ARIS Connect

ADMINISTRATOR USER MANUAL

Version 9.8 - Service Release 7

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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 process expert you receive the corresponding views and options for analyzing and improving processes.

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

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

News on ARIS is available in ARIS Community. (http://www.ariscommunity.com/system/files/SAG_ARIS_9.8_Features_Overview_SR6.pdf)

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 General

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 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.

2.3 Change profile

Change the data in your ARIS Connect profile. Data from LDAP users can be edited only to a limited extent.

Procedure

4. Click **<User name> > My profile**. The user data (details) is displayed.
5. Click **Edit** to change the e-mail address, telephone number, etc. Some entries cannot be changed, such as the user name.
6. Click **Save**.
7. Click **Change picture** to change or delete your profile picture. The dialog opens.
8. Click **Select file** to navigate to the picture file you want to upload.
9. Using the **File Upload** dialog, select the picture file and click **Open**. The picture is displayed in the preview of the **Change picture** dialog.
10. Click **Upload**. The picture will be added to your profile. If a different picture is uploaded in ARIS Connect or in Collaboration, it is automatically transferred to the other application.

Your profile is changed.

2.4 Change password

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

Procedure

11. Click **<User name> > My profile**. The user data (details) is displayed.
12. Click **Edit**.
13. Enable the **Change password** check box. The **Old password**, **New password**, and **Confirm password** fields are displayed.
14. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
15. Click **Save**.

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

2.5 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 329) opens.

2.6 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.

2.7 Open Download clients page

You can switch to the Download clients page to download and use an ARIS product such as ARIS Architect or ARIS Designer.

Prerequisite

Your administrator enables download clients.

Procedure

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

A new tab opens with the Download clients page. With a click, you can download and start the ARIS products your administrator has configured for use.

2.8 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 call up the information you want using the **Contents** tab, the **Index** tab, and the **Search** field.

2.9 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 to which you are sending the link 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.

2.10 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.

2.11 Play videos

You can view 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).

2.12 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.

2.13 Known issues

AD BLOCKERS

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

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

POP-UP BLOCKERS

Under certain circumstances, if the response time is too long, a Web browser may consider the tab of 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.

2.14 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.

2.15 ARIS API

ARIS API allows read and write access to ARIS Repository and ARIS document storage content from external - particularly mobile - applications.

Using ARIS API requires a license for ARIS Access Infrastructure on the server side and one of the following licenses on the user side: **ARIS Access Full**, **ARIS Access Mobile**, **ARIS Access Read-only**. The exact range of ARIS API methods depends on the user license in place. Furthermore, registration and certification of the application using a Web form (http://www.ariscommunity.com/aris-access-certification-inquiry-form) is required.

ARIS API has its own separate technical documentation (../../../../../../apidocs/index.html).

3 ARIS Administration

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

3.1 Open ARIS Administration

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

Prerequisite

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

Procedure

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

ARIS Administration opens.

3.2 What is ARIS Administration for?

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

3.3 Licenses

3.3.1 Import and display license file

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

Prerequisite

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

Procedure

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

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

You can now assign users the required license privileges. If you need additional licenses later, simply import the new license file as described above.

To display imported license files, click the relevant license, and select **Open license file**.

3.3.2 Delete licenses/Delete license file

You can delete license files when they have expired. Before deleting licenses, back up user data, if required, in order to be able to reuse (page 32) them when new license are available. In the configuration, you can specify that administrators are notified before a license expires.

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

Prerequisite

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

Procedure

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

The license file is deleted.

3.3.3 Display information about licenses/license file

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

Prerequisite

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

Procedure

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

The imported license file is displayed as an XML file.

3.3.4 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.3.4.1 What license types exist?

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

LICENSE TYPES FOR CLIENT PRODUCTS

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

NAMED USER

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

CONCURRENT USER

For this license type, the number of users who can log in at the same time is specified. The assigned users share the available licenses. If the number of users logged in is the same as the number of available licenses, no other users can log in. The user must wait until another user logs off. However, the administrator can end (page 22) the sessions of users.

CROSS-CLIENT

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

SERVER LICENSES

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

3.3.4.2 What happens when a license expires?

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

Before deleting licenses, back up user data, if required, in order to be able to reuse (page 32) them when new license are available. In the configuration, you can specify that administrators are notified before a license expires.

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

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

3.3.4.4 What dependencies exist within the privileges?

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

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

3.4 User management

3.4.1 Use case 'Manage users'

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

MANAGEMENT IN USER MANAGEMENT

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

MANAGEMENT IN ARIS ARCHITECT

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

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

3.4.1.1 Manage users

This use case provides a comprehensive description of all procedures that administrators must carry out for a tenant (page 502) so that all authorized employees can work with ARIS Architect.

We recommend that you use ARIS Administration to manage users, user groups, privileges, licenses, documents, configurations, and processes in ARIS Connect. This is what the use case is based on. Using User Management is advisable only for users of ARIS Risk & Compliance Manager, ARIS Publisher, PPM, and MashZone.

Scenario

After installation, the following system users exist: 'superuser (page 500)' and 'system (page 500)'. They are responsible for the user management of an activated tenant (page 502). The server was started, the password for the system user (page 501) **superuser** has not been changed yet.

USER MANAGEMENT IN ARIS ADMINISTRATION

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

d. Click **<User name> > Administration**.

ARIS Administration opens.

2. Change the passwords for the users 'superuser' and 'system'.
   a. Change the passwords of the users **superuser** and **system** (page 500) to prevent unauthorized access to the system. These users are created automatically after installation and have comprehensive function privileges and authorizations.
   a. Click the user whose password you want to change.
   b. Click **Edit**.
   c. Enable the **Change password** check box. The **Old password**, **New password**, and **Confirm password** fields are displayed.
   d. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
   e. Click **Save**.

      The password is changed. The user receives a notification by e-mail.
3. Import the license purchased.
   a. Click **Licenses**.
   b. Click **Import license file**. The dialog opens.
   c. Select the relevant license file.
   d. Click **Upload**.

      The license file is transferred. It is shown how many licenses were imported, as well as which licenses could not be installed and why.
4. Create users or synchronize them from your LDAP system.
   a. Click **Add user**. The **Create user** form opens.
   b. Enter the user name, first and last name, e-mail address, if applicable, and password. If a user that already exists in the LDAP system is created, the user name must match. The e-mail address is transferred automatically. For the other specifications you can enter any characters you wish because this information will automatically be transferred from the LDAP system after the user is created.

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

      The user has been created.
5. Create user groups or synchronize them from your LDAP system.
   a. Click **User management**, and select **User groups**. The list of user groups opens.
   b. Click **Add user group**.
   c. Enter the name of the user group and an optional description.
   d. Click **Save**.

The user group is created.

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

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

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

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

USER MANAGEMENT IN ARIS ARCHITECT

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

1. Start ARIS Architect.
2. Log in as **system** user and connect to the **default** tenant.

   Please use the new password that you just changed in ARIS Administration. ARIS Architect starts.
3. Create databases. All users with the **Database administrator** function privilege can do so.
   a. Click **ARIS > Administration** or **ARIS > Explorer**.
   b. Click **Navigation** in the bar panel if the **Navigation** bar is not activated yet.

c. In the Explorer tree, right-click your connection to ARIS Design Server and select **New > Database**.

d. Enter a name. Do not use any special characters.

e. Enable the **Versionable** check box if you want the content of the new database to be versioned.

f. Click **OK**. The database is created and displayed in the **Navigation** bar, either as a non-versionable or versionable database.

g. All users and user groups are automatically transferred from ARIS Administration.

h. Change the password of the system user **system**.

i. Assign access privileges.

j. Assign function privileges to users and user groups.

k. Assign filters to users and user groups.

The database is available to authorized users.

4. Assign access privileges for database groups. These actions can be carried out by all users with the **User administrator** function privilege.

a. Click **ARIS > Explorer**.

b. Log in to the database.

c. Click **Navigation** in the bar panel if the **Navigation** bar is not activated yet.

d. Right-click the group for which you want to edit the access privileges, and select **Properties**.

e. Click **Access privileges (users)** or **Accesss privileges (user groups)** on the **Selection** tab.

f. Select the users/user groups for which you want to assign privileges.

g. Select the required access privileges. You can assign **Read (r)**, **Write (w)**, and **Delete (d)** access privileges. The **Version (v)** access privilege is available for versionable databases only. The selection is displayed in the **Privileges** column.

h. If you click the **Pass on privileges** button, the selected access privileges are applied to all subgroups. This also applies to all new subgroups created below this group in the future.

i. Click **OK**.

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

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

a. Click **ARIS > Administration**.

b. Log in to the database.

c. Click **Navigation** in the bar panel if the **Navigation** bar is not activated yet.

d. In the **Navigation** bar, click **Users** or **User groups**.

e. In the table, right-click the user or user group, and select **Properties**.

f. Click **Function privileges** on the **Selection** tab.

g. In the **Assign** column, click the relevant function privileges. You can assign only function privileges that are assigned to you, too.

You cannot change function privileges for system users.

If you selected **User** in the **Navigation** bar and are logged on as system user, you can enable the **System user** check box. This user receives all function and access privileges.

h. Click **OK**.

The function privileges are now assigned. For users to be able to view specific content of the database, you assign access privileges to them.

6. Assign filters to users and user groups.

a. Click **ARIS >** **Administration**.

b. Log in to the database.

c. Click **Navigation** in the bar panel if the **Navigation** bar is not activated yet.

d. In the **Navigation** bar, click **Users** or **User groups**.

e. In the table, right-click the user or user group, and select **Properties**.

f. Click **Method filter** on the **Selection** tab.

g. In the **Assign** column, click the relevant filters.

h. Click **OK**.

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

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

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

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

3.4.2 Import LDAP users

You can import users from the LDAP system.

Prerequisite

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

Procedure

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

The users are transferred from the LDAP system according to the selected options.

3.4.3 Synchronize users with the LDAP system

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

Prerequisite

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

Procedure

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

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

3.4.4 Create user

Create a user for authorized employees. The default users system (page 39), superuser (page 39), arisservice (page 40), and guest (page 40) are created automatically.

Warning

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

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

Prerequisite

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

Procedure

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

   The user name does not necessarily have to correspond to a person's first or last name. In many cases, a randomly selected character string is used, or an abbreviation of the first and/or last name.
4. Click **Save**. The detail view of the user is displayed.
5. Assign a user group to the user, if required.
6. Click **Associated user groups**.
7. Click **Edit assignment**. The **Associate user groups** dialog opens.
8. Enable the check boxes of the relevant items in the box of the available items, and click ▶ **Add**. The items are transferred to the box of the assigned items. To remove items from the **Assigned items** box, enable the check boxes of the relevant items in this box, and click ◀ **Remove**.
9. Click **Save**.
10. Enable (page 29) the required function and license privileges for the user under **Privileges**.

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

Tip

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

3.4.5 Edit user

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

Prerequisite

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

Procedure

1. Click **User management**. The list of users is displayed.
2. Click the user whose data you want to change. The user data (details) is displayed.
3. Click **Edit**.
4. Change the relevant information, such as name, e-mail address, etc.
5. To change a password, enable **Change password**. The **Old password**, **New password**, and **Confirm password** fields are displayed.
6. Enter a new password, and reenter it. If you want to use the webMethods integration, passwords must not contain a colon.
7. Change the user group association (page 26), if necessary.
8. If required, change the function, license, and database privileges for the user.
9. Click **Save**.

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

Tip

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

3.4.6 Delete user

Delete users when they are no longer relevant. The system user cannot be deleted.

Prerequisite

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

Procedure

1. Click **User management**. The list of users is displayed.
2. Move the mouse pointer to the relevant user name. The buttons of the available functions are displayed.
3. Click **Delete**. The **Confirmation** dialog opens.
4. Click **OK**.

The user is deleted.

Tip

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

3.4.7 Change user password

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

Prerequisite

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

CHANGE PASSWORD MANUALLY

Procedure

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

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

GENERATE PASSWORD

Procedure

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

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

3.4.8 Forgot password

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

Procedure

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

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

3.4.9 Log out user

You can end the sessions of users. This may be necessary, for example, if all licenses of the **Concurrent user** license type (page 11) are used up because users have forgotten to log out. It can also be useful to end sessions if the assignment of function or license privileges has been changed, as these privileges only take effect after users have logged in again.

Prerequisite

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

LOG OUT SINGLE USER

Procedure

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

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

LOG OUT MULTIPLE USERS USING A SPECIFIC LICENSE

Procedure

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

The users are logged out.

Note

To obtain an overview of all users currently logged in, export (page 33) a user statistics.

3.4.10 Create user group

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

Prerequisite

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

Procedure

1. Click **User management**, and select **User groups**. The list of user groups opens.
2. Click **Add user group**.
3. Enter the name of the user group and an optional description.
4. Click **Save**.

The user group is created.

Tip

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

3.4.11 Copy user group

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

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

Procedure

1. Click **User management**, and select **User groups**. The list of user groups opens.
2. Move the mouse pointer over the user group you want to copy. The buttons of the available functions are displayed.
3. Click **Copy user group**.
4. Click **Transfer user associations** to assign the users of the group copied to the new group.
5. Click **Transfer privilege assignments** to assign the function privileges of the group copied to the new group. License privileges are transferred only with the **Concurrent user** license type. For the other license types, the license privileges must be assigned (page 27) in a separate step.
6. Enter the name of the user group.
7. Click **Save**.

The user group is created based on the group copied.

If applicable, assign the group the required license privileges.

3.4.12 Edit user group

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

Prerequisite

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

Procedure

1. Click **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group whose data you want to change.
3. Click **Edit**.
4. Change the description, if necessary.
5. Click **Save**.
6. Change the user association (page 27), if necessary.
7. Change the function privileges for the user group, if necessary.

The user group data is changed.

3.4.13 Delete user group

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

Prerequisite

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

Procedure

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

The user group is deleted.

Tip

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

3.4.14 Find users/user groups

You can search for users and user groups.

Prerequisite

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

Procedure

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

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

3.4.15 Delete all users and user groups

If you want to set up user management from scratch, you should delete all users and user groups. This is recommended before you change to or deactivate LDAP, for example.

Prerequisite

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

Procedure

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

All users and user groups are deleted except for the default users system (page 39), superuser (page 39), arisservice (page 40), and guest (page 40).

3.4.16 Change association of user groups to a user

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

Prerequisite

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

Procedure

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

The user groups assigned to the user have been changed.

Tip

To assign all available items, click **Add all**, and click **Remove all** to remove all assignments.

3.4.17 Change association of users to a user group

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

Prerequisite

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

Procedure

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

   Enable the check boxes of the relevant items in the box of the available items, and click ▶ **Add**. The items are transferred to the box of the assigned items. To remove items from the **Assigned items** box, enable the check boxes of the relevant items in this box, and click ◀ **Remove**.
5. Click **OK**.

The users associated to the user group have been changed.

Tip

To assign all available items, click **Add all**, and click **Remove all** to remove all assignments.

3.4.18 Assign a license privilege to new users/user groups

Assign license privileges to new users or user groups.

Prerequisite

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

Procedure

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

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

Tip

To assign all available items, click **Add all**, and click **Remove all** to remove all assignments.

3.4.19 Assign a license pool to a user group

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

Prerequisite

- You have the **User administrator** function privilege.
- License distribution is activated in ARIS Administration.

Procedure

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

The licenses are assigned to the user group.

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

Assign the relevant function, license, and database privileges to allow usage of specific programs and functions. Product-specific privileges are assigned in each ARIS product.

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

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

Prerequisite

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

CHANGE FUNCTION, LICENSE, AND DATABASE PRIVILEGES FOR INDIVIDUAL USERS

Procedure

1. Click **User management**. The list of users is displayed.
2. Click the user whose privileges you want to change.
3. Click **Privileges**. The list of function privileges is displayed. A distinction is made between privileges assigned directly and those assigned via a user group.
4. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
5. Click **License privileges**. A distinction is made between privileges assigned directly and those assigned via a user group.
6. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
7. Click **Database privileges**.
8. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
9. Assign the relevant privilege.
10. Click **OK**.

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

CHANGE FUNCTION PRIVILEGES FOR ALL MEMBERS OF A USER GROUP

Procedure

1. Click **User management**, and select **User groups**. The list of user groups opens.
2. Click the user group whose privileges you want to change.
3. Click **Privileges**. The list of function privileges is displayed.
4. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
5. Click **License privileges**.
6. Enable/disable the check boxes of the privileges whose assignment you want to add/remove.
7. Click **Database privileges**.

8. Enable/disable the check boxes of the privileges whose assignment you want to add/remove. No database privileges are assigned yet.
9. Click **Edit**. The **Edit database privileges** dialog opens.
10. Assign the relevant privilege.
11. Click **OK**.

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

Product-specific privileges are assigned in each ARIS product.

The following special features apply for process automation:

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

3.4.21 Display assignment of users to a privilege

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

Prerequisite

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

Procedure

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

The associated users are displayed.

Note

To obtain an overview of the privileges assigned, you can also export (page 33) a user statistics.

3.4.22 Display information on users/user groups

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

Prerequisite

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

Procedure

1. Click **User management**. The list of users is displayed.
2. Click the user you want to retrieve information about.
3. Click **Active sessions** to obtain information on the time the user was logged in. This is where you can also log out (page 22) the user.
4. Click the relevant user/user group.
5. Click History (page 42) to retrieve information on the events and details of a user/user group, for example, the privilege assigned to a user.

The requested information is displayed.

3.4.23 Refresh items

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

Prerequisite

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

Procedure

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

The users and user groups are refreshed.

3.4.24 Back up user management data

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

Prerequisite

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

Procedure

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

The user management data is saved in JSON format in a ZIP file. The file is separated into several areas to enable even large data volumes to be saved easily: Users, User groups, Licenses, Pictures, Privileges, Configuration, and Charts. Backups from an ARIS installation version 9.7 and older can be restored. Backups from the current ARIS installation cannot be restored in older versions.

3.4.25 Restore user management data

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

Prerequisite

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

Procedure

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

The user management data is restored.

3.4.26 Export user statistics

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

Prerequisites

- You have the **User administrator** function privilege.
- **Generate user statistics** (**com.aris.umc.audit.enabled**) is enabled in the configuration (page 175).

Procedure

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

The user statistics are output in the selected format.

3.4.27 Generate report

Generate reports (page 41) about users, user groups, privileges, licenses, assignments, etc.

Prerequisite

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

Procedure

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

The relevant report is output as an Excel file.

3.4.28 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.4.28.1 What function privileges can be assigned?

Function privileges provide users with specific functions and control their privileges. You can assign (page 29) the following function privileges to users or user groups. Additional privileges can be assigned in each ARIS product at the database level.

- **Analysis administrator**

  Back up, restore, and manage a tenant's analysis database. Import and export queries and ad hoc analyses.
- **Analysis publisher**

  Publish and delete ad hoc analyses and queries for other users. Back up ad hoc analyses and queries.
- **ARCM administrator**

  Manage ARIS Risk & Compliance Manager system settings and run data exports/imports.
- **ARIS Cloud Controller configuration administrator**

  Edit the ARIS Cloud Controller server configuration including registered nodes and application types.
- **ARIS Connect administrator**

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

  Manage users, user groups, and privileges in ARIS Administration/User Management.
- **Collaboration administrator**

  Manage private groups, and be the moderator for posts users flagged as inappropriate.
- **Dashboard administrator**

  Manage server settings, dashboards, data feeds, and data sources of MashZone.
- **Database administrator**

  Manage tenant databases. System user (page 39) in all databases.
- **Document administrator**

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

  Manage data in other tenants using impersonated users and their privileges.
- **Component administrator**

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

- **Configuration administrator**

  Configure ARIS Design Server or ARIS Connect server, export and import a tenant's configuration files, e.g., ARIS filters, templates, and XML structures.
- **License administrator**

  Use ARIS Administration/User Management to import, export, or delete licenses.
- **Tenant administrator**

  Create, back up, restore, and delete tenants on the ARIS Cloud Controller server.
- **Portal administrator**

  Manage the portal's corporate design.
- **PPM user**

  Use PPM.
- **Process Governance administrator**

  Manage Process Governance processes.
- **Publisher administrator**

  Generate, update, and delete ARIS Publisher exports.
- **Publishing administrator**

  Specify which version of which database is to be published in the portal.
- **Server administrator**

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

  Register external systems and services (e.g., external database systems, mail servers, or proxy servers) on the ARIS Cloud Controller server.
- **Script administrator**

  Manage report scripts and macros of ARIS Design Server or ARIS Connect Server.
- **Technical configuration administrator**

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

  View UML content in ARIS Connect.
- **ARIS Aware administrator**

  Create and manage visual content in ARIS Connect, e.g., dashboards.

3.4.28.2 What license privileges can be assigned?

License privileges provide users with specific products and components. You can assign (page 29) the following license privileges to users or user groups. Additional privileges can be assigned in each ARIS product at the database level.

- **ARCM Contribute**

  Perform tasks in ARIS Risk & Compliance Manager that do not require GRC-specific knowledge.
- **ARCM Operate**

  Perform all administrative and operative GRC-specific tasks in ARIS Risk & Compliance Manager.
- **ARIS Access Full**

  View and edit ARIS data of ARIS Connect Server using external applications.
- **ARIS Access Full**

  View and edit ARIS data of ARIS Design Server using external applications.
- **ARIS Access Mobile**

  View and edit ARIS data of ARIS Connect Server using mobile applications.
- **ARIS Access Mobile**

  View and edit ARIS data of ARIS Design Server using mobile applications.
- **ARIS Access Read-Only**

  View ARIS data of ARIS Connect Server using external applications.
- **ARIS Access Read-Only**

  View ARIS data of ARIS Design Server using external applications.
- **ARIS Alfabet Interoperability**

  Exchange information between ARIS and Alfabet.
- **ARIS Architect**

  Develop, model, analyze, control, and manage the corporate process architecture.
  - **ARIS Access**

    Access ARIS data and ARIS Repository content via external applications.
  - **Business Strategy**

    Define, analyze, and control corporate strategies, business models, and KPIs.
  - **Enterprise Architecture Management**

    Create a uniform inventory of systems and technologies to align business requirements with IT changes.
  - **Process Governance**

    Design and deploy BPM governance processes to coordinate, automate, and monitor BPM projects.
  - **SAP®**

Support SAP® projects by means of process design (business blueprints), test design, and process implementation, and by connecting ARIS with SAP® Solution Manager.

- **Simulation**

  Identify process bottlenecks and run what-if analyses in order to obtain valuable decision support for process improvement programs.

- **webMethods integration**

  Develop, model, and improve business processes, and make them available for implementation by IT via an automated process.

- **ARIS Connect Designer**

  Create, modify, and maintain models in the Web browser and make them available in the cloud.

- **ARIS Connect Viewer**

  View ARIS Connect content.

  - **Contribution**

    View and add ARIS Connect content.

- **ARIS Designer**

  Provide models for business process management representing aspects such as business processes, business organization, data modeling, IT landscapes, or workflows.

  - **Business Strategy**

    Define, analyze, and control corporate strategies, business models, and KPIs.

  - **Enterprise Architecture Management**

    Create a uniform inventory of systems and technologies to align business requirements with IT changes.

  - **SAP®**

  Support SAP® projects by means of process design (business blueprints), test design, and process implementation, and by connecting ARIS with SAP® Solution Manager.

  - **Test Designer**

    Create end-to-end test paths based on business processes.

- **ARIS Optimizer**

  Calculate meaningful business process data and plan your operational structure and process organization based on these calculations.

- **ARIS Smart Input**

  Record data to be processed using ARIS Optimizer, or record the duration of processes.

- **ARIS UML Designer**

  Use ARIS UML Designer to integrate business processes and UML in software development processes and develop and supply high-quality software.

  - **ARIS Access**

    Access ARIS UML data and UML Repository content via external applications.

- **ARIS Viewer**

  View published process content in ARIS Publisher, participate in Process Governance workflows using the Web-based ARIS Process Board, and edit content in IT Inventory.
- **MashZone User**

  Create, edit, and display dashboards and data feeds.
- **MashZone Viewer**

  Display dashboards and data feeds.
- **MashZone Free User**

  Create, edit, and display dashboards and data feeds.
- **MashZone Free Viewer**

  Display dashboards and data feeds.
- **ARIS Cloud Advanced Administration**

  Manage databases.
- **ARIS Cloud Basic Viewer**

  View ARIS Cloud content.
- **ARIS Cloud Basic Designer**

  Create models.
- **ARIS Cloud Advanced Designer**

  Create models.
- **ARIS Cloud Advanced Viewer**

  Check models.
- **webMethods integration (for Software AG Designer)**

  Make business processes available for implementation and optimization by IT via an automated process.

