ARIS Connect

VIEWER USER MANUAL

Version 10.0

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Contents

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 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.

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

As a user with the additional **Contribution** privilege, you can edit attributes of various model elements (page 87).

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

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

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 85) 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	▪ 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)	▪ 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 111) and the default view (page 112) 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 10) 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 12)
- Groups (page 13)
- Glossary (page 25)

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 61) to further restrict this content. Role filters are available only if roles are assigned (page 60) 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 176) you want to discuss with, for example.

Start discussion

Activates Collaboration where you can start a new discussion (page 176).

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 85) 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 177) or in the portal (page 58).

Favorites

Provides direct access to saved filter criteria (Seite 55) of the **Favorites** area of the search and to models a user selected as a favorite element (page 73).

Contacts

Lists your contacts.

My activities

Shows the current activities you are following in Collaboration or in the portal (page 177).

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.

Find people ( )

Activates Collaboration where you find people (page 176) you want to discuss with, for example.

Start discussion ( )

Activates Collaboration where you can start a new discussion (page 176).

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 85) 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 177) or in the portal (page 58).

FAVORITES

Provides direct access to saved filter criteria (Seite 55) of the **Favorites** area of the search and to models a user selected as a favorite element (page 73).

CONTACTS

Lists your contacts.

MY ACTIVITIES

Shows the current activities you are following in Collaboration or in the portal (page 177).

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 58) and **Comment** (page 57), 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.

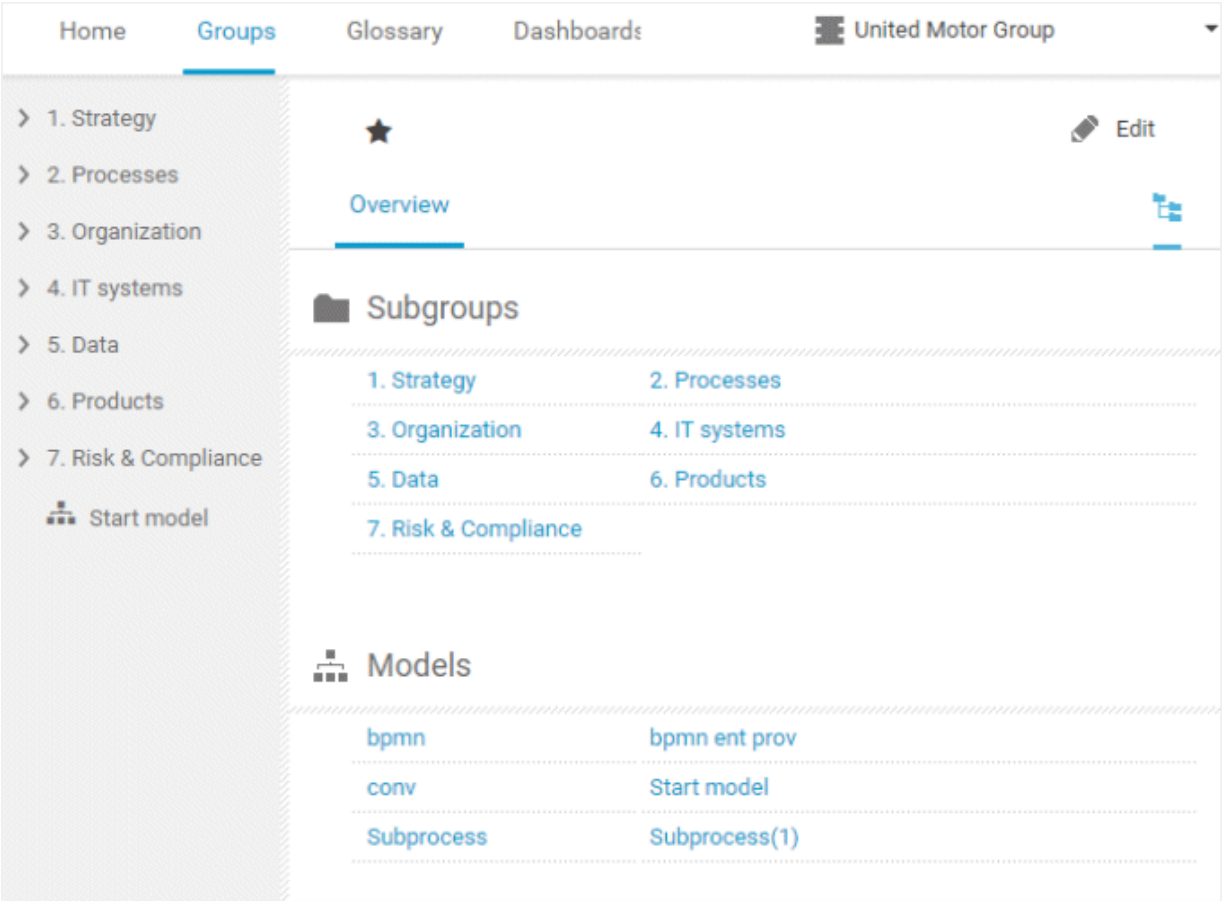
Click **Share model** to share models with other users (page 65). Click **Submit change request** to send change requests to the process manager (page 56). The function **Start governance process** (page 58) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes 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 93), create new or reuse existing items (page 88), as well as delete items (page 90).

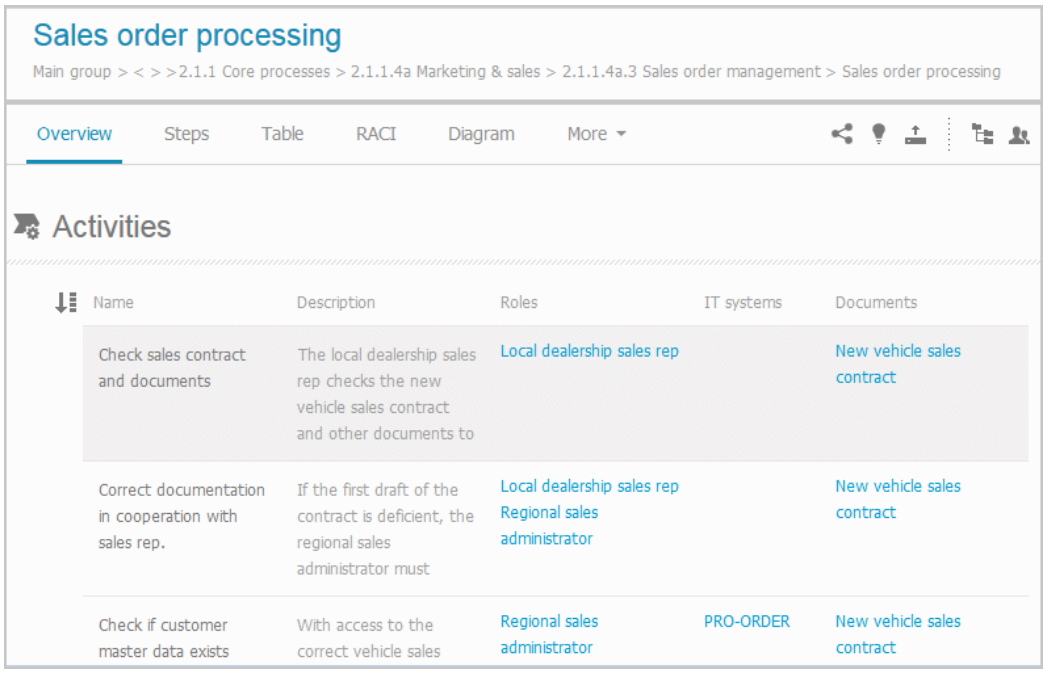
GROUP ITEMS OF ARIS MODELS

Overview

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

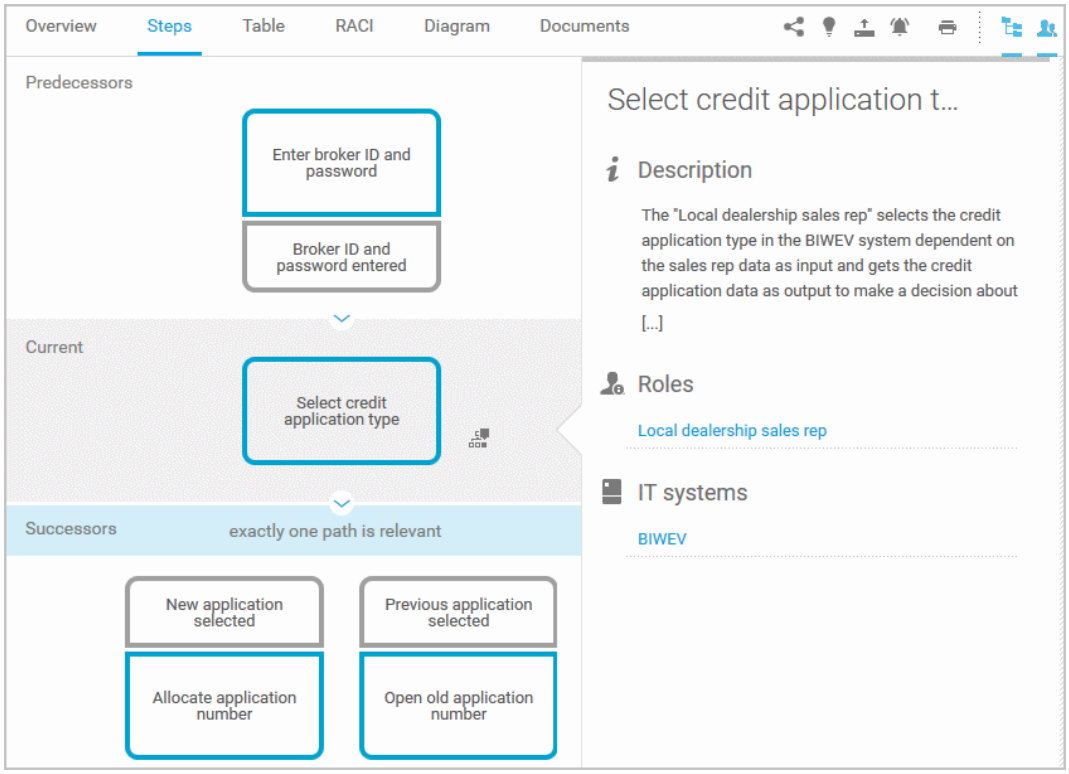


The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



Steps

Transparently displays all steps of a process (EPC) (page 48). 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.



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.

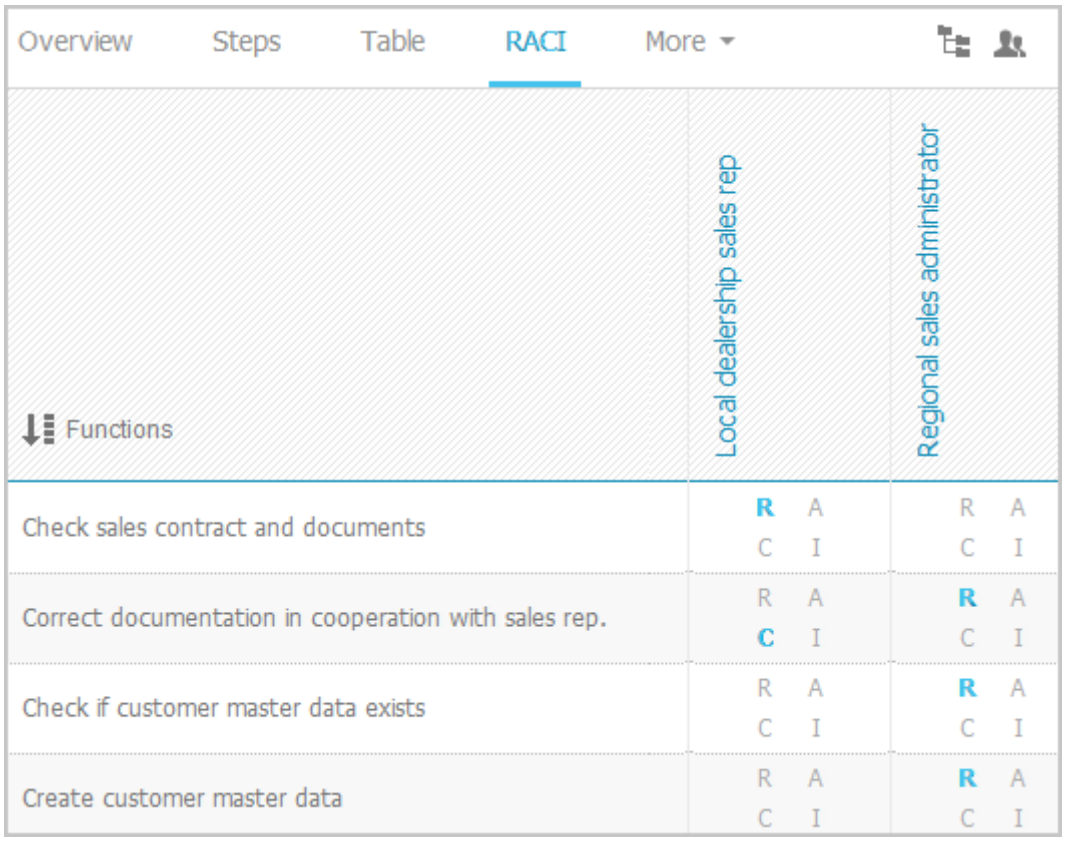
Overview Steps Table RACI More

Functions	Roles	
	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	☑	
Correct documentation in cooperation with sales rep.	☑	☑
Check if customer master data exists		☑
Create customer master data		☑
Enter vehicle data and details		☑

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

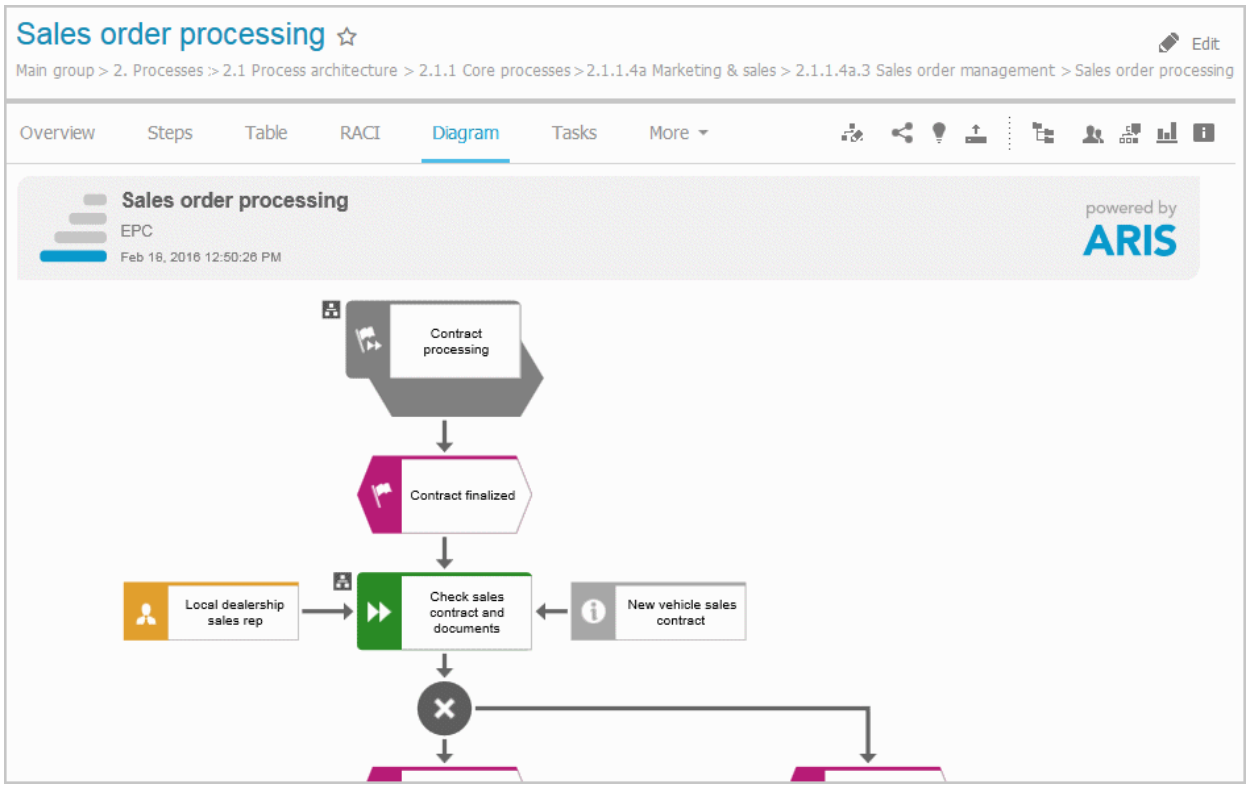
RACI

RACI matrices are displayed only if RACI information is available for this process. Using the button you can sort the matrices by process flow.



Diagram

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



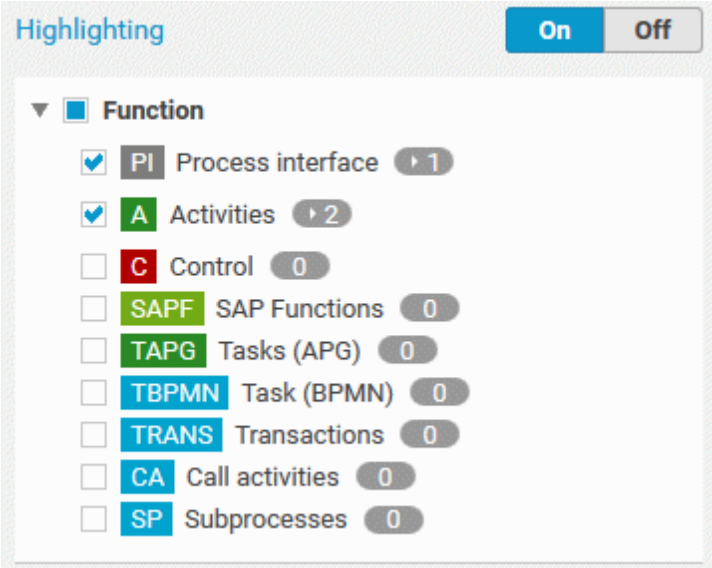
Using the functions of the view bar you can change the size of appearance. Navigate in the model using the small frame of the thumbnail view above the slider. Clicking the ▼ arrow head will hide the bar.

Click **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.

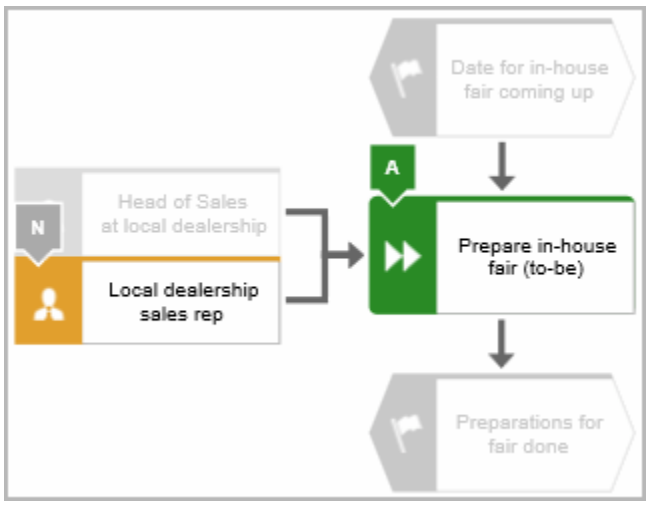
Attributes More

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 (page 70) 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.

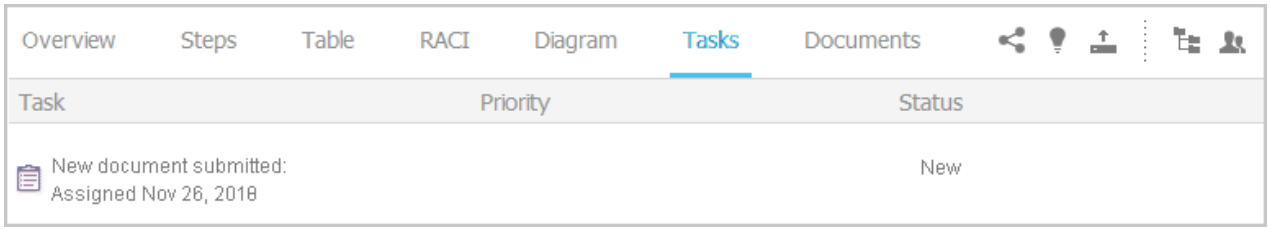


ASSIGNMENTS

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).



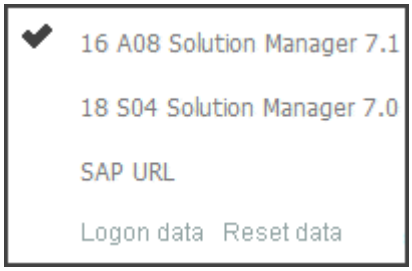
Transactions

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

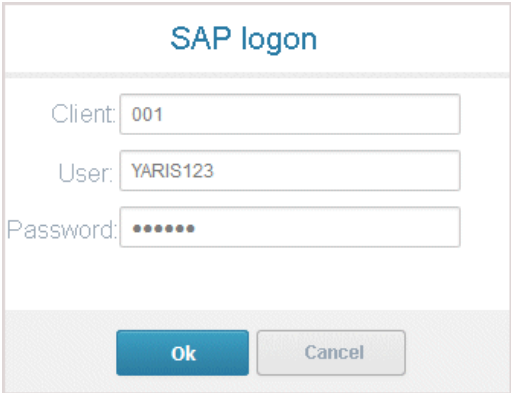
Overview | Steps | Table | RACI | Diagram | Tasks | **Transactions**

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

You can start (page 100) the ▶ transaction automatically via the default server in each row displaying a transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.



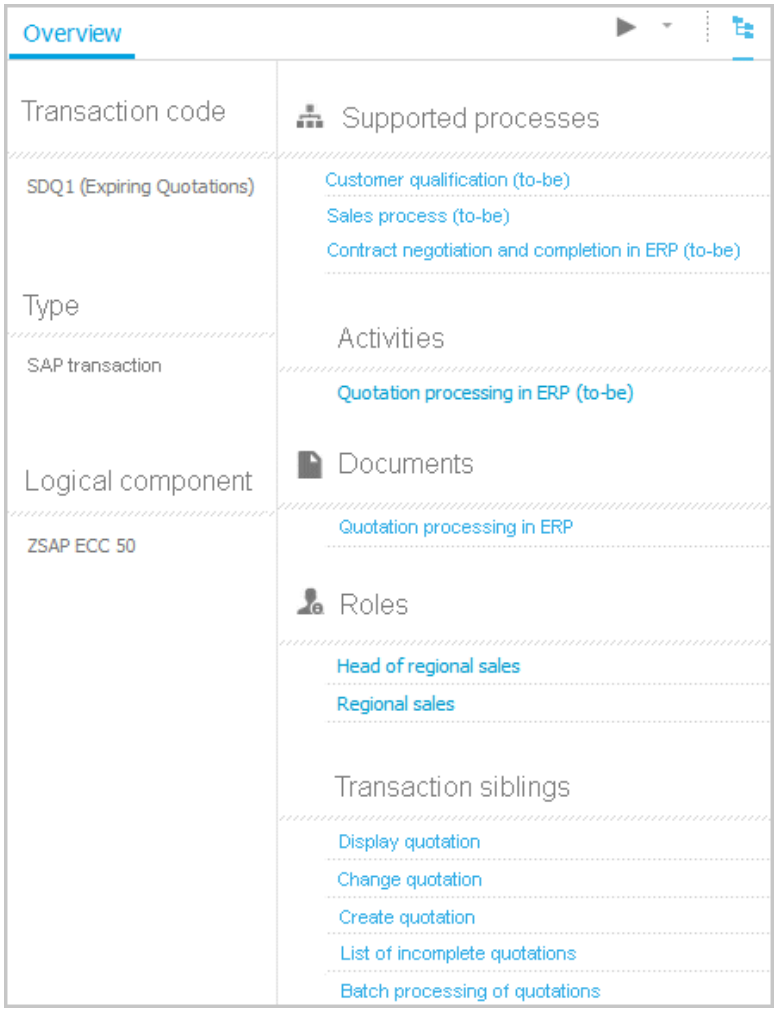
To start the transaction, click an SAP Server or a URL. The Login dialog opens.



Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 101). 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 101) them.



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.

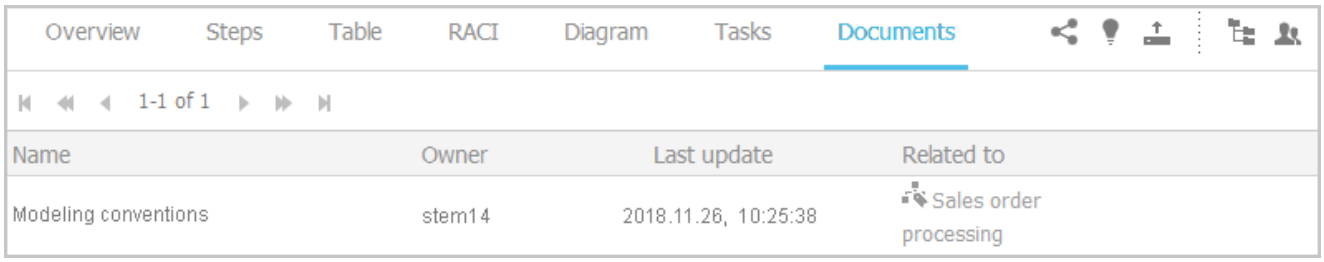
Temporary documents are deleted automatically after the executable process is terminated. Permanent documents are kept until they are deleted explicitly.

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.

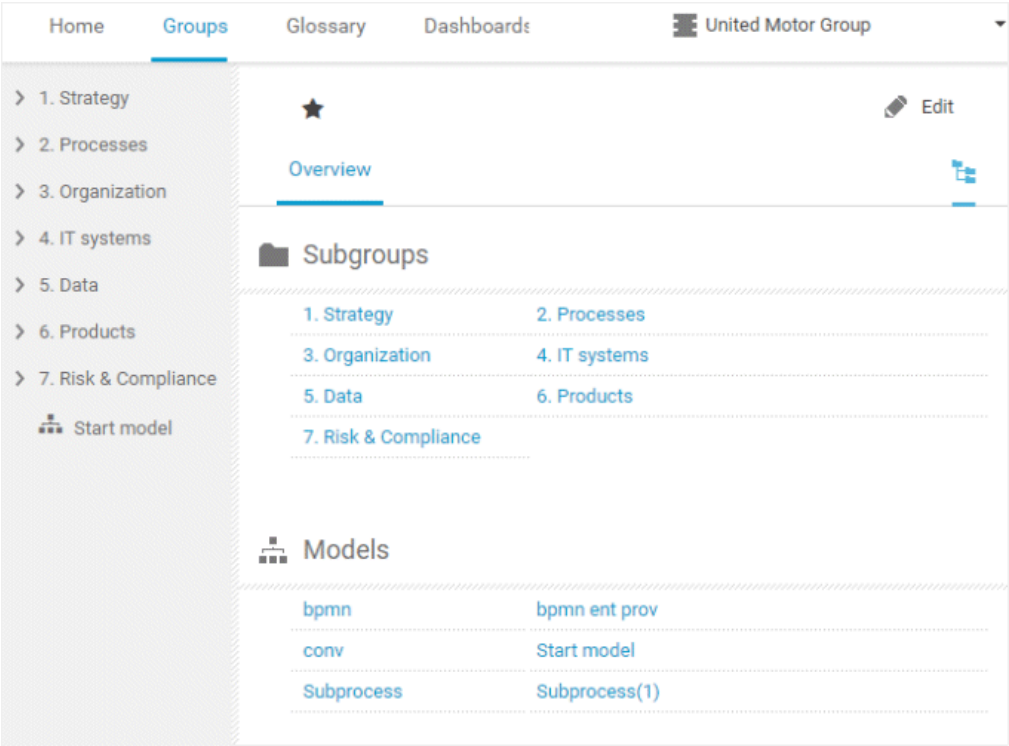
ARIS document storage as standalone component should be used for administrative purposes only. End users should access documents in the repository in ARIS Connect.



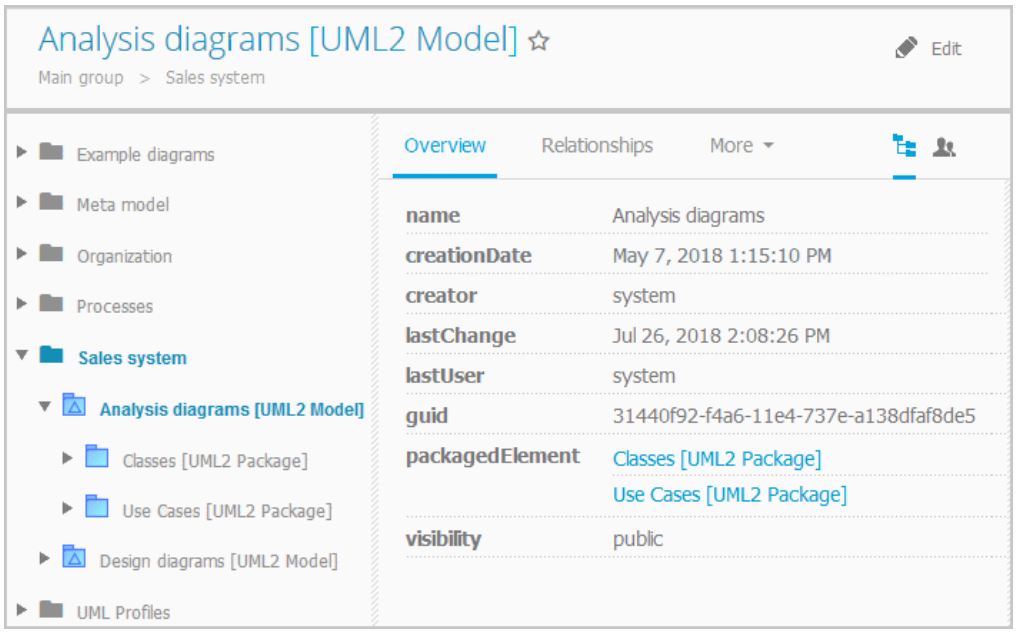
GROUP ITEMS OF UML ELEMENTS

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.

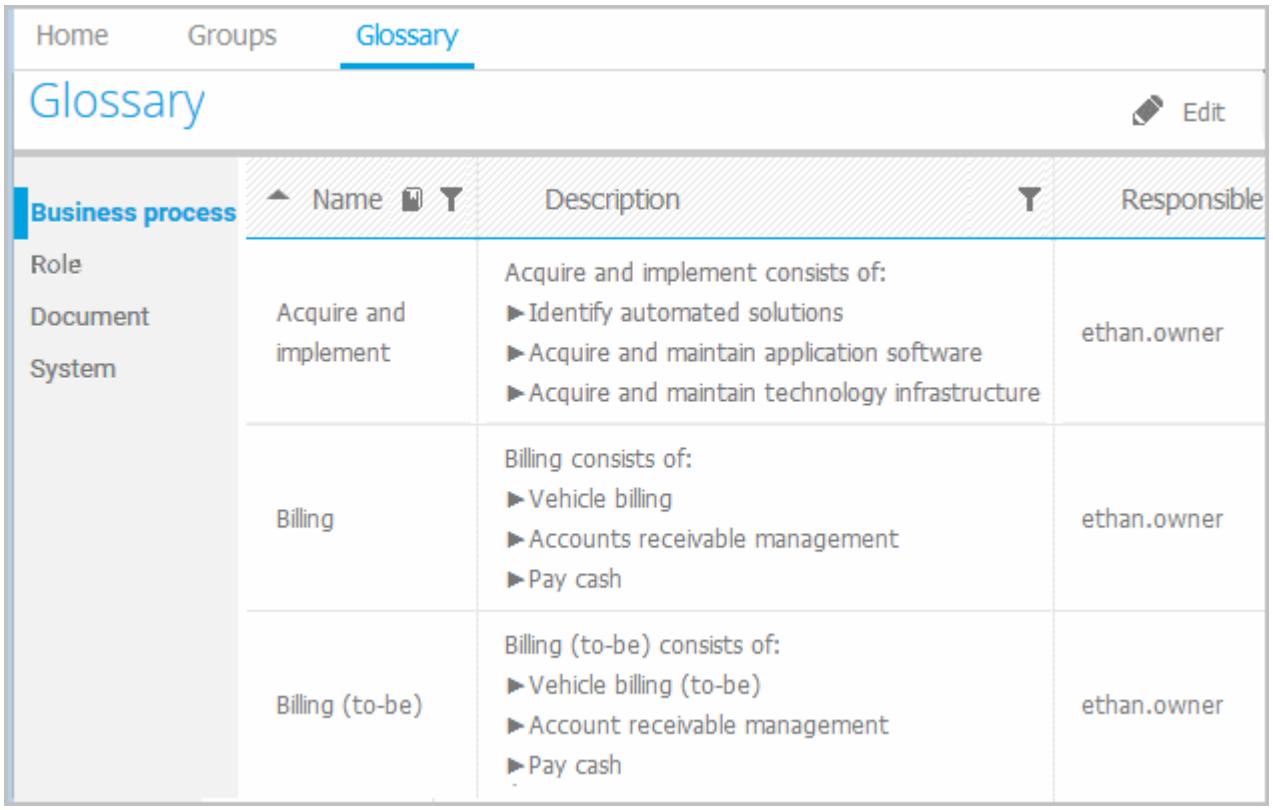
Diagram

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 93), create new or reuse existing items (page 88), as well as delete items (page 90).



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

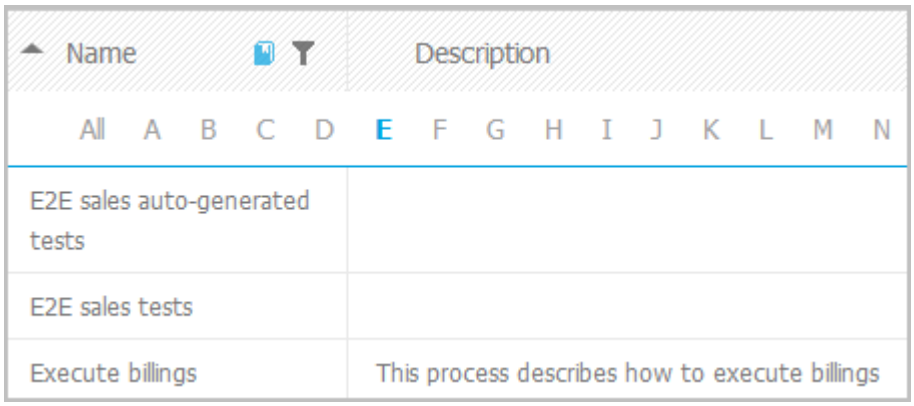
You can reduce the number of items shown in the list or change the glossary page:

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click **Glossary letters** in the **Name** cell of the table header. The **Glossary letters** bar opens.



3. Click on the relevant letter.

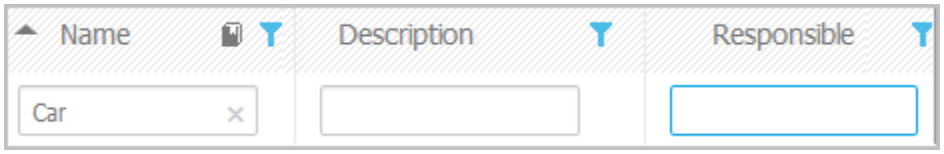
Only items starting with the same letter are shown.

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click **Filter** in the table header. The text boxes to filter the list are opened.



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 25) or the Default configuration set (page 43) 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 29)
- Organization (page 39)
- IT systems (page 40)
- Glossary (page 43)

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 61) to further restrict this content. Role filters are available only if roles are assigned (page 60) to your user in models and the portal has been configured for the use of role filters.

Important for me

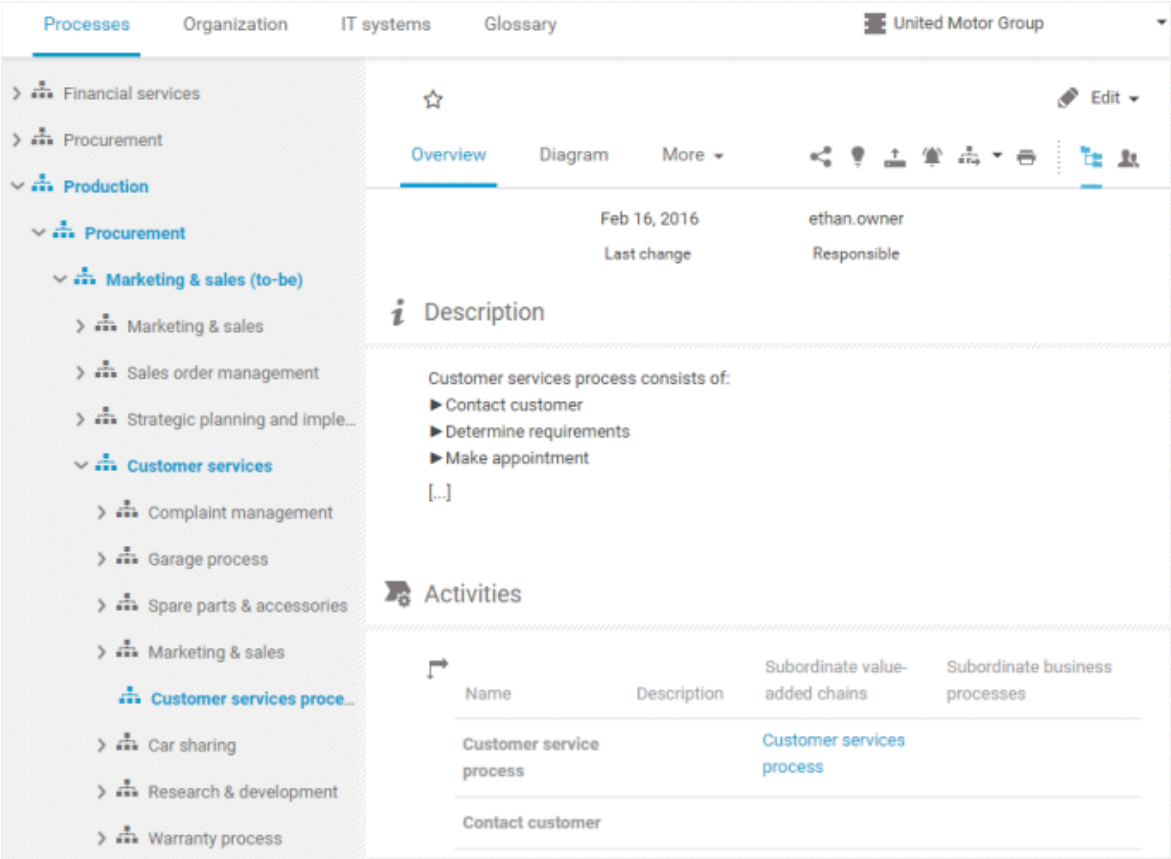
Displays processes in which the user logged in or their group is modeled, as well as application systems for which the user or user group is responsible. Processes are models of the **EPC** type (event-driven process chain).

My activities

Shows the current activities you are following in Collaboration or in the portal (page 177).

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.



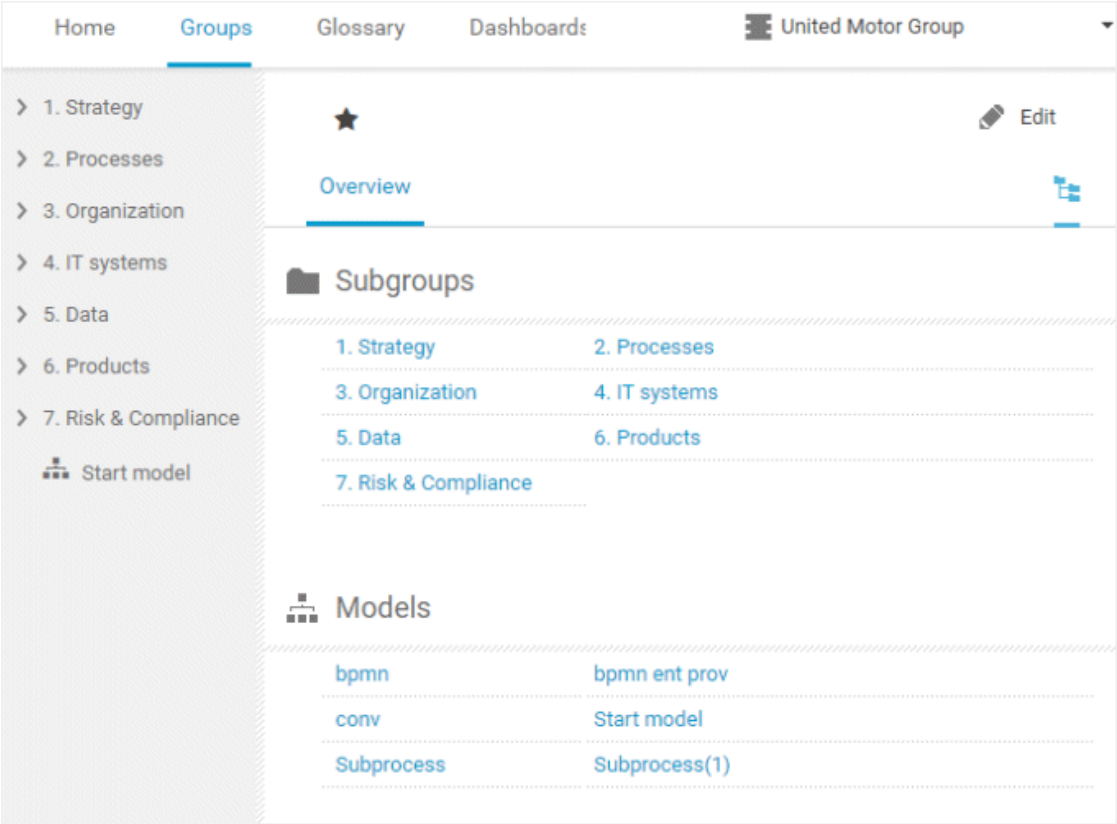
Depending on the contents selected and the type of a diagram, different functions are available.

Using the bar panel buttons **Comment** and **Navigation**, you can show or hide the Collaboration functions **Follow** (page 58) and **Comment** (page 57), 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.

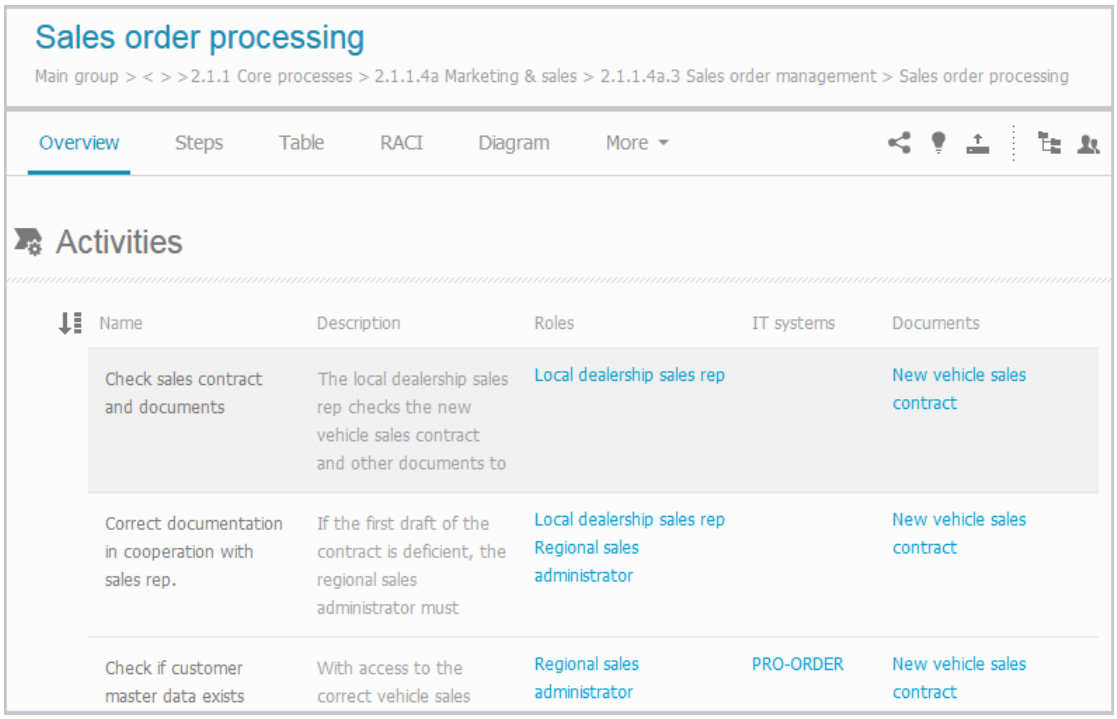
Click **Share model** to share models with other users (page 65). Click **Submit change request** to send change requests to the process manager (page 56). The function **Start governance process** (page 58) is provided only if an executable process is available. Users with the function privilege **ARIS Connect Designer** can change processes using the **Edit** button.

Overview

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

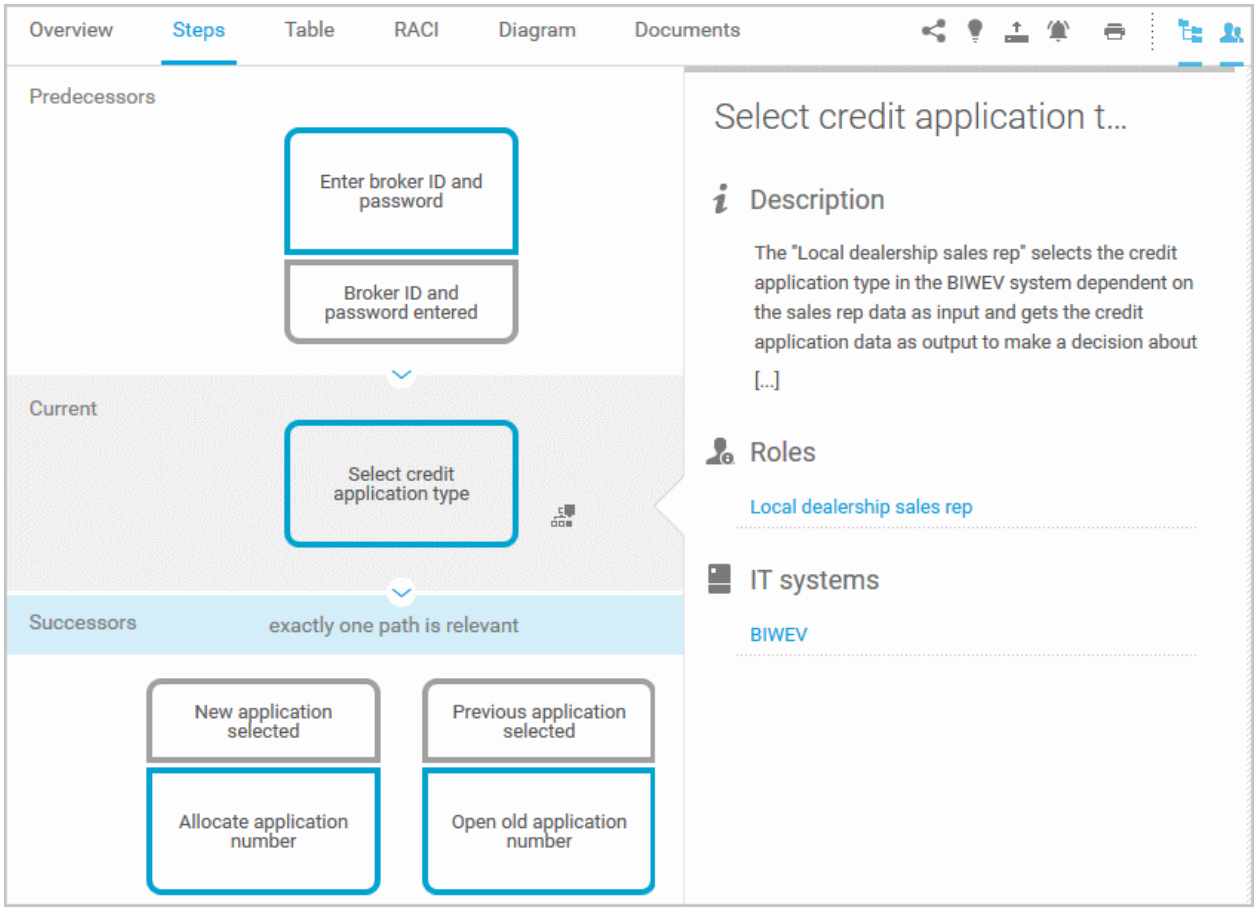


The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



Steps

Transparently displays all steps of a process (EPC) (page 48). 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.



