.

system

The system user **system** assumes the administrator role of the system administrator and has all function and access privileges in all databases. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP, for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. If you forgot the passwords of all your system users, the full range of functions and access to the data in this database are no longer available to you.

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. 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. 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. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP, for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. If you forgot the passwords of all your system users, the full range of functions and access to the data in this database are no longer available to you.

What is the user 'arisservice'?

System database

This database manages the content of the **Configuration** and **Evaluations** folders, which is displayed on the **Administration** tab. This includes filters, templates, and font formats, but also ARIS Method and all common files, report scripts, scheduled reports, semantic checks and macros.

The system database is created automatically while the first user is logging in to ARIS. The content is available for all databases of this tenant. The ARIS Service Administrator commands **backupsystemdb**, **restoresystemdb**, and **updatesystemdb** can be used to save and restore this data centrally.

After performing an update setup, please update the system configuration of the tenant (filters, templates, and scripts) based on the supplied system database (ARIS_DVD/Content/SystemDB/*.adb). Any content you have created will be retained.

Syntax

```
updatesystemdb <archive>
```

Restores the central system database that contains data such as filters, model templates, and scripts from a system database backup file (ADB) <archive>. It is also possible for you to update the system database using the **updatesystemdb** command

After performing an update setup, please update the system configuration of the tenant (filters, templates, and scripts) based on the supplied system database (ARIS_DVD/Content/SystemDB/*.adb). Any content you have created will be retained.

Syntax

```
updatesystemdb <archive>
```

Syntax

```
restoresystemdb <archive>
```

Saves the central system database that contains data such as filters, model templates, and scripts in an ADB file in a directory **<archivedir>**.

Syntax

```
backupsystemdb <archivedir> [<alternatename>]
```

T

Tenant

Provides a user with a particular functionality and specific data depending on their license. One ARIS Administration exists for each tenant. All ARIS clients use tenants to access database servers and thus work with a common data basis. For each tenant, there is a configuration on the **Administration** tab that defines ARIS Method and the modeling conventions. These are used by all databases on that tenant.

All tenants are managed using the Infrastructure tenant.

TLS

Transport Layer Security (**TLS**).

TLS is known under the name of its predecessor **Secure Sockets Layer (SSL)** and is an encryption protocol for the secure transfer of data on the Internet.

U

UML (Unified Modeling Language)

UML is a graphical modeling language for specifying, constructing, and documenting software, parts of software, and other systems. This "unified" modeling language specifies the notations of the modeling terms and their relationships. It also defines the graphical notation, the static structures, and the dynamic processes.

URI

String that is used to uniquely identify an abstract or physical resource.

URIs are used to describe resources (such as Web sites, other files, calls for Web services) on the Internet.

URIs can be incorporated as a string (encoded with a character set) into digital documents, particularly those in HTML format, or written by hand. A link from one Web site to another is called a hyperlink.

URL

Uniform Resource Locator, a particular type of URI (**Uniform Resource Identifier**).

URLs identify a resource via the network protocol used (e.g., http or ftp) and the **location** of the resource (e.g., 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 (e.g., **system**) for access to a database. The user name does not necessarily have to correspond to a person's real name.

Access to a database is possible if a user logs in to it with the combination of user name and password that has previously been stored for the database. This is the case when the system administrator or a user with the **User management** function privilege creates the new user.

V

Version

A model that remains fixed and can no longer be changed in a change list.

The versioning state of the last version created is the current version.

Version number

Number assigned to a model during versioning.

The number relates to the model whose versions are numbered in ascending order.

Versioning state

Image of database content recorded at a certain point in time.

A versioning state can include models of different versions with different or identical version numbers that represent a specific state. While Workspace represents a state that is editable but has not yet been versioned, the versions are included in the Current version state and in the revisions associated with the Change list numbers.

W

Workspace (versioning)

Indicates the database content that has not yet been versioned. It can be edited. (Versioning state)

5 Support information

5.1 Support

ONLINE

A valid support contract allows you to access the solution database.

Click <https://empower.softwareag.com/> (<https://empower.softwareag.com/>).

If you have any questions on specific installations that you cannot perform yourself, please contact your local Software AG sales organization.