3.4.28.3 What is the 'system' user?

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

To avoid problems, you can create (page 19) additional system users. Alternatively, an existing **system** user can be copied. This user only uses up a license if a license privilege is activated for this user. The default password is **manager**. You should change the default password to prevent unauthorized access. You can change all user data except for the user name. By default, the **system** user has the following function privileges:

- **User administrator**
- **Analysis administrator**
- **Collaboration administrator**
- **Dashboard administrator**
- **Database administrator**
- **Document administrator**
- **Configuration administrator**
- **License administrator**
- **Portal administrator**
- **PPM user**
- **Process Governance administrator**
- **Publishing administrator**
- **ARCM administrator**
- **Server administrator**
- **Script administrator**
- **Technical configuration administrator**

3.4.28.4 What is the user superuser?

The user **superuser** is created automatically. By default, this user is assigned the **User management**, **License management**, and **Configuration administrator** function privileges. This user can also activate this function privilege for other users. The **superuser** user does not use up a license. The **superuser** user manages the system administration, but cannot use ARIS products due to license restrictions. The default password is **superuser**. You should change the default password to prevent unauthorized access. You can change all user data except for the user name.

3.4.28.5 What is the user 'arisservice'?

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

3.4.28.6 What is the user 'guest'?

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

3.4.28.7 How can the password be changed?

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

PASSWORD IS CHANGED BY THE ADMINISTRATOR

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

CHANGE PASSWORD MANUALLY

A password can be changed (page 21) manually in the user management (**Change password**).

GENERATE PASSWORD

Alternatively, a password can be generated (page 21) automatically in the user management (**Generate password**).

PASSWORD IS CHANGED BY THE USER

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

CHANGE PASSWORD

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

RESET PASSWORD

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

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

Various events including their timestamp are shown in the history.

USERS

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

USER GROUPS

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

3.4.28.9 Which reports exist?

You can generate the following reports as Excel files.

ACTIVE USER SESSIONS

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

USER GROUPS WITH ASSIGNED USERS AND PRIVILEGES

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

ASSIGNED AND UNUSED ARIS LICENSES

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

USERS WITH ASSIGNED PRIVILEGES

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

3.4.28.10 What is shown in the history of a user/user group?

The following information on users and user groups is shown in the history.

USERS

- Update of data
- Association to a user group
- Removal of user group association
- Assignment of a privilege
- Removal of privilege assignment

USER GROUPS

- Update of data
- Association of a user to a user group
- Removal of user group association of a user
- Assignment of a privilege
- Removal of privilege assignment

3.5 Process administration

Process administration (page 54) in ARIS Connect provides information and functions pertaining to automated processes.

3.5.1 Start governance process in process administration

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

Prerequisite

You have the Process Governance administrator (page 53) function privilege.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Navigate to the executable process you want to start, or to the process version.
3. Click the process or version.
4. Click **Start governance process**. The **Select context** dialog opens. The items are displayed on which the executable process can be started depending on the specified execution context.
5. Select the relevant model.
6. Click **OK**.

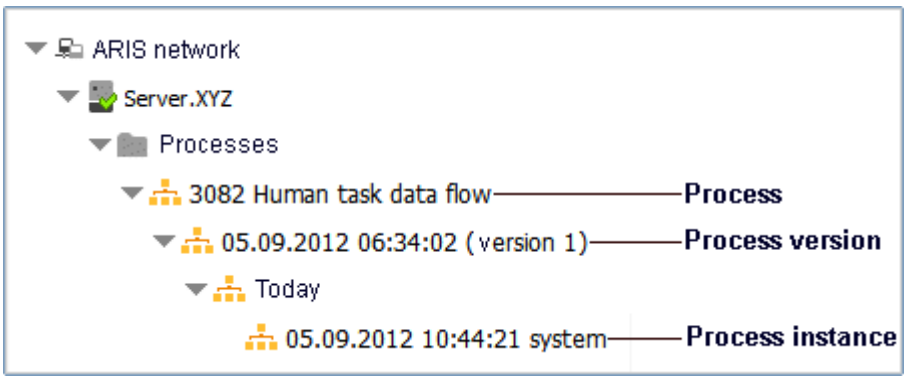
The executable process is started for the selected item.

3.5.2 Display information about executable processes

In process administration, existing executable processes are displayed. You receive detailed information on processes, process versions/instances, and human tasks (Details (page 56), Context (page 56), History (page 56), Activities (page 57), Console (page 55), Assignments (page 56)).

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the process, process version, process instance, or human task.



3. Activate the required function in the navigation bar.

The information available for this item is displayed.

Processes for which a Process Governance Simulation was performed are marked with .

Processes for which a recurrence has been configured are identified in process administration by the symbol .

Statistics data in the form of charts (page 63) for Governance processes are available under **Charts > Governance > Processes**.

3.5.3 Display information about activities

You can display details of an activity.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Under **Processes** click the relevant process instance.
3. Click **History**.
4. Click the relevant activity in the table.
5. Click **Input activities**.
6. Click on **Show associated activity in the history**, in order to display the corresponding activity in the history table. Then click **Input activities** again.

   Alternatively, you can click **Used by** and all activities for which the selected activity acts as an input activity are displayed.
7. Click **Input data** or **Output data**, to check the data. Additionally, you can click **Show details**, to display the XML data.

The relevant details are displayed.

3.5.4 Display human tasks of a process instance

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the process instance whose human tasks you want to display.
3. Click **Show tasks**.

The associated human tasks are displayed.

3.5.5 Export process administration content as a CSV file

You can export data of human tasks, instance monitoring, and the console, for example, for evaluation purposes.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click **Human tasks**, **Instances**, or **Console** or under **Processes**, click the process instance and then **History**.
3. Click **Export as a CSV file** in the navigation bar. The dialog opens.
4. Select the output options.
5. Click **Export**.

The content is exported as a CSV file.

3.5.6 Display and delegate executors of a human task

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

Prerequisites

- A task must have been selected in the list.
- The task must have been assigned to a user group.
- The status of this task is **New** or **In process**.
- The user to whom the task has been transferred belongs to the allowed group (data flow: **Group of allowed delegates**).

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click **Human tasks**.
3. Move the mouse pointer over the relevant task. The buttons of the available functions are displayed.
4. Click **Show details**. The human task is displayed in **Processes**.
5. Click **Assignments**.
6. Move the mouse pointer over the relevant task. The buttons of the available functions are displayed.
7. Click **Delegate task**. The **Select executor** dialog is displayed.
8. Click the executor who you want to delegate the task to. Filter the list of executors if it is too large.
9. Click **Save**.

The task is passed on to the selected executor and its status (page 59) is displayed as **Delegated**.

Statistics data in the form of charts (page 63) for human tasks are available under **Charts > Governance > Human tasks**.

3.5.7 Send reminder about executing human tasks

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Open the relevant human task.
3. Click **Send reminder**.

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

If 75% of the processing time has expired, the executors automatically receive a reminder. If the task is not edited by the due date the escalation manager (page 60) is notified.

Statistics data in the form of charts (page 63) for human tasks are available under **Charts > Governance > Human tasks**.

3.5.8 Delete executable process

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

Warning

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Under **Processes**, click the process, process version, or process instance.
3. Click **Delete**.

The selected item is deactivated.

3.5.9 Suspend execution of a process instance

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click **Suspend**.

The execution of the process instance is suspended. It has the status **Suspended**. It can be resumed (page 48) again later. Unlike the **Suspend recurrence** function, it is not the creation of recurrences that is suspended for the entire process, but only the execution of this process instance.

Example

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

- **Suspend recurrence**

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

- **Suspend process instances**

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

3.5.10 Resume execution of a process instance

You can resume the execution of a process instance that was previously suspended (page 48).

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click **Resume**.

The execution of the process instance is resumed.

3.5.11 Terminate execution of a process instance

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the relevant process instance under **Processes**.
3. Click **Terminate**.

The execution of the process instance is terminated permanently.

3.5.12 Suspend recurrence for the executable process

You can suspend the recurrence of an executable process.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. In the navigation, click the relevant process version under **Processes**. Processes for which a recurrence has been configured are identified in process administration by the symbol .
3. Click **Suspend recurrence**.

The recurrence of the executable process is suspended. You can continue (page 50) later with the existing configuration.

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

Example

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

- **Suspend recurrence**

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

- **Suspend process instances**

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

3.5.13 Resume recurrence for the executable process

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. In the navigation, click the relevant process version under **Processes**. Processes for which a recurrence has been configured are identified in process administration by the symbol .
3. Click **Resume recurrence**.

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

3.5.14 Display simulation information

In process administration, the processes for which Process Governance Simulation was performed are displayed. You receive further information and tips regarding errors. If the simulation of a process instance fails, the Process Governance administrator receives a notification and a message is displayed in Instance monitoring.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the relevant process and then select the version number under **Processes** in the navigation. Processes for which a Process Governance Simulation was performed are marked with .
3. Click the relevant process instance.
4. Click Details (page 56) to display information about the status and progress of the simulated process instances.
5. To display simulation data for simulated activities, click History (page 56), and activate the relevant activity in the table.
6. If you need an overview of the process instances a simulation was performed for, click Instances (page 55). The simulated activities are selected in the **Simulated** column.
7. To display messages regarding the process instance, activate the Console (page 55) bar. The various process passes of the instance are displayed under the process instance, e.g., when an XOR operator is used in the process.

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

Simulate governance process

3.5.15 Suspend, resume, or terminate simulation runs

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

Prerequisite

You have the Process Governance administrator (page 53) function privilege.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the relevant process and then select the version number under **Processes** in the navigation. Processes for which a Process Governance Simulation was performed are marked with .
3. To suspend a simulation run, click the relevant process instance and select **Suspend**.
4. Use **Resume** to continue the simulation run at a later time.
5. To stop a simulation run, select **Terminate**. The simulation run is terminated and cannot be restarted.

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

3.5.16 Delete simulation runs

You can delete terminated simulation runs to make process administration clearer.

Prerequisite

You have the Process Governance administrator (page 53) function privilege.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the relevant process and then select the version number under **Processes** in the navigation. Processes for which a Process Governance Simulation was performed are marked with .
3. Click the relevant process instance.
4. Click **Delete**.
5. Confirm the confirmation prompt by clicking **OK**.

The simulation run is deleted and removed from Process administration.

3.5.17 Share simulated process

You can release process versions that were created and checked by Process Governance Simulation, i.e., transform the simulated process into a normal process. It is not possible to start a governance process for process versions generated by the simulation. These are marked with in the ARIS Connect process administration. This can be done after the transformation into a released process.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Select the relevant process version.
3. Click **Transform simulated version into a normal process**.

The process version is transformed into a normal process.

3.5.18 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.5.18.1 What tasks does the Process Governance administrator perform?

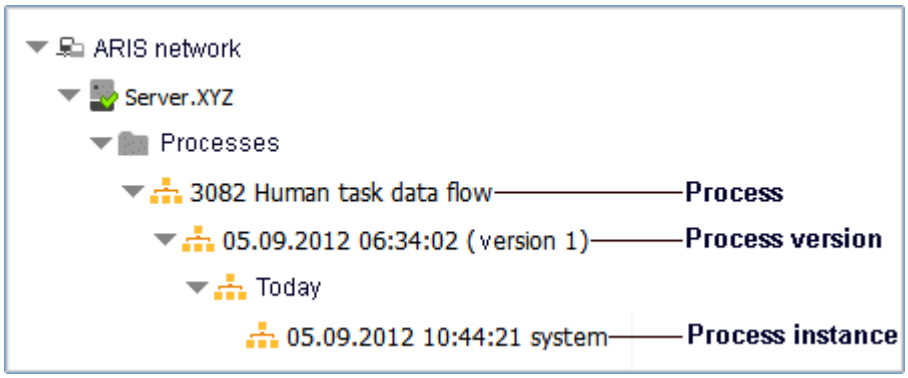
The Process Governance administrator manages (page 54) the processes. Process administration in ARIS Connect provides process automation functions and supplies information on processes. Depending on whether a process, process version, or process instance is selected, various functions and tabs are available:

- Start (page 43) governance processes in process administration, e.g., older versions of the process.
- Deactivate (page 47) executable processes.
- Restart (page 61) activities in the status **FAILED**.
- Suspend (page 48) the execution of process instances.
- Resume (page 48) the execution of process instances that were previously suspended.
- Terminate (page 49) the execution of process instances if, for example, the executable process is no longer relevant.
- Configure recurrences for an executable process.
- Suspend (page 49) the recurrence of an executable process
- Resume (page 50) the recurrence of an executable process that was previously stopped.
- Suspend the recurrence of an executable process
- Resolve (page 60) error in process.
- Read privileges for the Console (page 55) bar also at the process level.
- View all tasks of other users in ARIS Process Board.

Statistics data in the form of charts (page 63) for Governance processes are available under **Charts > Governance > Processes**.

3.5.18.2 Where do I find process administration and what does it include?

Process administration in ARIS Connect (**ARIS Administration > Process administration**) provides functions (page 53) for process automation and information about executable processes. Executable processes, process versions, process instances, and human tasks are displayed under **Processes**.



EXECUTABLE PROCESS

You can delete (page 47) the executable process including all versions and instances.

PROCESS VERSION

You can start (page 43) the governance process or delete (page 47) the process version. If a recurrence is configured, you can suspend (page 49) the recurrence of the process. You can transform (release (page 52)) simulated processes into a normal process.

PROCESS INSTANCE

You can display (page 45) associated tasks, and suspend (page 48), resume (page 48), terminate (page 49), or delete (page 47) the process instance.

The context selected for the process instance is displayed in the navigation tree. Further information can be found in the detailed (page 56) view.

HUMAN TASK

You can send (page 47) a reminder to the executors of the tasks.

NAVIGATION BARS

Use the navigation bars to display human tasks (page 55), instances (page 55), the console (page 55), details (page 56), context (page 56), history (page 56), and activities (page 57).

3.5.18.3 What functions/information does the overview of humans tasks provide?

The human tasks of all executable processes are displayed. Use **filters** to restrict the number of process instances displayed according to various criteria. You can sort the table by different columns, e.g., by status. You can export the data as a CSV file ( ).

You can display/delegate (page 46) the assigned executor or send (page 47) a reminder to the executors. To do so, move the mouse pointer over the relevant task and select **Show details**.

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

Statistics data in the form of charts (page 63) for human tasks are available under **Charts > Governance > Human tasks**.

3.5.18.4 What functions/information does instance monitoring provide?

It provides an overview of the process instances and their various statuses (page 58). Use **filters** to restrict the number of process instances displayed according to various criteria. You can sort the table by different columns, e.g., by status. You can export the data as a CSV file ( ).

You can check if process instances failed so that you can correct (page 62) and restart them, if required.

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

Statistics data in the form of charts (page 63) for Governance processes are available under **Charts > Governance > Processes**.

3.5.18.5 What functions/information does the console provide?

The console can be shown for all processes or for a process instance.

The following messages are displayed:

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

You can export the data as a CSV file ( ).

3.5.18.6 What functions/information do the details provide?

Details (page 44) provide different information, such as ID, status, priority, depending on whether you selected a human task, a process version, or process instance. In addition, they display the assigned users for human tasks (**Assignments**).

3.5.18.7 What functions/information does the context provide?

The context can be displayed for the process version or the process instance. The execution context determines from which items (database, group, model/object type, document), in which applications (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. The context selected for the process instance is also displayed in the navigation tree (page 54) for process administration and in instance monitoring (page 55).

3.5.18.8 You have activated 'Diagram'.

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

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

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

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

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

3.5.18.9 What functions/information does a recurrence provide?

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

3.5.18.10 You have activated 'History'.

History is displayed if you have selected a process instance of an executable process. The tab lists activities run by process instances. If an entry contains a process instance with the **Failed** status, the activity can be restarted (page 61) from here.

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

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

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

3.5.18.11 What functions/information does the overview of activities provide?

Activities are displayed if you have selected a process instance of an executable process. It displays the activities of the executable process of the **BPMN process diagram (BPMN 1.x)** type. To skip (page 62) an activity, right-click the relevant row, and select **Skip activity**.

3.5.18.12 What is an executable process?

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

3.5.18.13 Where can the executable process be started?

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

3.5.18.14 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.

3.5.18.15 What happens when an executable process is deactivated?

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

3.5.18.16 Which status can activities have?

An activity can have any of the following statuses:

- **ACTIVE**

  The activity is just being performed.
- **TERMINATED**

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

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

  The activity has been automatically canceled.
- **COMPLETED**

  The activity was completely performed.

3.5.18.17 Which status can process instances have?

A process instance can have any of the following statuses:

- **Running**

  The process instance is running the process.
- **Suspended**

  The Process Governance administrator suspended (page 48) the process instance manually during process execution. This can be useful, for example, if a server outage would cause the process execution to fail.
- **Terminated**

  The Process Governance administrator terminated (page 49) the process instance manually during process execution. This may be called for if, for example, the executable process is no longer relevant.
- **Failed**

  The process instance was not able to pass through the process completely due to an error. Failed process instances can be restarted (page 62) after the error is fixed.

- **Idle**

  The process instance is in wait state because something unforeseen has happened while the process was passed through. The Process Governance administrator must check and resolve this.

- **Completed**

  The process instance has completely passed through the process.

3.5.18.18 What statuses can tasks have?

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

- **New**

  The task has not been edited since it was assigned or it has been reset.

- **In process**

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

- **Active**

  Tasks to be edited, i.e., tasks in the **New** or **In process** state.

- **Overdue**

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

- **Suspended**

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

- **Being edited by another user**

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

- **Failed**

  The task could not be performed because a problem occurred.

- **Completed**

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

- **Passed on**

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

- **Delegated**

  Editing of the task was passed on permanently from the original executor to another user. The task remains in the list of the original executor with this status.

- **Task assignment failed**

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

3.5.18.19 What is the escalation manager?

The escalation manager is the user who is notified when a human task is not completed by any executor by the due date. It is specified in the data flow diagram or in the model using an organizational element and the **is escalated to** connection.

3.6 Find problems in the process and correct processes

To ensure a smooth process flow the Process Governance administrator must be able to query information on processes and intervene, if required. Information and functions are provided in process administration (page 53) in ARIS Connect for this purpose. If problems occur during process execution, e.g., if an error occurs during an automated task or the recipient of an e-mail message is not recorded as a user, the Process Governance administrator is informed by e-mail.

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

You can display a list of process instances in their various statuses (page 58). You can check if process instances failed so that you can correct (page 62) and restart them, if required.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click **Instances**. The list of process instances is displayed.
3. Click **Filter** to restrict the number of process instances displayed based on various criteria.
4. Select filter criteria.
5. Click **Apply filter**. To display the unfiltered list of process instances, click **Reset filter**.
6. To display a specific instance/version, move the mouse pointer over the relevant table row and select **Display process instance** or **Display process version**. The instance/version is selected in the Explorer tree.

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

Tip

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

3.6.2 Review input and output data of an activity

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Select the process instance of the executable process containing the failed activity. You were informed about the relevant activity in the notification.
3. Click **History**.
4. Click the activity whose execution failed.

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

You can change the output data using the function Skip activity (page 62).

3.6.3 Restart activities with status FAILED

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click the process instance of the executable process containing the failed activity. You were informed about the relevant activity in the notification.
3. Click **History**.
4. Move the mouse pointer over the activity whose execution failed. The buttons of the available functions are displayed.
5. Click **Retry**.

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

If the activity cannot be restarted, you will receive a notification. You can skip (page 62) the activity.

3.6.4 Skip activities with status 'Failed'

If a restart (page 61) is impossible, you can skip failed activities. You are notified by e-mail if an activity failed.

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click a process instance of an executable process.
3. Click **Activities**. The process instance activities are listed.
4. Move the mouse pointer over the activity you want to skip. The buttons of the available functions are displayed.
5. Click **Skip activity**. If output data was specified for the activity, a dialog opens for you to correct the data and thus avoid further failure. If no output data was specified for the activity, the activity is skipped immediately.
6. Change the output data.
7. Click **Save**.

The process continues with the next activity.

3.6.5 Correct and restart process instances with status 'Failed'

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

Procedure

1. Open (page 54) **Process administration** in ARIS Connect.
2. Click **Instances**.
3. Click **Filter**, select the filter **Status** and the status **FAILED**.
4. Click **Apply filter**. The list of failed process instances is displayed.

   Alternatively, you filter process instances with the filter **ID** by entering the ID of the failed process instance, which you received in the notification.
5. Move the mouse pointer over the process instance you want to correct. The buttons of the available functions are displayed.
6. Select **Display process instance**. The instance is displayed.
7. Click **Console** to obtain further information on why the instance failed.
8. Correct the errors that led to the process instance failing.
9. Click the relevant process instance.
10. Click **History**.
11. Move the mouse pointer over the activity whose execution failed. The buttons of the available functions are displayed.
12. Click **Retry**.

The activity is restarted and the process instance continues.

3.7 Charts

Charts represent accumulated statistics data graphically.

3.7.1 Display charts

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

Prerequisite

You have one of the following function privileges:

- **User administrator** (charts on user management)
- **Database administrator** (charts on modeling)
- **Document administrator** (charts on ARIS document storage)
- **Process Governance administrator** (charts on Process Governance)
- **Generate user statistics** (**com.aris.umc.audit.enabled**) is enabled in the configuration (page 175). Only the **Users > License usage** chart is displayed regardless of this activation.

Procedure

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

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

You can update the charts to reflect the current state by clicking **Refresh**.

You can also export (page 33) statistics on usage patterns, assignments, changes to data and database items made by the user, the information used most often or the information used last, etc.

3.7.2 What charts exist?

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

3.8 Configuration

3.8.1 Delete property

You can delete the value of an individual property of your system configuration.

Prerequisite

The User management configuration function privilege is assigned to you.

Procedure

1. Activate the **Configuration** tab.
2. Click the relevant entry that is not locked ( ) and click **Delete**.

You have deleted the value of an individual property of your system configuration.

3.8.2 Portal

Configure the process portal.

3.8.2.1 Publish database as a process portal

Select the database to be published as the process portal.

Prerequisite

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

Procedure

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

The content of the databases is published in the portal in the selected view (page 65). As long as the databases are available in the portal they cannot be deleted in ARIS.

3.8.2.2 Manage views

Portal administrators select the view for showing the portal data. The way you are able to navigate through the data is determined by the hierarchies.

By default, ARIS Connect provides the classic view (page 90) and the default view (page 91) as examples. With these, you publish sample portals on the basis of the demo database, for example. Of course, you can also publish your databases with these sample views. If you want to change the appearance of the portal, administrators simply create (page 66) custom views for you based on the classic view or default view. If you need extended views with different functions that you cannot configure in ARIS Administration, please contact your local Software AG sales organization (http://softwareag.com).

3.8.2.2.1 Select view

Select the view for showing the portal data. By default, the program provides the classic view (page 90) and the default view (page 91). If required, user-defined views (page 66) and restored views (page 67) are also displayed here.

You can create (page 66) your own views based on the classic view (page 90) or the default view (page 91). If you require further views, please contact your local Software AG sales organization (http://softwareag.com).

Prerequisite

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

Procedure

1. Click your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked as **(active)**.
4. Move the mouse pointer over a user-defined view.
5. Click ✔ **Activate**. The selected view is marked as **(active)**.

All of the databases selected for the portal are published in the view selected.

3.8.2.2.2 Create view

You can create (page 66) your own views based on the classic view (page 90) or the default view (page 91).

If you require further views, please contact your local Software AG sales organization (http://softwareag.com).

Prerequisite

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

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked as **(active)**.
4. Click **Create** in the **Views** area. The **Create view** dialog opens.
5. Enter the name for the new view.
6. In the **Template** box select the view that your new view is to be based on.
7. Click **Create**.

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

Change (page 71) the new view by adding the required items, properties, and fact sheets, or by adapting existing ones.

3.8.2.2.3 Save view

Save user-defined views (page 66) before you edit them. You can restore saved views at any time or provide them on other tenants.

Prerequisite

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

Procedure

1. Click your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked as **(active)**.
4. Move the mouse pointer over a user-defined view.
5. Click **Backup**.
6. Save the file in any directory.