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

	Roles	
Functions	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	☑	
Correct documentation in cooperation with sales rep.	☑	☑
Check if customer master data exists		☑
Create customer master data		☑
Enter vehicle data and details		☑

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

RACI

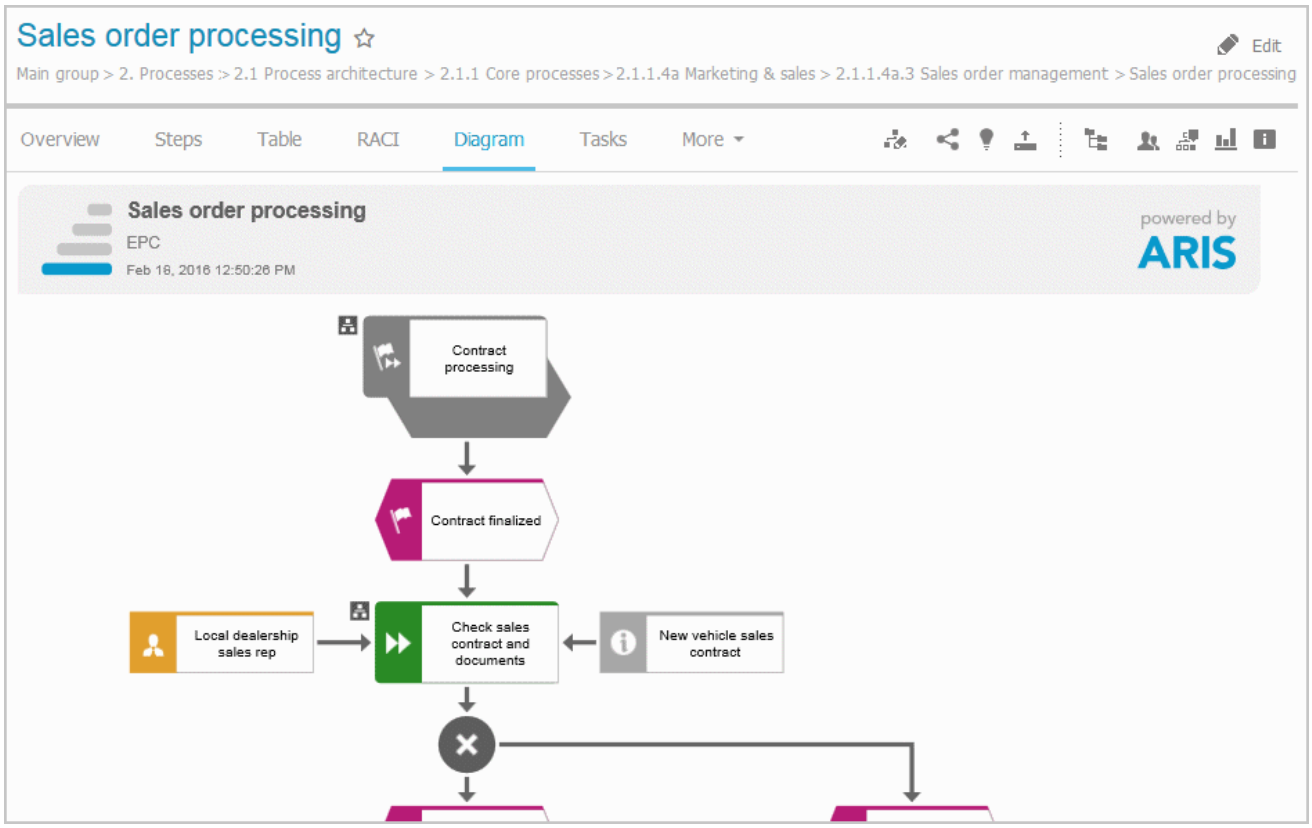
RACI matrices are displayed only if RACI information is available for this process. Using the button you can sort the matrices by process flow.

Overview Steps Table RACI More

Functions	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	**R** A C I	R A C I
Correct documentation in cooperation with sales rep.	R A **C** I	**R** A C I
Check if customer master data exists	R A C I	**R** A C I
Create customer master data	R A C I	**R** A C I

Diagram

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



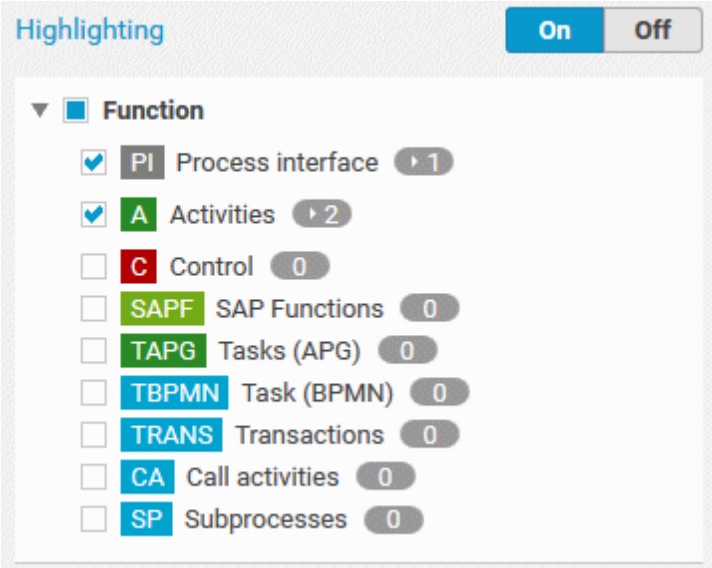
Using the functions of the view bar you can change the size of appearance. Navigate in the model using the small frame of the thumbnail view above the slider. Clicking the ▼ arrow head will hide the bar.

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

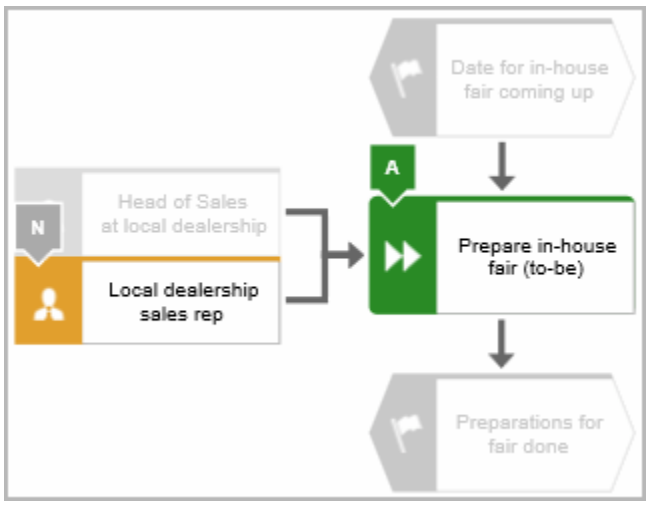
Attributes More

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 (page 70) 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.

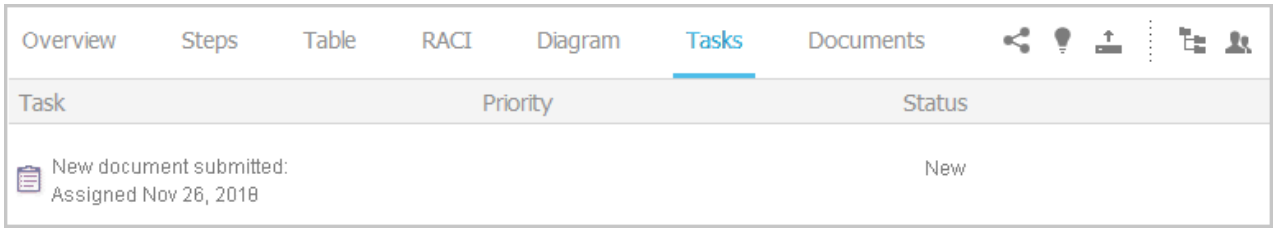


ASSIGNMENTS

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.

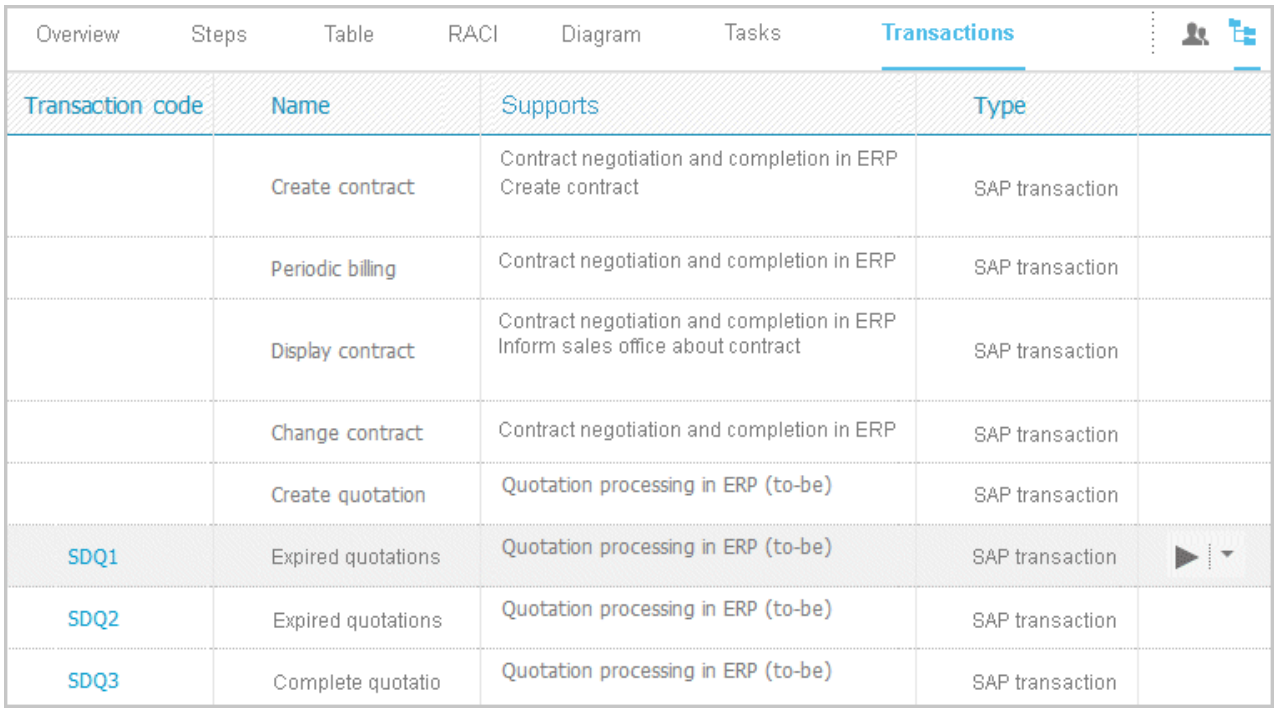
Tasks

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

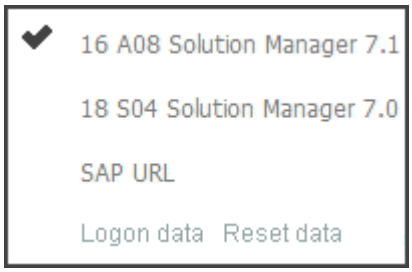


Transactions

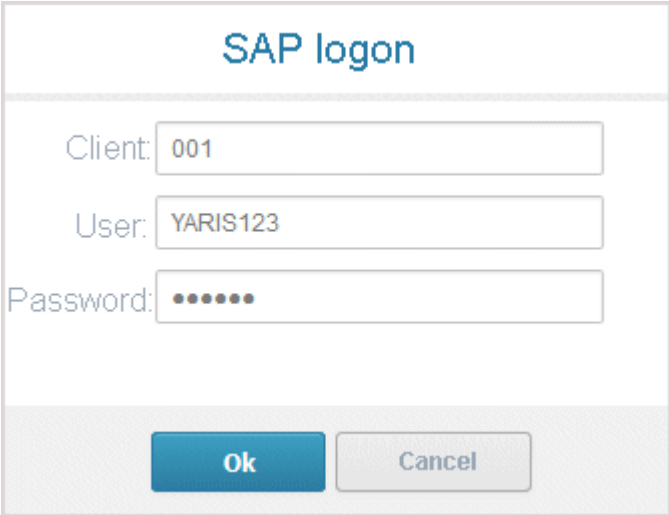
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured in the portal.



You can start (page 100) the ▶ transaction automatically via the default server in each row displaying a transaction code. Click the ▼ arrow head to display all registered SAP Servers. The default server selected is indicated by a check mark.

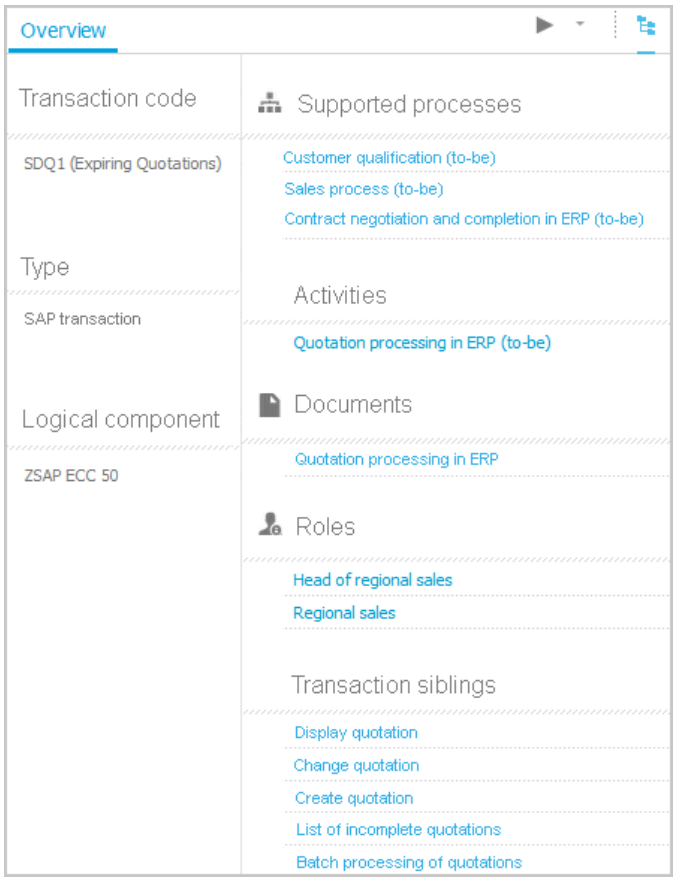


To start the transaction, click an SAP Server or a URL. The Login dialog opens.



Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 101). 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 101) them.



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.

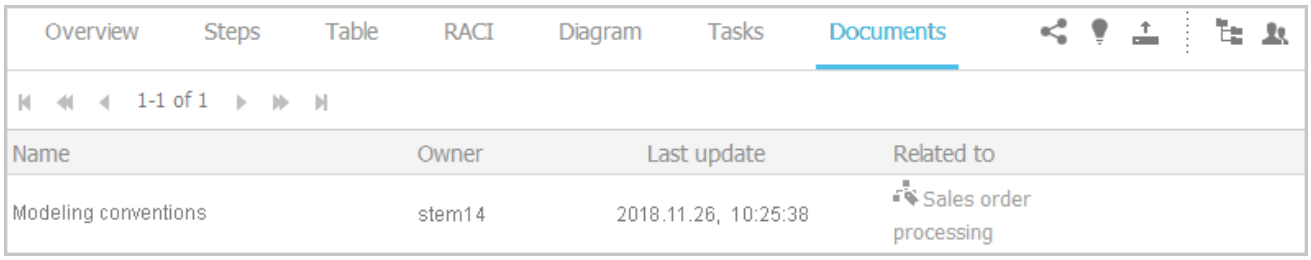
Temporary documents are deleted automatically after the executable process is terminated. Permanent documents are kept until they are deleted explicitly.

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.



ARIS video tutorial

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

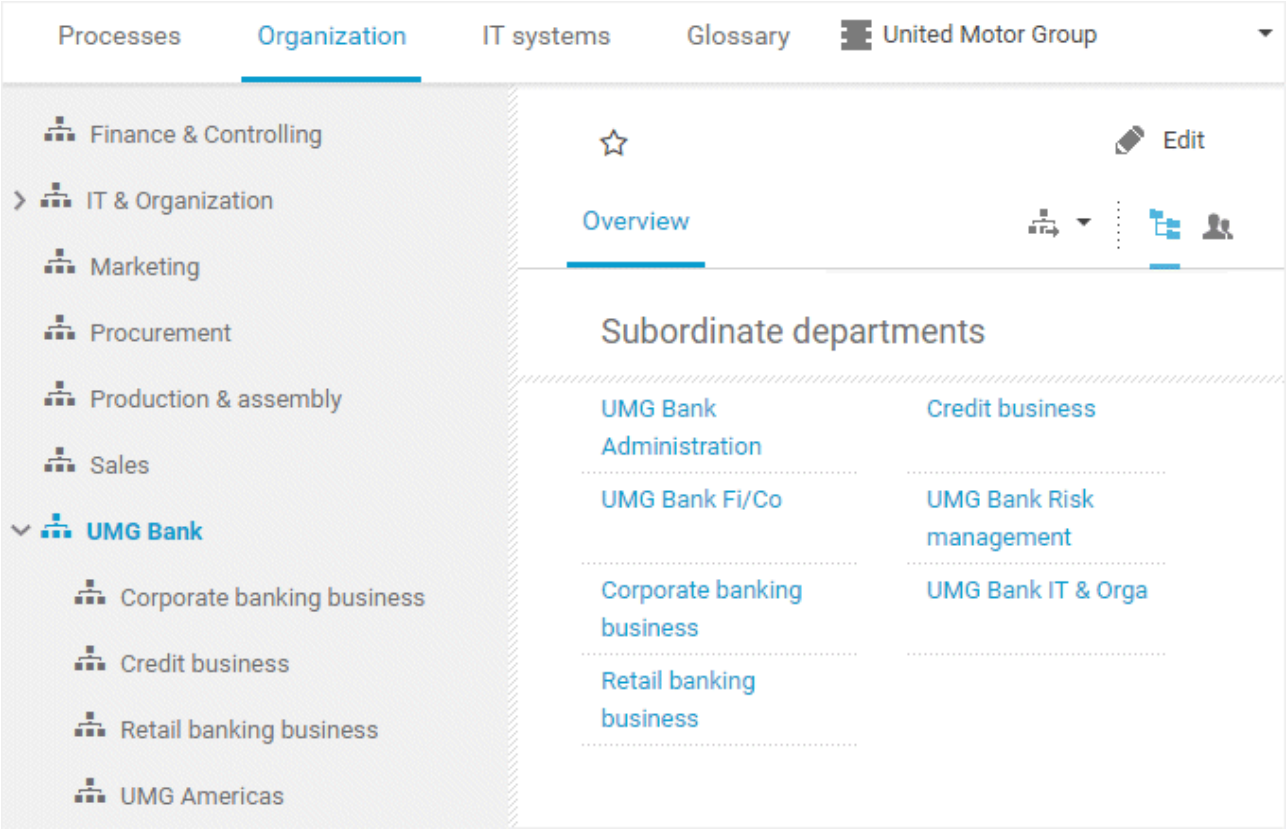
3.1.1.2.2 Organization

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 29) is displayed. IT information (page 40) 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 58) and **Comment** (page 57), 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 58) is provided only if an executable process is available.



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.

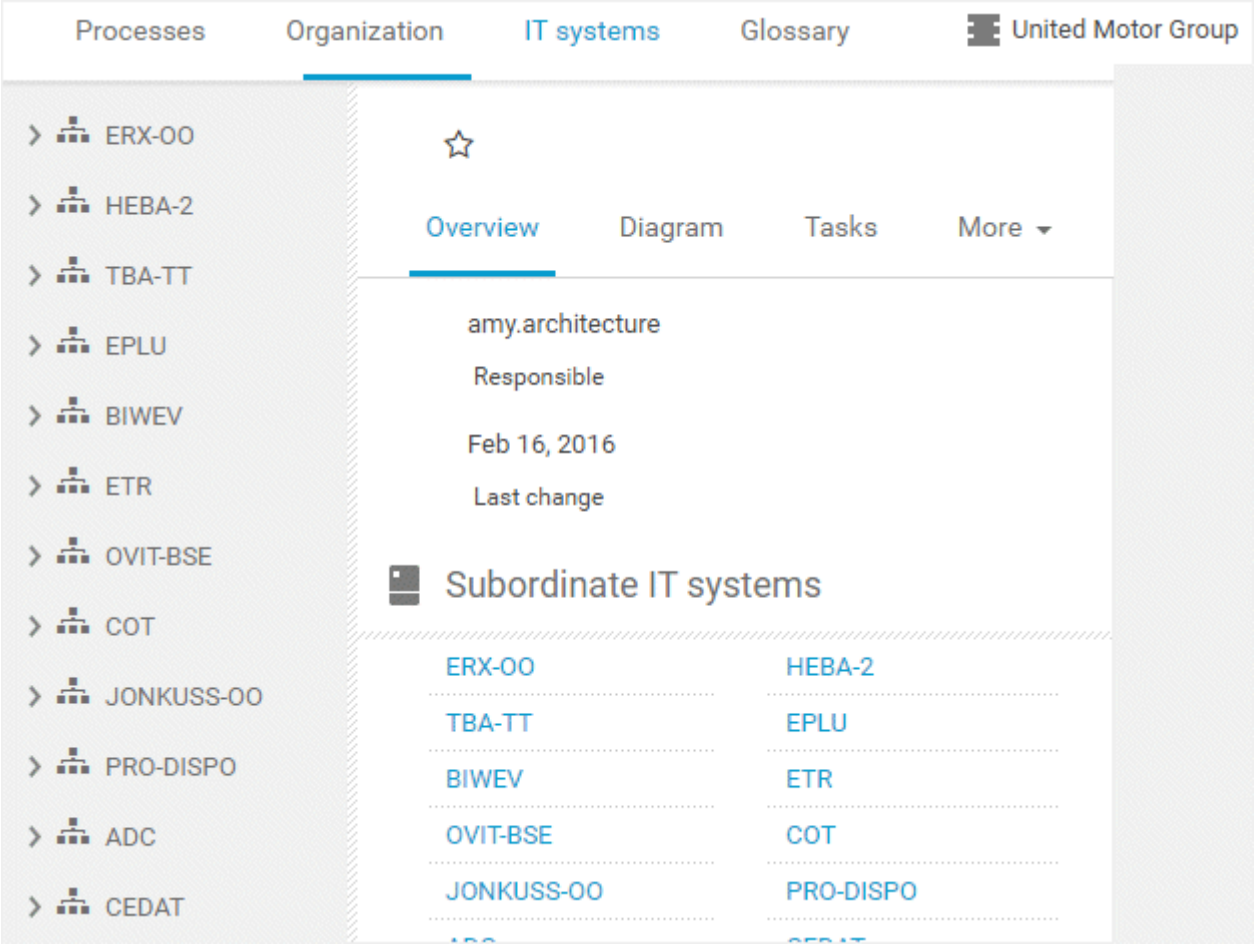
Depending on the contents selected, different functions are available.

Using the bar panel buttons **Comment** and **Navigation**, you can show or hide the Collaboration functions **Follow** (page 58) and **Comment** (page 57), 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 65). Click **Submit change request** to send change requests to the process manager (page 56). The function **Start governance process** (page 58) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes 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 93), create new or reuse existing items (page 88), as well as delete items (page 90).

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.