BY TELEPHONE

If you have a valid support contract, you can contact Global Support ARIS at:

+800 ARISHELP

The plus sign stands for the prefix required in a given country to dial an international connection.

Example for dialing within Germany with a direct extension line: 00 800 2747 4357

5.2 Disclaimer

ARIS products are intended and developed for use by persons. Automated processes, such as the generation of content and the import of objects/artifacts via interfaces, can lead to an outsized amount of data, and their execution may exceed processing capacities and physical limits. For example, processing capacities are exceeded if models and diagrams transcend the size of the modeling area or an extremely high number of processing operations is started simultaneously. Physical limits may be exceeded if the memory available is not sufficient for the execution of operations or the storage of data.

Proper operation of ARIS products requires the availability of a reliable and fast network connection. Networks with insufficient response time will reduce system performance and may cause timeouts.

If ARIS products are used in a virtual environment, sufficient resources must be available there in order to avoid the risk of overbooking.

The system was tested using scenarios that included 100,000 groups (folders), 100,000 users, and 1,000,000 modeling artifacts. It supports a modeling area of 25 square meters.

If projects or repositories are larger than the maximum size allowed, a powerful functionality is available to break them down into smaller, more manageable parts.

6 Index

A

Alfabet

- Alfabet • 286
- ARIS and Alfabet • 286
- Configuration • 286
- Create object • 263
- Map objects • 262
- Unmap object • 263

ARIS Aware

- Dashboard Customer experience • 166
- Dashboard Customer journey map • 173
- Dashboard EA IT systems • 184
- Dashboard EA objectives • 187
- Dashboard EA organizational units • 180
- Dashboard Piwik - Publications • 176
- Dashboard Piwik - Technical KPIs • 178
- Dashboard Responsibilities • 170

ARIS document storage

- Customer experience • 166

Assignment

- Create new • 204

Attribute

- As a symbol • 259
- Documentation • 249
- Edit • 221
- Format placed attributes • 221
- Hide always • 208
- Hide, if not specified • 208
- Move placed attribute • 258
- Name of placed attributes • 257
- Place anywhere • 256
- Place fixed • 255
- Place from Attributes bar • 257
- Placed • 279
- Remove placement • 259
- Select placed attributes • 257

Attributes bar

- Set up • 208
- Show and hide • 206

B

BPMN

- Add lane • 225
- Assign global reference • 228
- Change loop type • 224
- Change sequence flow • 226
- Change symbol • 218
- Collapse subprocess • 227
- Delete pool or lane • 226
- Edit subprocess • 227
- Expand subprocess • 227
- Lane into a pool or lane • 225
- Move lane • 225

- Transform communication • 226

C

- Change symbol • 218

Collaboration

- Add documents to posts • 194
- Create filter • 195
- Create groups • 197
- Create user profile • 189
- Filter feeds • 196
- Follow feeds • 190
- Getting started • 189
- Group types • 202
- Invite user(s) • 198
- Open Collaboration • 189
- Target group for posts • 200
- Use hashtags • 196
- Use tags • 195

Comment

- Collaboration bar • 264

Connection

- Implicit (term) • 310
- Line style • 254
- Line weight • 254
- Term • 310

Contribution

- Change values • 104
- Changeable items • 110
- Create item in list • 106
- Delete item from list • 108
- Delete item from table • 107
- Edit mode • 109
- Editable attributes • 111
- Editing options • 112
- Item in table • 105
- Prerequisites • 109
- Saved items • 115

Coordinator

- Edit requests • 199
- Pass on privilege • 199

Copy

- Definition copy • 214
- Occurrence copy • 214

- Create group • 205

D

Dashboards

- Customer experience • 166
- Customer journey map • 173
- EA IT systems • 184
- EA objectives • 187
- EA organizational units • 180
- Piwik - Publications • 176
- Piwik - Technical KPIs • 178
- Responsibilities • 170