The **<name of the view>_bak.zip** backup file is downloaded.

Based on this backup, you can restore this version of the view (page 67).

3.8.2.2.4 Restore view

Restore saved views (page 66).

Prerequisite

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

Procedure

1. Click your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked as **(active)**.
4. Click **Restore**. The file selection dialog opens.
5. Double-click the ZIP file (syntax: **<name of the view>_bak.zip**).

The configuration is tested, and is applied if it is an error-free configuration. Notes are displayed in yellow, errors in red. The view is displayed in the list with the original name.

If a view with the same name exists, it is overwritten. If you want to keep the original view, you must rename the view (page 69) to prevent this from happening.

3.8.2.2.5 Define a portal view providing SAP® content

In order make SAP transactions,ARIS Online Guide and SAP documents available for portal users, you need to create an additional portal view.

You can create (page 66) your own views based on the classic view (page 90) or the default view (page 91). If you require further views, please contact your local Software AG sales organization (http://softwareag.com).

Prerequisites

- You have the **Portal administrator** function privilege.
- You have the **ARIS Connect Designer** license privilege.
- You have the **Portal publisher** function privilege.
- You have access to the ARIS Connect installation directory.

Warning

Advanced configuration changes may require the use of XML configuration. Please contact Software AG (https://empower.softwareag.com/) for a customization request or participate in the **742-xx ARIS Connect Portal Configuration training http://www.softwareag.com/education/**. Please note that customization and training services are not subject to the standard Software AG software maintenance agreement. Configuration changes can only be performed by Software AG if you requested and agreed on them.

Errors in XML configuration may cause strong impact. You might not be able to start ARIS Connect again.

Procedure

1. Copy and paste the directory you want to use as a basis for the new view. This example is based on the **classic** view:

   <ARIS installation path>\server\bin\work**work_copernicus_<s**, **m**
   or **l>**\base\webapps\ROOT\WEB-INF\config**classic**
2. Rename it to **Groupview_SAP**. Do not use spaces and any language-specific special characters. This directory name will be automatically used as view name in all user interface languages.
3. Open the following XML file in an editor:

   <ARIS installation path>\server\bin\work**work_copernicus_<s**, **m**
   or **l>**\base\webapps\ROOT\WEB-INF\config**Groupview_SAP**\views**item.xml**
4. Find the following entry that occurs multiple times in the file:

   ```
   <!--Remove the following comments to enable SAP-Transactions-->
   ```
5. Remove the commented tags before and after the rows with the SAP-relevant content:

   ```
   <!--SAP
   ...
   SAP-->
   ```
6. Save the file.
7. Open the ARIS installation directory:
8. Copy and paste the directory that is to be used as a basis for the search in the new view:

   <ARIS installation path>\server\bin**work_abs_<s**, **m**
   or **l>**\base\webapps\abs\WEB-INF\config**classic**

   Make sure to copy the directory name, which in **step 2** you just copied as a basis for the new view. In this example this is **classic**.
9. Rename it to **Groupview_SAP**. Make sure to use the same name as in **step 3**. Do not use spaces and any language-specific special characters.
10. Open the following XML file in an editor:

    work_abs_<s, **m**
    or **l>**\base\webapps\abs\WEB-INF\config**Groupview_SAP**\search**search.xml**
11. Find the following entry that occurs multiple times in the file:

    ```
    <!--Remove the following comments to enable SAP-Transactions-->
    ```
12. Remove the commented tags before and after the rows with the SAP-relevant content:

    ```
    <!--SAP
    ...
    SAP-->
    ```
13. Save the file.
14. Load the current changes using the external link:

    http://<server name><:port number, if different from default port>/#<tenant>/**reloadConfig**,

    e.g. http://connectserver.eu.comp:1080/#default/reloadConfig
15. Log in as a system user.

16. Click **Reload and validate configuration files**. The changed configuration is being validated. Results will be displayed when completed.

17. If the **Groupview_SAP** entries Groupview_SAP Groupview_SAP (modSet) are not marked with the **error** symbol, the new view is configured properly and can be made available.

    If errors were detected, resolve the logged problems and **Reload and validate configuration files** again. Possible warnings about missing properties can be ignored.

18. Activate the **Groupview_SAP** view via external link:

    http://<server name><:port number, if different from default port>/#<tenant>/**adminSettings**

    e.g:

    http://connectserver.eu.comp:1080/#default/adminSettings

    You can also activate (page 65) the **Groupview_SAP** view within ARIS Connect.

In this view the functions Run SAP transaction (page 345), Download SAP documents (page 346), and ARIS Online Guide (page 348) are now available for published databases (page 64).

3.8.2.2.6 Rename view

Change the names of views.

Prerequisite

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

Procedure

1. Click your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked as **(active)**.
4. Move the mouse pointer over a user-defined view.
5. Click **Rename**. The **Rename view** dialog opens.
6. Enter the new name.
7. Click **Rename**.

All of the databases selected for the portal are published in the view selected.

3.8.2.2.7 Delete view

Delete views that are no longer needed.

Warning

The configurations of deleted views will be lost.

Prerequisite

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

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked.
4. Move the mouse pointer over the relevant view.
5. Click **Delete**.

   The configurations of deleted views will be lost.
6. Confirm the confirmation prompt.

The view is deleted.

3.8.2.3 Edit view

Edit your own views created based on the classic view (page 90) or the default view (page 91). You cannot edit the classic view and the default view.

Prerequisite

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

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Manage views** on the **Configuration** tab. All available views are displayed. The current view is marked as **(active)**.
4. Move the mouse pointer over a user-defined view. You can edit custom (page 66) views only.
5. Click **Edit**.

The **Define view** page opens and you can edit the view.

3.8.2.3.1 Items

3.8.2.3.1.1 Add items

Edit your own views created based on the classic view (page 90) or the default view (page 91). You cannot edit the classic view and the default view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Items**. All items defined in this view for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Click **Create item**. The dialog opens.
4. Enter the technical name of the new item as an identifier, e.g., **Risk**.
5. For each language enter the name of the element that it is to be displayed with in the portal.
6. In the **Source** box, select the type of ARIS item, e.g., **Object** or **Model**.
7. Enter the object or model type names. All types that you can use are displayed during input. Types that have already been assigned to other items are not shown.
8. Click an entry. The type is added.
9. Add further types, if necessary.
10. Click **Create**. The item is displayed in the list.
11. Click **Back**.

12. To test the changed view, select (page 65) it for publishing.

As soon as a fact sheet has been configured (page 77), the changes are available to all users of the portal.

3.8.2.3.1.2 Edit items

Edit your own views created based on the classic view (page 90) or the default view (page 91).

You cannot edit the classic view and the default view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Items**. All items defined in this view for groups, models, and objects are displayed. You can use these items in fact sheets and thus define which information is displayed where.
3. Move the mouse pointer to the item you want to change, e.g., **Process**.
4. Click **Edit**. The**Edit item** page opens.

   Identifier, name, type, and ARIS items are shown on the overview page of the **Process** item. In this example, these are various model types whose information for the **Process** item are displayed in the portal. They are model types for representing business processes.
5. Click **Edit**. The **Edit item** dialog opens.
6. If required, change the name displayed in the portal in all languages, e.g., **Process** to **Business process**.
7. Click **OK**. The changes are applied and the dialog closes.
8. Next to the **ARIS items** box, click **Add**. The **Add ARIS item** dialog opens.
9. Add more items from ARIS. In the **Process** example, you can select model types that have not been used for the **Process** item yet.
10. Click **Add**. The model list is completed and the dialog closes.
11. Click **Remove** to delete entries.
12. Click **Back**.
13. To test the changed view, select (page 65) it for publishing.

The changes are available to users in the portal.

3.8.2.3.1.3 Add item properties

Item properties determine the information available and displayable for the item in the portal. You can edit custom properties.

You can edit the classic view and the default view only to a limited extent.

You can allow users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges to edit certain properties. This is also possible for properties that have already been defined in the selected template of the view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Items**. All items defined in this view for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Move the mouse pointer to the item you want to change, e.g., **Process**.
4. Click **Edit**. The **Edit item** page opens.
5. Click **Properties**. All properties of the item that can be displayed in the portal are listed.
6. Click **Create property**. A dialog of the same name opens.
7. Enter the technical name of the new property as an identifier.
8. For each language enter the name of the property that it is to be displayed with in the portal. Always specify the name in English as well, because English is used as the alternative language in the event that a language is missing.
9. In the **Data mapping** box, select the type of ARIS item whose information is to be available. This depends on the type of item for which you are defining the property.
10. For models you can select **Attributes**, **Occurrence contained**, or **Related assigned models**, while you can select **Attributes**, **Related objects**, or **Object to object** for objects. If you select **Attribute** and the attribute type, e.g., **Description**, the descriptive texts for objects or models are searched and provided. For **Connected objects**, select connection and object type. This finds all objects associated with an object. **Occurrences contained** provides all objects of a model.
11. Specify the settings described depending on the item type.
12. Click **Create**. The new property is displayed in the table.
13. In order to be able to test the changed property, it must first be assigned to an area in a fact sheet. To test the changed view, select it for publishing.

The changes are available to users in the portal.

3.8.2.3.1.4 Edit item properties

Item properties determine the information available and displayable for the item in the portal. You can edit the properties.

You can edit the classic view and the default view only to a limited extent.

You can allow users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges to edit certain properties. This is also possible for properties that have already been defined in the selected template of the view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Items**. All items defined in this view for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Move the mouse pointer to the item you want to change, e.g., **Process**.
4. Click **Edit**. The **Edit item** page opens.
5. Click **Properties**. All properties of the item that can be displayed in the portal are listed.
6. Move the mouse pointer to the property you want to change, e.g., Process.
7. Click **Edit**.
8. For each language enter the name of the property that it is to be displayed with in the portal. Always specify the name in English as well, because English is used as the alternative language in the event that a language is missing.
9. In the **Data mapping** box, select the type of ARIS item whose information is to be available. This depends on the type of item for which you are defining the property.
10. For models you can select **Attributes**, **Occurrence contained**, or **Related assigned models**, while you can select **Attributes**, **Related objects**, or **Object to object** for objects. If you select **Attribute** and the attribute type, e.g., **Description**, the descriptive texts for objects or models are searched and provided. For **Connected objects**, select connection and object type. This finds all objects associated with an object. **Occurrences contained** provides all objects of a model.
11. Specify the settings described depending on the item type.
12. Click **OK**.
13. Click **Back**.
14. In order to be able to test the changed property, it must first be assigned to an area in a fact sheet. To test the changed view, select it for publishing.

The changes are available to users in the portal.

3.8.2.3.1.5 Allow ARIS Connect Viewer users to edit

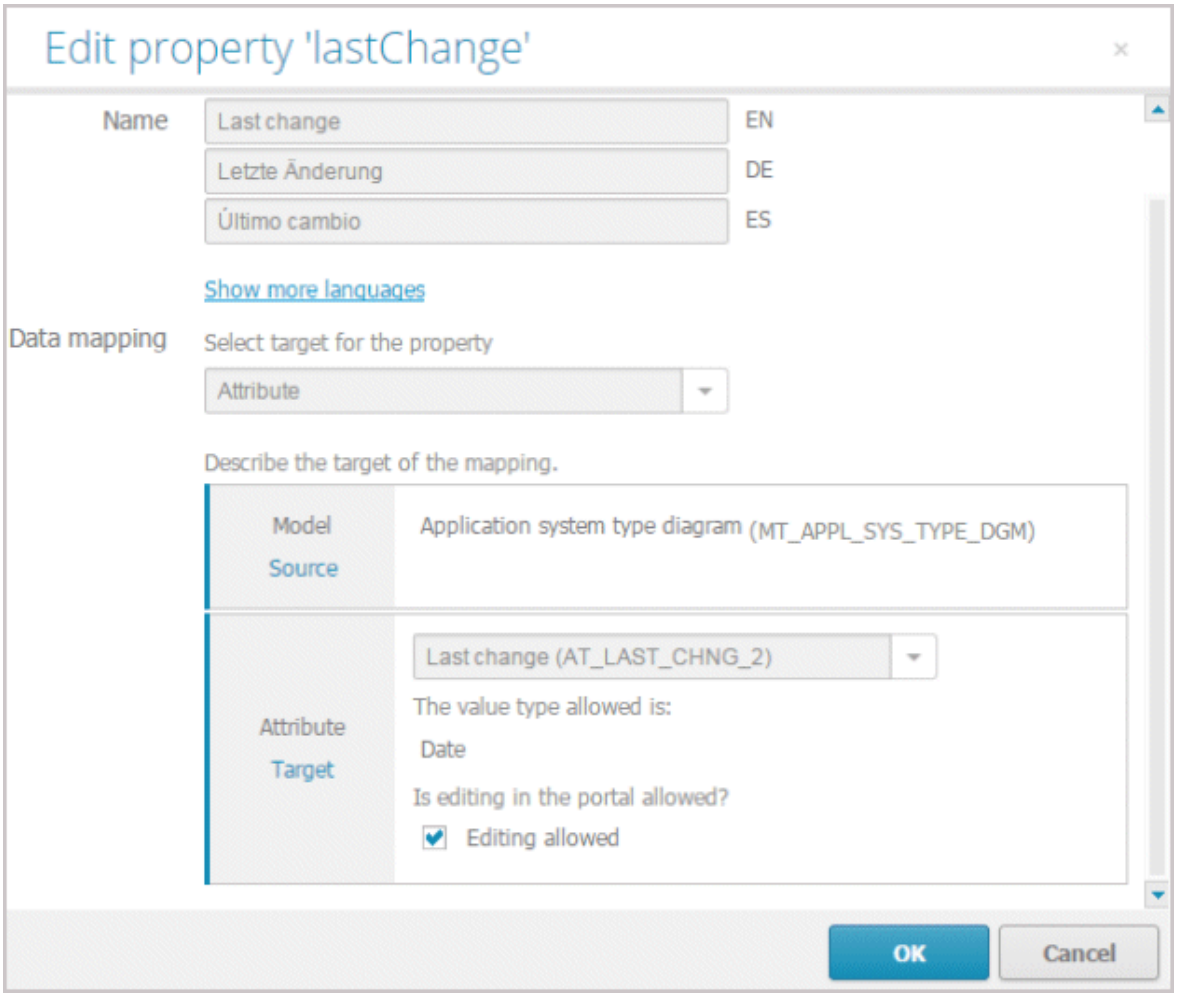
You can allow users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges along with the corresponding access privileges to edit item properties that represent attribute values in the portal.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Items**. All items defined in this view for groups, models, and objects are displayed. You can use these items in fact sheets and define which information is displayed where.
3. Move the mouse pointer to the item you want to change, e.g., **Process**.
4. Click **Edit**. The**Edit item** page opens.
5. Click **Properties**. All properties of the item that can be displayed in the portal are listed.
6. Move the mouse pointer to the property you want to edit.
7. Click **Edit**. The **Edit property** dialog opens.
8. Enable **Editing allowed**.



9. Click **OK**.
10. Click **Back**.
11. To test the changed view, select (page 65) it for publishing.

Users who have both the **ARIS Connect Viewer** and the **Contribution** license privileges can edit the item.

3.8.2.3.2 Fact sheets

3.8.2.3.2.1 Add fact sheet

Edit your own views created based on the classic view (page 90) or the default view (page 91). You cannot edit the classic view and the default view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Fact sheets** on the **Define view** page.
3. Click **Add fact sheet**. The **Create fact sheet** dialog opens.
4. In the **Source** box, enter the identifier of the item for which information is to be displayed on this fact sheet. You can use only items that have not yet been assigned to another fact sheet.
5. Click **Create**. The fact sheet is created. It includes an overview page by default. The selected item is added to the list. As long as no more item properties are assigned to this page, only the name of the item is displayed in the title bar. The overview itself is empty.
6. Click **Back**.

The changes are available to users in the portal. To test the changed view, select (page 65) it for publishing.

3.8.2.3.2.2 Edit fact sheet

Edit your own views created based on the classic view (page 90) or the default view (page 91). You cannot edit the classic view and the default view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Fact sheets** on the **Define view** page.
3. Move the mouse pointer to the item you want to change, e.g., **Process**.
4. Click **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. Click **Add**. The **Add subordinate sheet** dialog opens. All pages you can add are displayed. Typically, the pages **Overview**, **Table**, **RACI**, **Diagram**, **Tasks**, and **Documents** are offered.
6. Select an entry and click **Add**.
7. Specify the contents to be displayed in the fact sheet.

8. Click **Fact sheets** on the **Define view** page. All items available for fact sheets are displayed.
9. Move the mouse pointer over the item you want to change the overview page for, e.g., **Process**.
10. Click **Edit**. The **Edit fact sheet** page opens. All subordinate sheets are listed.
11. Ensure that an overview page is added. If this is not the case, click **Add** and select **Overview**.
12. Move the mouse pointer over the **Overview** entry.
13. Click **Edit**. The **Edit subordinate sheet** page opens. The items in the different areas are displayed.

    If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated.
14. Select the layout of the page. This enables you to specify how the content of the areas is to be arranged.
15. Click **Add** in the areas and select the property to be displayed in the relevant area.

    If a property of the **ItemList** type is displayed in an area, this property can be edited (page 78).
16. Click **Remove** to delete entries.

The new view is created and adjusted.

For the portal to be displayed in this view, you need to select (page 65) the new view for display.

3.8.2.3.2.3 Edit templates for ItemList type items

Edit your own views created based on the classic view (page 90) or the default view (page 91).

You cannot edit the classic view and the default view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Fact sheets** on the **Define view** page.
3. Move the mouse pointer to the item you want to change, e.g., **Process**.
4. Click **Edit**. The **Edit fact sheet** page opens. All subordinate pages shown on the fact sheet are listed.
5. In the **Overview** item, click **Edit**. If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated, which cannot be altered.
6. Select a layout. **ItemList** type items can be edited.
7. Click **Edit** for the relevant item of the **ItemList** type.
8. Select a layout.

The **Table** option displays the items in a table. The first row in the table displays the item name. You can configure the display of additional properties. These appear as additional rows.

The **List** option displays the items that were previously shown in a table or an embedded page as a simple list. In the overview, all properties except the item name are hidden. If you have selected the **List** option and activated the view, you cannot switch back to the table view.

9. Click **Back**.

The new view is created and adjusted.

For the portal to be displayed in this view, you need to select (page 65) the new view for display.

3.8.2.3.2.4 Define layout

For new items (page 71) to be displayed you need to define the position on the overview page where the content is to be shown in the fact sheet.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Fact sheets** on the **Define view** page. All items available for fact sheets are displayed.
3. Move the mouse pointer over the item you want to change the overview page for, e.g., **Process**.
4. Click **Edit**. The **Edit fact sheet** page opens. All subordinate sheets are listed.
5. Ensure that an overview page is added. If this is not the case, click **Add** and select **Overview**.
6. Move the mouse pointer over the **Overview** entry.
7. Click **Edit**. The **Edit subordinate sheet** page opens. The items in the different areas are displayed.

   If the overview belongs to an item that is in the package and the overview has not yet been edited, the **System** layout is activated.
8. Select the layout of the page. This enables you to specify how the content of the areas is to be arranged.
9. Click **Add** in the areas and select the property to be displayed in the relevant area.

   If a property of the **ItemList** type is displayed in an area, this property can be edited (page 78).
10. Click **Remove** to delete entries.

The new view is created and adjusted.

For the portal to be displayed in this view, you need to select (page 65) the new view for display.

3.8.2.3.3 Hierarchies

3.8.2.3.3.1 Create navigation hierarchy

Define your own navigation options for the portal. You can use hierarchies (page 93) to control how portal users can quickly navigate to relevant information. These hierarchies map the relationships between superior and subordinate items.

You can define your own hierarchies for each user-defined view.

Prerequisite

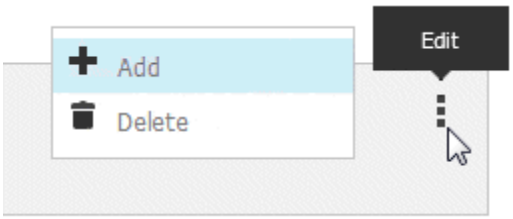
- You have the **Portal administrator** function privilege.
- If you want to use a root element (page 96), the GUID of the root element must be available on the clipboard.

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Hierarchies** on the **Define view** page.

   All hierarchies defined in this view for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined view was derived, e.g., **Processes**, **Organizations**, **IT systems**, or **Groups**. You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

   Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.
3. Click **Create**. The Hierarchy Wizard opens.
4. Specify the name for the hierarchy to be displayed in the portal in all languages. This name is shown in the portal as another navigation option. If the name is not specified in a language, it is displayed in English in the portal.
5. Click **Next**. The **Create hierarchy – Specify hierarchy structure** page opens.
6. Click **Select item**. All items that are defined in the view are displayed.
7. Select the first item. The item is inserted.
8. Move the mouse pointer over the item and click **Edit**.



9. Click ✚ Add.
10. Click **Select item/property** and select an entry. The second item must be of the same type as the first item. If it is not, a hierarchy cannot be created. The selected property or the item is made subordinate without space. The name of the property of the subordinate item is shown in parentheses.

11. Add further items in the same manner. The hierarchy is symbolized by indents.
12. Click **Finish** if you do not want to insert a root element (page 96). Otherwise click **Next** to insert a root element.
    a. Click **Add**. The **Add root element** dialog opens.
    b. Paste the GUID from the clipboard.
    c. Click **OK**. The GUID of the item is displayed in the list.
    d. Click **Finish**.
13. Click **Back**.
14. Activate (page 81) the hierarchy.

The navigation is available to users in the portal. To test the changed view, select (page 65) it for publishing.

3.8.2.3.3.2 Activate navigation hierarchy

Use hierarchies to define the navigation (page 290) in the portal. These hierarchies map the relationships between superior and subordinate items.

You can define your own hierarchies for each user-defined view.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Hierarchies** on the **Define view** page.

   All hierarchies defined in this view for navigation are displayed. By default, these are the hierarchies from the template from which the user-defined view was derived, e.g., **Processes**, **Organizations**, **IT systems**, or **Groups**. You can activate or deactivate these hierarchies marked with **system**, or change the order in which they are displayed in the portal.

   Unused hierarchies are shown in strikethrough formatting and are not displayed in the portal.
3. To show a hierarchy, move the mouse pointer over the row for a deactivated hierarchy and click **Activate**.

   The **Groups** hierarchy from the classic view cannot be combined with any other hierarchy. If the **Groups** hierarchy is activated, all other hierarchies are automatically deactivated. If you activate another hierarchy, the **Groups** hierarchy is automatically hidden.
4. Click **Back**.

The changed navigation is available to users in the portal. To test the changed view, select (page 65) it for publishing.

3.8.2.3.4 Components

On the **Components** tab, you can configure global settings for certain components, e.g., diagrams.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Component** on the **Define view** page.
3. Click **Edit** in the **Diagram** row. The **Edit component** dialog opens.
4. If you want to rename the **Diagram** component, click **Edit** in the **Edit component property** area. The dialog opens.
5. Change the name in the required languages, and click **OK**.
6. Configure the display of diagrams in the **Display options** area.

   To begin with, the ARIS Connect default settings are used. As soon as you disable these, you can configure the diagram graphic size and the assignment filter.

   You can optionally adjust the representation of a model in the portal to the dimensions of the model, or specify any size for it. For example, if you select **Fit to window**, the zoom factor is selected such that the entire model is displayed. Selecting **Fit width** displays the model so that its full width can be seen.

   If you activate the assignment filter, the diagrams show an assignment icon only for objects that have a diagram assigned to them which can also be accessed via the navigation hierarchy. For example, if a user-defined hierarchy includes value-added chains and processes only, the assignment icon is not displayed for functions to which only a model of the Function allocation diagram type is assigned.

   To reset the changed component properties and display options to the initial state, click **Restore default settings** and confirm the corresponding confirmation prompt.
7. Click **Back**.

You have configured the diagram on the **Component** tab.

3.8.2.3.5 Home

3.8.2.3.5.1 Change layout

Define your own layout for the portal. You can select layouts with one, two, or three columns.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.