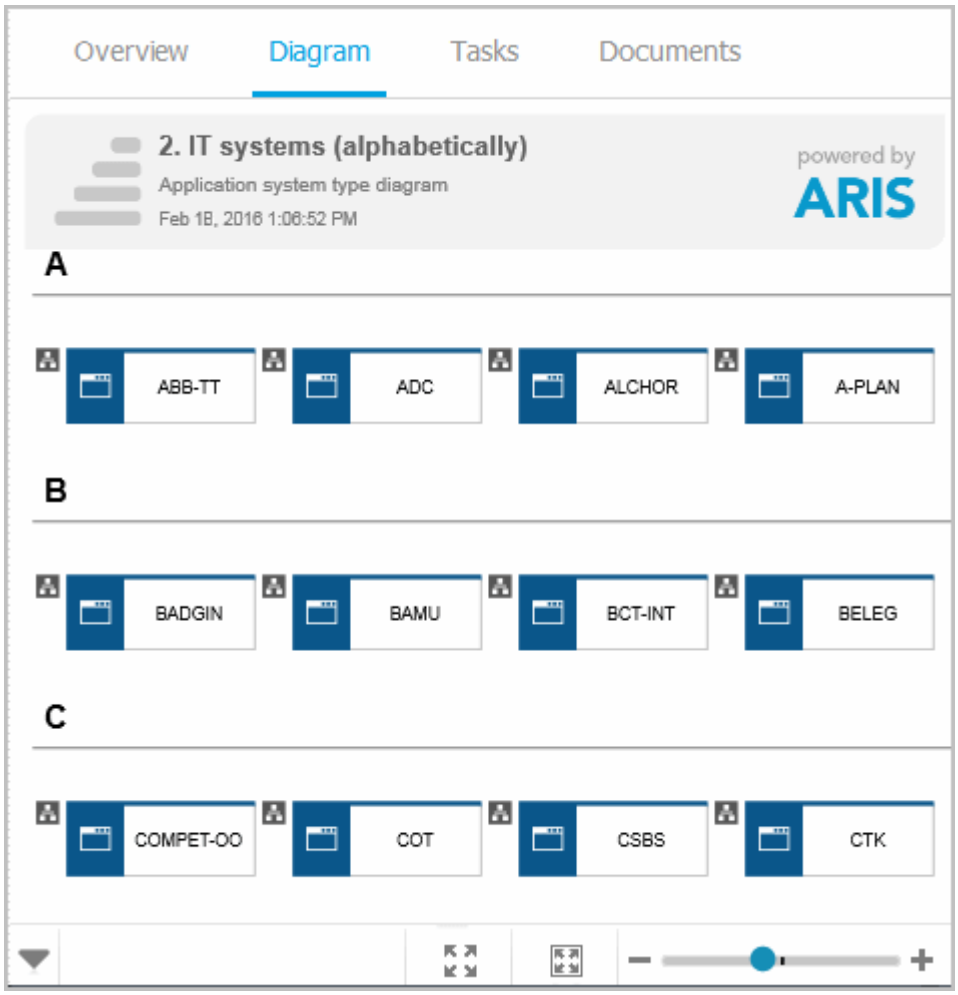
Diagram

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

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

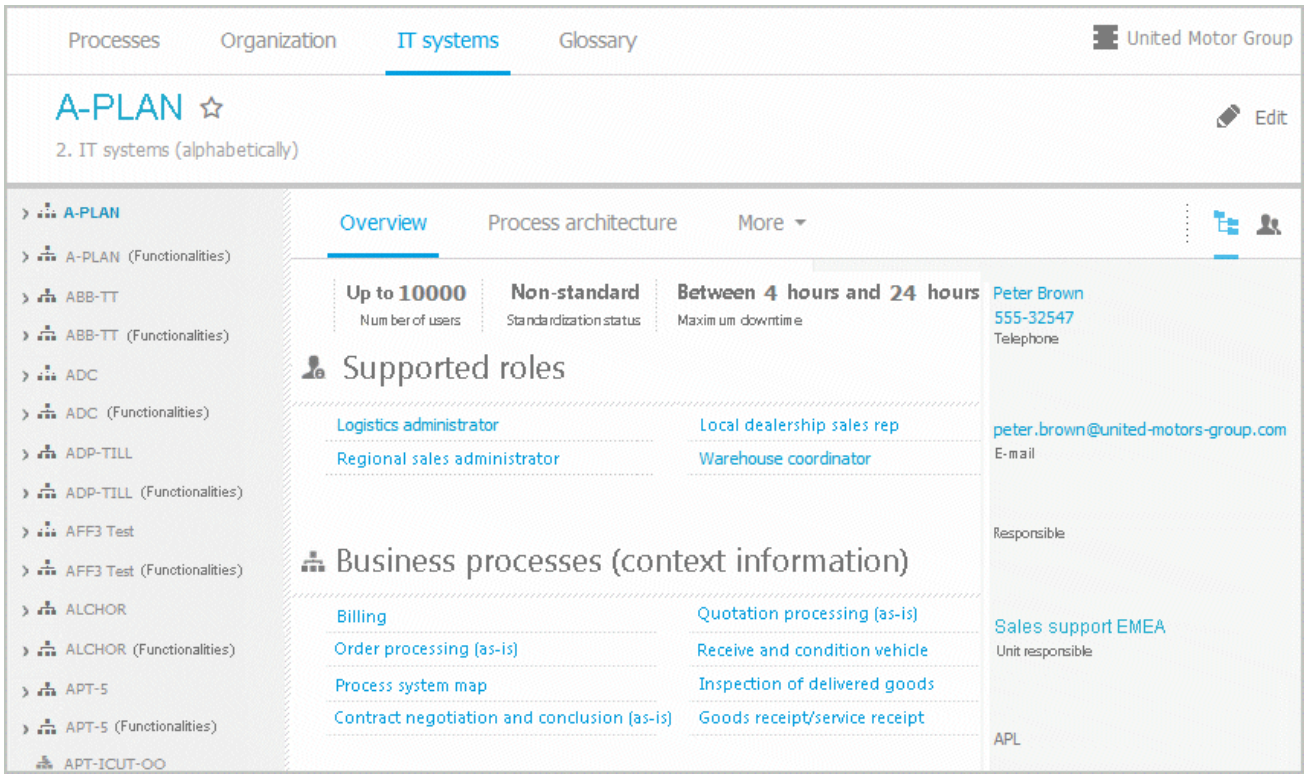
Click **Properties** to view all attributes specified. If you have selected an object, the attributes for that object are displayed. Click **More** to view related objects or occurrences. The model properties are shown if no object is selected.

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



IT system fact sheet

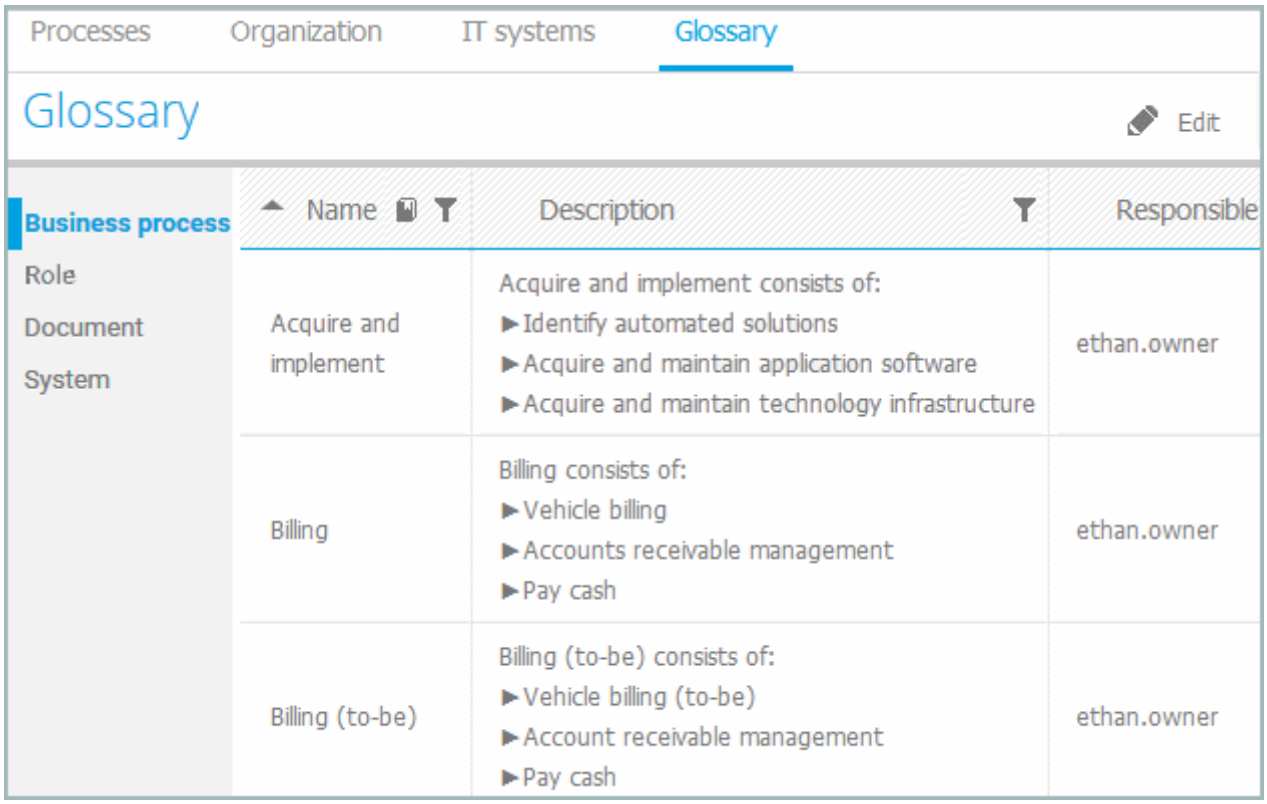
If you click an IT system in the Explorer tree or Overview, the IT system fact sheet provides you with important information at a glance.



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 93), create new or reuse existing items (page 88), as well as delete items (page 90).



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

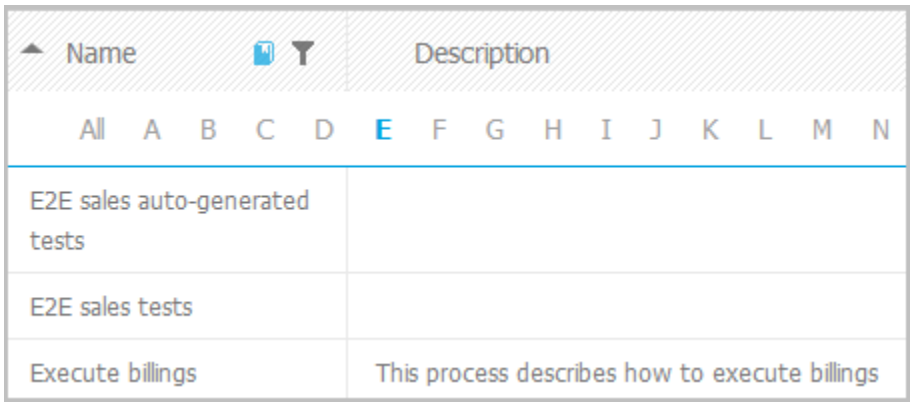
You can reduce the number of items shown in the list or change the glossary page:

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click **Glossary letters** in the **Name** cell of the table header. The **Glossary letters** bar opens.



3. Click on the relevant letter.

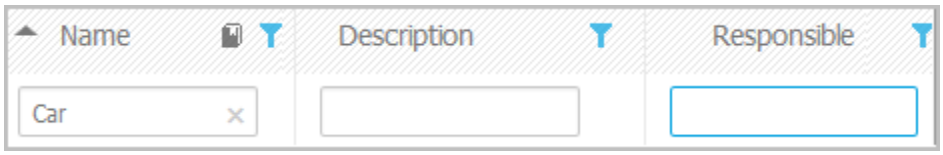
Only items starting with the same letter are shown.

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click **Filter** in the table header. The text boxes to filter the list are opened.



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 25) or the Default configuration set (page 43) 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 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 111) and the default view (page 112) are described.

3.1.2.1 Select database

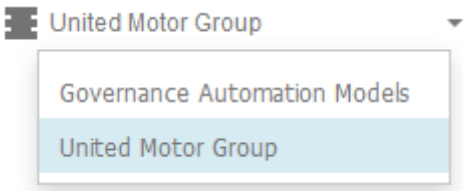
You can select one of the databases offered in the portal to access its content.

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.

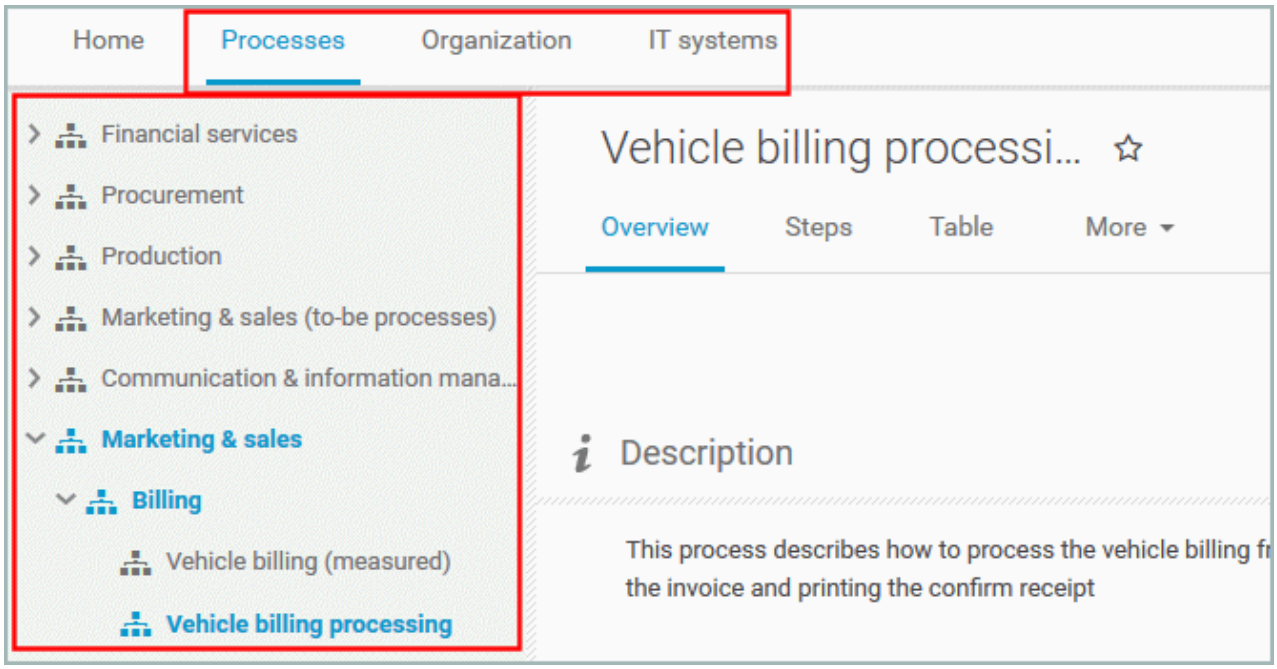
2. Click the name of the database you want to use.

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.

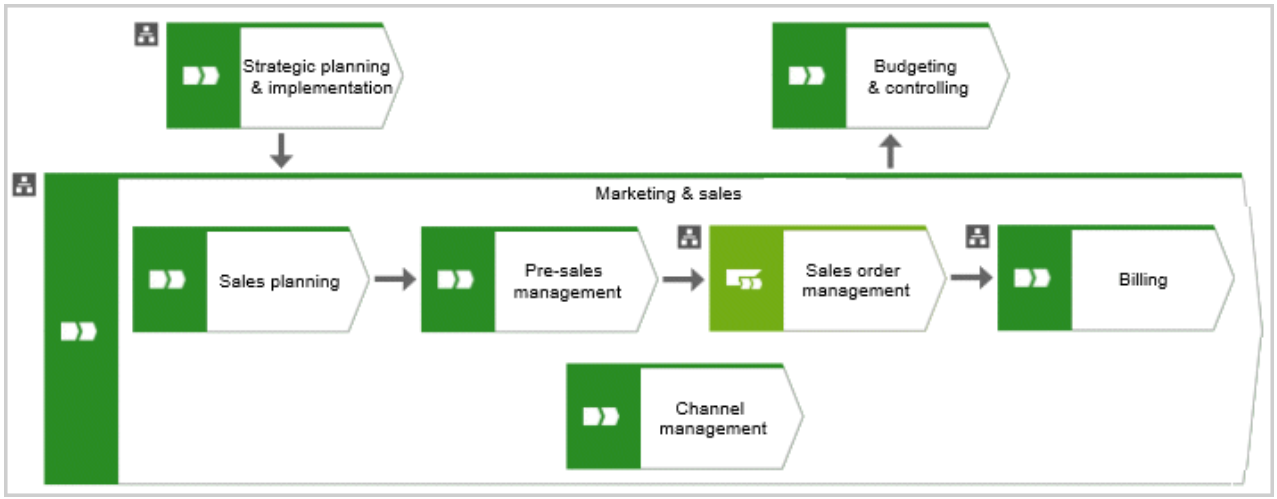
3.1.2.2 Navigate

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.



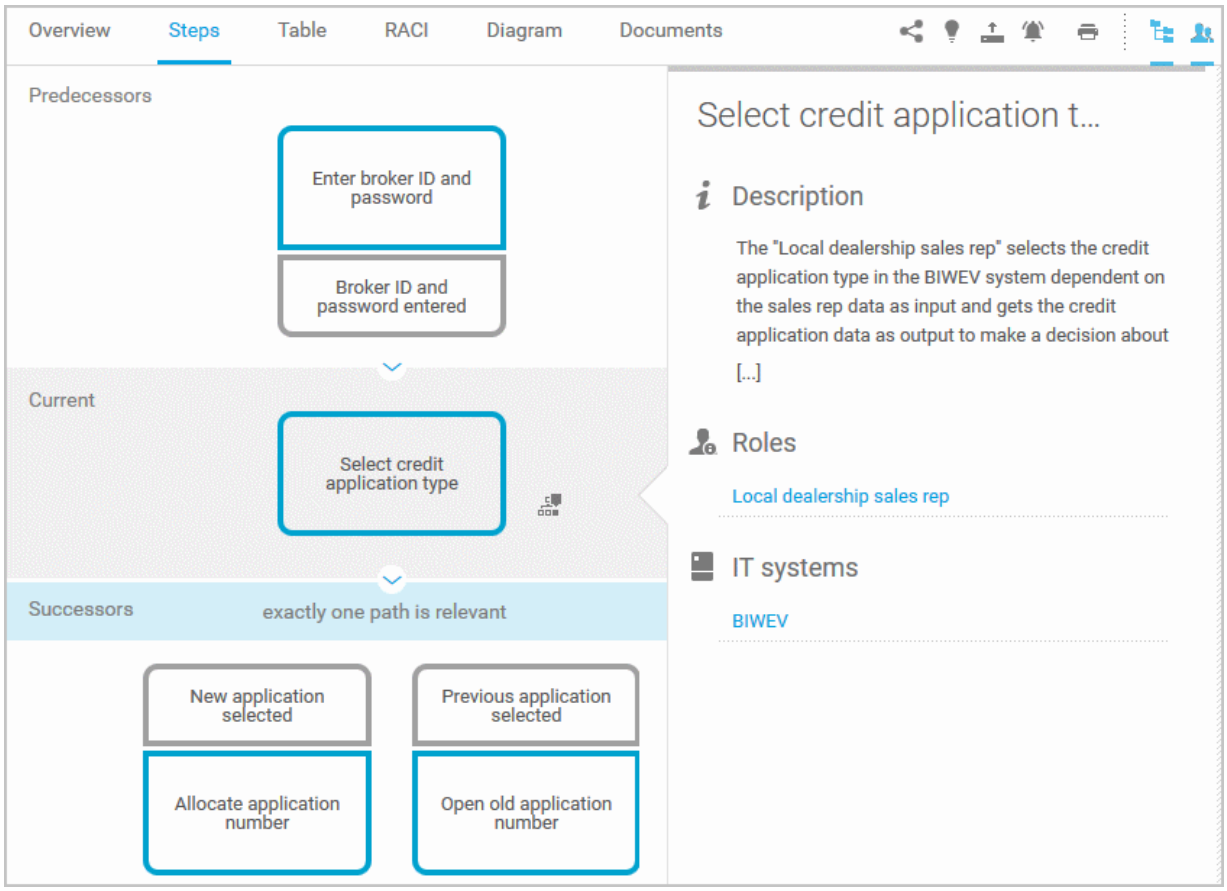
3.1.2.3 Navigate step by step

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 13), select a model of the **EPC** type. You are offered the steps of the EPC.

   Transparently displays all steps of a process (EPC) (page 48). 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.



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.

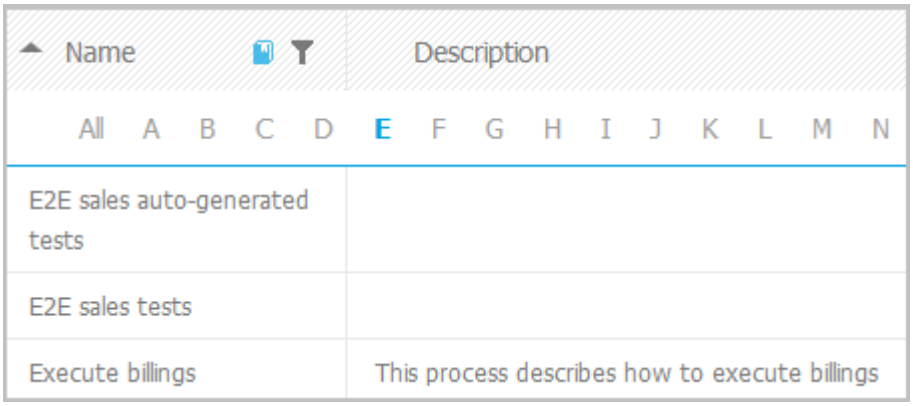
You navigate through a process step by step.

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click **Glossary letters** in the **Name** cell of the table header. The **Glossary letters** bar opens.



3. Click on the relevant letter.

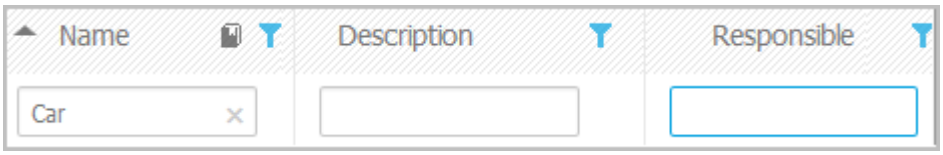
Only items starting with the same letter are shown.

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click **Filter** in the table header. The text boxes to filter the list are opened.



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 49).

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 25) or the Default configuration set (page 43) of the portal, click **Glossary**.
2. Click the relevant page number at the bottom of the page.