Database selection • 48

Display bar • 264

Document

Add documents • 86

Assign • 247

Link document to model or object • 74

Lock • 90

Move • 89

Rename • 81

Unlock • 91

Upload version • 88

F

Favorite

Favorites area • 103

Filter settings as favorite • 97

Use favorite settings • 97

Use favorite settings (Favorites area) • 98

Feed

Assign • 210

Definition • 200

Follow in ARIS Connect (group) • 198

Follow in ARIS Connect (user) • 191

Reset • 211

Find bar • 264

G

Glossary

Change glossary page • 52

Choose item • 50

Filter glossary • 51

Remove filter • 51

Grid

Change width • 210

Set width • 214

Show • 213

L

Language • 213

Lock

Models • 301

Objects • 302

Unlock models • 302

Unlock objects • 303

M

Method filter

Display current • 53

Mini toolbar

Configure • 209

Modeling • 220

Show and hide • 209

Structure • 279

Model

Adjust appearance • 223

Align items • 261

Assignment • 204

Attribute as a symbol • 259

Change item appearance • 255

Color elements • 252

Color items • 251

Create connections • 222

Create new • 203

Create new as an assignment • 204

Delete items • 223

Display items without color • 253

Edit attributes • 221

Element with gradient • 252

Find objects • 244

Format painter • 251

Group items • 261

Name of placed attributes • 257

Occurrence in Explorer • 262

Open • 212

Place attribute (anywhere) • 256

Place attribute (fixed position) • 255

Place graphic objects • 218

Place items one behind the other • 260

Place object symbols • 214

Place text • 223

Remove attribute placement • 259

Save • 224

Select placed attributes • 257

Show grid • 213

Ungroup • 261

Model Editor

Customize • 206

Definition copy • 214

Display bar • 264

Find objects • 244

Grid • 213

Mini toolbar • 279

Occurrence copy • 214

Set up Attributes bar • 208

Set up Symbols bar • 207

Structure • 264

Model item

Align • 261

Change appearance • 255

Color • 252

Color borders and lines • 253

Delete • 223

Display without color • 253

Format painter • 251

Gradient • 252

Group • 261

Line style • 254

Line weight • 254

One behind the other • 260

Reset border and line color • 254

Ungroup • 261

N

Notification • 194

O

Object

- In an object • 245
- Object in objects • 280
- Occurrence in Explorer • 262
- On an object • 246

Object symbol

- Change • 218
- Color • 251, 252
- Create assignment • 260
- Display without color • 253
- Find objects • 244
- Gradient • 252
- Line style • 254
- Line weight • 254
- One behind the other • 260
- Place • 214
- Reset border and line color • 254
- Reset color • 253

Occurrence/Presentation

- Display order • 133
- Occurrence copy • 214

P

Place • 218

Portal

- ARIS Online Guide • 119
- Move placed attribute • 258
- Navigation • 49
- Open assignment • 63
- Placed link attribute • 63
- Portal profiles • 9
- Print model graphic • 53
- Run transaction • 116
- SAP documentation • 117
- Switch form Steps to Diagram • 52

Post

- Comment, share, flag, etc. • 193
- Publish • 192

Profile

- Create/edit for Collaboration • 190
- Edit for ARIS Connect • 3
- Edit your profile • 3

R

RACI

- Available base diagrams • 122
- Base diagram • 120
- Display matrix • 121

Relationship

- Implicit (term) • 313
- Term • 313

Report

- Available • 141
- Export graphic • 142
- Generate • 54
- Generate job description • 144
- Output formats • 154
- Output functions • 146
- Output model information • 149
- Output object information • 151
- Output various model information • 150
- Print model graphic • 53
- Process manual • 151
- RA(S)CI • 152
- Reports bar • 264
- Run • 68

S

Search

- Open Search area • 94
- Quick search • 101
- Search area • 102
- Search context • 96
- Search results • 103
- Start • 93

Symbols bar

- Set up • 207

T

Table based modeling

- Add attribute column • 233
- Add object column • 233
- Arrange columns • 234
- BPMN • 240
- Create object • 229
- Edit attribute • 234
- Full-screen mode • 229
- Modeling table • 228
- Modeling using the keyboard • 236
- Remove column • 235
- Satellites • 232
- Split paths • 231
- Use existing objects • 230

Tabs

- BPMN tab bar • 278
- Format tab bar • 277
- Model tab bar • 276
- Start tab bar • 275

Template

- Assign • 210
- Reset • 211

U

UML

- Display • 137
- Prerequisites • 137

V

Version

- Models • 299
- Open version • 300
- Show versions • 300

View

- Navigation • 49
- SAP documentation • 117