   By default, the **System** layout is activated which cannot be altered. The components that are initially displayed in the **Home** view appear below the layout options.
3. Select the relevant layout. You are offered more detailed configuration options depending on the layout you select.
4. Define the size and appearance of the areas. If you specify the size of the areas in percent, all areas of the **Home** view will become smaller when the size of the browser window is reduced. If you specify the size in pixels, only one area may vary. You must explicitly indicate which area this is. The sizes of the other areas can be freely selected.

   To begin with, the areas of a user-defined layout are empty.

   Click **Add** to select components that are to be displayed on the **Home** page.
5. Click the arrow keys to specify the order of the components.
6. Click **Back**.

The new layout is available to users in the portal. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.2 Add 'Contacts' component

Define your own layout for the portal. You can add contacts.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Contacts**.
5. Click **Add**.

The contacts are now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.3 Add 'Diagram' component

Define your own layout for the portal. You can configure the appearance of diagrams.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have copied the item identifier (page 85) to the clipboard.

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Diagram**.
5. Click **Add**.
6. Click **Edit** in the **Diagram** row. The **Edit diagram** dialog opens.
7. Specify the name of the diagram in the various languages. You can display more languages.
8. Click **Add new start item** to define a model for the **Home** page. The **Add item identifier** dialog opens. Enter an identifier for a model, e.g., **c.group.UnitedMotorGroup.SnE94F0CEeMP2v2B6YbX4g**.
9. Double-click **OK**.

The configured diagrams are now displayed on the **Home** page of the database. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.4 Find item identifier

You can find item identifiers for diagrams so that diagrams can be displayed on the ARIS Connect **Home** page.

Procedure

1. Click **Portal**.
2. Select the database in which the relevant diagram is stored.
3. Click **Groups**.
4. Navigate to the required diagram and click it. The model is displayed.
5. In the address bar of your browser, select the last part of the URL, immediately after the entry **item/**.
6. Copy the selected text to the clipboard by pressing **Ctrl + C**.

You can use the item identifier of this diagram (page 84) to configure the **Home** page.

Tip

If you want to configure multiple diagrams later, it is recommended to copy the various identifiers into a text file, and then copy them into the configuration from there.

Example

3.8.2.3.5.5 Add 'My content' component

Define your own layout for the portal. You can create a **My content** area.

In the **System** default configuration, information is displayed in the **My content** area regarding the processes in which a function that is connected to a role or via a function allocation diagram is modeled. The user currently logged in must have been specified in this role in the **User/User group association** attribute.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **My content**.
5. Click **Add**.

The **My content** item is now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.6 Add 'Recent changes' component

Define your own layout for the portal. You can create a **Recent changes** area. You can also define another name for this area. Moreover, the languages, the number of changes displayed, and a time interval for changes can also be configured.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **Recent changes**.
5. Click **Add**.
6. Click **Edit** in the **Recent changes** row. The **Edit recent changes** dialog opens. Configure the name, the languages, the number of changes displayed, and a time interval for changes.
7. Click **OK**.

The recent changes are now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.7 Add and configure 'App gallery' component

Define your own layout for the portal. You can configure an **App gallery** area, in which you provide references to apps.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **App gallery**.
5. Click **Add**.
6. Click **Edit** in the **App gallery** row. The **Edit app gallery** dialog opens.
7. Enter a name for the gallery in the various languages.
8. Click **Add** to add an existing app. The button is available if apps exist that you can add. The **Add app** dialog opens. The **Create model**, **Navigation**, **Find people**, **Create profile**, **Start discussion**, and **Search** apps are preconfigured.
9. Click **Delete** in the row for the app you do not want to be displayed on the **Home** page. You can make a deleted app accessible in the app gallery again.
10. Change the order of the apps by clicking the up or down arrow.
11. Click **OK**.

The configured apps are now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.8 Add new app to gallery

Define your own layout for the portal. You can configure an **App gallery** area, in which you provide references to apps.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **App gallery**.
5. Click **Add**.
6. Click **Edit** in the **App gallery** row. The **Edit app gallery** dialog opens.
7. Enter a name for the gallery in the various languages.
8. Click **New** to add a new app. The **Add app** dialog opens.
9. Enter the name in the various languages.
10. Enter the URL under which the app can be found. Enter the entire URL in the form **http://<server>:<port>/<app path>**.
11. Enable **In a new tab** if the app is to be displayed on a new tab in the browser.
12. Select a symbol for the app.
13. Double-click **OK**.
14. Change the order of the apps by clicking the arrow keys.

The configured apps are now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.9 Add 'IFrame' component

Define your own layout for the portal. You can configure an **IFrame** area.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **IFrame**.
5. Click **Add**.
6. Click **Edit** in the **IFrame** row. The **Edit IFrame** dialog opens.
7. Enter the name in the various languages.
8. Enter the entire IFrame URL in the form **http://<server>:<port>/<IFrame path>**.
9. Click **OK**.

The configured IFrame item is now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.5.10 Add 'My activities' component

Define your own layout for the portal. You can add an overview of your activities.

Prerequisite

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

Procedure

1. Open a user-defined view for editing. (page 71)
2. Click **Home** on the **Define view** page.
3. Click **Add** in the relevant area. The **Add component** dialog opens.
4. Click the **Component** box and then click **My activities**.
5. Click **Add**.

The **My activities** component is now displayed on the **Home** page. To test the changed view, select (page 65) it for publishing.

3.8.2.3.6 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

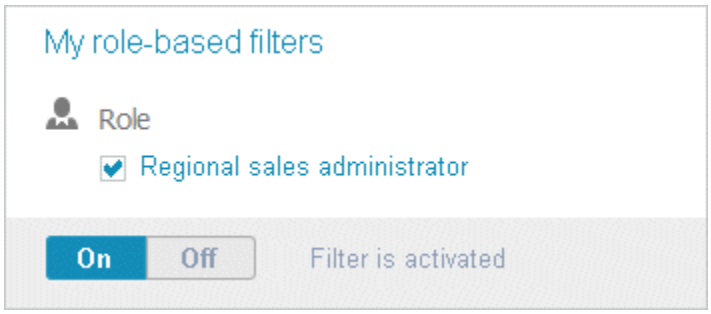
3.8.2.3.6.1 How is the classic view structured?

This view shows all content relevant to you in a clear structure under Home (page 257) and Groups (page 258).

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page 13).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 310) to your user in models and the portal has been configured for the use of role filters.

To activate the relevant role, click **Select role filter** on the left of your user name, and click **On**.



In the portal, you now see only information from all models in which the selected role occurs. Models of **Value-added chain diagram** type is always shown with an active role filter independent if the model contains the role or not.

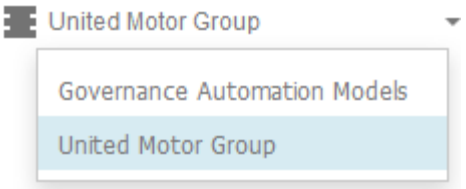
WHAT INFORMATION IS FILTERED?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 312), 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.

If your administrator has published multiple databases (page 64), these are offered to you for selection. You can switch between the published databases as required:



3.8.2.3.6.2 How is the default view structured?

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

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

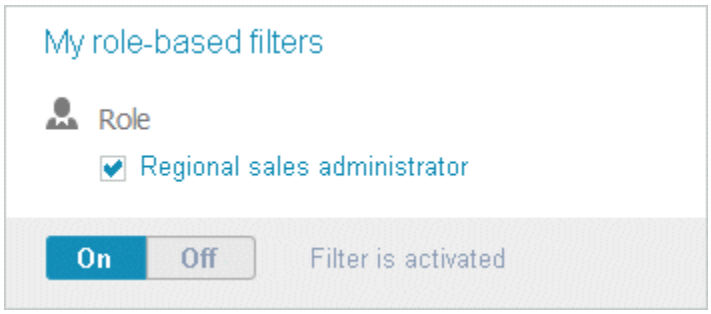
Shows the current activities you are following in Collaboration or in the portal (page 360).

This view shows all content relevant to you in a clear structure in the form of fact sheets under Processes (page 273), Organization (page 284), and IT systems (page 285).

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page 13).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 310) to your user in models and the portal has been configured for the use of role filters.

To activate the relevant role, click **Select role filter** on the left of your user name, and click **On**.



In the portal, you now see only information from all models in which the selected role occurs. Models of **Value-added chain diagram** type is always shown with an active role filter independent if the model contains the role or not.

WHAT INFORMATION IS FILTERED?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 312), 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.

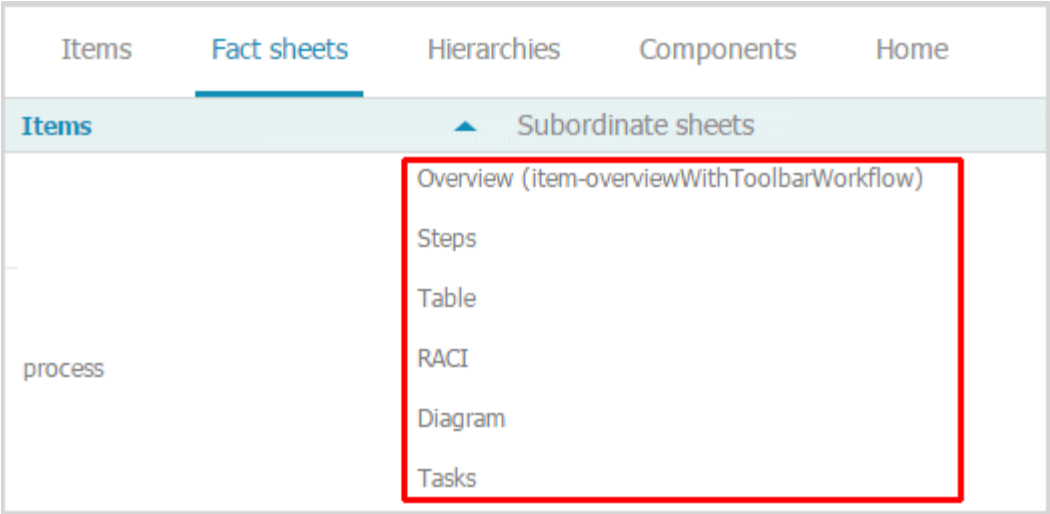
If your administrator has published multiple databases (page 64), these are offered to you for selection United Motor Group . You can switch between the published databases as required.

3.8.2.3.6.3 What can be configured in fact sheets?

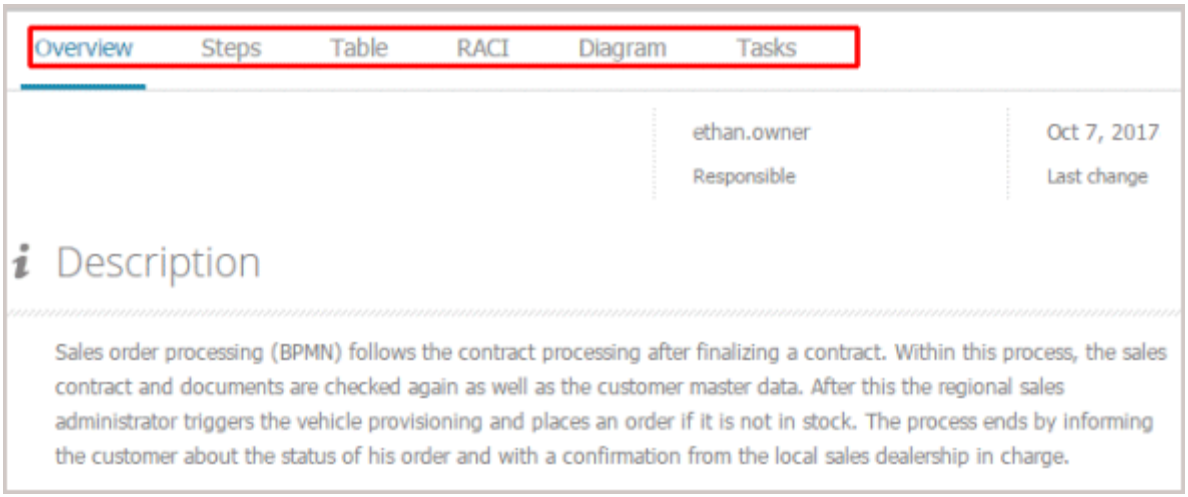
Using fact sheets, you configure how the pages are displayed that open when you click a process in the navigation. The fact sheet for a process includes the subordinate pages you defined in the fact sheet configuration (page 77).

Example

The subordinate pages shown are configured for a process:



The result of configuring the fact sheet for a process looks like this:



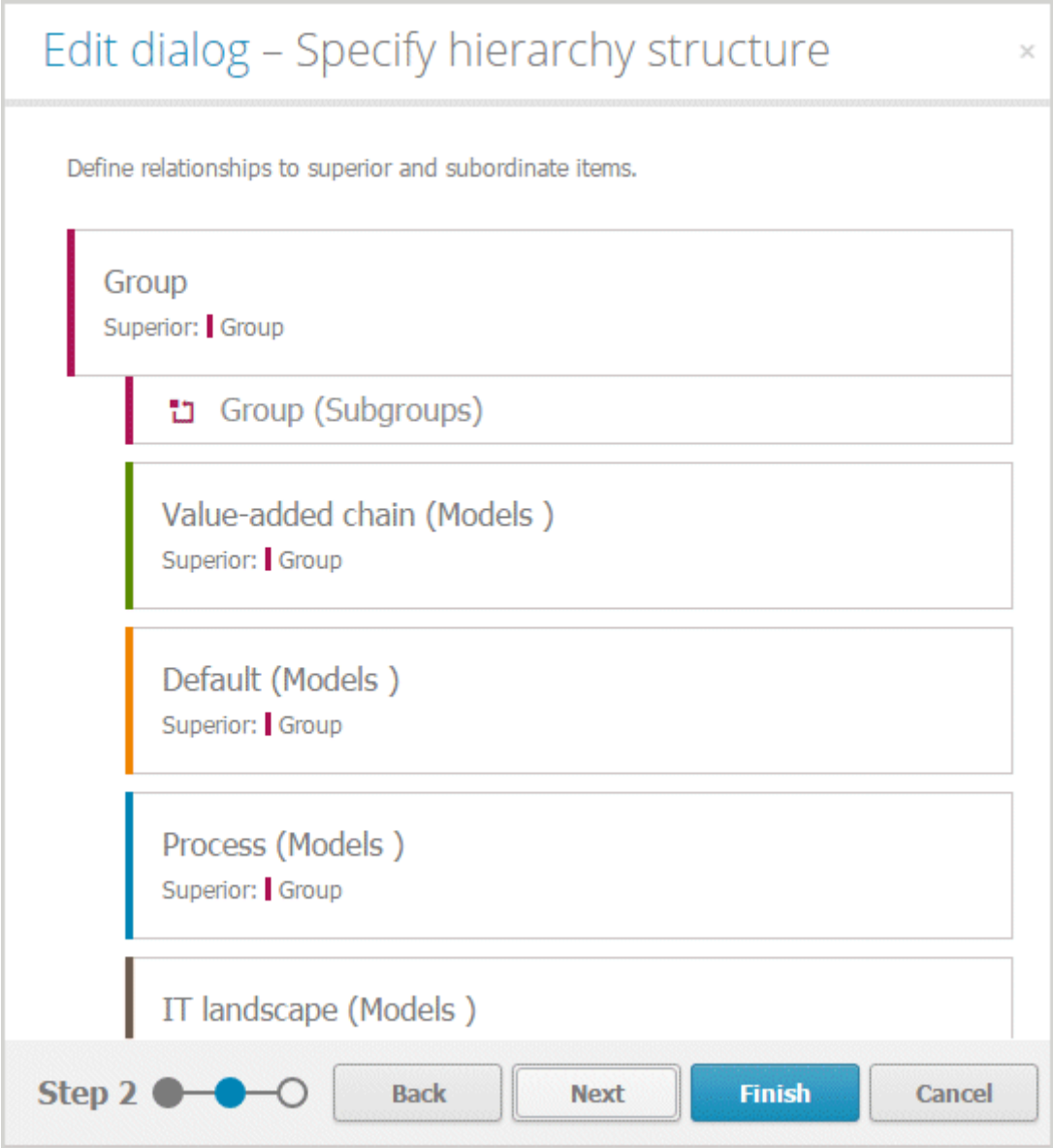
3.8.2.3.6.4 What does the navigation hierarchy define?

Using the navigation hierarchy, you define the navigation options for the portal. The example shows the configuration of the hierarchy for a group.

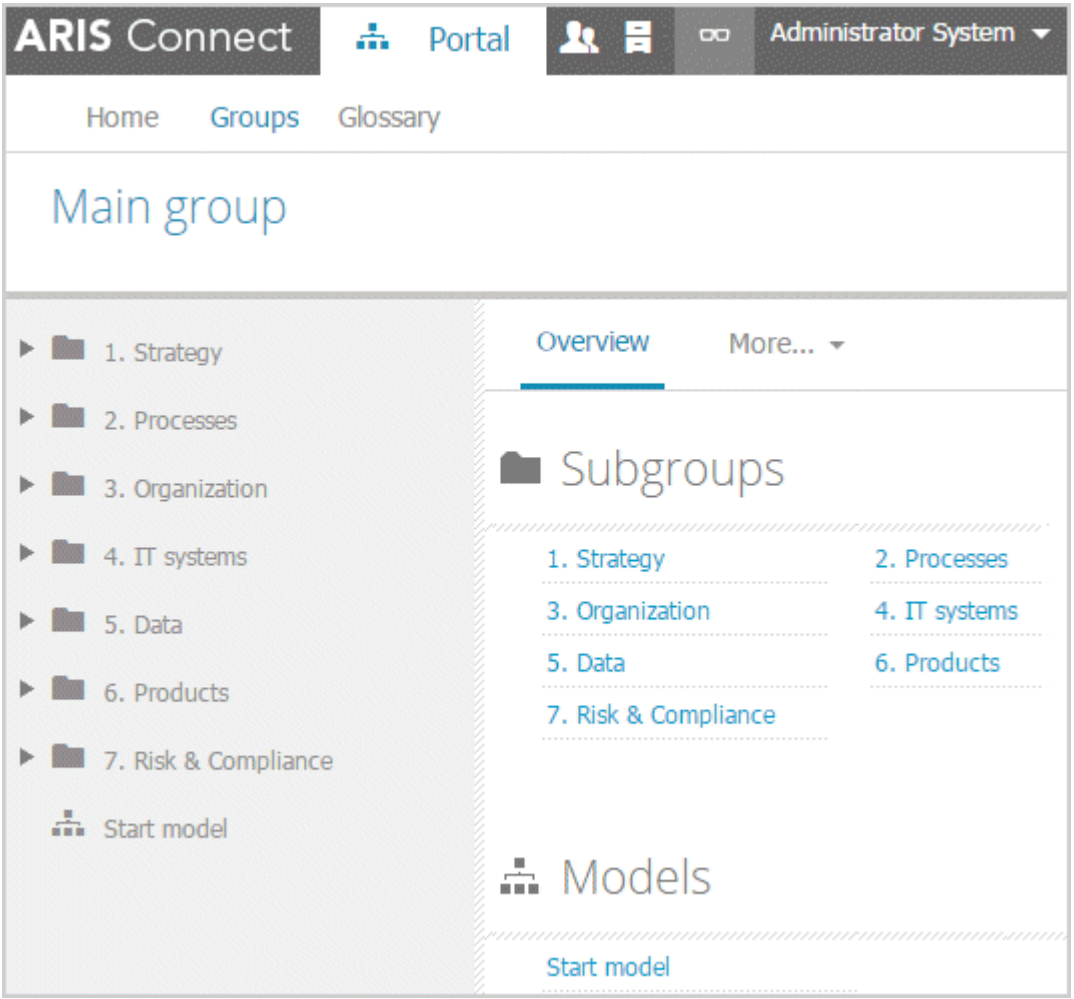
The second item must be of the same type as the first item. If it is not, a hierarchy cannot be created. Items of the same type are arranged without space.

Example

Subgroups and processes are configured for the group:

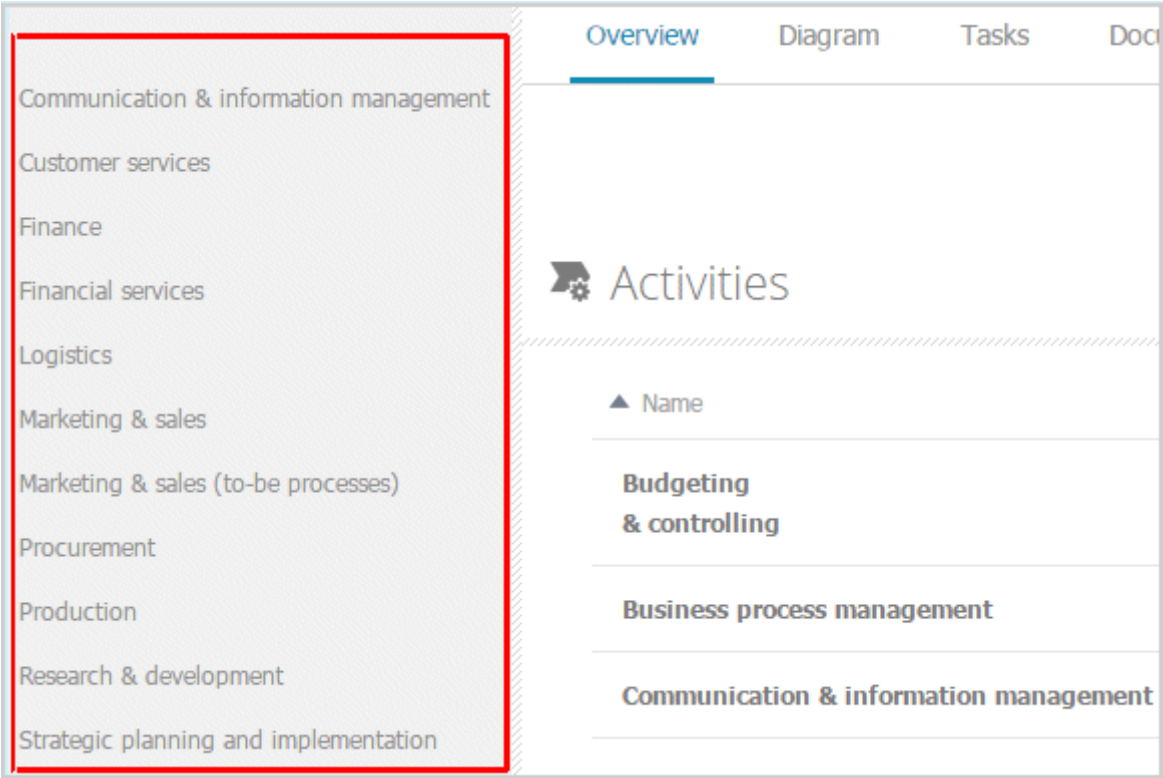


The result looks like this in the portal:

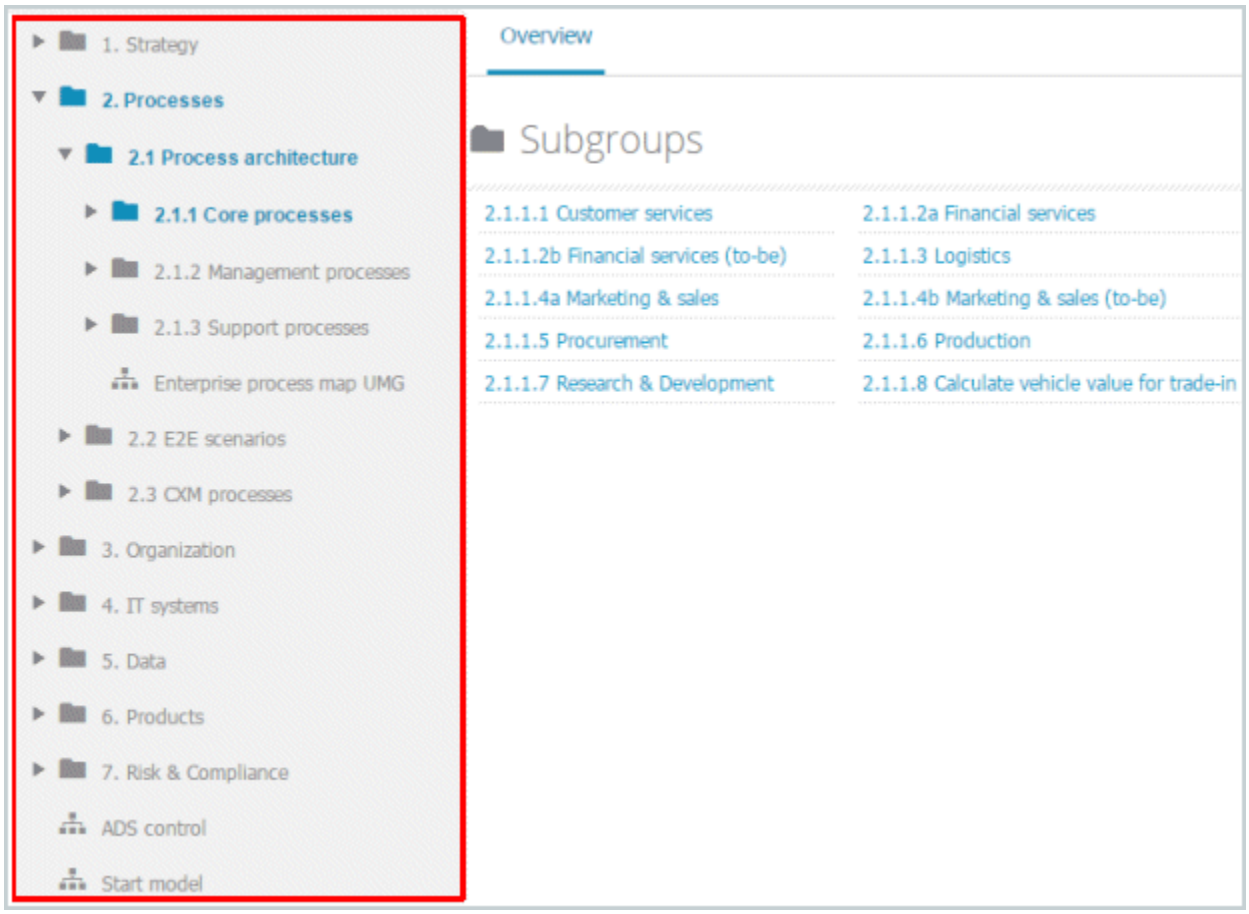


3.8.2.3.6.5 What to remember regarding hierarchies

Hierarchies define the way in which portal users receive relevant information. Hierarchies that are based on the **default** template have only one level.