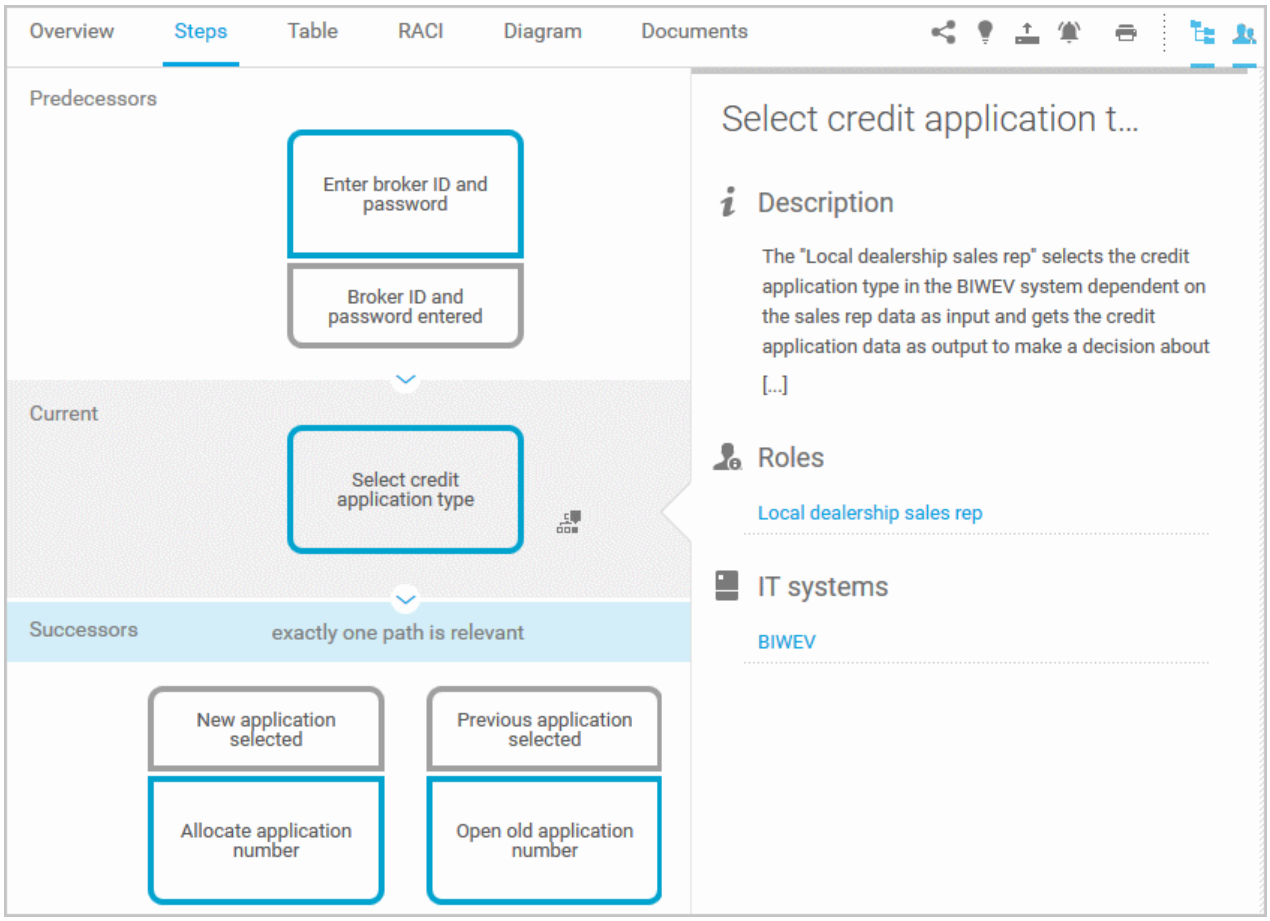
Car loan application	This process describes the functions necessary to create a car loan application. There are different organizational units involved, such as "Local dealership sales rep", "Credit check employee" and "Credit processing employee". The process is supported by three business services 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.

Transparently displays all steps of a process (EPC) (page 48). 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.



Procedure

1. Click Groups (page 13) in the classic view (page 111) or Processes (page 29) in the default view (page 112).
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 13) in the classic view (page 111) or Processes (page 29) in the default view (page 112).
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.

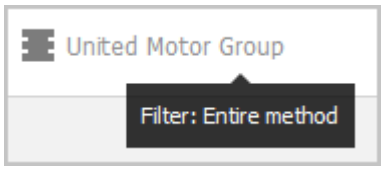
3.1.2.10 Display the current method filter

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:

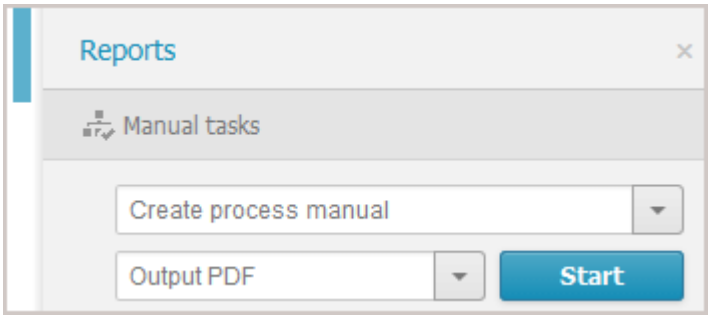


3.1.2.11 Generate report

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.

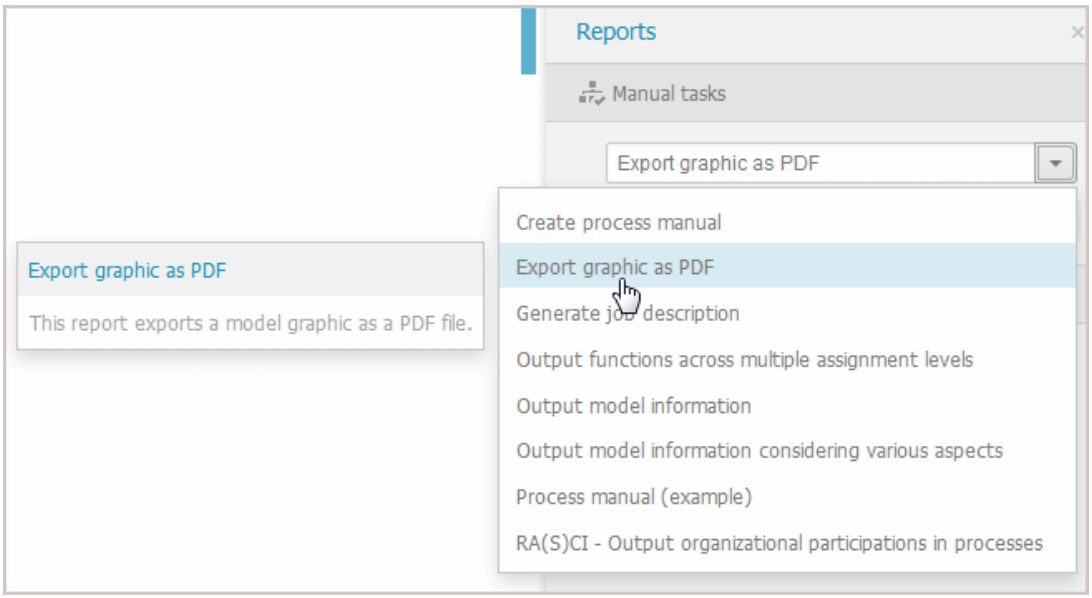
Procedure

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.

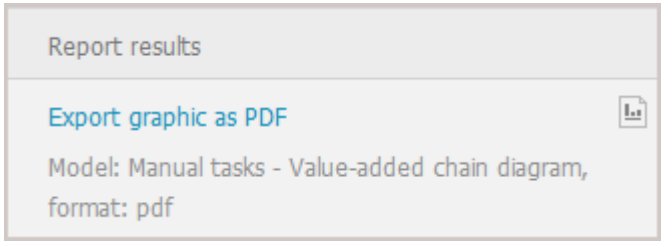


10. Select the output format.

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.



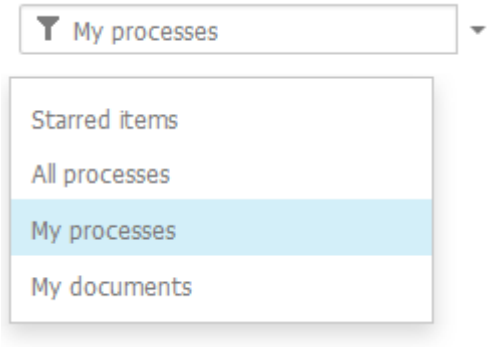
If you click the link, the report output opens.

3.1.2.12 Use the Favorites tab in the portal

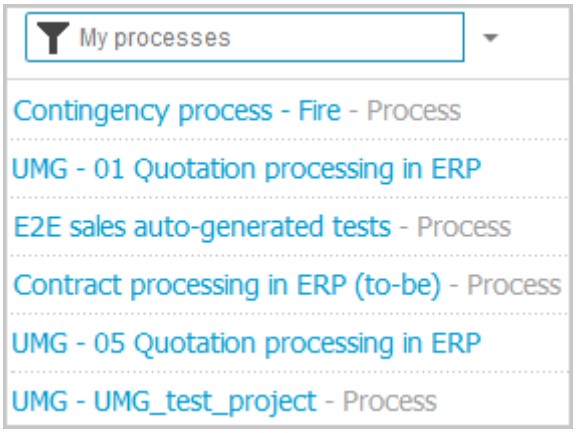
In the portal, you have direct access to all saved filter settings (page 73) to filter the content of the selected database.

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 188) 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 187) 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 113).

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 187) 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 60) 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 114) 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 61) the role filter, only information from models in which the selected role occurs will be displayed.

3.1.3.2 Activate role filter

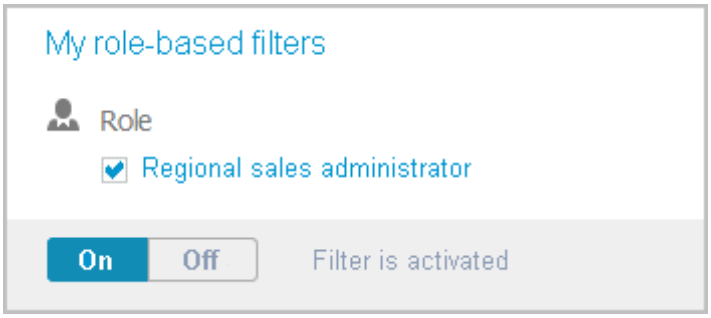
Using role filters, you restrict the content in such a way that you only see information from processes in which certain roles are involved.

Prerequisite

A role has been assigned (page 60) 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 48), 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 13) in the classic view (page 111).
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.

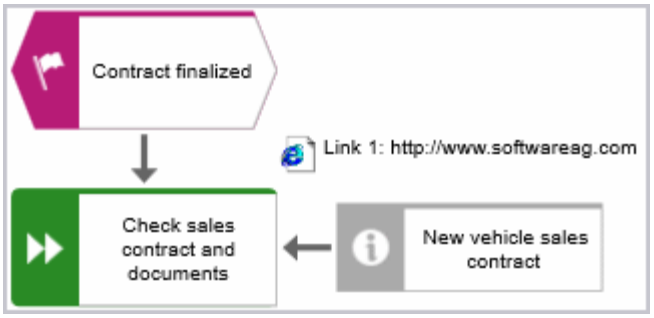
All assigned diagrams are offered for selection in a dialog. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

3.1.4.2 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click Groups (page 13) in the classic view (page 111).
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.



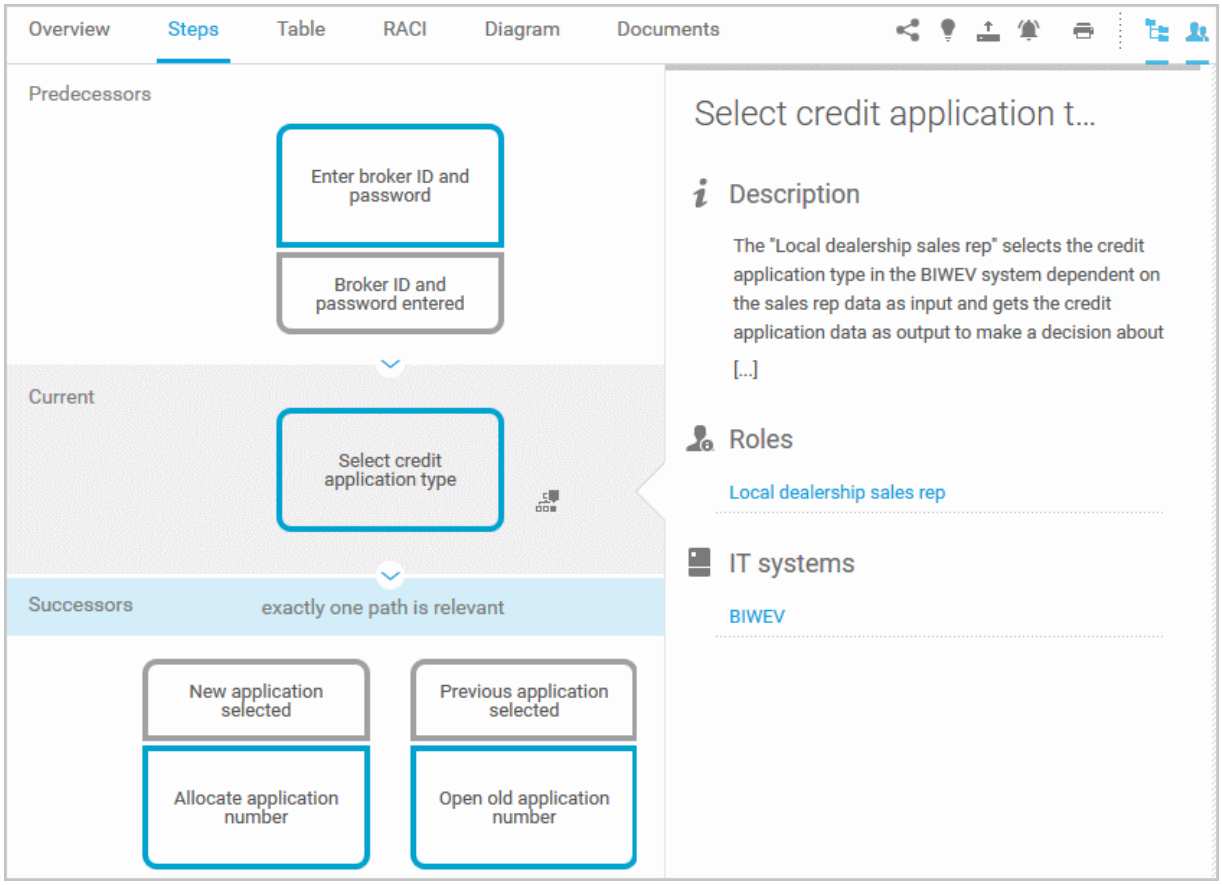
4. Click the relevant link attribute.

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.

Transparently displays all steps of a process (EPC) (page 48). 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.



Procedure

1. Click Groups (page 13) in the classic view (page 111) or Processes (page 29) in the default view (page 112).
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 13) in the classic view (page 111) or Processes (page 29) in the default view (page 112).
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 87). 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 87). Depending on the attributes, various editing options (page 95) 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 128).
   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.
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 Use matrix models

You can display a matrix model in ARIS Connect.

3.1.4.9.1 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.

3.1.4.9.2 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 68)
2. Place the mouse cursor over a connection cell.

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

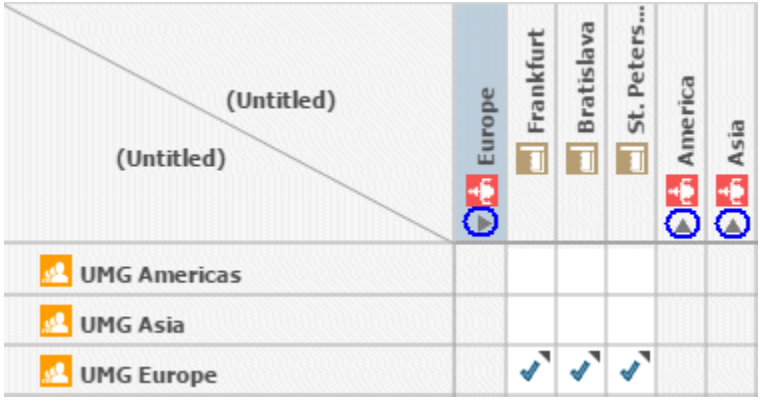
3.1.4.9.3 Show/Hide hierarchies in a matrix model in ARIS Connect

You can show or hide hierachies in a matrix model.

Procedure

1. Open a matrix model in ARIS Connect. (page 68)
2. Click the little arrow to expand or collapse the hierarchy. The hierarchy is shown or hidden accordingly.

The hierarchy is shown/hidden.



3.1.4.9.4 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 Highlight model elements

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

3.1.5.1 Switch highlighting on

You can highlight model elements to focus on aspects to be monitored. This example illustrates highlighting of a process model in Default view (page 28).

Prerequisites

The highlighting is configured for the model you have selected.

Procedure

1. Click **Portal > Processes**.
2. In the Navigation tree, navigate to the relevant process.
3. Click the process. The fact sheets of the model are displayed.
4. Click **Diagram**. The model is displayed.
5. Click **Highlight**. The **Highlighting** bar is opened. There are various criteria with criterion indicators sorted in different categories.
6. Click **On** in the **Highlighting** bar.
7. Open the relevant category and activate the check boxes of the criteria you want to be highlighted. To highlight all criteria of a category, activate the category check box.

The model elements that meet the selected highlighting criteria are colored and marked by the criterion indicator. The highlighting of process models remains active until you change the view or switch it the highlighting off (page 70).

3.1.5.2 Switch highlighting off

If you have switched highlighting on (page 70), it remains on as long as you stay in the view or you switch highlighting off.

Prerequisites

The highlighting is configured for the model you have selected.

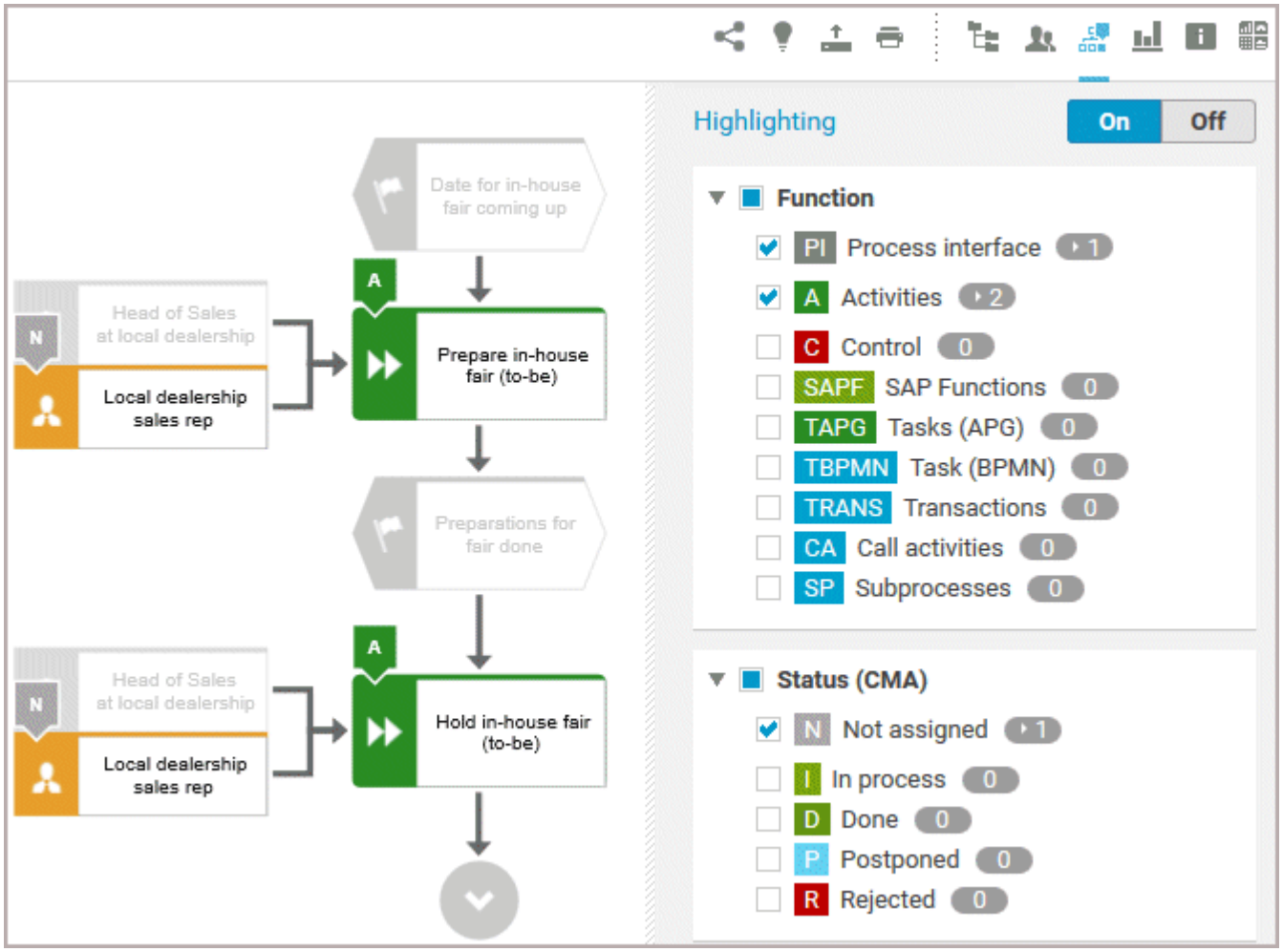
Procedure

1. Click **Portal > Processes**.
2. In the Navigation tree, navigate to the relevant process.
3. Click the process. The fact sheets of the model are displayed.
4. Click **Diagram**. The model is displayed.
5. Click **Highlight**. The **Highlighting** bar is opened.
6. Click **Off** in the **Highlighting** bar.

The coloring and marks of the model elements are removed.

3.1.5.3 What is highlighting?

Highlighting is the visual emphasis of model content. If you have switched highlighting on (page 70), model elements are colored and marked by criterion indicators, based on the criteria you selected.



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

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

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

3.1.6 Handle documents

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

3.1.6.1 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**.

3.1.7 Use favorites

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

You can save filter settings (page 73) and single database items as favorites (page 73). While you can define (page 73) and access the filter settings (Seite 74) in the Search area (page 78), you can access starred items and favorites based on filter settings in the Favorites area (page 74) of the portal.

3.1.7.1 Save a model as a favorite

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

Procedure

1. Navigate to the model that you want to save as favorite.
2. Behind the model's name, click ☆ **Save as a favorite**.

The star is colored (★) and the model is added to the favorites list. The stars of favored models are colored until you remove them from the favorite list (page 73). This means that the color of a star indicates whether a model is added to the favorites list.

3.1.7.2 Remove a favorite

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

Procedure

1. In the Portal, activate the **Favorites** tab.
2. Click the ▼ **down arrow** of the **Filter selection** field.
3. Click **Starred items**.
4. At the end of the model's line, click ★ **Remove favorite**.

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

3.1.7.3 Save filter settings as a favorite

In the Search area (page 85), 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 79) to define your filter.
2. Click ☆ **Save filters as favorites**. The dialog opens.
3. Enter a name.
4. Click **OK**.

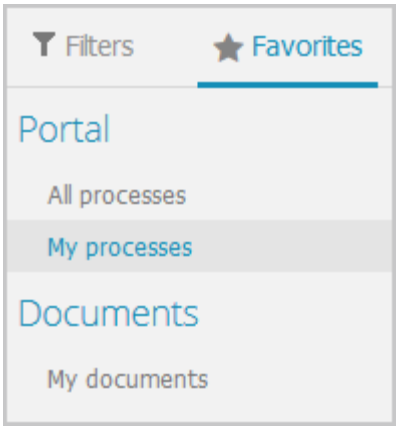
The filter settings are saved in the **Favorites** area. You can filter the content based on these settings (Seite 74) at any time from various devices.

3.1.7.4 Use a favorite in the Search area

In the Search area (page 85), you can open a favorite setting to filter the content based on predefined filter criteria.

Procedure

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



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

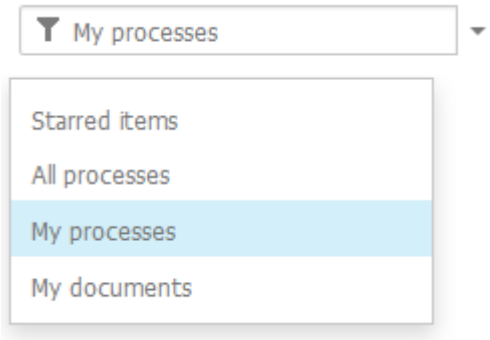
The filter criteria of the selected favorite setting are immediately applied and the list of filter results is updated.

3.1.7.5 Use a favorite in the Favorites area

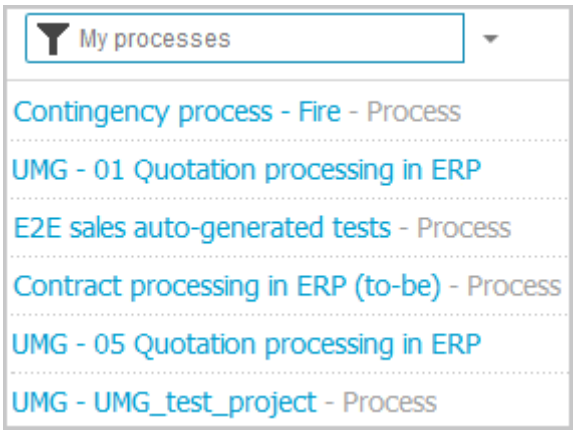
In the Favorites area (page 76), you can open a favorite setting to filter the content based on predefined filter criteria.