Hierarchies that are based on the **classic** template have multiple levels, and you can expand and collapse groups.



From a technical perspective, a hierarchy always has a tree structure and is level-based. A level can be made up of models, objects, or groups. It may contain a superior item and multiple subordinate items. In contrast, a level can have multiple subordinate items.

You can use multiple hierarchy definitions in a hierarchy configuration. For example, you can specify the following hierarchy definitions in a configuration:

Navigation in process models (value-added chain diagrams, EPCs, and function allocation diagrams), navigation in the organization (organizational charts, organizational units, roles, and groups), and navigation in the IT systems within an organization.

3.8.2.3.6.6 What is a hierarchy root element?

A root element is the model or object that is used as the top-level element in the hierarchy (page 80) you have defined. This element is displayed when you open the hierarchy in the portal.

If you want to use a specific item from an ARIS database as the top-level hierarchy element, e.g., a specific model or object, this must be defined as the root element. You require the GUID, which you can copy from the Properties dialog for the model or object in ARIS Architect, for example.

3.8.2.3.6.7 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 340) 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 340) if you do not enter a numerical value.

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

3.8.2.4 Customize font and color

As a portal administrator, you customize the user interface.

3.8.2.4.1 Customize font and colors

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

Prerequisite

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

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Customize font and color** on the **Configuration** tab.
4. Specify the required settings.
5. Click **Apply**.

The changes are applied.

3.8.2.4.2 Upload logo

Select the graphics file you want to display as the logo.

Prerequisite

- You have the **Portal administrator** function privilege.
- You have access to a graphics file in PNG format.

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Customize font and color** on the **Configuration** tab.
4. Click **Browse** next to the **Select logo (*.png)** field, and navigate to the required PNG file.
5. Click **Apply**.

The graphic was uploaded.

3.8.2.4.3 Restore defaults

You can undo all font, color, and logo settings you have specified.

Prerequisite

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

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Customize font and color** on the **Configuration** tab.
4. Click **Restore defaults**.

The default settings are loaded and the page is refreshed.

3.8.2.5 Languages

3.8.2.5.1 Configure languages

Customize the settings according to the requirements of your company.

Prerequisite

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

The selected languages are available as the interface, method, and database language (page 101).

Procedure

1. Click the arrow next to your user name.
2. Click **Administration**.
3. Click **Portal > Language selection** on the **Configuration** tab.
4. In the **Current language** list, select the languages you do not require, then click **Deactivate**. The languages are added to the **More languages** list.
5. In the **More languages** list, select the languages you require, then click **Activate**. The languages are added to the **Current language** list.
6. Click **Apply**.

The activated languages are available for selection by ARIS Connect users.

3.8.2.5.2 What are the special features in terms of languages?

You can select all languages (page 101) that ARIS supports. When a user selects a language, they specify which interface, method, and database language is used. Ideally, these are available in the selected language. If a language is not available, the procedure is as follows.

INTERFACE LANGUAGE IS NOT AVAILABLE IN SELECTED LANGUAGE

Available interface languages are installed.

If you have selected the language **Quechua (Bolivia)** and this language is not available as the interface language, the interface items, e.g., the links, are displayed in English.

METHOD LANGUAGE IS NOT AVAILABLE IN SELECTED LANGUAGE

The interface language is used.

For example, if you have selected the language **Quechua (Bolivia)** and this language is not available, model, object, and attribute names are displayed in English if you have selected English as the interface language.

DATABASE LANGUAGE IS NOT AVAILABLE IN SELECTED LANGUAGE

The alternative language for the database is used.

For example, if you have selected the language **Quechua (Bolivia)** and this language is not available, all entries you specify for attributes are added in the English database language if you have selected English as the alternative language. In Model Editor, for example, the current database language is displayed after the model name using a language code.

3.8.3 User management

3.8.3.1 Export configuration

You can export configurations in order to import them into any tenant or installation and use them there.

Prerequisite

- You have the **Technical configuration** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **User management**.
4. Click **Export current configuration as a file**.

You can save the configuration file for further use at the relevant location.

3.8.3.2 Import configuration

You can import configurations into any tenant or installation and use them there.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **User management**.
4. Click **Import configuration file**.

The **Import configuration file** dialog opens. Navigate to the location where the configuration file is stored and import it. The new configuration is active immediately and no system restart is required.

3.8.3.3 Customize infrastructure

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **Infrastructure** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

You can configure the following properties of your system:

Build number

Build number of ARIS Administration. This corresponds to the following property: com.aris.umc.version Cross-tenant property that cannot be changed.

Load balancer URL

Specifies the URL of the load balancer. This corresponds to the following property: com.aris.umc.loadbalancer.url Cross-tenant property that cannot be changed.

E-mails with HTTP URLs only

Specifies whether or not the HTTP protocol is used instead of the HTTPS protocol in e-mails. This corresponds to the following property: com.aris.umc.notification.useHttpLinks

HTTP CLIENT

These are all cross-tenant settings and cannot be changed.

Connection timeout

Specifies the duration after which a client's connection attempt is canceled. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.client.connect.timeout

Idle timeout

Specifies the wait time timeout of the ARIS Administration REST client. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.client.idle.timeout

Read timeout

Specifies the wait time timeout of the REST client for read access. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.client.read.timeout

Maximum connections (total)

Specifies the maximum number of connections that may be established simultaneously. If additional connections are to be established, they are refused. This corresponds to the following property: com.aris.umc.client.connections.max

Maximum connections (per host)

Specifies the maximum number of connections that may be established simultaneously per host. If additional connections are to be established, they are refused. This corresponds to the following property: com.aris.umc.client.connections.perhost

Number of retries

Specifies the maximum number of retries. This corresponds to the following property: com.aris.umc.client.retry.max

Host name verification

Specifies whether the verification of the SSL host name is activated. Verification is enabled by default. This corresponds to the following property: com.aris.umc.ssl.host.verification.active

ADVANCED SETTINGS

You can configure the following properties of your system:

Allowed remote clients

Comma-separated list of client IPs that use the remote interface of ARIS Administration. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.remote.clients

Configuration cache lifetime

Specifies the lifetime of the configuration cache in seconds. The configuration is reloaded after the time set here. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.config.cache.ttl

Encrypted properties

Specifies a comma-separated list of encrypted property keys. This corresponds to the following property: com.aris.umc.config.encrypted

JAAS login context

Specifies the login name for the JAAS context. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.jaas.login.context

Default tenant

Specifies that the default tenant is used for authentication. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.basicauth.tenant

Infrastructure tenant

Specifies the infrastructure tenant. Specifies the tenant with special privileges for managing other tenants, components, and the configuration in ARIS Administration.

By default, the **master** tenant is the infrastructure tenant. The system users **system** and **superuser** have administrative privileges, i.e., they can access ARIS Administration and Tenant Management.

Users with the relevant privileges can specify other infrastructure tenants in ARIS Administration. Cross-tenant property that cannot be changed.

This corresponds to the following property: com.aris.infrastructure.tenant

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.
7. Adjust your settings.
8. Click **Save**.

You have customized your system configuration.

3.8.3.4 Customize Kerberos settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **Kerberos** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

You can configure the following properties of your system:

Use Kerberos

Specifies whether a Kerberos-based login is allowed. This corresponds to the following property: com.aris.umc.kerberos.active

KDC

Specifies the fully qualified name of the central **K**ey **D**istribution **C**enter (**KDC**). This is usually the fully qualified host name of the LDAP server. This corresponds to the following property: com.aris.umc.kerberos.kdc

Realm

Specifies the realm of Kerberos tickets. Fully qualified domain name in uppercase letters. This corresponds to the following property: com.aris.umc.kerberos.realm

Principal

Specifies the name of the user used for verifying Kerberos tickets.

If Kerberos is used, each user, computer or service provided by a server must be defined as a principal. This corresponds to the following property: com.aris.umc.kerberos.servicePrincipalName

Key table

Specifies the location of the keytab file that is used for Kerberos tickets. This corresponds to the following property: com.aris.umc.kerberos.keyTab

Configuration file

Storage location of the configuration file for Kerberos. The file can be uploaded directly.

This corresponds to the following property: com.aris.umc.kerberos.config

ADVANCED SETTINGS

You can configure the following properties of your system:

Debug output

Specifies whether debug output is allowed for Kerberos operations. This corresponds to the following property: com.aris.umc.kerberos.debug

Allow local users

Specifies whether the LDAP connection is mandatory for Keberos-based login. If this option is enabled, Keberos is used for the login of local users also. This corresponds to the following property: com.aris.umc.kerberos.allowlocalusers

Default tenant

Specifies the default tenant for a Kerberos-based login. This corresponds to the following property: com.aris.umc.kerberos.tenant

Cross-tenant property that cannot be changed.

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.

8. Click **Save**.

You have customized your system configuration.

What is configurable for Kerberos?

3.8.3.5 Upload Kerberos configuration files

You can upload the Kerberos configuration file or the key table.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **Kerberos** in the list box. The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.
5. Activate the **General** configuration category.
6. Click **Upload**.
7. Select whether you want to upload the configuration file or the key table. The dialog for uploading a file opens.
8. Select the relevant file.

You have uploaded a configuration file.

Kerberos

3.8.3.6 Customize LDAP settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **LDAP** in the list box.
5. Click a configuration category. The following categories are available:

CONNECTION

You can configure the following properties of your system:

Activate LDAP

Specifies whether the LDAP integration is activated. This corresponds to the following property: com.aris.umc.ldap.active

Server URL

Specifies the URL of the LDAP server. This corresponds to the following property: com.aris.umc.ldap.url

Server URL (fallback)

Specifies the fallback URL of the LDAP server. This URL is only used if the server cannot be reached via its primary URL. This corresponds to the following property: com.aris.umc.ldap.backup.url

User name

Specifies the user name of the LDAP user. This corresponds to the following property: com.aris.umc.ldap.service.user

Password

Specifies the password of the LDAP user. This corresponds to the following property: com.aris.umc.ldap.service.pwd

Use SSL

Specifies if SSL is to be used. This corresponds to the following property: com.aris.umc.ldap.ssl

SSL mode

Specifies the SSL mode (page 141). This corresponds to the following property: com.aris.umc.ldap.ssl.mode

Test connection

Click **Test connection** to test the connection to the LDAP server.

Verify host names

Specifies if an SSL host is to be verified. This corresponds to the following property: com.aris.umc.ldap.ssl.host.verification.active

Verify certificates

Specifies whether an SSL certificate is to be verified. This corresponds to the following property:com.aris.umc.ldap.ssl.certificate.verification.active

Simultaneous connections

Specifies the maximum number of simultaneous connections to the same LDAP server. If additional connections are to be established, they are refused. Cross-tenant property that cannot be changed.

This corresponds to the following property: com.aris.umc.ldap.connection.concurrent

Connection timeout

Specifies the duration after which the attempt to connect to the LDAP server is canceled. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.ldap.timeout

Read timeout

Specifies the maximum amount of time that read access may take. This corresponds to the following property: com.aris.umc.ldap.read.timeout

ATTRIBUTE MAPPINGS

You can configure the following properties of your system:

objectClass

Specifies the attribute that contains the object class. This corresponds to the following property: com.aris.umc.ldap.attribute.objectclass

DN

Specifies the fully qualified name (distinguished name). This corresponds to the following property: com.aris.umc.ldap.attribute.distinguishedname

GUID

Specifies the LDAP GUID. This corresponds to the following property: com.aris.umc.ldap.attribute.guid

GROUP ATTRIBUTE MAPPINGS

You can configure the following properties of your system:

Name

Specifies the group name. This corresponds to the following property: com.aris.umc.ldap.attribute.group.name

hasMember

Specifies the attribute that references the members of a group. This corresponds to the following property: com.aris.umc.ldap.attribute.hasmember

User-defined

Specifies a comma-separated list of LDAP attributes that are to be imported as user-defined attributes of a group. This corresponds to the following property: com.aris.umc.ldap.group.attributes.userdefined

USER ATTRIBUTE MAPPINGS

You can configure the following properties of your system:

Name

Specifies the user name of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.user.name

First name

Specifies the first name of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.user.firstname

Last name

Specifies the last name of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.user.lastname

E-mail address

Specifies the e-mail address of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.user.email

Telephone number

Specifies the telephone number of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.user.phone

Picture

Specifies the picture of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.user.picture

memberOf

Specifies the attribute that references the groups of a user. This corresponds to the following property: com.aris.umc.ldap.attribute.memberof

User-defined

Specifies a comma-separated list of LDAP attributes that are to be imported as user-defined attributes of a user. This corresponds to the following property: com.aris.umc.ldap.user.attributes.userdefined

BEHAVIOR

Group object class

Object class of the LDAP groups. This corresponds to the following property: com.aris.umc.ldap.group.objectclass

User object class

Specifies the object class of the LDAP user. This corresponds to the following property: com.aris.umc.ldap.user.objectclass

Search paths

Specifies a semicolon-separated list of all LDAP search paths. This corresponds to the following property: com.aris.umc.ldap.searchpath

Group search paths

Specifies a semicolon-separated list of all LDAP search paths for user groups. Overwrites the list of general search paths. This corresponds to the following property: com.aris.umc.ldap.group.searchpath

User search paths

Specifies a semicolon-separated list of LDAP search paths for users. Overwrites the list of general search paths. This corresponds to the following property: com.aris.umc.ldap.user.searchpath

Group search filter

Specifies the query filter for LDAP groups. This corresponds to the following property: com.aris.umc.ldap.filter.group

User search filter

Specifies the query filter for LDAP users. This corresponds to the following property: com.aris.umc.ldap.filter.user

Recursion depth

Specifies the recursion depth that is to be used for nested groups and users. This corresponds to the following property: com.aris.umc.ldap.recursion.depth

Page size

Specifies the maximum number of entries that are loaded in a single LDAP query. This corresponds to the following property: com.aris.umc.ldap.pagesize

Referrals

Defines how referrals to other LDAP systems are processed. This corresponds to the following property: com.aris.umc.ldap.referral

TRUSTSTORE

Truststore

Specifies where to look for the truststore. This corresponds to the following property: com.aris.umc.ldap.ssl.truststore.location

Password

Specifies the truststore password. This corresponds to the following property: com.aris.umc.ldap.ssl.truststore.password

Type

Specifies the truststore type to be used. This corresponds to the following property: com.aris.umc.ldap.ssl.truststore.type

ADVANCED SETTINGS

Debug output

Specifies whether or not debug information for LDAP operations is output. This corresponds to the following property: com.aris.umc.ldap.debug

Import superior group

Specifies whether the superior group is to be imported automatically when the group is imported. This corresponds to the following property: com.aris.umc.ldap.group.import.parent.enabled

Import user at login

Specifies whether an LDAP user is to be imported automatically during the login attempt. This corresponds to the following property: com.aris.umc.ldap.user.importOnLogin

Import user groups when synchronizing

Specifies whether additional user groups are to be imported during user synchronization. This corresponds to the following property: com.aris.umc.ldap.sync.user.importgroups

Update group associations at login

Specifies whether the **memberOf** attribute is read (**true**) or not (**false**). If the value of the property is **true**, the **memberOf** attribute is read and the referenced groups are automatically imported. The import of the groups occurs when a user from the group logs in for the first time. This corresponds to the following property: com.aris.umc.ldap.attribute.memberof.resolveOnFirstLogin

Use attribute value paging

Specifies whether a page break is to be inserted if the server-side limit for valid values is exceeded for attributes, e.g., if more than 1,500 attribute values exist. This corresponds to the following property: com.aris.umc.ldap.user.attributes.paging.enabled

Prevent login of manually created users

Specifies that only LDAP users may log in. This does not apply to the **arisservice**, **guest**, **superuser**, and **system** users. This corresponds to the following property: com.aris.umc.ldap.auth.only

Cache size

Specifies the maximum number of LDAP entities that are cached during an import. This corresponds to the following property: com.aris.umc.ldap.entity.cache.size

Pool wait time

Specifies the maximum amount of time that a connection request may take if the maximum number of connections to the LDAP server was exceeded. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.ldap.connection.concurrent.timeout

Pool size

Specifies the maximum number of connections that are ready for reuse in a pool. The connection that was used last is discarded when the pool is full. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.ldap.connection.pool.size

Pool time

Specifies the maximum amount of time that a connection remains in a pool. The connection is removed from the pool at the latest after this period of time. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.ldap.connection.pool.timeout

Skip errors

Specifies whether the LDAP import ignores users or user groups for which errors occurred without showing an error message. This corresponds to the following property: com.aris.umc.ldap.sync.skipOnFault

Use bottom-up method

Specifies whether the bottom-up method (**memberOf** attribute) or the top-down method (**hasMember** attribute) is applied when associating users to user groups. This corresponds to the following property: com.aris.umc.ldap.sync.members.searchBottomUp

Use DN as GUID

Specifies that the fully qualified name (distinguished name) is used as GUID. This corresponds to the following property: com.aris.umc.ldap.sync.useDnAsGuid

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.

8. Click **Save**.

You have customized your system configuration.

What is configurable for the LDAP connection?

What is configurable for the LDAP attribute mappings?

3.8.3.7 Upload LDAP truststore file

You can upload the truststore file.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **LDAP** in the list box.
5. Click **Truststore**.
6. Click **Upload > Truststore**. The dialog for uploading a file opens.
7. Select the relevant file.

You have uploaded a truststore file.

3.8.3.8 Upload templates for notifications

You can upload the templates for user-defined notifications.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **User-defined notifications** in the list box.
5. Click a configuration category.
6. Click **Upload**.
7. Select the relevant template. The dialog for uploading a file opens.
8. Select the relevant file.

You have uploaded a template for notifications.

3.8.3.9 Customize user-defined notifications

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Variables (page 168) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **User-defined notifications** in the list box.
5. Click a configuration category. The following categories are available:

USERS

Notify about creation

Specifies whether users are to be notified after they have been created. This corresponds to the following property: com.aris.umc.notification.userCreated.enabled

User created - Subject

Subject of the notification that is sent when a user has been created. This corresponds to the following property: com.aris.umc.notification.userCreated.subject

User created - Message

Specifies the text of the notification that is sent when a user has been created. This corresponds to the following property: com.aris.umc.notification.userCreated.message

User created - HTML template

Specifies the HTML template used for the notification that is sent when users are notified that they have been created. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.userCreated.template

Notify about deactivation

Specifies whether users are to be notified after they have been deactivated. This corresponds to the following property: com.aris.umc.notification.userDisabled.enabled

User deactivated - Subject

Specifies the subject of the notification that is sent when a user has been deactivated. This corresponds to the following property: com.aris.umc.notification.userDisabled.subject

User deactivated - Message

Specifies the text of the notification that is sent when a user has been deactivated. This corresponds to the following property: com.aris.umc.notification.userDisabled.message

User deactivated - HTML template

Specifies the HTML template used for the notification that is sent when users are notified that they have been deactivated. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.userDisabled.template

Notify about activation

Specifies whether users are to be notified after they have been activated. This corresponds to the following property: com.aris.umc.notification.userEnabled.enabled

User activated - Subject

Specifies the subject of the notification that is sent when a user has been activated. This corresponds to the following property: com.aris.umc.notification.userEnabled.subject

User activated - Message

Specifies the text of the notification that is sent when a user has been activated. This corresponds to the following property: com.aris.umc.notification.userEnabled.message

User activated - HTML template

Specifies the HTML template used for the notification that is sent when users are notified that they have been activated. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.userEnabled.template

PASSWORDS

Notify about password change

Specifies whether users are to be notified after their password has been changed. This corresponds to the following property: com.aris.umc.notification.passwordChanged.enabled

Password change - Subject

Specifies the subject of the notification that is sent when a password has been changed. This corresponds to the following property: com.aris.umc.notification.passwordChanged.subject

Password change - Message

Specifies the text of the notification that is sent when a password has been changed. This corresponds to the following property: com.aris.umc.notification.passwordChanged.message

Password change - HTML template

Specifies the HTML template used for the notification that is sent when a user is to be notified about a password change. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.passwordChanged.template

Notify about password reset

Specifies whether users are to be notified after their password has been reset. This corresponds to the following property: com.aris.umc.notification.passwordReset.enabled

Password reset - Subject

Specifies the subject of the notification that is sent when a password has been reset. This corresponds to the following property: com.aris.umc.notification.passwordReset.subject

Password reset - Message

Specifies the text of the notification that is sent when a password has been reset. This corresponds to the following property: com.aris.umc.notification.passwordReset.message

Password reset - HTML template

Specifies the HTML template used for the notification that is sent when a user is to be notified about a password reset. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.passwordReset.template

Notify about password reset request

Specifies that users are to be notified if they have requested a password reset. This corresponds to the following property: com.aris.umc.notification.passwordResetRequested.enabled

Password reset request - Subject

Specifies the subject of the notification that is sent when a user has requested a password reset. This corresponds to the following property: com.aris.umc.notification.passwordResetRequested.subject

Password reset request - Message

Specifies the text of the notification that is sent when a user has requested a password reset. This corresponds to the following property: com.aris.umc.notification.passwordResetRequested.message

Password reset request - HTML template

Specifies the HTML template used for the notification that is sent when a user has requested a password reset. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.passwordResetRequested.template

LICENSES

Notify about license expiration

Specifies whether administrators with the **License management** privilege are to be notified when a license has expired. This corresponds to the following property: com.aris.umc.notification.licenseExpired.enabled

License has expired - Subject

Specifies the subject of the notification that is sent when a license has expired. This corresponds to the following property: com.aris.umc.notification.licenseExpired.subject

License has expired - Message

Specifies the text of the notification that is sent when a license has expired. This corresponds to the following property: com.aris.umc.notification.licenseExpired.message

License has expired - HTML template

Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license has expired. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.licenseExpired.templates

Notify before license expiration

Specifies whether administrators with the **License management** privilege are to be notified when a license is about to expire. This corresponds to the following property: com.aris.umc.notification.licenseExpiring.enabled

Days before expiration

Specifies how many days before license expiration a notification is sent. This corresponds to the following property: com.aris.umc.notification.licenseExpiring.threshold

License will expire soon - Subject

Specifies the subject of the notification that is sent when a license is about to expire. This corresponds to the following property: com.aris.umc.notification.licenseExpiring.subject

License will expire soon - Message

Specifies the text of the notification that is sent when a license is about to expire. This corresponds to the following property: com.aris.umc.notification.licensselicenseExpiring.message