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.

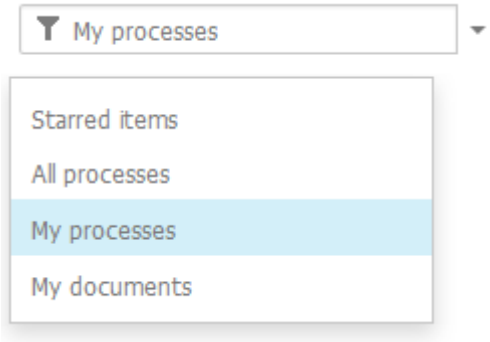
You have filtered database content based on your filter setting and opened one of your favorites using the **Favorites** tab.

3.1.7.6 Valuable information

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

3.1.7.6.1 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.

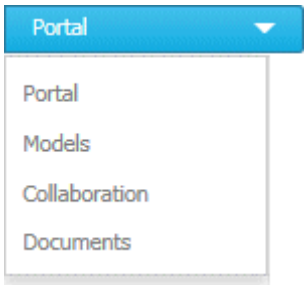


3.1.8 Search content

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 77) on the start page to access items directly. Or you can use the Search area (page 78) 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:



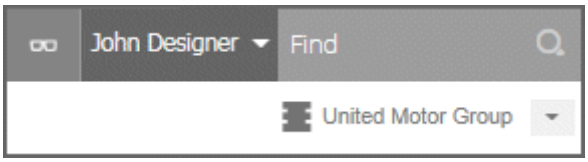
If you use an **ARIS Connect Viewer** license, the **Models** search context is not available. Models found can be opened for editing, but users with **ARIS Connect Viewer** licenses have read-only access to models.

3.1.8.1 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 46) 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 84) 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.

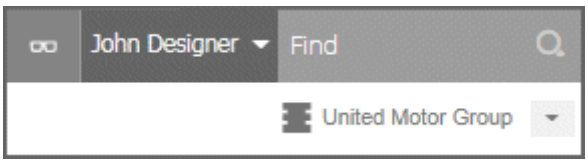
The item opens. For example, if you click the name of an object, it is displayed in the portal. If you click a comment, it is output in Collaboration. If you click the name of a model, the model opens in Model Editor.

3.1.8.2 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 46) 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.

3.1.8.3 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 46) 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 46) your search is to be based on.
2. If you are not in the portal, click **Portal**.
3. Click **Search**.

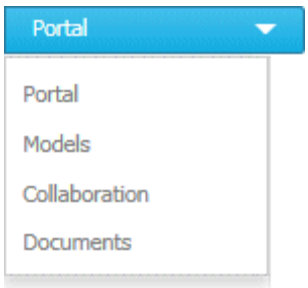
The Search area opens and you can browse ARIS Connect for the relevant terms.

3.1.8.4 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 46) 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 79).

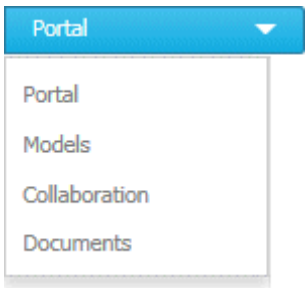
The result of the search will be updated to reflect the search context and filter criteria you specified.

3.1.8.5 Use search context and filters

You can restrict the result in the Search area (page 78) to the items you want to find by using the search context and filters.

Procedure

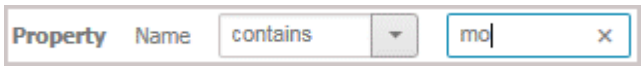
1. In the Search area, click the down arrow that follows the term you entered, and select, e.g., **Portal**, **Models**, **Collaboration**, or **Documents**.



   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.

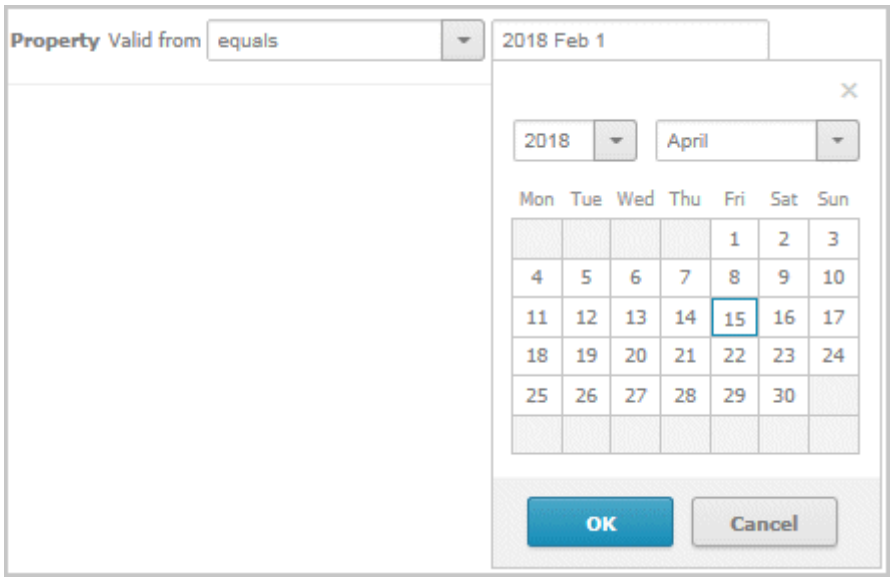
2. Click one or more filter criteria. The selected filter criteria will be listed and the search result updated. If you have selected a filter criterion that you can define more precisely, another area with subordinate filter criteria will be added to the **Filters** area.
3. Click additional criteria.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

3.1.8.6 Save filter settings as a favorite

In the Search area (page 85), 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 79) to define your filter.
2. Click ☆ **Save filters as favorites**. The dialog opens.
3. Enter a name.
4. Click **OK**.

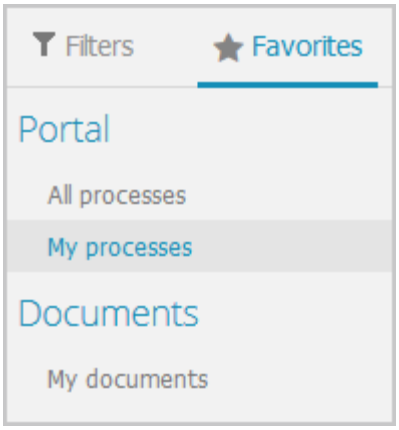
The filter settings are saved in the **Favorites** area. You can filter the content based on these settings (Seite 74) at any time from various devices.

3.1.8.7 Use a favorite in the Search area

In the Search area (page 85), 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.

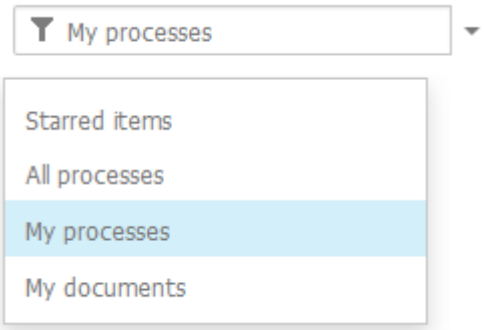
The filter criteria of the selected favorite setting are immediately applied and the list of filter results is updated.

3.1.8.8 Use a favorite in the Favorites area

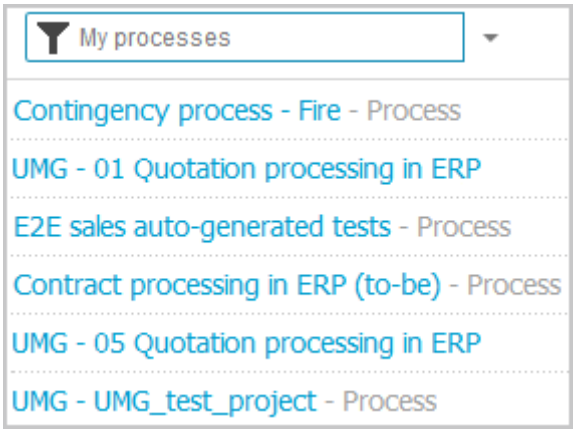
In the Favorites area (page 76), you can open a favorite setting to filter the content based on predefined filter criteria.

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.

3.1.8.9 Clear filters

You can clear filter criteria in more than one way.

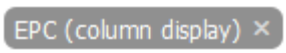
Procedure

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.



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.

3.1.8.10 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 78).
2. Hold down the **Ctrl** key, and click the name of the relevant item.

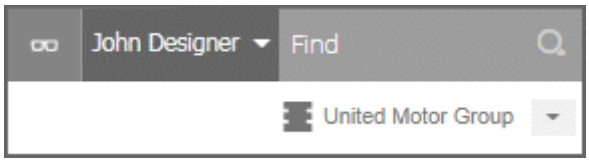
The item will open on a separate tab.

3.1.8.11 Valuable information

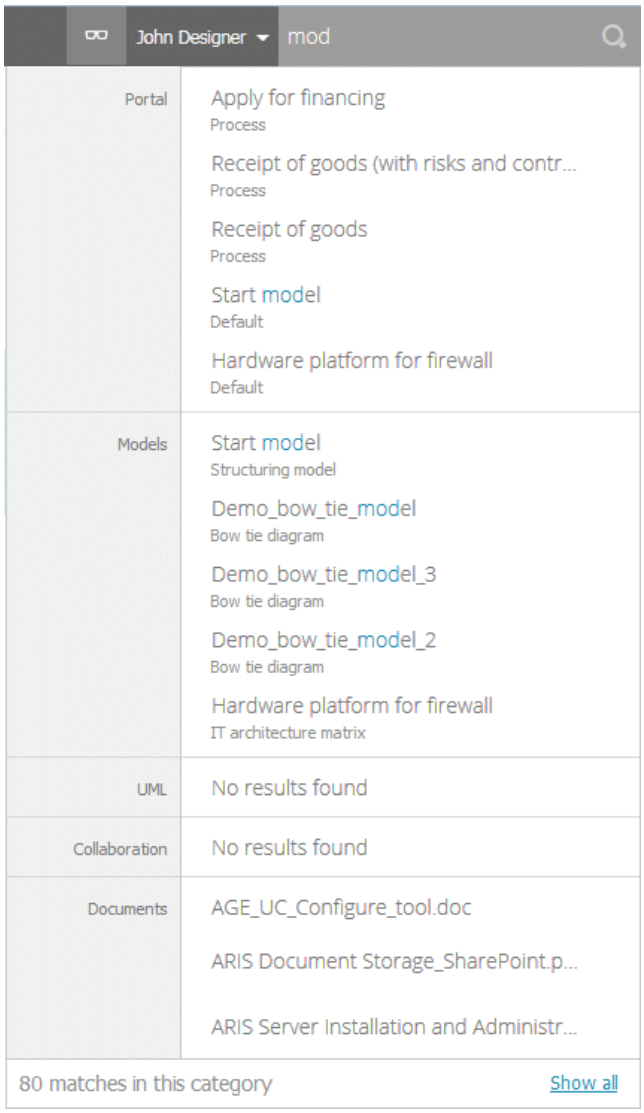
This section provides background information to assist you in carrying out the relevant procedures.

3.1.8.11.1 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 85).

3.1.8.11.2 How is the Search area structured?

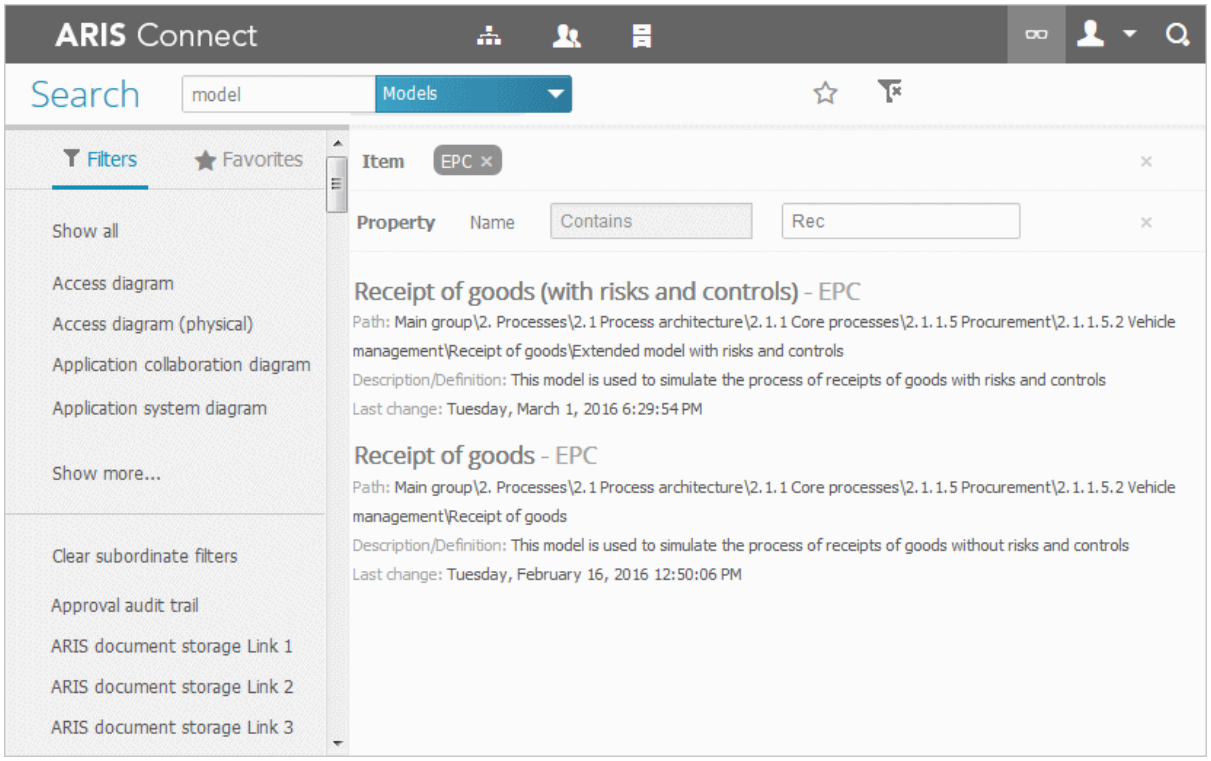
The Search area (page 78) includes a list of all matches.

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.

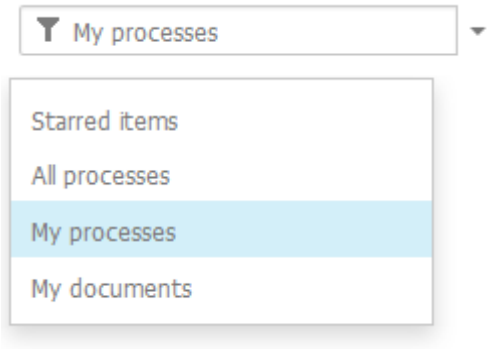
For certain filter criteria, such as the file name, you can enter properties as the search criterion, e.g., a term that should be present in the name.

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.



3.1.8.11.3 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.



3.1.8.11.4 How can search results be influenced?

If you use quick search (page 77) or the Search area (page 78) to find items, the list of results will be influenced by the selected database (page 46) 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.

3.1.9 Contribute as a viewer

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you can change values of specific items (page 93), create new or reuse existing items (page 88), as well as delete items (page 90) 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.

3.1.9.1 Change values of items

You can change values of items (page 93) 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 92) 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 95) 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 95) if you do not enter a numerical value.

3.1.9.2 Create or reuse items in a table

In the portal, you can create new or reuse existing items.

The following description refers to items in a table (page 95). 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 92) 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 99) 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.

3.1.9.3 Create or reuse items in a list

In the portal, you can create new or reuse existing items.

The following description refers to items in a list (page 95). 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 92) 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 99) 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.

3.1.9.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 95). 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 92) 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.

3.1.9.5 Delete items from lists

In the portal, you can delete items from lists and thus from diagrams.

The following description refers to items in a list (page 95). 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 92) 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.

3.1.9.6 Valuable information

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

3.1.9.6.1 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.

3.1.9.6.2 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:

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

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

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

The availability of various edit boxes (page 95) is another clear indication that the edit mode is active.

3.1.9.6.3 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

3.1.9.6.4 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 95) 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 95) if you do not enter a numerical value.

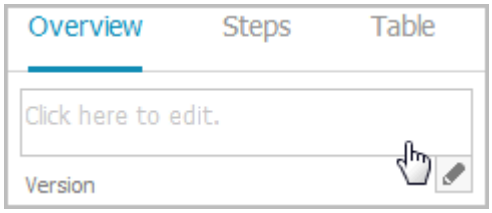
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

3.1.9.6.5 Which editing options are available?

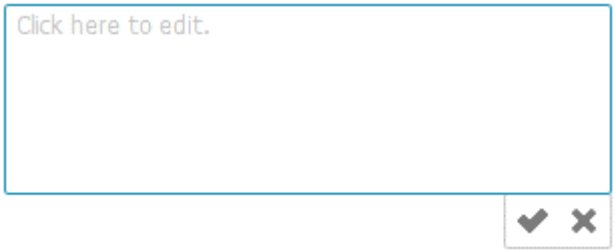
Depending on the attribute (page 94), various editing options are available.

Edit box

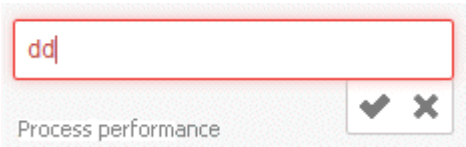
If the edit mode is active (page 92), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 87), the hint **Click here to edit.** is displayed:



Clicking in the field will open it for editing:



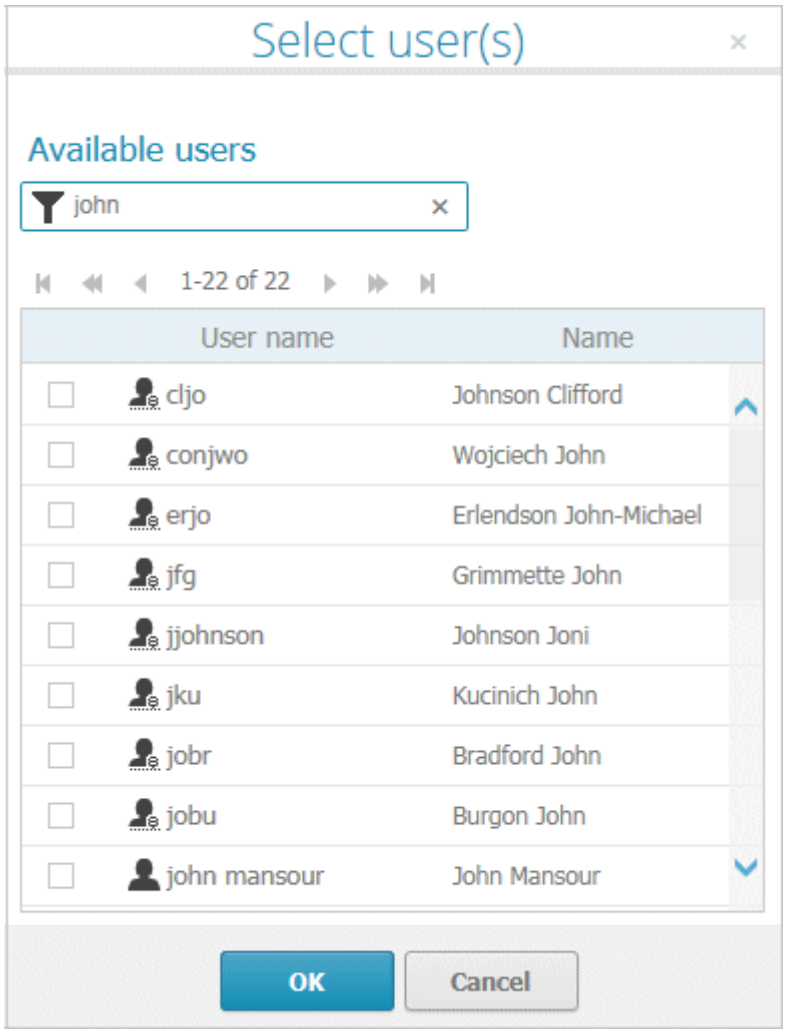
The field indicates whether or not the input corresponds to the type expected. If an entry differs from the type expected, the field is displayed with a red border:



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

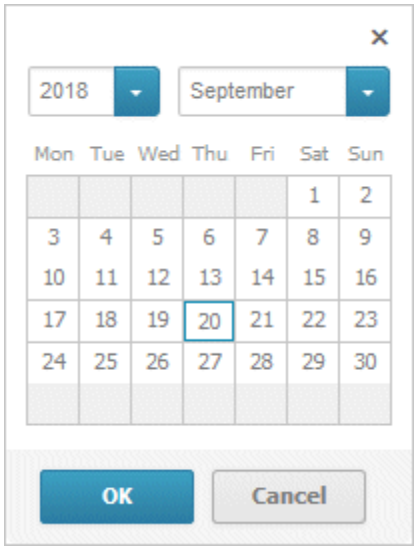
Select user(s)

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

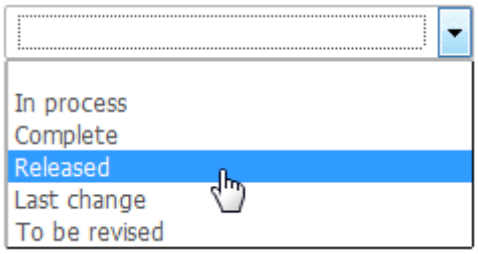
You can enter dates using the calendar. It opens when you click in the edit box:



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:

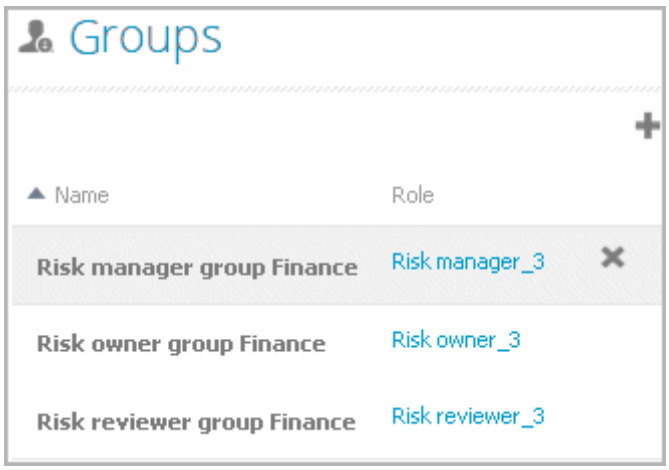
Clicking in the field will offer possible values for selection:



CREATE AND REUSE OBJECTS

Table

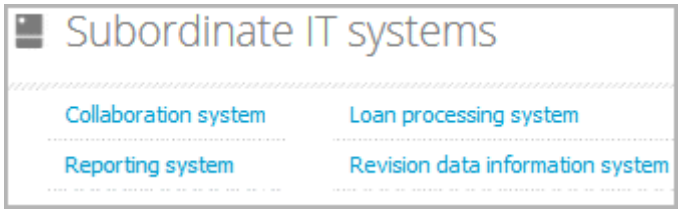
Existing objects are listed in a table. Additional information is displayed in the individual rows:



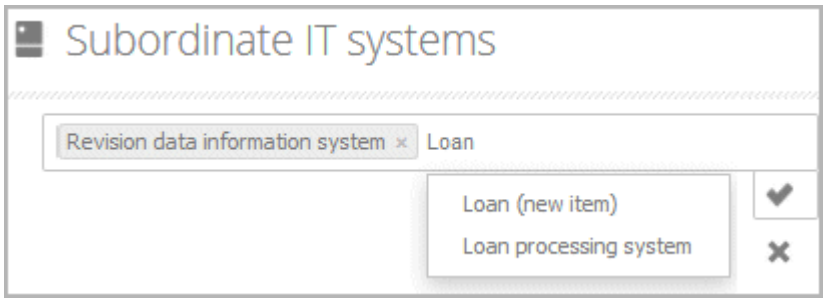
You can add individual objects to the table (page 88) or remove objects from the table (page 90).