License will expire soon - HTML template

Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license will soon expire. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.licenseExpiring.template

Notify about license exhaustion

Specifies whether administrators with the **License management** privilege are to be notified when the total number of logins allowed for the license is reached. This corresponds to the following property: com.aris.umc.notification.licenseSeatsConsumed.enabled

License exhaustion - Subject

Specifies the subject of the notification that is sent when the total number of logins allowed for the license is reached. This corresponds to the following property: com.aris.umc.notification.licenseSeatsConsumed.subject

License exhaustion - Message

Specifies the text of the notification that is sent when the total number of logins allowed for the license is reached. This corresponds to the following property: com.aris.umc.notification.licenseSeatsConsumed.message

License exhaustion - HTML template

Specifies the HTML template used for the notification that is sent when an administrator is to be notified that the total number of logins allowed with a license is reached. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.licenseSeatsConsumed.template

TENANTS

Notify about deletion

Specifies whether a notification is sent if a tenant was deleted. This corresponds to the following property: com.aris.umc.notification.tenantDeleted.enabled

Notify all users about deletion

Specifies whether a notification is to be sent to all users. This corresponds to the following property: com.aris.umc.notification.tenantDeleted.sendToAll.enabled

Tenant deleted - Subject

Specifies the subject of the notification that is sent if a tenant was deleted. This corresponds to the following property: com.aris.umc.notification.tenantDeleted.subject

Tenant deleted - Message

Specifies the text of the notification that is sent if a tenant was deleted. This corresponds to the following property: com.aris.umc.notification.tenantDeleted.message

Tenant deleted - HTML template

Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been deleted. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.tenantDeleted.template

Notify about deactivation

Specifies whether a notification is sent if a tenant was deactivated. This corresponds to the following property: com.aris.umc.notification.tenantDisabled.enabled

Notify all users about deactivation

Specifies whether a notification is sent to all users if a tenant was deactivated. This corresponds to the following property: com.aris.umc.notification.tenantDisabled.sendToAll.enabled

Tenant deactivated - Subject

Specifies the subject of the notification that is sent if a tenant was deactivated. This corresponds to the following property: com.aris.umc.notification.tenantDisabled.subject

Tenant deactivated - Message

Specifies the text of the notification that is sent if a tenant was deactivated. This corresponds to the following property: com.aris.umc.notification.tenantDisabled.message

Tenant deactivated - HTML template

Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been deactivated. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.tenantDisabled.template

Notify about activation

Specifies whether a notification is sent if a tenant was activated. This corresponds to the following property: com.aris.umc.notification.tenantEnabled.enabled

Notify all users about activation

Specifies whether a notification is sent to all users if a tenant was activated. This corresponds to the following property: com.aris.umc.notification.tenantEnabled.sendToAll.enabled

Tenant activated - Subject

Specifies the subject of the notification that is sent if a tenant was activated. This corresponds to the following property: com.aris.umc.notification.tenantEnabled.subject

Tenant activated - Message

Specifies the text of the notification that is sent if a tenant was activated. This corresponds to the following property: com.aris.umc.notification.tenantEnabled.message

Tenant activated - HTML template

Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been activated. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.tenantEnabled.template

MULTI-FACTOR AUTHENTICATION

Notify about one-time password request

Specifies whether users are to be notified if they have requested a one-time password. This corresponds to the following property: com.aris.umc.notification.otpRequested.enabled

One-time password request - Subject

Subject of the notification that is sent when a user has requested a one-time password. This corresponds to the following property: com.aris.umc.notification.otpRequested.subject

One-time password request - Message

Text of the notification that is sent when a user has requested a one-time password. This corresponds to the following property: com.aris.umc.notification.otpRequested.message

One-time password request - HTML template

Specifies the HTML template used for the notification that is sent when a user has requested a one-time password. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.otpRequested.message

Notify about token secret change

Specifies whether users are to be notified if their token secret has been changed. This corresponds to the following property: com.aris.umc.notification.otpSecretChanged.enabled

Token secret change - Subject

Subject of the notification that is sent when the token secret has been changed by a user. This corresponds to the following property: com.aris.umc.notification.otpSecretChanged.subject

Token secret change - Message

Text of the notification that is sent when the token secret has been changed by a user. This corresponds to the following property: com.aris.umc.notification.otpSecretChanged.message

Token secret change - HTML template

Specifies the HTML template used for the notification that is sent when a user has changed the token secret. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.otpSecretChanged.template

OAUTH

Notify about signup

Specifies whether administrators are to be notified if a new user has signed up. This corresponds to the following property: com.aris.umc.notification.signupCompleted.enabled

Signup complete - Subject

Subject of the notification that is sent when a new user has signed up. This corresponds to the following property: com.aris.umc.notification.signupCompleted.subject

Signup complete - Message

Text of the notification that is sent when a new user has signed up. This corresponds to the following property: com.aris.umc.notification.signupCompleted.message

Signup complete - HTML template

Specifies the HTML template used for the notification that is sent when a new user has signed up. The template must have been uploaded previously. This corresponds to the following property: com.aris.umc.notification.signupCompleted.template

6. Click **Edit**.
7. Adjust your settings.
8. Click **Save**.

You have customized your system configuration.

How to configure the LDAP connection?

How to configure LDAP attribute mappings?

3.8.3.10 Customize OAuth settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **OAuth** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

Use OAuth

Specifies whether OAuth is allowed. The default value is **false**. This corresponds to the following property: com.aris.umc.oauth.active

OAuth providers

Specifies in a comma-separated list the social network providers for which login is allowed.

Activate the relevant providers. This corresponds to the following property: com.aris.umc.oauth.providers

API keys

Specifies a comma-separated list of API keys. This corresponds to the following property: com.aris.umc.oauth.api.keys

API secrets

Specifies a comma-separated list of API secrets. This corresponds to the following property: com.aris.umc.oauth.api.secrets

ADVANCED SETTINGS

Debug output

Specifies whether debug output is enabled for OAuth operations. The default value is **false**. This corresponds to the following property: com.aris.umc.oauth.debug

Default tenant

Specifies the default tenant that is used for OAuth-based authentication. The default value is **default**. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.oauth.tenant

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.
7. Adjust your settings.
8. Click **Save**.

You have customized your system configuration.

What is configurable for OAuth?

3.8.3.11 Customize password policy

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **Password policy** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

Minimum length

Specifies the minimum length of a password. This corresponds to the following property: com.aris.umc.password.length.min

Maximum length

Specifies the maximum length of a password. This corresponds to the following property: com.aris.umc.password.length.max

Minimum number of lowercase letters

Specifies the minimum number of lowercase letters in a password. This corresponds to the following property: com.aris.umc.password.characters.lowercase.min

Allow uppercase letters

Specifies whether uppercase letters are allowed in a password. This corresponds to the following property: com.aris.umc.password.characters.uppercase.allowed

Minimum number of uppercase letters

Specifies the minimum number of uppercase letters in a password. This corresponds to the following property: com.aris.umc.password.characters.uppercase.min

Allow numbers

Specifies whether numbers are allowed in a password. This corresponds to the following property: com.aris.umc.password.characters.numeric.allowed

Minimum number of numbers

Specifies the minimum number of numbers that must be contained in a password. This corresponds to the following property: com.aris.umc.password.characters.numeric.min

Allow special characters

Specifies whether special characters are allowed in a password. This corresponds to the following property: com.aris.umc.password.characters.special.allowed

Minimum number of special characters

Specifies the minimum number of special characters in a password. This corresponds to the following property: com.aris.umc.password.characters.special.min

Special characters

Specifies which characters are special characters. This corresponds to the following property: com.aris.umc.password.characters.special.set

EXPIRING PASSWORDS

Activate expiring passwords

Specifies whether passwords are set to be valid only for a specific amount of time. This is defined for a single tenant. Once the password has expired, the user is directed to a Web site enabling the password to be changed. Thereafter, the user is redirected to the application. This corresponds to the following property: com.aris.umc.password.expiry.active

Password lifetime

Specifies the period of time after which a password expires. This is defined for a single tenant. This corresponds to the following property: com.aris.umc.password.expiry.days

ADVANCED SETTINGS

Force change after reset

Specifies whether a user must change the password if it was reset (and sent via e-mail). This is defined for a single tenant. This corresponds to the following property: com.aris.umc.password.change.forceAfterReset

Force different password

Specifies whether the new password must differ from the old one. This is defined for a single tenant. This corresponds to the following property: com.aris.umc.password.change.forceDifference

Force change before first login

Specifies whether a user must change the password upon first login. This is defined for a single tenant. This corresponds to the following property: com.aris.umc.password.change.forceOnFirstLogin

Activate reset confirmation

Specifies whether a user must confirm a password reset. This corresponds to the following property: com.aris.umc.password.reset.confirmation.active

Link lifetime

Specifies the time in seconds during which a user can click the link sent by e-mail in order to confirm the password. This corresponds to the following property: com.aris.umc.password.reset.confirmation.ttl

6. Click **Edit**.
7. Adjust your settings.
8. Click **Save**.

You have customized your system configuration.

3.8.3.12 Customize SAML

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration. ARIS supports SAML 2.0.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **SAML** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

Use SAML

Specifies whether an SAML-based login is allowed. This corresponds to the following property: com.aris.umc.saml.active

Binding

Specifies the binding used for sending authtentication requests to the identity provider. Activates the possibility of redirecting the authentication (Redirect) or not (POST). This corresponds to the following property: com.aris.umc.saml.binding

Identity provider ID

Specifies the ID of the identity provider. This corresponds to the following property: com.aris.umc.saml.identity.provider.id

Service provider ID

Specifies the ID of the service provider. This corresponds to the following property: com.aris.umc.saml.service.provider.id

Artifact resolution URL

Specifies the end point of the SAML provider that is used to resolve SAML artifacts. This corresponds to the following property: com.aris.umc.saml.identity.provider.artifact.resolution.url

Single sign-on URL

Specifies the end point of the identity provider that is used for single sign-on. This corresponds to the following property: com.aris.umc.saml.identity.provider.sso.url

Single logout URL

Specifies the end point of the identity provider that is used for single logout. This corresponds to the following property: com.aris.umc.saml.identity.provider.logout.url

SIGNATURE

Sign assertions

Specifies whether SAML assertions must be signed or not. This corresponds to the following property: com.aris.umc.saml.signature.assertion.active

Sign requests

Specifies whether the SAML authentication request must be signed or not. This corresponds to the following property: com.aris.umc.saml.signature.request.active

Sign responses

This corresponds to the following property:

Signature algorithm

Specifies the algorithm for the signature. The algorithm can be selected from the list. This corresponds to the following property: com.aris.umc.saml.signature.algorithm

KEYSTORE

Keystore

Specifies the location of the keystore file used for validating SAML assertions. The keystore must have been uploaded previously. This corresponds to the following property: com.aris.umc.saml.keystore.location

Alias

Specifies the alias name that is used to access the keystore. This corresponds to the following property: com.aris.umc.saml.keystore.alias

Password

Specifies the password that is used to access the keystore. This corresponds to the following property: com.aris.umc.saml.keystore.password

Type

Specifies the type of the keystore to be used. The keystore type can be selected from a list. This corresponds to the following property: com.aris.umc.saml.keystore.typ

TRUSTSTORE

Truststore

Specifies the location of the truststore file used for validating SAML assertions. The keystore must have been uploaded previously. This corresponds to the following property: com.aris.umc.saml.truststore.location

Alias

Specifies the alias to be used for accessing the truststore. This corresponds to the following property: com.aris.umc.saml.truststore.alias

Password

Specifies the password to be used for accessing the truststore. This corresponds to the following property: com.aris.umc.saml.truststore.password

Type

Specifies the type of the truststore. This corresponds to the following property: com.aris.umc.saml.truststore.type

ADVANCED SETTINGS

Login using DN

Specifies whether login is to be tried using the fully qualified name instead of the user name. This corresponds to the following property: com.aris.umc.saml.login.mode.dn.active

Decompose DN

Specifies whether the fully qualified name is to be decomposed. This corresponds to the following property: com.aris.umc.saml.login.mode.keyword.active

Keyword

Specifies which part of the fully qualified name is to be used for login. This corresponds to the following property: com.aris.umc.saml.login.mode.keyword.name

Clock skew

Specifies the time offset between identity provider and service provider in seconds. Assertions are accepted if they are received within the permitted time frame. This corresponds to the following property: com.aris.umc.saml.assertion.timeoffset

Assertion lifetime

Specifies the maximum lifetime of an SAML assertion in seconds. This corresponds to the following property: com.aris.umc.saml.assertion.ttl

Default tenant

Specifies the default tenant that is to be used for the SAML-based login. This corresponds to the following property: com.aris.umc.saml.tenant

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.

8. Click **Save**.

You have customized your system configuration.

3.8.3.12.1 Upload keystore file

You can upload the keystore file.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **SAML** in the list box.
5. Click **Keystore**.
6. Click **Upload > Keystore**. The dialog for uploading a file opens.
7. Select the relevant file.

You have uploaded a keystore file.

3.8.3.12.2 Upload truststore file

You can upload the truststore file.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **SAML** in the list box.
5. Click **Truststore**.
6. Click **Upload > Truststore**. The dialog for uploading a file opens.
7. Select the relevant file.

You have uploaded a truststore file.

3.8.3.13 Customize security settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **Security** in the list box.
5. Click a configuration category. The following categories are available:

ACCOUNT LOCKOUT

Lock users after failed login attempts

Specifies whether a user login is temporarily locked when a user causes too many failed logins. The default value is **false**. This corresponds to the following property: com.aris.umc.authentication.lock.enabled

Attempt limit

Specifies the number of failed login attempts that are allowed before user login is locked. This corresponds to the following property: com.aris.umc.authentication.lock.counter.limit

Lockout duration

Specifies how long a user login is temporarily locked when a user causes too many failed logins. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.authentication.lock.ttl

Lock counter duration

Time that must elapse before the number of failed login attempts is reset. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.authentication.lock.counter.ttl

USER SESSIONS

Session cache size

Specifies how many session IDs are saved in the session renewal cache. When the cache is full, the least recently used sessions are removed. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.session.renewal.cache.size

Session cache lifetime

Specifies the maximum duration in seconds that a renewed session remains in the session renewal cache. A session can be renewed at the earliest after this period of time. Cross-tenant

property that cannot be changed. This corresponds to the following property: com.aris.umc.session.renewal.cache.ttl

Session ID generator

Specifies the random number generator used for generating session IDs. This corresponds to the following property: com.aris.umc.session.identifier.generator

Minimum length of session ID

Specifies the minimum length of a session ID in bytes. For security reasons this value should not be less than 32. This corresponds to the following property: com.aris.umc.session.identifier.length.min

Maximum length of session ID

Specifies the maximum length of a session ID in bytes. This corresponds to the following property: com.aris.umc.session.identifier.length.max

Maximum concurrent sessions

Specifies the maximum number of concurrent sessions that can be active for a single user. This does not apply to the **arisservice** and **superuser** users. This corresponds to the following property: com.aris.umc.session.concurrent.max

MULTI-FACTOR AUTHENTICATION

Use multi-factor authentication

Specifies whether multi-factor authentication is required. The default value is **false**. This corresponds to the following property: com.aris.umc.authentication.multiFactor.active

Clock skew intervals

Specifies the clock skew in number of intervals. One-time passwords (OTPs) that are within the valid range [currentTimeStep - clock_skew, currentTimeStep + clock_skew] are permitted. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.authentication.multiFactor.clockSkew

ADVANCED SETTINGS

Generate user statistics

Activates the user statistics. This corresponds to the following property: com.aris.umc.audit.enabled

Log authentication

Enables the authentication logging. This corresponds to the following property: com.aris.umc.audit.log.auth.enabled

Log changes to configuration

Enables the logging of changes to the configuration. This corresponds to the following property: com.aris.umc.audit.log.conf.enabled

Log changes to license/privileges

Enables the logging of changes to licenses or privileges. This corresponds to the following property: com.aris.umc.audit.log.license.privilege.enabled

Log changes to users/user groups

Enables the logging of changes to users or user groups. This corresponds to the following property: com.aris.umc.audit.log.user.group.enabled

Force SSO

Specifies that only an SSO login is allowed. The default value is **false**. This corresponds to the following property: com.aris.umc.authentication.sso.only

Minimum authentication delay

Specifies the minimum delay that is added at each login. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.authentication.delay.min

Maximum authentication delay

Specifies the maximum delay that is added at each login. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.authentication.delay.max

Use OTPs

Specifies whether or not the generation of one-time passwords (OTPs) is allowed. This corresponds to the following property: com.aris.umc.otp.active

Lifetime

Specifies the lifetime of a one-time password (OTP) in seconds. Passwords become invalid after this time period at the latest. This corresponds to the following property: com.aris.umc.otp.ttl

Enforce group-level license pools

Specifies that license pools are assigned at the user group level (page 28). If this option is enabled, licenses must not be assigned to users directly, but are to be assigned via user groups only. This corresponds to the following property: com.aris.umc.license.distribution.handling

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.

8. Click **Save**.

You have customized your system configuration.

What is configurable for the LDAP connection?

What is configurable for the LDAP attribute mappings?

3.8.3.14 Customize SMTP settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **SMTP** in the list box.
5. Click a configuration category. The following categories are available:

CONNECTION

Host name

Specifies the host name or IP address of the SMTP server. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.host

Port

Specifies the port for the SMTP server. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.port

Sender address

Specifies the sender address for notifications. This must be a valid e-mail address. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.sender

E-mail format

Specifies the default type used for sending notifications. This corresponds to the following property: com.aris.umc.notification.type

Default language

Specifies the default language in which notifications are sent. If this property is not defined, the server operating system language is used. This corresponds to the following property: com.aris.umc.notification.language

Use authentication

Specifies whether authentication to the SMTP server is to be used. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.authentication

User name

Specifies the user name that is used for authentication. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.userName

Password

Specifies the password that is used for authentication to the SMTP server. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.password

Use SSL

Specifies whether TLS is to be used for the connection to the SMTP server. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.ssl

SSL mode

Specifies the method to be used for a trusted connection. **STARTTLS** or **SSL** can be used. STARTTLS transforms a connection that was originally untrusted into an encrypted connection without requiring a specific port for the trusted connection. SSL establishes a trusted connection with a dedicated port immediately. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.ssl.mode

Connection timeout

Specifies the duration after which the attempt to connect to the SMTP server is canceled. This is defined in milliseconds. This corresponds to the following property: com.aris.umc.notification.smtp.timeout

ADVANCED SETTINGS

Debug output

Activates debugging output. This corresponds to the following property: com.aris.umc.notification.debug

Number of retries

Specifies the number of retries for sending notifications. This corresponds to the following property: com.aris.umc.notification.smtp.retry.count

Minimum wait time

Specifies the minimum wait time between the retries. This corresponds to the following property: com.aris.umc.notification.smtp.retry.sleep.min

Maximum wait time

Specifies the maximum wait time between the retries. This corresponds to the following property: com.aris.umc.notification.smtp.retry.sleep.max

Send rate

Specifies the maximum number of messages sent per second. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.smtp.sendrate

Reply-to addresses

Specifies a comma-separated list of reply-to addresses. This corresponds to the following property: com.aris.umc.notification.smtp.replyto

Number of threads

Specifies the maximum number of threads that are used for sending notifications. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.threads

Maximum queue length

Specifies the maximum number of notifications allowed in a send queue. If the send queue is too full, all subsequent notifications are refused. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.umc.notification.queue

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.

8. Click **Save**.

You have customized your system configuration.

What is configurable for the LDAP connection?

What is configurable for the LDAP attribute mappings?

3.8.3.15 Customize user settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Activate **User Management**.
4. Select **Users** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

E-mail address required

Specifies whether the **E-mail address** box must be specified for a user. This corresponds to the following property: com.aris.umc.users.email.required

Validate e-mail address

Specifies whether a check is performed when entering the e-mail address of a user to determine whether the e-mail address is valid. This corresponds to the following property: com.aris.umc.users.email.validation.active

Maximum login name length

Specifies the maximum length of the login names. This corresponds to the following property: com.aris.umc.users.name.length.max

Maximum picture size

Specifies the maximum size of a profile picture in bytes. The default setting is 1048576 bytes. This corresponds to the following property: com.aris.umc.collaboration.picture.size.max

Session duration (initial)

Specifies the initial life span of a standard user session in minutes. This corresponds to the following property: com.aris.umc.session.ttl

Session duration (max)

Specifies the maximum life span of a standard user session in minutes. This corresponds to the following property: com.aris.umc.session.ttl.max

Impersonation target users

Specifies the users for which you want to allow impersonation (page 147). This corresponds to the following property: com.aris.umc.impoersonation.targets

Display technical users

Specifies whether or not user statistics and charts are also displayed for technical users such as **system**, **arisservice**, and **guest**. This corresponds to the following property: com.aris.umc.chart.display.defaultUsers.enabled

ARISSERVICE

Generate, if not available

Specifies whether the user **arisservice** is generated at startup, if not yet available. This corresponds to the following property: com.aris.umc.users.service.create

User name

Specifies the login name of the user **arisservice**. This corresponds to the following property: com.aris.umc.users.service.name

E-mail address

Specifies the e-mail address of the user **arisservice**. This corresponds to the following property: com.aris.umc.users.service.email

Initial password

Specifies the initial password of the user **arisservice**. This corresponds to the following property: com.aris.umc.users.service.password

GUEST

Generate, if not available

Specifies whether the user **guest** is generated at startup, if not yet available. This corresponds to the following property: com.aris.umc.users.guest.create

User name

Specifies the login name of the user **guest**. This corresponds to the following property: com.aris.umc.users.guest.name

E-mail address

Specifies the e-mail address of the user **guest**. This corresponds to the following property: com.aris.umc.users.guest.email

Initial password

Specifies the initial password of the user **guest**. This corresponds to the following property: com.aris.umc.users.guest.password

Automatically log in visitors

Specifies that visitors are automatically logged in as a guest when accessing the ARIS Connect portal. This corresponds to the following property: com.aris.umc.users.guest.allow.auto.login

SUPERUSER

User name

Specifies the login name of the administrator in ARIS Administration. This corresponds to the following property: com.aris.umc.users.admin.name

E-mail address

Specifies the e-mail address of the administrator. This corresponds to the following property: com.aris.umc.users.admin.email

Initial password

Specifies the initial password of the administrator in ARIS Administration. This corresponds to the following property: com.aris.umc.users.admin.password

SYSTEM

Generate, if not available

Specifies whether the user **system** is generated at startup, if not yet available. This corresponds to the following property: com.aris.umc.users.system.create

User name

Specifies the login name of the user **system**. This corresponds to the following property: com.aris.umc.users.system.name

E-mail address

Specifies the e-mail address of the user **system**. This corresponds to the following property: com.aris.umc.users.system.email

Initial password

Specifies the initial password of the user **system**. This corresponds to the following property: com.aris.umc.users.system.password

Session duration (initial)

Specifies the initial duration of a system user session in minutes. This corresponds to the following property: com.aris.umc.session.system.ttl

Session duration (max)

Specifies the maximum duration of a system user session in minutes. This corresponds to the following property: com.aris.umc.session.system.ttl.max

6. Click **Edit**.
7. Adjust your settings.
8. Click **Save**.

3.8.3.16 Configure user for impersonation

Impersonation enables a user to assume another user account. The user can then perform operations that are actually only permitted for the other account. This configuration must be set for each tenant.

Prerequisite

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

Procedure

1. Log in to User Management.

   Click the link that was provided to you or that you have saved as a bookmark in your browser, e.g., **http://myServer:1080/umc**. The Log in dialog opens.
2. Enter the name of the infrastructure tenant in the **Tenant** field, e.g., **master**.
3. Enter your user name and your password.
4. Click the user for which you want to allow impersonation.
5. Click **Privileges**. The list of function privileges is displayed.
6. Click the user for which you want to allow impersonation.
7. Activate the **Impersonation** function privilege.
8. Log out.
9. Log in (page 8) to ARIS Connect.
10. Click the arrow next to your user name, and select **Administration**.
11. Activate the **Configuration** tab.
12. Click **User management**.
13. Select **Users** from the selection list.
14. Click **General**.
15. Click **Edit**.
16. Click in the **Impersonation target users** field.
17. Enter the users for which you want to allow impersonation as a comma-separated list.

    If the ARIS server was updated, for all operational tenants make sure to reenter the user names in the **Impersonation target users** field again.
18. Click **Save**.

You have allowed users to use impersonation.

3.8.3.17 Customize ARIS for LDAP server operations

You can configure ARIS for LDAP server operations.

Prerequisite

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

Procedure

1. Click **Configuration**.
2. Click **User management**.
3. Select an **LDAP connection** from the list.
4. If you want to define a single parameter double-click the relevant key. A dialog is displayed. In this case, define the value of the key **com.aris.umc.ldap.active.only** as **true** only after you have already completed all other configurations.

   If you want to upload a configuration ensure that you have not enabled any pop-up blockers in the browser, and click the field next to the relevant key.

   The dialog for selecting the file opens.
5. Configure the URL for the LDAP system. To do so, enter the URL as a value of the property **com.aris.umc.ldao.url**, for example:

   `ldap://hqgc.mycompany.com:3168`.
6. Configure the path to the backup system if this backup system is used for your LDAP system and automatically applies the function of the original system, if required.

   `com.aris.umc.ldap.backup.url=`**`<Backup system URL>`**
   If you saved users or user groups in subdirectories, configure the following keys:

   `com.aris.umc.ldap.user.searchpath=`**`<Path to users>`**
   `com.aris.umc.ldap.group.searchpath=`**`<Path to user groups>`**
   If you want to enable the function of following referrals of users to other directories, configure the following:

   `com.aris.umc.ldap.referral=`**`follow`**
   If you want to avoid the above behavior, configure as follows:

   `com.aris.umc.ldap.referral=`**`ignore`**
   If you leave this entry blank, referrals are not followed.

   Optional: If you want to ensure that the import of LDAP users is carried out despite of any errors that might occur, e.g., if names are redundant, define the following:

   `com.aris.umc.ldap.sync.skipOnFault = true`
   Please note that system performance is significantly affected if you enable this option.

3.8.3.17.1 Configure secure communication between ARIS and LDAP server

You can encrypt the communication between ARIS and the LDAP server.

To do so, you have two options, of which only one may be enabled:

- **STARTTLS**

  This transforms a connection that was originally untrusted into an encrypted connection without using a specific port.

- **SSL**

  The connection between ARIS and the LDAP server is established using a specific port.

Prerequisite

- The LDAP server has a valid SSL certificate and LDAPS is activated.
- ARIS Administration trusts the LDAP server (the SSL certificate of the LDAP server or the certification authority is stored in the JRE database of trustworthy certificates).

STARTTLS

You can use STARTTLS to configure an encrypted communication between ARIS and the LDAP server.

Procedure

1. Click **Configuration**.
2. Click **User management**.
3. Search for the following strings and configure them:

   ```
   com.aris.umc.ldap.url=ldaps://<myldapserver>:<myport>
   com.aris.umc.ldap.ssl=true
   com.aris.umc.ldap.ssl.mode=starttls
   ```

4. ARIS must trust the LDAP server used. Therefore, we recommend that you use the LDAP server with a certificate signed by a public certification authority. If your certificate is signed by a public certification authority and stored in the list of trustworthy certificates of your JRE, you do not need to configure anything else.
5. Self-signed certificates must be manually installed and entered in the list of your JRE.

   Import a self-signed certificate into your ARIS Design Server JRE, e.g., ...server/jre.

   ```
   keytool.exe -importcert -file <mycertificate> -keystore
   %JAVA_HOME%/jre/lib/security/cacerts -storepass changeit
   ```

SSL

Procedure

1. Click **Configuration**.
2. Click **User management**.
3. Select an **LDAP connection** from the list.
4. Find the following string:

```
com.aris.umc.ldap.url=ldap://<myldapserver>:<myport>
com.aris.umc.ldap.ssl=true
com.aris.umc.ldap.ssl.mode=ssl
```

5. ARIS must trust the LDAP server used. Therefore, we recommend that you use the LDAP server with a certificate signed by a public certification authority. If your certificate is signed by a public certification authority and stored in the list of trustworthy certificates of your JRE, you do not need to configure anything else.
6. Self-signed certificates must be manually installed and entered in the list of your JRE.

   Import a self-signed certificate into your ARIS Design Server JRE, e.g., ...server/jre.

   ```
   keytool.exe -importcert -file <mycertificate> -keystore
   %JAVA_HOME%/jre/lib/security/cacerts -storepass changeit
   ```

3.8.3.17.2 Allow login only for LDAP users

If you want to allow only LDAP users to log in to ARIS Architect and ARIS Process Board, you need to configure the system accordingly.

Prerequisite

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

Procedure

1. Click **Configuration**.
2. Click **User management**.
3. Find the string **com.aris.umc.ldap.auth.only** and define it as **true**.

Only LDAP users and the following users may log in to ARIS Architect and ARIS Process Board: system, superuser, arisservice, guest.

3.8.3.17.3 Configure single sign-on

If you are using MS Active Directory Domain Services you can configure SSO (single sign-on). This allows users to work with all ARIS components as soon as they are logged in to the domain. Separate login to ARIS components is not required.

Single sign-on in ARIS is based on Kerberos. Kerberos is a network authentication allowing nodes to communicate via an invisible network and to securely make their identity known to each other. Kerberos is the recommended method for user authentication in MS Windows networks. In addition, it is widely used with Linux operating systems and is designed for use with all major platforms.

Please contact your LDAP administrator for this.

Prerequisite

Server

- Users who want to use SSO must have a valid Microsoft Active Directory Domain Services user login.
- This user is available in ARIS Administration.
- ARIS Administration authenticates against LDAP.
- Microsoft Active Directory Domain Services supports a Kerberos-based authentication (default) and the Service Principal Name of the ARIS Connect server has the following format: **HTTP/<host name>**, e.g., **HTTP/mypc01.my.domain.com**.

Client

- Client and server computers are connected with the same MS Active Directory Domain Services.
- The browser used supports Kerberos-based authentication.
- The browser used has been configured accordingly.

CONFIGURATION IN ARIS ADMINISTRATION

SSO must be configured for the servers.

Prerequisite

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

Procedure

1. Click **Configuration**.
2. Click **User management**.
3. To activate SSO find the string

   `com.aris.umc.kerberos.active`

   Define the value as **true**.
4. Find

   `com.aris.umc.kerberos.config`

5. Click in the field.
6. Click **Edit**.
7. Upload the Kerberos configuration.

   If you do not have a Kerberos configuration file create one. Name it, for example, **krb5.conf**, add the following lines, and adjust the configuration to meet your requirements.

   ```
   [libdefaults]
   default_tgs_enctypes = des-cbc-md5 des-cbc-crc des3-cbc-sha1 aes128-cts
   aes128-cts-hmac-sha1-96 aes256-cts aes256-cts-hmac-sha1-96 rc4-hmac
   arcfour-hmac arcfour-hmac-md5
   default_tkt_enctypes = des-cbc-md5 des-cbc-crc des3-cbc-sha1 aes128-cts
   aes128-cts-hmac-sha1-96 aes256-cts aes256-cts-hmac-sha1-96 rc4-hmac
   arcfour-hmac arcfour-hmac-md5
   permitted_enctypes = des-cbc-md5 des-cbc-crc des3-cbc-sha1 aes128-cts
   aes128-cts-hmac-sha1-96 aes256-cts aes256-cts-hmac-sha1-96 rc4-hmac
   arcfour-hmac arcfour-hmac-md5
   ```
8. Upload this file.
9. Find the following string in ARIS Administration and configure the user name of the technical user in use that your administrator has given you.

   com.aris.umc.kerberos.servicePrincipalName

   If the Service Principal Name in the keytab is, for example, **mypc01@MY.DOMAIN.COM**, the values of the property **com.company.aris.umc.kerberos.servicePrincipalName** must contain the Service Principal Name exactly as specified in the keytab file.
10. Find the following string in ARIS Administration and configure the user name of the technical user in use that your administrator has given you.

    If the Service Principal Name in the keytab file is, for example, **mypc01@MY.DOMAIN.COM**, the value of the property **com.aris.umc.kerberos.servicePrincipalName** must correspond to the Service Principal Name defined in the keytab file.
11. Find the following string in ARIS Administration and configure the realm for the Kerberos service. Enter the fully qualified domain name in uppercase letters.

    `com.aris.umc.kerberos.realm`

    Example: **MYDOMAIN.COM**.
12. Find the following string in ARIS Administration and configure the fully qualified name of the KDC to be used:

    com.aris.umc.kerberos.kdc
13. **Optional:** In ARIS Administration find the following string and configure the debug mode for the Kerberos operations:

    com.aris.umc.kerberos.debug=true

    The debug output of the program that the user wishes to log in to are saved in the file **system.out** of the respective program. For the user management, for example, this is located in the directory **<ARIS installation directory/work_umcadmin_m/base/logs**.

Example

You can configure the following in ARIS Administration.

```
com.aris.umc.kerberos.active=true
com.aris.umc.kerberos.servicePrincipalName=mypc01
com.aris.umc.kerberos.realm=MY.DOMAIN.COM
com.aris.umc.kerberos.kdc=mykdc01.my.domain.com
com.aris.umc.kerberos.debug=false
```

CLIENT CONFIGURATION

Configure the browser settings to allow SSO. SSO has been tested with the following browsers:

- Microsoft Internet Explorer (version 6 or higher)
- Firefox

You need to empty the Kerberos ticket cache of each client first in order to avoid obsolete tickets if Microsoft Active Directory Domain Services were changed. Delete the Kerberos ticket cache by executing the command **klist.exe purge**. You can also just log off the client computer from the domain and log it back in if the purge program is not available on the client computer.

MICROSOFT INTERNET EXPLORER

Microsoft Internet Explorer supports Kerberos authentication only if the ARIS Connect server is part of your local intranet.

Procedure

1. Start Microsoft Internet Explorer.
2. Click **Tools > Internet Options**.
3. Activate the **Security** tab and click **Local Intranet**.
4. Click **Sites**, and select **Advanced**.
5. Add the URL of the ARIS Connect server that was configured for SSO. Add the DNS host name and the IP address of the ARIS Connect server.
6. Disable the **Require server verification (https:) for all sites in this zone** check box.
7. Click **Close**, and select **OK**.
8. Click **Custom level** and make sure that no user-defined settings affect your new settings.
9. Find the **User Authentication** section. Verify whether the **Automatic logon only in Intranet zone** option is enabled.
10. Click **OK**.
11. Close and restart Microsoft Internet Explorer.

MOZILLA FIREFOX

In Mozilla Firefox, you can define trustworthy sites via the computer name, IP address, or a combination of both. You can use wildcards.

Procedure

1. Start Mozilla Firefox.
2. Enter **about:config** in the address box and press Enter. Confirm a message, if required.
3. Enter **network.negotiate** in the **Search** box and press Enter, if required.
4. Double-click **network.negotiate-auth.trusted-uris**.
5. Enter the computer name or the IP address of the ARIS Connect server that you configured for SSO, and click **OK**.
6. Close and restart Mozilla Firefox.

If you prefer to use an encryption stronger than AES 128bit and this is allowed in your country, replace the JCE Policy file of the JDK of your ARIS Connect server with the Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files 6 (http://www.oracle.com/technetwork/java/javase/downloads/index.html). This allows unlimited key length.

If you cannot replace the Policy files, but still want to use SSO, you need to apply a procedure allowed by the JDK for encrypting Kerberos tickets, for example, AES 128bit.

GOOGLE CHROME

Your administrator can activate Kerberos by configuring a comma-separated list of allowed URLs via the whitelist on the authentication server.

APPLE SAFARI (FOR MAC OS X)

Apple Safari supports Kerberos immediately and does not require any configuring. Apple Macintosh X operating systems support the Kerberos standard that was developed by Massachusetts Institute of Technology (MIT). For single sign-on, Apple Macintosh computers need to be connected to the same MS Active Directory that the ARIS server is connected to.

3.8.3.18 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.8.3.18.1 What is impersonation?

Users manage tenants on behalf of the user **superuser**. This requires the **creation** of these users in the user management for the infrastructure tenant, e.g., master (page 139). To use impersonation, users require the **Impersonation** function privilege in the infrastructure tenant.

For Tenant Management, they also require the **User administrator**, **Tenant administrator**, and **Technical configuration administrator** function privileges.

In all other operational tenants, e.g., **default**, the user **superuser** must be defined as the target for impersonation (page 256). Impersonation enables users to back up tenants in which they do not exist as a user.

To back up and restore the data, the user **superuser** requires the following function privileges in all operational tenants:

- Analysis administrator
- User administrator
- Collaboration administrator
- Document administrator
- License administrator
- Process Governance administrator
- Server administrator
- Technical configuration administrator

3.8.3.18.2 Which infrastructure properties are available?

You can customize your system infrastructure (page 104) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.notification.useHttpLinks	E-mails with HTTP URLs only Specifies whether or not the HTTP protocol is used instead of the HTTPS protocol in e-mails.	true, false.	
com.aris.umc.basicauth.tenant	Default tenant Specifies that the default tenant is used for authentication. Cross-tenant property that cannot be changed.	String	
com.aris.infrastructure.tenant	Infrastructure tenant Specifies the tenant with special privileges for managing other tenants, components, and the configuration in ARIS Administration. By default, the **master** tenant is the infrastructure tenant. The system users **system** and **superuser** have administrative privileges, i.e., they can access ARIS Administration and Tenant Management. Users with the relevant privileges can specify other infrastructure tenants in ARIS Administration. Cross-tenant property that cannot be changed.		
com.aris.umc.client.connect.timeout	Connection timeout Specifies the duration after which a client's connection attempt is canceled. This is defined in milliseconds. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.umc.client.connections.max	Maximum connections (total) Specifies the maximum number of connections that may be established simultaneously. If additional connections are to be established, they are refused.	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.client.connections.perhost	Maximum connections (per host) Specifies the maximum number of connections that may be established simultaneously per host. If additional connections are to be established, they are refused.	Integer > 0	
com.aris.umc.client.idle.timeout	Idle timeout Specifies the wait time timeout of the ARIS Administration REST client. This is defined in milliseconds.	Integer > 0	
com.aris.umc.client.read.timeout	Read timeout Specifies the wait time timeout of the REST client for read access. This is defined in milliseconds.	Integer > 0	
com.aris.umc.client.retry.max	Number of retries Specifies the maximum number of retries.	Integer > 0	
com.aris.umc.config.cache.ttl	Configuration cache lifetime Specifies the lifetime of the configuration cache in seconds. The configuration is reloaded after the time set here. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.umc.config.encrypted	Encrypted properties Specifies a comma-separated list of encrypted property keys.	List of strings	com.softwareag.aris.umc.ldap.service.pwd
com.aris.umc.jaas.login.context	JAAS login context Specifies the login name for the JAAS context. Cross-tenant property that cannot be changed.	String	UMC-DB
com.aris.umc.remote.clients	Allowed remote clients Comma-separated list of client IPs that use the remote interface of ARIS Administration.	String	
com.aris.umc.ssl.host.verification.active	Host name verification Specifies whether the verification of the SSL host name is activated. Verification is enabled by default.	true, false	

Key	Description	Valid input	Example
com.aris.umc.version	Build number Build number of ARIS Administration. Cross-tenant property that cannot be changed.	String	9.8.0-SNAPSHOT
com.aris.umc.loadbalancer.url	Load balancer URL Specifies the URL of the load balancer. Cross-tenant property that cannot be changed.		

3.8.3.18.3 Which Kerberos properties are available?

You can configure Kerberos (page 106) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.kerberos.active	Use Kerberos Specifies whether a Kerberos-based login is allowed.	true, false	
com.aris.umc.kerberos.config	Configuration file Storage location of the configuration file for Kerberos. The file can be uploaded directly.	String	./config/Kerberos/krb5.conf
com.aris.umc.kerberos.debug	Debug output Specifies whether debug output is allowed for Kerberos operations.	true, false	
com.aris.umc.kerberos.kdc	KDC Specifies the fully qualified name of the central **K**ey **D**istribution **C**enter (**KDC**). This is usually the fully qualified host name of the LDAP server.	String	049bfs01.me.corp.softwareag.com
com.aris.umc.kerberos.keyTab	Key table Specifies the location of the keytab file that is used for Kerberos tickets. The file can be uploaded directly.	String	C:/safePlace/krb-umc.keytab
com.aris.umc.kerberos.realm	Realm Specifies the realm of Kerberos tickets. Fully qualified domain name in uppercase letters.	String	MY.CORP.SOFTWAREAG.COM
com.aris.umc.kerberos.servicePrincipalName	Principal Specifies the name of the user used for verifying Kerberos tickets. If Kerberos is used, each user, computer or service provided by a server must be defined as a principal.	String	MyLogin
com.aris.umc.kerberos.tenant	Default tenant Specifies the default tenant for a Kerberos-based login. Cross-tenant property that cannot be changed.	String	

Key	Description	Valid input	Example
com.aris.umc.kerberos.allowlocalusers	Allow local users Specifies whether the LDAP connection is mandatory for Keberos-based login. If this option is enabled, Keberos is used for the login of local users also.	true, false	

3.8.3.18.4 Which LDAP properties are available?

You can customize LDAP (page 108) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.ldap.active	Activate LDAP Specifies whether the LDAP integration is activated.	true, false	
com.aris.umc.ldap.attribute.memberof.resolveOnFirstLogin	Update group associations at login Specifies whether the **memberOf** attribute is read (**true**) or not (**false**). If the value of the property is **true**, the **memberOf** attribute is read and the referenced groups are automatically imported. The import of the groups occurs when a user from the group logs in for the first time.	true, false	
com.aris.umc.ldap.user.attributes.paging.enabled	Use attribute value paging Specifies whether a page break is to be inserted if the server-side limit for valid values is exceeded for attributes, e.g., if more than 1,500 attribute values exist.	true, false	
com.aris.umc.ldap.auth.only	Prevent login of manually created users Specifies that only LDAP users may log in. This does not apply to the **arisservice**, **guest**, **superuser**, and **system** users.	true, false	
com.aris.umc.ldap.url	Server URL Specifies the URL of the LDAP server.		
com.aris.umc.ldap.backup.url	Server URL (fallback) Specifies the fallback URL of the LDAP server. This URL is only used if the server cannot be reached via its primary URL.	String	ldap://0815bfs01.my.corp.com:389
com.aris.umc.ldap.connection.concurrent	Simultaneous connections Specifies the maximum number of simultaneous connections to the same LDAP server. If additional connections are to be established, they are refused.	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.ldap.timeout	Connection timeout Specifies the duration after which the attempt to connect to the LDAP server is canceled. This is defined in milliseconds.		
com.aris.umc.ldap.connection.concurrent.timeout	Pool wait time Specifies the maximum amount of time that a connection request may take if the maximum number of connections to the LDAP server was exceeded.	Integer > 0	
com.aris.umc.ldap.connection.pool.size	Pool size Specifies the maximum number of connections that are ready for reuse in a pool. The connection that was used last is discarded when the pool is full.	Integer > 0	
com.aris.umc.ldap.connection.pool.timeout	Pool time Specifies the maximum amount of time that a connection remains in a pool. The connection is removed from the pool at the latest after this period of time.	Integer > 0	
com.aris.umc.ldap.entity.cache.size	Cache size Specifies the maximum number of LDAP entities that are cached during an import.	Integer > 0	3500
com.aris.umc.ldap.filter.group	Group search filter Specifies the query filter for LDAP groups.	String	(&(objectClass=role)(name=y*))
com.aris.umc.ldap.filter.user	User search filter Specifies the query filter for LDAP users.	String	(&(sAMAccountName=*))
com.aris.umc.ldap.group.import.parent.enabled	Import superior group Specifies whether the superior group is to be imported automatically when the group is imported.	true, false	false

Key	Description	Valid input	Example
com.aris.umc.ldap.group.searchpath	Group search paths Specifies a semicolon-separated list of all LDAP search paths for user groups. Overwrites the list of general search paths.	String	OU\=distribution lists\,DC\=my,DC\=corp\,DC\=company\,DC\=com
com.aris.umc.ldap.searchpath	Search paths Specifies a semicolon-separated list of all LDAP search paths.	String	OU\=stadt\,OU\=location\, OU\=employees\,DC\=my\,DC\=corp\, DC\=company\,DC\=com
com.aris.umc.ldap.pagesize	Page size Specifies the maximum number of entries that are loaded in a single LDAP query.	Integer > 0	
com.aris.umc.ldap.read.timeout	Read timeout Specifies the maximum amount of time that read access may take.	Integer > 0	
com.aris.umc.ldap.recursion.depth	Recursion depth Specifies the recursion depth that is to be used for nested groups and users.	**1** means one level, **0** means all	1

Key	Description	Valid input	Example
com.aris.umc.ldap.referral	Referrals Defines how referrals to other LDAP systems are processed.	▪ **follow** means that the referral is automatically followed. ▪ **ignore** means that referrals are ignored. ▪ **throw** means that referrals are checked.	ignore
com.aris.umc.ldap.service.pwd	Password Specifies the password of the LDAP user.	String	
com.aris.umc.ldap.service.user	User name Specifies the user name of the LDAP user.	String	arisldapservice
com.aris.umc.ldap.ssl	Use SSL Specifies if SSL is to be used.	true, false	
com.aris.umc.ldap.ssl.certificate.verification.active	Verify certificates Specifies whether an SSL certificate is to be verified.	true, false	
com.aris.umc.ldap.ssl.host.verification.active	Verify host names Specifies if an SSL host is to be verified.	true, false	
com.aris.umc.ldap.ssl.mode	SSL mode Specifies the SSL mode (page 141).	String	STARTTTLS
com.aris.umc.ldap.ssl.truststore.location	Truststore Specifies where to look for the truststore.	String	

Key	Description	Valid input	Example
com.aris.umc.ldap.ssl.truststore.password	Password Specifies the truststore password.	String	
com.aris.umc.ldap.ssl.truststore.type	Type Specifies the truststore type to be used.	String	
com.aris.umc.ldap.sync.skipOnFault	Skip errors Specifies whether the LDAP import ignores users or user groups for which errors occurred without showing an error message.	true (without message), false (with error message)	
com.aris.umc.ldap.sync.useDnAsGuid	Use DN as GUID Specifies that the fully qualified name (distinguished name) is used as GUID.	true, false	
com.aris.umc.ldap.user.importOnLogin	Import user at login Specifies whether an LDAP user is to be imported automatically during the login attempt.	true, false	false
com.aris.umc.ldap.user.searchpath	User search paths Specifies a semicolon-separated list of LDAP search paths for users. Overwrites the list of general search paths.	String	OU\=employees\,DC\=my\,DC\=corp\,DC\=company\,DC\=com
com.aris.umc.ldap.sync.members.searchBottomUp	Use bottom-up method Specifies whether the bottom-up method (**memberOf** attribute) or the top-down method (**hasMember** attribute) is applied when associating users to user groups.		
com.aris.umc.ldap.debug	Debug output Specifies whether or not debug information for LDAP operations is output.	true, false	false
com.aris.umc.ldap.sync.user.importgroups	Import user groups when synchronizing Specifies whether additional user groups are to be imported during user synchronization.	true, false	false

3.8.3.18.5 Which LDAP attribute mappings properties are available?

You can customize the LDAP attribute mappings (page 108) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.ldap.attribute.distinguishedname	DN Specifies the fully qualified name (distinguished name).	String	distinguishedName
com.aris.umc.ldap.attribute.group.name	Name Specifies the group name.	String	Group name
com.aris.umc.ldap.attribute.guid	GUID Specifies the LDAP GUID.	String	Object GUID
com.aris.umc.ldap.attribute.hasmember	hasMember Specifies the attribute that references the members of a group.	String	hasMember
com.aris.umc.ldap.attribute.memberof	memberOf Specifies the attribute that references the groups of a user.	String	memberOf
com.aris.umc.ldap.attribute.objectclass	objectClass Specifies the attribute that contains the object class.	String	objectClass
com.aris.umc.ldap.attribute.user.email	E-mail address Specifies the e-mail address of a user.	String	john.smith@softwareag.com
com.aris.umc.ldap.attribute.user.firstname	First name Specifies the first name of a user.	String	John
com.aris.umc.ldap.attribute.user.lastname	Last name Specifies the last name of a user.	String	Smith
com.aris.umc.ldap.attribute.user.name	Name Specifies the user name of a user.	String	Fragment
com.aris.umc.ldap.attribute.user.phone	Telephone number Specifies the telephone number of a user.	String	+491234567

Key	Description	Valid input	Example
com.aris.umc.ldap.attribute.user.picture	Picture Specifies the picture of a user.	Location of an image	
com.aris.umc.ldap.group.attributes.userdefined	User-defined Specifies a comma-separated list of LDAP attributes that are to be imported as user-defined attributes of a group.j	String	Description, operating system
com.aris.umc.ldap.group.objectclass	Group object class Object class of the LDAP groups.	String	Group
com.aris.umc.ldap.user.attributes.userdefined	User-defined Specifies a comma-separated list of LDAP attributes that are to be imported as user-defined attributes of a user.	String	Description, operating system
com.aris.umc.ldap.user.objectclass	User object class Specifies the object class of the LDAP user.	String	Organizational unit

3.8.3.18.6 Which properties are available for user-defined notifications?

You can customize the user-defined notifications (page 115) to meet your requirements.