List

Existing objects are displayed in a list:



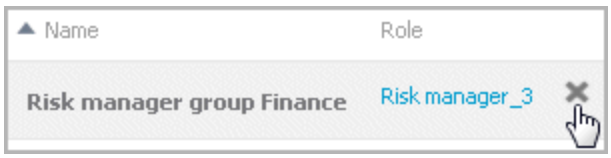
You can create new or reuse existing objects. It is possible to add multiple items at once. Click in the field and enter the names for the required items. Once your input is complete, click ✔ **Change**:



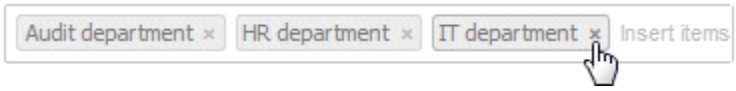
DELETE OBJECTS

You can delete objects from tables (page 90) and lists (page 91):

Table



List



3.1.9.6.6 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.

3.1.10 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)

3.1.10.1 Run SAP® transaction

Run transactions in the connected SAP system.

Prerequisite

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

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 ot 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.

3.1.10.2 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 100) you need to log on to the SAP system again.

3.1.10.3 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.

3.1.10.4 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**.

3.1.10.5 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 102).

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.

3.1.11 Use RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process. RACI is short for **R**esponsible, **A**ccountable, **S**upportive, **C**onsulted, and **I**nformed.

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

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

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

3.1.11.1 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 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 13) 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 127) report to output the RACI matrix in Microsoft® Excel format from an open process model. By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g_bRASCI** variable to **true**.

3.1.12 Use Mini workflows

3.1.12.1 Share model

You can share models with other users.

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. 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**.

3.1.12.2 Submit change request

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

Prerequisites

- You have at least the **ARIS Connect Viewer** license privilege.
- The **Person responsible** model attribute must be specified for the relevant model with a user name that exists in the user management.
- 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**.

3.1.12.3 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**.

3.1.12.4 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 187) 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**.

3.1.12.5 Inform owner of change

You can inform the model owner of model changes you have made in the portal (page 87). 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 87). Depending on the attributes, various editing options (page 95) 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**.

3.1.13 Use dashboards

Based on a ARIS Aware (page 129) license, you can create and display predefined dashboards that are delivered by default or self-provided dashboards.

3.1.13.1 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 10).

Prerequisite

Dashboards are configured for the items selected.

Procedure

1. In the Portal, select (page 46) 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 135) 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 135) dashboard.
5. Click the **Dashboards** fact sheet. The model's dashboards are shown. You can switch between the Process Change Management (page 138) and the CoE - Local Maturity (page 135) dashboards.

You have shown different dashboards by default.

3.1.14 Valuable information

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

3.1.14.1 What is the portal view?

The portal shows specific information for each user. Different views display information in different ways. By default, ARIS comes with two different views. The classic view (page 10) 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.

3.1.14.2 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 12)
- Groups (page 13)
- Glossary (page 25)

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 61) to further restrict this content. Role filters are available only if roles are assigned (page 60) 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 176) you want to discuss with, for example.

Start discussion

Activates Collaboration where you can start a new discussion (page 176).

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 85) 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 177) or in the portal (page 58).

Favorites

Provides direct access to saved filter criteria (Seite 55) of the **Favorites** area of the search and to models a user selected as a favorite element (page 73).

Contacts

Lists your contacts.

My activities

Shows the current activities you are following in Collaboration or in the portal (page 177).

3.1.14.3 What is the structure of the default view?

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

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

- Processes (page 29)
- Organization (page 39)
- IT systems (page 40)
- Glossary (page 43)

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 61) to further restrict this content. Role filters are available only if roles are assigned (page 60) 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 177).

3.1.14.4 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.

3.1.14.5 Where is UML content displayed?

UML content is displayed in the same way as other ARIS content. You can use the groups (page 13) 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.

3.1.14.6 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.

3.1.14.7 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 61) to further restrict this content. Role filters are available only if roles are assigned (page 60) 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 48), 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.

3.1.14.8 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 95) that are based on the following base types:

- Boolean
- Value

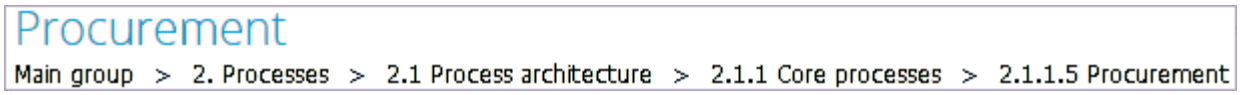
- Floating point number domain
- Integer domain
- Floating point number
- Integer
- Date
- One-liner
- Multi-line text
- Link/File

Text formatting is ignored and cannot be assigned. If you are expected to enter numbers, the field is colored red (page 95) if you do not enter a numerical value.

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

3.1.14.9 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.



3.1.14.10 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 117)

Export graphic as PDF (page 118)

Generate job description (page 119)

Output functions across multiple assignment levels (page 121)

Output functions with connected objects (page 123)

Output model information (page 124)

Output model information considering various aspects (page 125)

Output object information (page 126)

Process manual (example) (page 126)

RA(S)CI - Output organizational participations in processes (page 127)

3.1.14.10.1 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

3.1.14.10.2 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

3.1.14.10.3 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

3.1.14.10.4 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

3.1.14.10.5 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

3.1.14.10.6 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

3.1.14.10.7 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

3.1.14.10.8 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

3.1.14.10.9 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

3.1.14.10.10 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:

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

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

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

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

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

CONTEXT

- Individual process
- List of processes
- Process hierarchy

OUTPUT FORMAT

- XLS

3.1.14.11 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

3.1.14.12 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 131), Business Usage Monitoring (page 154), Enterprise Architecture Management (page 164), Customer Experience Management (CXM) (page 142), Process Performance Management and Governance, Risk and Compliance Management. These templates can be extended and customized according to the individual needs of a company.

3.1.14.13 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.

CREATE DASHBOARDS AND DATA FEEDS

There, dashboards and data feeds 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 110).

3.1.14.14 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.

3.1.14.14.1 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.

3.1.14.14.1.1 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

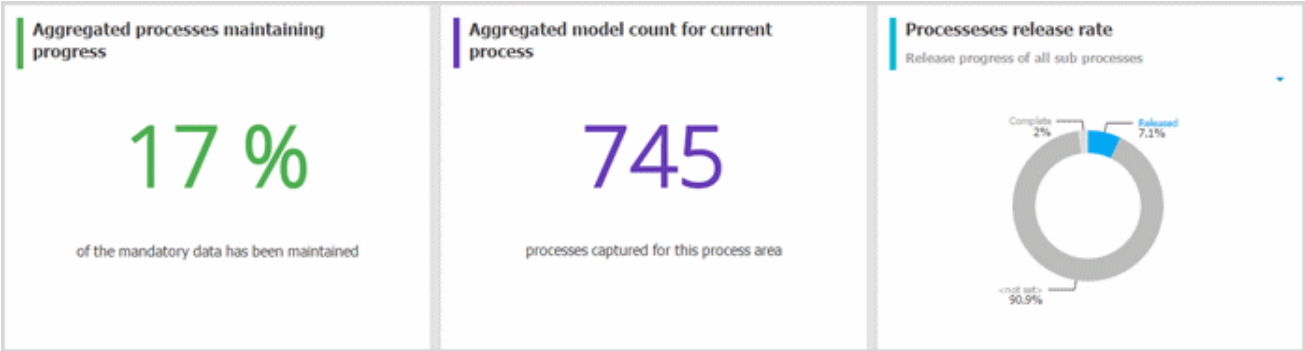
Shows the percentage of processes that are not completed (not set), completed, and released.

Data source
Model/Database content

Calculation

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

EXAMPLE



3.1.14.14.1.2 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


Aggregated processes maintaining progress
59
of the mandatory data has been maintained
Mandatory properties summary
Mandatory property
Number of missing properties
Activities.Roles 1067
Valid from 569
Model status 543
Version 539
Responsible 49
Activities 1
2768 mandatory properties are not maintained
Processes age distribution
How long have the processes been unchanged?
> 1 Year
50.7%
3-12 Months
49.3%

3.1.14.14.1.3 CoE - Local Maturity

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

3.1.14.14.1.4 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.

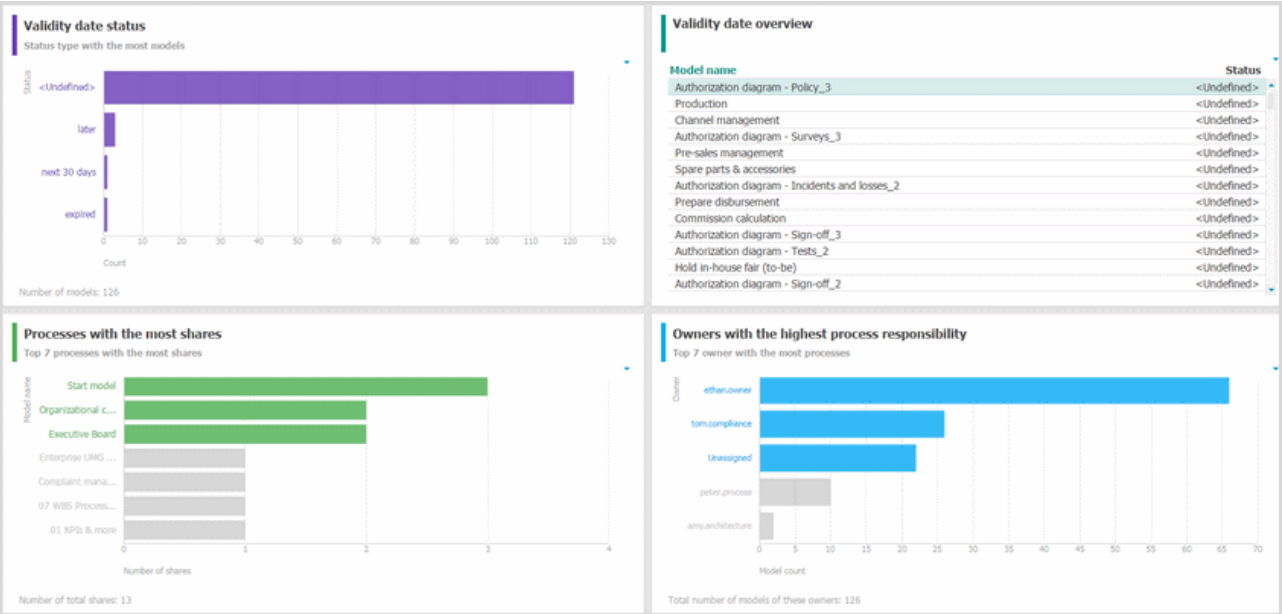
Data source

Model/Database content

Calculation

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

EXAMPLE


Validity date status
Status type with the most models
Status
<Undefined>
later
next 30 days
expired
0 10 20 30 40 50 60 70 80 90 100 110 120 130
Count
Number of models: 126
Validity date overview
Model name
Status
Authorization diagram - Policy_3 <Undefined>
Production <Undefined>
Channel management <Undefined>
Authorization diagram - Surveys_3 <Undefined>
Pre-sales management <Undefined>
Spare parts & accessories <Undefined>
Authorization diagram - Incidents and losses_2 <Undefined>
Prepare disbursement <Undefined>
Commission calculation <Undefined>
Authorization diagram - Sign-off_3 <Undefined>
Authorization diagram - Tests_2 <Undefined>
Hold in-house fair (to-be) <Undefined>
Authorization diagram - Sign-off_2 <Undefined>
Processes with the most shares
Top 7 processes with the most shares
Model name
Start model
Organizational c...
Executive Board
Enterprise UMG ...
Complaint mana...
07 WBS Process...
01 KPIs & more
0 1 2 3 4
Number of shares
Number of total shares: 13
Owners with the highest process responsibility
Top 7 owner with the most processes
Owner
ethan.owner
tom.compliance
Unassigned
peter.process
amy.architecture
0 5 10 15 20 25 30 35 40 45 50 55 60 65 70
Model count
Total number of models of these owners: 126

3.1.14.14.1.5 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.

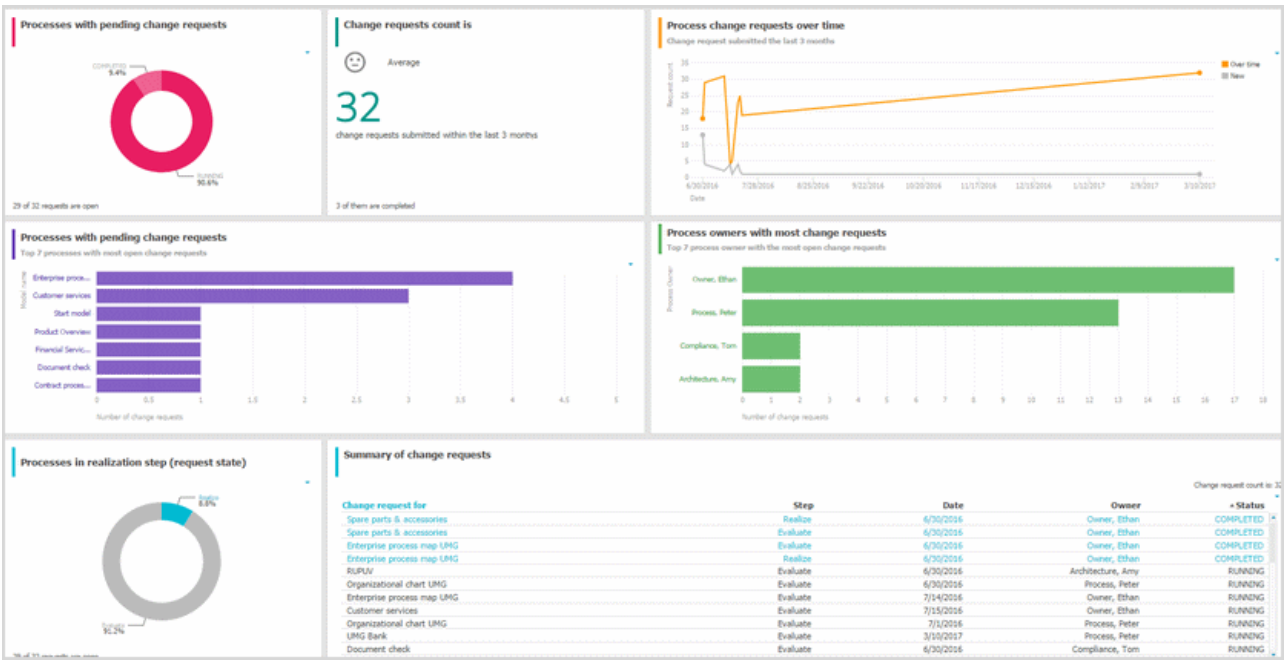
Data source

Model/Database content

Calculation

Lists all change requests with data.

EXAMPLE



3.1.14.14.1.6 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.

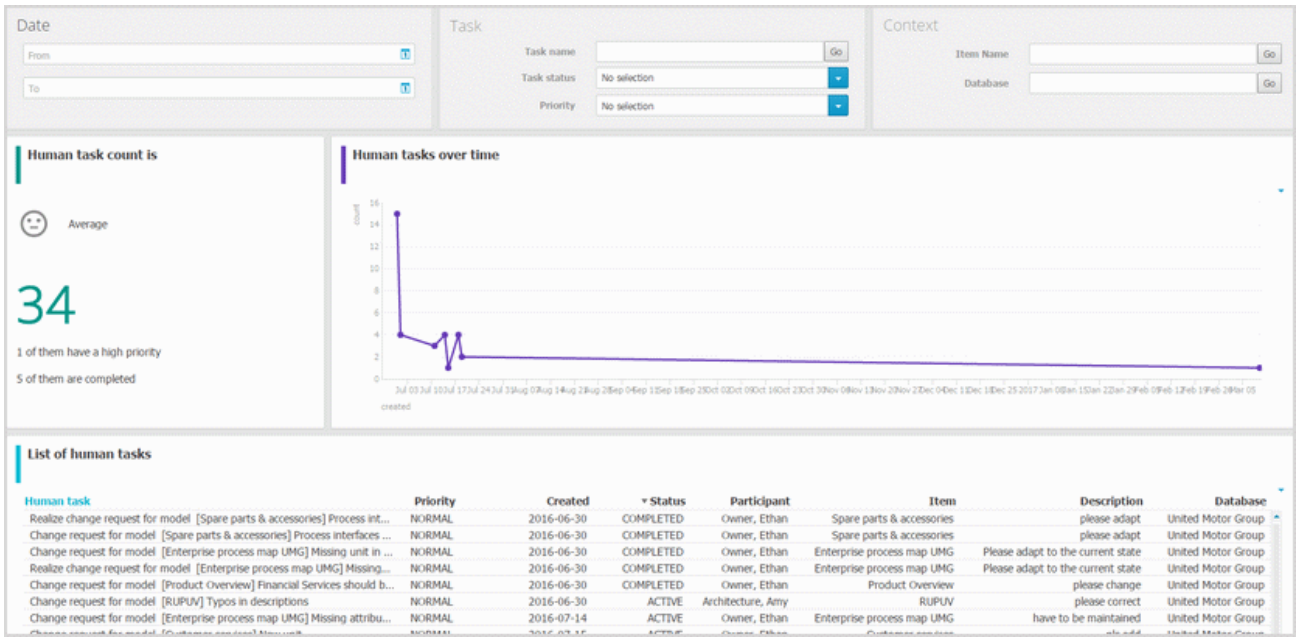
Data source

Model/Database content

Calculation

Lists all human task including details in a table.

EXAMPLE


Date
From
To
Task
Task name
Go
Task status
No selection
Priority
No selection
Context
Item Name
Go
Database
Go
Human task count is
Average
34
1 of them have a high priority
5 of them are completed
Human tasks over time
count
created
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

3.1.14.14.2 Based on Customer Experience (CXM)

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

3.1.14.14.2.1 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

ARIS Architect:

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

ARIS Architect:

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

ARIS Architect:

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

ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in the ARIS document storage/Dashboarding/United Motor Group/**EA** subfolder.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the the **Customer experience** CXM dashboard (page 142).

CONTEXT

Database

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

ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in the ARIS document storage/Dashboarding/United Motor Group/**EA** subfolder.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the the **Customer experience** CXM dashboard (page 142).

CONTEXT

Database

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**).

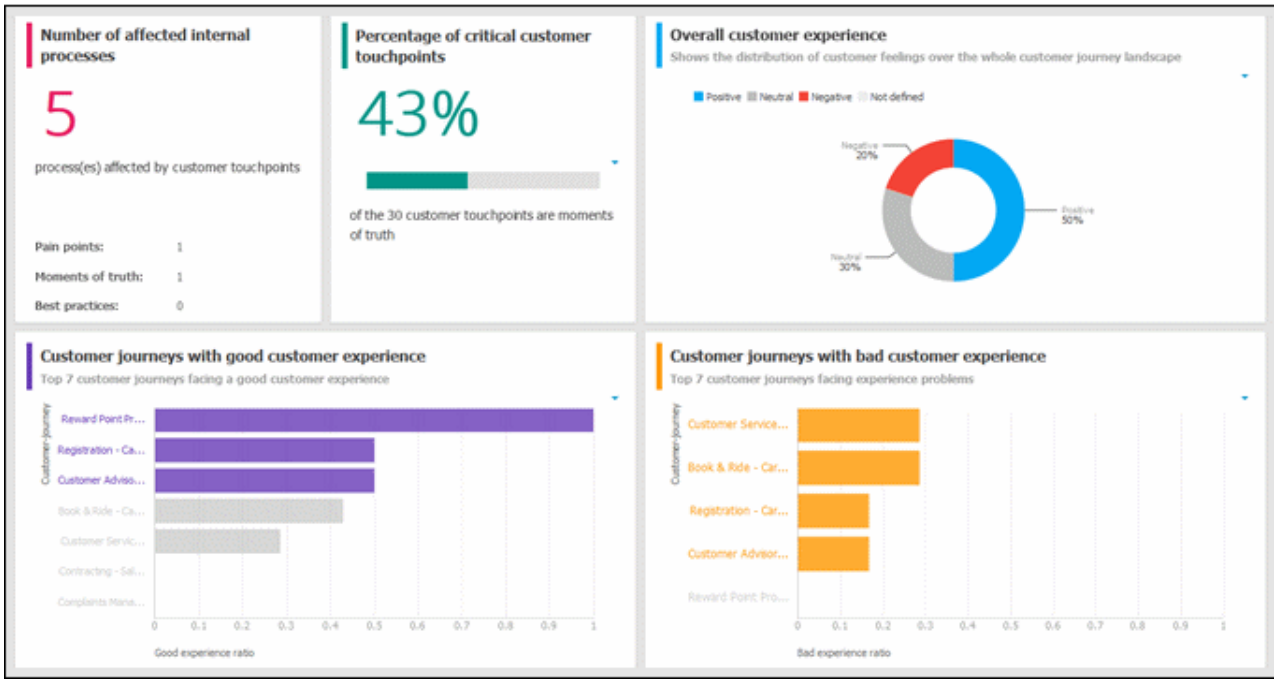
Data feed

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


Number of affected internal processes
5
process(es) affected by customer touchpoints
Pain points: 1
Moments of truth: 1
Best practices: 0
Percentage of critical customer touchpoints
43%
of the 30 customer touchpoints are moments of truth
Overall customer experience
Shows the distribution of customer feelings over the whole customer journey landscape
Positive
Neutral
Negative
Not defined
Negative 20%
Positive 50%
Neutral 30%
Customer journeys with good customer experience
Top 7 customer journeys facing a good customer experience
Customer journey
Reward Point Pr...
Registration - Ca...
Customer Adviso...
Book & Ride - Ca...
Customer Servic...
Contracting - Sali...
Complaints Mana...
0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1
Good experience ratio
Customer journeys with bad customer experience
Top 7 customer journeys facing experience problems
Customer journey
Customer Service...
Book & Ride - Car...
Registration - Car...
Customer Advisor...
Reward Point Pro...
0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1
Bad experience ratio

3.1.14.14.2.2 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

ARIS Architect:

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

ARIS Architect:

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

ARIS Architect:

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

ARIS Architect:

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**).

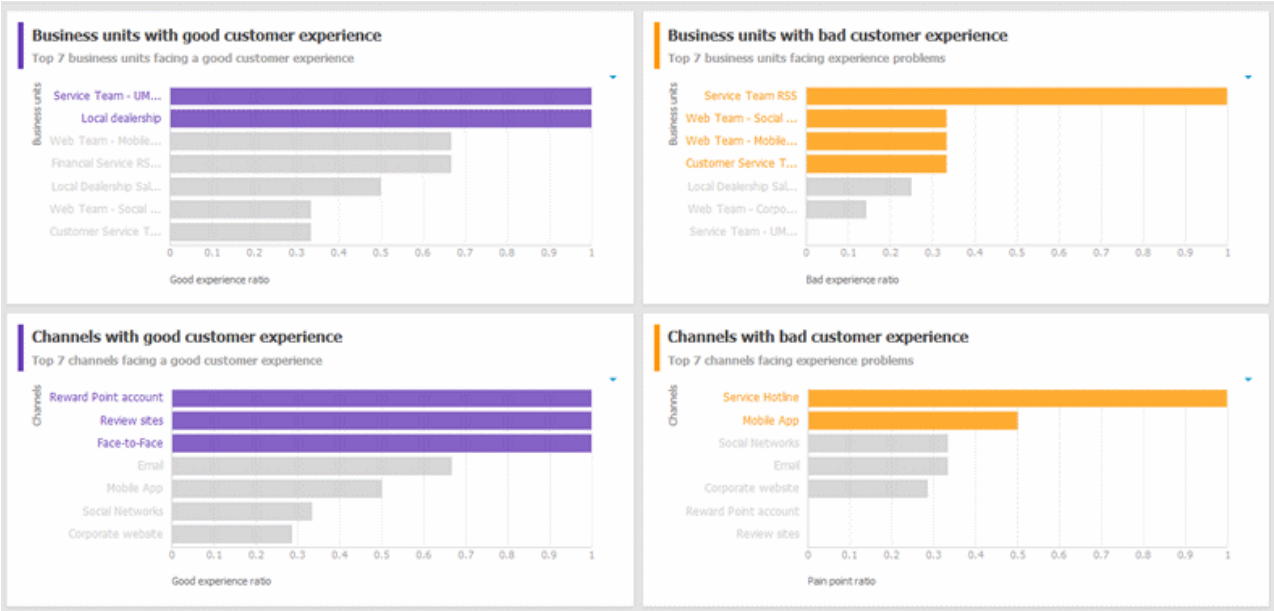
Data feed

CXM - Responsible channel

Calculation

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

EXAMPLE


Business units with good customer experience
Top 7 business units facing a good customer experience
Business units
Service Team - UM...
Local dealership
Web Team - Mobile...
Financial Service RS...
Local Dealership Sal...
Web Team - Social ...
Customer Service T...
0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1
Good experience ratio
Business units with bad customer experience
Top 7 business units facing experience problems
Business units
Service Team RSS
Web Team - Social ...
Web Team - Mobile...
Customer Service T...
Local Dealership Sal...
Web Team - Corpo...
Service Team - UM...
0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1
Bad experience ratio
Channels with good customer experience
Top 7 channels facing a good customer experience
Channels
Reward Point account
Review sites
Face-to-Face
Email
Mobile App
Social Networks
Corporate website
0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1
Good experience ratio
Channels with bad customer experience
Top 7 channels facing experience problems
Channels
Service Hotline
Mobile App
Social Networks
Email
Corporate website
Reward Point account
Review sites
0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1
Pain point ratio

3.1.14.14.2.3 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

ARIS Architect:

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

ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable

No

Data collection
-.-

Data feed
CXM - Analyze customer experience

Calculation
Number of pain points divided by the number of customer touchpoints multiplied by 100.

Percentage of critical customer touchpoints

Overview of the percentage of critical customer touchpoints.

Data source
ARIS Architect:

Report: CXM - Analyze customer experience

Report configurable
No

Data collection
-.-

Data feed
CXM - Analyze customer experience

Calculation
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
ARIS Architect:

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

ARIS Architect:

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

ARIS Architect:

Report: CXM – Analyze customer journeys

This report answers the following questions:

- Which customer journey is the most critical?
- Which customer lifecycle
- Which stage is the most critical?

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **CXM_ANALYZE_CUSTOMER_JOURNEYS.XML** document stored in ARIS document storage. The **Analyze customer journeys (TOP 7)** document is stored in the ARIS document storage/Dashboarding/United Motor Group/**EA** subfolder.

The report result is used as input for the **CXM - Analyze customer journeys** data feed. This data feed is related to the the **Customer experience** CXM dashboard (page 142).

CONTEXT

Database

Report configurable

No

Data collection

-.-

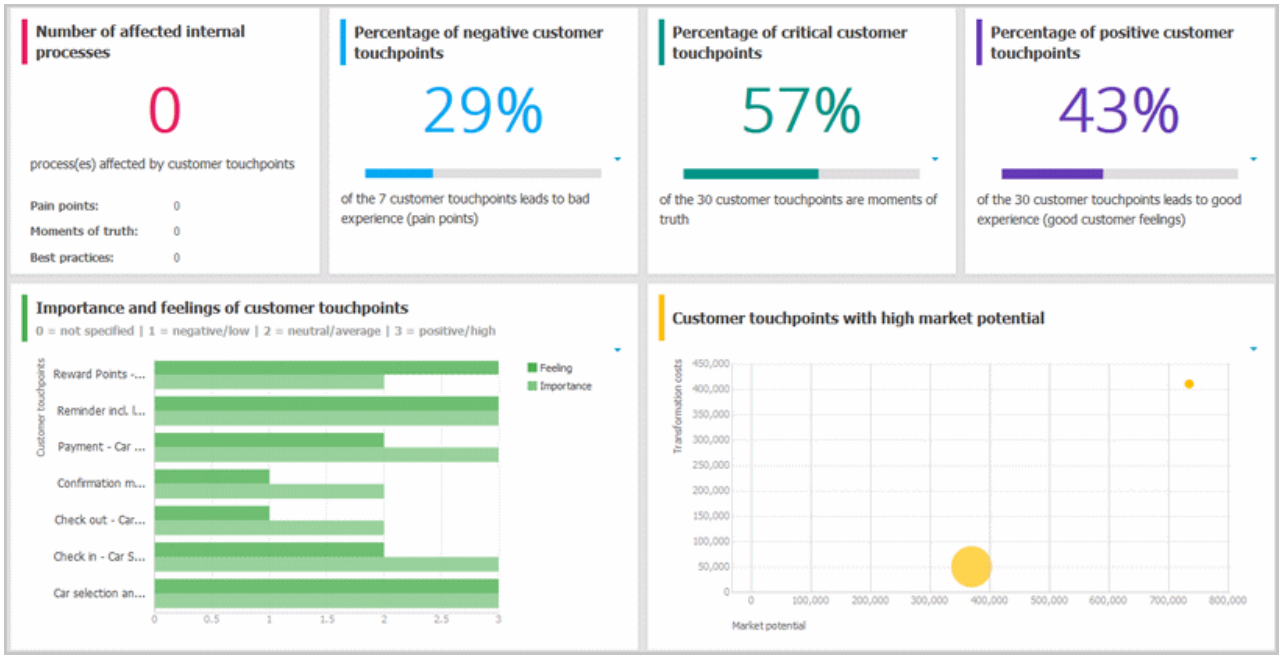
Data feed

CXM - Importance vs. feelings

Calculation

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

EXAMPLE



3.1.14.14.3 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.

3.1.14.14.3.1 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

ARIS Architect:

Report: Piwik - Global portal usage reports using the Piwik **VisitsSummary** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- VisitsSummary report
- BrowserVersions report
- BrowserEngines report
- Language report
- OsVersions report

The report provides various parameters allowing customizing without changing the report code.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/**piwik** subfolder.

The report result is used as input for the Piwik - Technical KPIs (page 160)dashboard.

CONTEXT

Database

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

ARIS Architect:

Report: Piwik - Database-specific portal usage reports using the Piwik **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- PageTitles report
- CustomDimension report
- SiteSearchKeywords report

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/United Motor Group/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 154) dashboard.

CONTEXT

Database

Data feed

Piwik - Most viewed item types

Most viewed items

Top seven items most viewed over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Database-specific portal usage reports using the Piwik **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- PageTitles report
- CustomDimension report
- SiteSearchKeywords report

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/United Motor Group/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 154) dashboard.

CONTEXT

Database

Data feed

Piwik - Most viewed item

Most searched keywords

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

Data source

ARIS Architect:

Report: Piwik - Database-specific portal usage reports using the Piwik **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- PageTitles report
- CustomDimension report
- SiteSearchKeywords report

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/United Motor Group/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 154) dashboard.

CONTEXT

Database

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

ARIS Architect:

Report: Piwik - Database-specific portal usage reports using the Piwik **CustomDimension** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- PageTitles report
- CustomDimension report
- SiteSearchKeywords report

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/United Motor Group/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 154) dashboard.

CONTEXT

Database

Data feed

Piwik - Most viewed items types

Most viewed items list

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

Data source

ARIS Architect:

Report: Piwik - Database-specific portal usage reports using the Piwik **PageTitles** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- PageTitles report
- CustomDimension report
- SiteSearchKeywords report

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/United Motor Group/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 154) dashboard.

CONTEXT

Database

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

ARIS Architect:

Report: Piwik - Database-specific portal usage reports using the Piwik **SiteSearchKeywords** report.

This report creates ARIS database-specific portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific Piwik reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- PageTitles report
- CustomDimension report
- SiteSearchKeywords report

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/United Motor Group/**Piwik** subgroup.

The report result is used as input for the Piwik - Publications (page 154) dashboard.

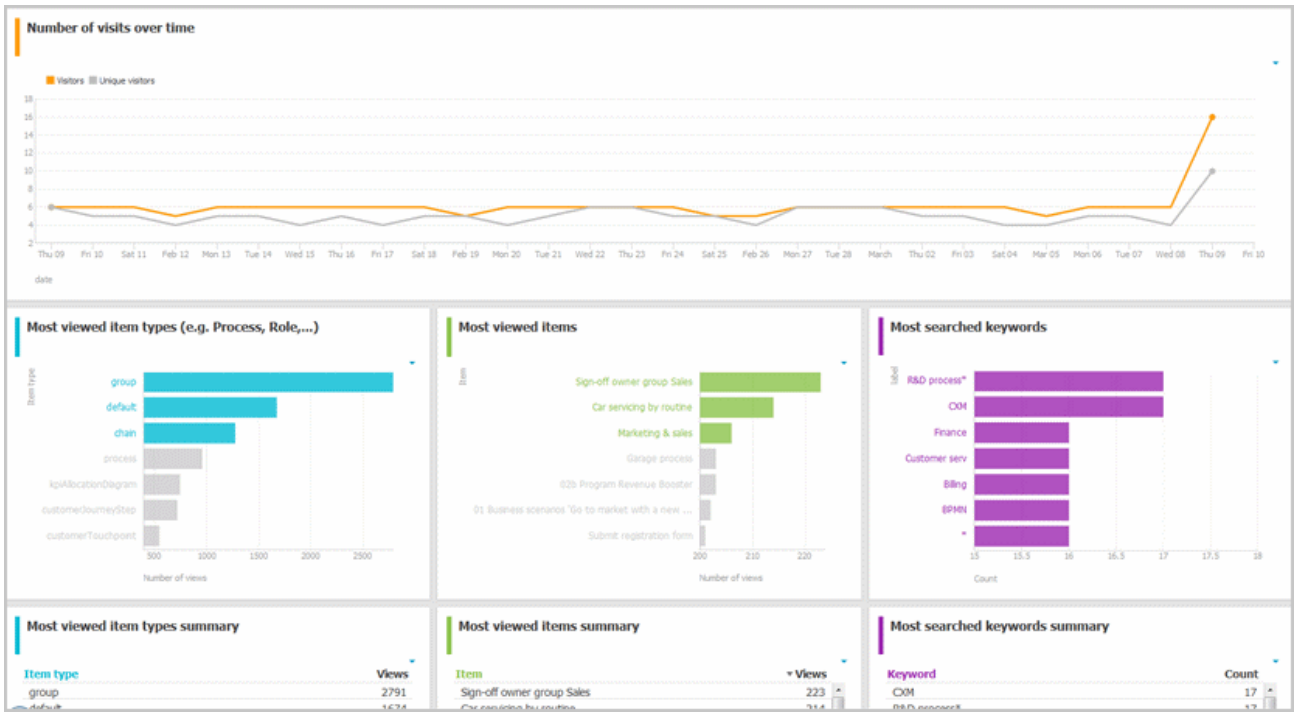
CONTEXT

Database

Data feed

Piwik - Most searched keywords

EXAMPLE


Number of visits over time
Visitors
Unique visitors
date
Most viewed item types (e.g. Process, Role,...)
group
default
chain
process
kpiAllocationDiagram
customerJourneyStep
customerTouchpoint
Number of views
Most viewed items
Sign-off owner group Sales
Car servicing by routine
Marketing & sales
Garage process
02b Program Revenue Booster
01 Business scenarios "Go to market with a new ...
Submit registration form
Number of views
Most searched keywords
R&D process*
CXM
Finance
Customer serv
Billing
BPMN
Count
Most viewed item types summary
Item type
Views
group
2791
Most viewed items summary
Item
Views
Sign-off owner group Sales
223
Most searched keywords summary
Keyword
Count
CXM
17

3.1.14.14.3.2 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

ARIS Architect:

Report: Piwik - Global portal usage reports using the Piwik **BrowserEngines** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- VisitsSummary report
- BrowserVersions report
- BrowserEngines report
- Language report
- OsVersions report

The report provides various parameters allowing customizing without changing the report code.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/**piwik** subfolder.

The report result is used as input for the Piwik - Technical KPIs (page 160)dashboard.

CONTEXT

Database

Data feed

Piwik - Browser engines

Most used operation systems

Operation systems most used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage reports using the Piwik **OsVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- VisitsSummary report
- BrowserVersions report
- BrowserEngines report
- Language report
- OsVersions report

The report provides various parameters allowing customizing without changing the report code.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/**piwik** subfolder.

The report result is used as input for the Piwik - Technical KPIs (page 160)dashboard.

CONTEXT

Database

Data feed

Piwik - Operating system version

Browser version summary

Browser versions most used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage reports using the Piwik **BrowserVersions** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- VisitsSummary report
- BrowserVersions report

- BrowserEngines report
- Language report
- OsVersions report

The report provides various parameters allowing customizing without changing the report code.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/**piwik** subfolder.

The report result is used as input for the Piwik - Technical KPIs (page 160)dashboard.

CONTEXT

Database

Data feed

Piwik - Browser version

Portal language summary

Portal language most used over the selected time period.

Data source

ARIS Architect:

Report: Piwik - Global portal usage reports using the Piwik **Language** report.

This report creates global portal usage statistics. Therefore, it accesses an external Piwik instance that contains a collection of ARIS portal events, retrieves specific **Piwik** reports, and adds ARIS data to them, if required.

The following **Piwik** reports are retrieved:

- VisitsSummary report
- BrowserVersions report
- BrowserEngines report
- Language report
- OsVersions report

The report provides various parameters allowing customizing without changing the report code.

The parameters must be specified according to the required Piwik settings. If the settings are specified several output files are generated.

OUTPUT

Generates several **XML** documents stored in the ARIS document storage/Dashboarding/**piwik** subfolder.

The report result is used as input for the Piwik - Technical KPIs (page 160)dashboard.

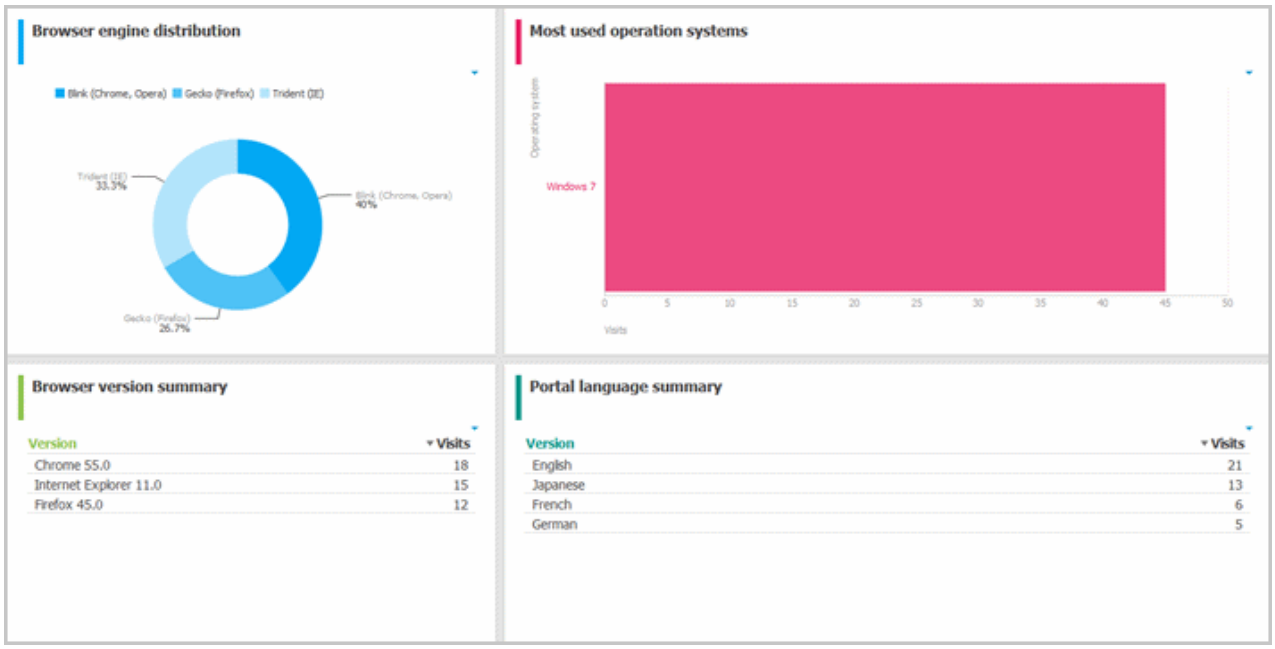
CONTEXT

Database

Data feed

Piwik - Portal language

EXAMPLE



3.1.14.14.4 Based on EA

Dashboards based on Enterprise Architecture (EA) information.

3.1.14.14.4.1 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 Architect or ARIS Architect 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 Architect or ARIS Architect 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 Architect or ARIS Architect 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 Architect or ARIS Architect 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 Architect or ARIS Architect 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

This report creates a table listing all IT systems of the database. For each system, various types of information are provided, such as the **Data center costs** and **Criticality** attributes, or the number of interfaces.

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **EA_SYSTEMS_WITH_DATA.XML** file. The **Systems with data** document is stored within the ARIS document storage/Dashboarding/United Motor Group/**EA** subfolder.

The report result is used as input for the **EA - Organizational unit - Systems with data** data feed. This data feed is related to the EA dashboard for organizational units (page 164) dashboard.

CONTEXT

Database

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 Architect:

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

This report creates a table listing all IT system pairs that have common capabilities. In each pair, **System A** is considered to be the potential replacement for **System B**. For each pair, the capability overlap is shown as a percentage.

The report provides various parameters allowing customizing without changing the report code.

OUTPUT

Generates the **EA_SYSTEM_REDUNDANCIES.XML** file. **The System redundancies in the use of capabilities** document is stored in the ARIS document storage/Dashboarding/United Motor Group/**EA** subfolder.

The report result is used as input for the **EA - System - System redundancies** data feed. This data feed is related, e. g., to the EA dashboard for organizational units (page 164) dashboard.

CONTEXT

Database

Data feed

EA - System - System redundancies

Calculation

Compares systems regarding there 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

ARIS Architect:

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

3.1.14.14.4.2 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 there common capabilities.

Operating costs by cost type

Operating costs for the selected IT system by different cost types over time.

Data source

ARIS Architect:

Report: EA/Alfabet - System costs

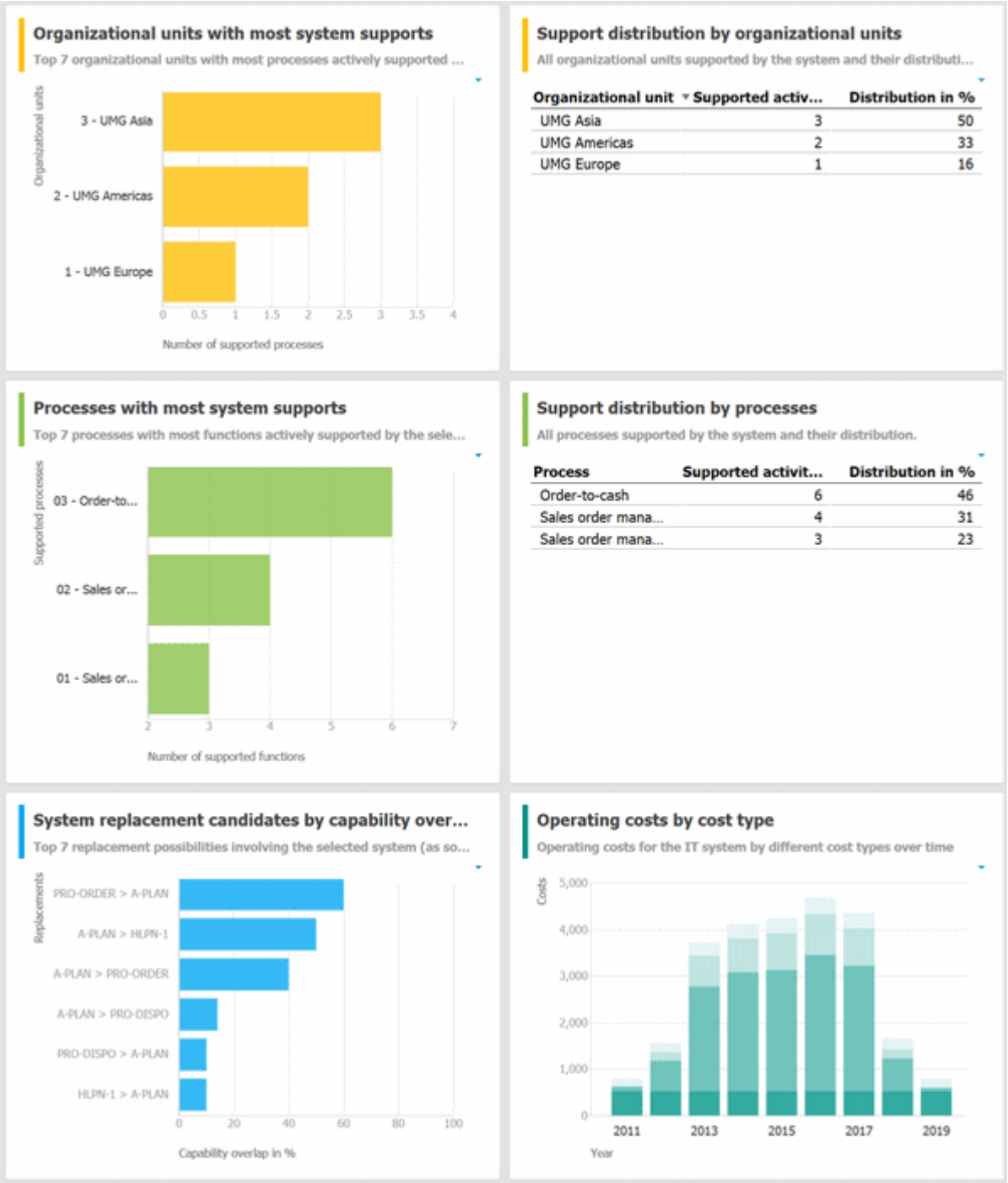
Data feed

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



3.1.14.14.4.3 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

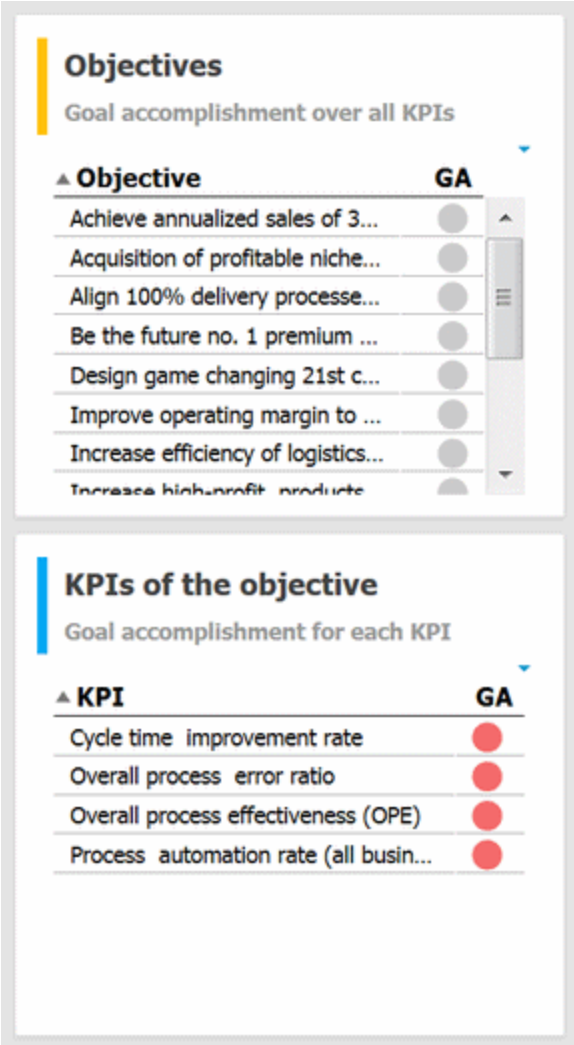
Data feed

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...
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 175) a user profile.
2. Search (page 176) for groups and people who provide interesting content.
3. Create filters and check (page 181) for new information.
4. Comment on (page 179), share, flag posts, etc.
5. Invite (page 183) 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 188) 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 188) 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 187) 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 188) 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 187) 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 186) 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 188) 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 178) 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 **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 178) 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 187) 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 187) 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 187) 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 178) 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 178) 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 181). 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 187) **#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 184).
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 184) 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 188) 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 188) 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 178) in Collaboration, which for example, can be commented (page 179) 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 178):

- **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 179) 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 182). 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 181). 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 179) 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 183) 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 184) 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).

4 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 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.

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