Variables (page 168) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body.

Key	Description	Valid input	Example
com.aris.umc.notification.licenseExpired.enabled	Notify about license expiration Specifies whether administrators with the **License management** privilege are to be notified when a license has expired.	true, false	true
com.aris.umc.notification.licenseExpired.message	License has expired - Message Specifies the text of the notification that is sent when a license has expired.	String	
com.aris.umc.notification.licenseExpired.subject	License has expired - Subject Specifies the subject of the notification that is sent when a license has expired.	String	
com.aris.umc.notification.licenseExpired.templates	License has expired - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license has expired. The template must have been uploaded previously.		
com.aris.umc.notification.licenseExpiring.enabled	Notify before license expiration Specifies whether administrators with the **License management** privilege are to be notified when a license is about to expire.	true, false	true
com.aris.umc.notification.licensselicenseExpiring.message	License will expire soon - Message Specifies the text of the notification that is sent when a license is about to expire.	String	
com.aris.umc.notification.licenseExpiring.subject	License will expire soon - Subject Specifies the subject of the notification that is sent when a license is about to expire.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.licenseExpiring.template	License will expire soon - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a license will soon expire. The template must have been uploaded previously.		
com.aris.umc.notification.licenseExpiring.threshold	Days before expiration Specifies how many days before license expiration a notification is sent.	Integer > 0	14
com.aris.umc.notification.licenseSeatsConsumed.enabled	Notify about license exhaustion Specifies whether administrators with the **License management** privilege are to be notified when the total number of logins allowed for the license is reached.	true, false	true
com.aris.umc.notification.licenseSeatsConsumed.message	License exhaustion - Message Specifies the text of the notification that is sent when the total number of logins allowed for the license is reached.	String	
com.aris.umc.notification.licenseSeatsConsumed.template	License exhaustion - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that the total number of logins allowed with a license is reached. The template must have been uploaded previously.		
com.aris.umc.notification.licenseSeatsConsumed.subject	License exhaustion - Subject Specifies the subject of the notification that is sent when the total number of logins allowed for the license is reached.	String	
com.aris.umc.notification.passwordChanged.enabled	Notify about password change Specifies whether users are to be notified after their password has been changed.	true, false	
com.aris.umc.notification.passwordChanged.message	Password change - Message Specifies the text of the notification that is sent when a password has been changed.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.passwordChanged.subject	Password change - Subject Specifies the subject of the notification that is sent when a password has been changed.	String	
com.aris.umc.notification.passwordChanged.template	Password change - HTML template Specifies the HTML template used for the notification that is sent when a user is to be notified about a password change. The template must have been uploaded previously.		
com.aris.umc.notification.passwordReset.enabled	Notify about password reset Specifies whether users are to be notified after their password has been reset.	true, false	
com.aris.umc.notification.passwordReset.message	Password reset - Message Specifies the text of the notification that is sent when a password has been reset.	String	
com.aris.umc.notification.passwordReset.subject	Password reset - Subject Specifies the subject of the notification that is sent when a password has been reset.	String	
com.aris.umc.notification.passwordReset.template	Password reset - HTML template Specifies the HTML template used for the notification that is sent when a user is to be notified about a password reset. The template must have been uploaded previously.		
com.aris.umc.notification.passwordResetRequested.enabled	Notify about password reset request Specifies that users are to be notified if they have requested a password reset.		
com.aris.umc.notification.passwordResetRequested.message	Password reset request - Message Specifies the text of the notification that is sent when a user has requested a password reset.		
com.aris.umc.notification.passwordResetRequested.subject	Password reset request - Subject Specifies the subject of the notification that is sent when a user has requested a password reset.		

Key	Description	Valid input	Example
com.aris.umc.notification.passwordResetRequested.template	Password reset request - HTML template Specifies the HTML template used for the notification that is sent when a user has requested a password reset. The template must have been uploaded previously.		
com.aris.umc.notification.tenantDeleted.enabled	Notify about deletion Specifies whether a notification is sent if a tenant was deleted.	true, false	true
com.aris.umc.notification.tenantDeleted.message	Tenant deleted - Message Specifies the text of the notification that is sent if a tenant was deleted.	String	
com.aris.umc.notification.tenantDeleted.sendToAll.enabled	Notify all users about deletion Specifies whether a notification is to be sent to all users.	true, false	false
com.aris.umc.notification.tenantDeleted.subject	Tenant deleted - Subject Specifies the subject of the notification that is sent if a tenant was deleted.	String	
com.aris.umc.notification.tenantDeleted.template	Tenant deleted - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been deleted. The template must have been uploaded previously.		
com.aris.umc.notification.tenantDisabled.enabled	Notify about deactivation Specifies whether a notification is sent if a tenant was deactivated.	true, false	true
	Tenant deactivated - Message Specifies the text of the notification that is sent if a tenant was deactivated.	String	
com.aris.umc.notification.tenantDisabled.sendToAll.enabled	Notify all users about deactivation Specifies whether a notification is sent to all users if a tenant was deactivated.	true, false	false
com.aris.umc.notification.tenantDisabled.subject	Tenant deactivated - Subject Specifies the subject of the notification that is sent if a tenant was deactivated.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.tenantDisabled.template	Tenant deactivated - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been deactivated. The template must have been uploaded previously.		
com.aris.umc.notification.tenantEnabled.enabled	Notify about activation Specifies whether a notification is sent if a tenant was activated.	true, false	true
com.aris.umc.notification.tenantEnabled.message	Tenant activated - Message Specifies the text of the notification that is sent if a tenant was activated.	String	
com.aris.umc.notification.tenantEnabled.sendToAll.enabled	Notify all users about activation Specifies whether a notification is sent to all users if a tenant was activated.	true, false	false
com.aris.umc.notification.tenantEnabled.subject	Tenant activated - Subject Specifies the subject of the notification that is sent if a tenant was activated.	String	
com.aris.umc.notification.tenantEnabled.template	Tenant activated - HTML template Specifies the HTML template used for the notification that is sent when an administrator is to be notified that a tenant has been activated. jThe template must have been uploaded previously.		
com.aris.umc.notification.userCreated.enabled	Notify about creation Specifies whether users are to be notified after they have been created.	true, false	
com.aris.umc.notification.userCreated.message	User created - Message Specifies the text of the notification that is sent when a user has been created.	String	
com.aris.umc.notification.userCreated.subject	User created - Subject Subject of the notification that is sent when a user has been created.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.userCreated.template	User created - HTML template Specifies the HTML template used for the notification that is sent when users are notified that they have been created. The template must have been uploaded previously.		
com.aris.umc.notification.userDisabled.enabled	Notify about deactivation Specifies whether users are to be notified after they have been deactivated.	true, false	
com.aris.umc.notification.userDisabled.message	User deactivated - Message Specifies the text of the notification that is sent when a user has been deactivated.	String	
com.aris.umc.notification.userDisabled.subject	User deactivated - Subject Specifies the subject of the notification that is sent when a user has been deactivated.	String	
com.aris.umc.notification.userDisabled.template	User deactivated - HTML template Specifies the HTML template used for the notification that is sent when users are notified that they have been deactivated. The template must have been uploaded previously.		
com.aris.umc.notification.userEnabled.enabled	Notify about activation Specifies whether users are to be notified after they have been activated.	true, false	
com.aris.umc.notification.userEnabled.message	User activated - Message Specifies the text of the notification that is sent when a user has been activated.	String	
com.aris.umc.notification.userEnabled.subject	User activated - Subject Specifies the subject of the notification that is sent when a user has been activated.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.userEnabled.template	User activated - HTML template Specifies the HTML template used for the notification that is sent when users are notified that they have been activated. The template must have been uploaded previously.		
com.aris.umc.notification.otpSecretChanged.enabled	Notify about token secret change Specifies whether users are to be notified if their token secret has been changed.	true, false	
com.aris.umc.notification.otpSecretChanged.subject	Token secret change - Subject Subject of the notification that is sent when the token secret has been changed by a user.	String	
com.aris.umc.notification.otpSecretChanged.message	Token secret change - Message Text of the notification that is sent when the token secret has been changed by a user.	String	
com.aris.umc.notification.otpSecretChanged.template	Token secret change - HTML template Specifies the HTML template used for the notification that is sent when a user has changed the token secret. The template must have been uploaded previously.		
com.aris.umc.notification.otpRequested.enabled	Notify about one-time password request Specifies whether users are to be notified if they have requested a one-time password.	true, false	
com.aris.umc.notification.otpRequested.subject	One-time password request - Subject Subject of the notification that is sent when a user has requested a one-time password.	String	
com.aris.umc.notification.otpRequested.message	One-time password request - Message Text of the notification that is sent when a user has requested a one-time password.	String	

Key	Description	Valid input	Example
com.aris.umc.notification.otpRequested.message	One-time password request - HTML template Specifies the HTML template used for the notification that is sent when a user has requested a one-time password. The template must have been uploaded previously.		
com.aris.umc.notification.signupCompleted.enabled	Notify about signup Specifies whether administrators are to be notified if a new user has signed up.	true, false	
com.aris.umc.notification.signupCompleted.subject	Signup complete - Subject Subject of the notification that is sent when a new user has signed up.	String	
com.aris.umc.notification.signupCompleted.message	Signup complete - Message Text of the notification that is sent when a new user has signed up.	String	
com.aris.umc.notification.signupCompleted.template	Signup complete - HTML template Specifies the HTML template used for the notification that is sent when a new user has signed up. The template must have been uploaded previously.		

3.8.3.18.7 Which variables can be used for user-defined notifications?

Variables (page 168) may be used to personalize the content of a notification of ARIS Administration. Variables can be used in both notification subject and body. The following variables are supported:

- @tenant.name - Name of the tenant the user belongs to
- @user.login - Login of a user receiving notifications
- @user.givenName - First name of a user receiving notifications
- @user.lastName - Last name of a user receiving notifications
- @user.password - (New) password of a user receivings notifications

The following variables are supported for license-related events:

- @license.serial - Serial number of a license
- @license.productName - Name of a licensed product
- @license.expiry - Expiration date of a licensed product in the format YYYY-MM-DD

3.8.3.18.8 Which OAuth properties are available?

You can configure OAuth (page 122) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.oauth.active	Use OAuth Specifies whether OAuth is allowed. The default value is **false**.	true, false	
com.aris.umc.oauth.api.keys	API keys Specifies a comma-separated list of API keys.	String	
com.aris.umc.oauth.api.secrets	API secrets Specifies a comma-separated list of API secrets.	String	
com.aris.umc.oauth.debug	Debug output Specifies whether debug output is enabled for OAuth operations. The default value is **false**.	true, false	
com.aris.umc.oauth.providers	OAuth providers Specifies in a comma-separated list the social network providers for which login is allowed.	Comma-separated list	Google, Facebook
com.aris.umc.oauth.tenant	Default tenant Specifies the default tenant that is used for OAuth-based authentication. The default value is **default**.	String	default

3.8.3.18.9 Which properties are available for password policies?

You can customize your password policies (page 124) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.password.characters.lowercase.min	Minimum number of lowercase letters Specifies the minimum number of lowercase letters in a password.	Integer > 0	
com.aris.umc.password.characters.numeric.allowed	Allow numbers Specifies whether numbers are allowed in a password.	true, false	
com.aris.umc.password.characters.numeric.min	Minimum number of numbers Specifies the minimum number of numbers that must be contained in a password.	Integer > 0	
com.aris.umc.password.characters.special.allowed	Allow special characters Specifies whether special characters are allowed in a password.	true, false	
com.aris.umc.password.characters.special.min	Minimum number of special characters Specifies the minimum number of special characters in a password.	Integer > 0	
com.aris.umc.password.characters.special.set	Special characters Specifies which characters are special characters.	String	*$-+?&=!%{ }/ _
com.aris.umc.password.characters.uppercase.allowed	Allow uppercase letters Specifies whether uppercase letters are allowed in a password.	true, false	
com.aris.umc.password.characters.uppercase.min	Minimum number of uppercase letters Specifies the minimum number of uppercase letters in a password.	Integer > 0	
com.aris.umc.password.length.max	Maximum length Specifies the maximum length of a password.	0 < Integer > 47	
com.aris.umc.password.length.min	Minimum length Specifies the minimum length of a password.	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.password.expiry.active	Activate expiring passwords Specifies whether passwords are set to be valid only for a specific amount of time. This is defined for a single tenant. Once the password has expired, the user is directed to a Web site enabling the password to be changed. Thereafter, the user is redirected to the application.	true, false	
com.aris.umc.password.expiry.days	Password lifetime Specifies the period of time after which a password expires. This is defined for a single tenant.	Integer > 0	
com.aris.umc.password.change.forceOnFirstLogin	Force change before first login Specifies whether a user must change the password upon first login. This is defined for a single tenant.	true, false	
com.aris.umc.password.change.forceAfterReset	Force change after reset Specifies whether a user must change the password if it was reset (and sent via e-mail). This is defined for a single tenant.	true, false	
com.aris.umc.password.change.forceDifference	Force different password Specifies whether the new password must differ from the old one. This is defined for a single tenant.	true, false	
com.aris.umc.password.reset.confirmation.active	Activate reset confirmation Specifies whether a user must confirm a password reset.	true, false	
com.aris.umc.password.reset.confirmation.ttl	Link lifetime Specifies the time in seconds during which a user can click the link sent by e-mail in order to confirm the password.	Integer > 0	30

3.8.3.18.10 Which SAML properties are available?

You can configure SAML (page 126) to meet your requirements.

Key	Description	Valid input
com.aris.umc.saml.active	Use SAML Specifies whether an SAML-based login is allowed.	true, false
com.aris.umc.saml.binding	Binding Specifies the binding used for sending authtentication requests to the identity provider. Activates the possibility of redirecting the authentication (Redirect) or not (POST).	
com.aris.umc.saml.identity.provider.id	Identity provider ID Specifies the ID of the identity provider.	String
com.aris.umc.saml.service.provider.id	Service provider ID Specifies the ID of the service provider.	String
com.aris.umc.saml.identity.provider.artifact.resolution.url	Artifact resolution URL Specifies the end point of the SAML provider that is used to resolve SAML artifacts.	
com.aris.umc.saml.identity.provider.sso.url	Single sign-on URL Specifies the end point of the identity provider that is used for single sign-on.	
com.aris.umc.saml.identity.provider.logout.url	Single logout URL Specifies the end point of the identity provider that is used for single logout.	
com.aris.umc.saml.signature.assertion.active	Sign assertions Specifies whether SAML assertions must be signed or not.	true, false
com.aris.umc.saml.signature.request.active	Sign requests Specifies whether the SAML authentication request must be signed or not.	true, false
com.aris.umc.saml.signature.response.active	Sign responses Specifies whether the SAML response must be signed or not.	true, false
com.aris.umc.saml.signature.algorithm	Signature algorithm Specifies the algorithm for the signature. The algorithm can be selected from the list.	String

Key	Description	Valid input
com.aris.umc.saml.keystore.location	Keystore Specifies the location of the keystore file used for validating SAML assertions. The keystore must have been uploaded previously.	
com.aris.umc.saml.keystore.alias	Alias Specifies the alias name that is used to access the keystore.	String
com.aris.umc.saml.keystore.password	Password Specifies the password that is used to access the keystore.	String
com.aris.umc.saml.keystore.typ	Type Specifies the type of the keystore to be used. The keystore type can be selected from a list.	String
com.aris.umc.saml.truststore.location	Truststore Specifies the location of the truststore file used for validating SAML assertions. The keystore must have been uploaded previously.	
com.aris.umc.saml.truststore.alias	Alias Specifies the alias to be used for accessing the truststore.	String
com.aris.umc.saml.truststore.password	Password Specifies the password to be used for accessing the truststore.	String
com.aris.umc.saml.truststore.type	Type Specifies the type of the truststore.	String
com.aris.umc.saml.login.mode.dn.active	Login using DN Specifies whether login is to be tried using the fully qualified name instead of the user name.	true, false
com.aris.umc.saml.login.mode.keyword.active	Decompose DN Specifies whether the fully qualified name is to be decomposed.	true, false
com.aris.umc.saml.login.mode.keyword.name	Keyword Specifies which part of the fully qualified name is to be used for login.	String

Key	Description	Valid input
com.aris.umc.saml.assertion.timeoffset	Clock skew Specifies the time offset between identity provider and service provider in seconds. Assertions are accepted if they are received within the permitted time frame.	
com.aris.umc.saml.assertion.ttl	Assertion lifetime Specifies the maximum lifetime of an SAML assertion in seconds.	
com.aris.umc.saml.tenant	Default tenant Specifies the default tenant that is to be used for the SAML-based login.	String

3.8.3.18.11 Which security properties are available?

You can configure the security (page 130) to meet your requirements.

Key	Description	Valid inputC	Example
com.aris.umc.authentication.lock.enabled	Lock users after failed login attempts Specifies whether a user login is temporarily locked when a user causes too many failed logins. The default value is **false**.	true, false	
com.aris.umc.authentication.delay.max	Maximum authentication delay Specifies the maximum delay that is added at each login. This is defined in milliseconds.	Integer > 0	
com.aris.umc.authentication.delay.min	Minimum authentication delay Specifies the minimum delay that is added at each login. This is defined in milliseconds.	Integer > 0	
com.aris.umc.authentication.lock.counter.limit	Attempt limit Specifies the number of failed login attempts that are allowed before user login is locked.	Integer > 0	
com.aris.umc.authentication.lock.counter.ttl	Lock counter duration Time that must elapse before the number of failed login attempts is reset. This is defined in milliseconds.	Integer > 0	
com.aris.umc.authentication.lock.ttl	Lockout duration Specifies how long a user login is temporarily locked when a user causes too many failed logins. This is defined in milliseconds.	Integer > 0	
com.aris.umc.authentication.multiFactor.active	Use multi-factor authentication Specifies whether multi-factor authentication is required. The default value is **false**.	true, false	
com.aris.umc.authentication.multiFactor.clockSkew	Clock skew intervals Specifies the clock skew in number of intervals. One-time passwords (OTPs) that are within the valid range [currentTimeStep - clock_skew, currentTimeStep + clock_skew] are permitted. jThis is defined in milliseconds.		
com.aris.umc.authentication.sso.only	Force SSO Specifies that only an SSO login is allowed. The default value is **false**.	true, false	

Key	Description	Valid inputC	Example
com.aris.umc.session.concurrent.max	Maximum concurrent sessions Specifies the maximum number of concurrent sessions that can be active for a single user. This does not apply to the **arisservice** and **superuser** users.	Integer > 0	
com.aris.umc.session.identifier.generator	Session ID generator Specifies the random number generator used for generating session IDs.	String	
com.aris.umc.session.identifier.length.max	Maximum length of session ID Specifies the maximum length of a session ID in bytes.	Integer > 0	
com.aris.umc.session.identifier.length.min	Minimum length of session ID Specifies the minimum length of a session ID in bytes. For security reasons this value should not be less than 32.	Integer > 0	
com.aris.umc.session.renewal.cache.size	Session cache size Specifies how many session IDs are saved in the session renewal cache. When the cache is full, the least recently used sessions are removed. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.umc.session.renewal.cache.ttl	Session cache lifetime Specifies the maximum duration in seconds that a renewed session remains in the session renewal cache. A session can be renewed at the earliest after this period of time. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.umc.otp.active	Use OTPs Specifies whether or not the generation of one-time passwords (OTPs) is allowed.		
com.aris.umc.otp.ttl	Lifetime Specifies the lifetime of a one-time password (OTP) in seconds. Passwords become invalid after this time period at the latest.		
com.aris.umc.audit.enabled	Generate user statistics Activates the user statistics.		

Key	Description	Valid inputC	Example
com.aris.umc.audit.log.auth.enabled	Log authentication Enables the authentication logging.	true, false	true
com.aris.umc.audit.log.conf.enabled	Log changes to configuration Enables the logging of changes to the configuration.	true, false	true
com.aris.umc.audit.log.license.privilege.enabled	Log changes to license/privileges Enables the logging of changes to licenses or privileges.	true, false	true
com.aris.umc.audit.log.user.group.enabled	Log changes to users/user groups Enables the logging of changes to users or user groups.	true, false	true
com.aris.umc.license.distribution.handling	Enforce group-level license pools Specifies that license pools are assigned at the user group level (page 28). If this option is enabled, licenses must not be assigned to users directly, but are to be assigned via user groups only.	true, false	false

3.8.3.18.12 Which SMTP properties are available?

You can configure SMTP (page 133) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.notification.debug	Debug output Activates debugging output.	true, false	
com.aris.umc.notification.language	Default language Specifies the default language in which notifications are sent. If this property is not defined, the server operating system language is used.	en	
com.aris.umc.notification.queue	Maximum queue length Specifies the maximum number of notifications allowed in a send queue. If the send queue is too full, all subsequent notifications are refused. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.umc.notification.sender	Sender address Specifies the sender address for notifications. This must be a valid e-mail address.	String	
com.aris.umc.notification.type	E-mail format Specifies the default type used for sending notifications.	String	
com.aris.umc.notification.smtp.authentication	Use authentication Specifies whether authentication to the SMTP server is to be used.	true, false	
com.aris.umc.notification.smtp.host	Host name Specifies the host name or IP address of the SMTP server. Cross-tenant property that cannot be changed.	String	localsmtp.my.corp.softwareag.com
com.aris.umc.notification.smtp.password	Password Specifies the password that is used for authentication to the SMTP server.	String	smtppassword

Key	Description	Valid input	Example
com.aris.umc.notification.smtp.port	Port Specifies the port for the SMTP server.	Integer greater than or equal to 0, but less than or equal to 65535	
com.aris.umc.notification.smtp.ssl	Use SSL Specifies whether TLS is to be used for the connection to the SMTP server.	true, false	false
com.aris.umc.notification.smtp.ssl.mode	SSL mode Specifies the method to be used for a trusted connection. **STARTTLS** or **SSL** can be used. STARTTLS transforms a connection that was originally untrusted into an encrypted connection without requiring a specific port for the trusted connection. SSL establishes a trusted connection with a dedicated port immediately.	STARTTTLS, SSL	STARTTTLS
com.aris.umc.notification.smtp.timeout	Connection timeout Specifies the duration after which the attempt to connect to the SMTP server is canceled. This is defined in milliseconds.	Integer > 0	
com.aris.umc.notification.smtp.userName	User name Specifies the user name that is used for authentication.	String	
com.aris.umc.notification.smtp.retry.count	Number of retries Specifies the number of retries for sending notifications.	Integer > 0	
com.aris.umc.notification.smtp.retry.sleep.min	Minimum wait time Specifies the minimum wait time between the retries. This is defined in milliseconds.	Integer > 0	
com.aris.umc.notification.smtp.retry.sleep.max	Maximum wait time Specifies the maximum wait time between the retries. This is defined in milliseconds.	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.notification.smtp.sendrate	Send rate Specifies the maximum number of messages sent per second. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.umc.notification.smtp.replyto	Reply-to addresses Specifies a comma-separated list of reply-to addresses.		
com.aris.umc.notification.threads	Number of threads Specifies the maximum number of threads that are used for sending notifications. Cross-tenant property that cannot be changed.	Integer > 0	

3.8.3.18.13 Which user settings properties are available?

You can customize the configuration for users (page 136) to meet your requirements.

Key	Description	Valid input	Example
com.aris.umc.collaboration.picture.size.max	Maximum picture size Specifies the maximum size of a profile picture in bytes. The default setting is 1048576 bytes.	Integer > 0	1048576
com.aris.umc.users.admin.email	E-mail address Specifies the e-mail address of the administrator.	String	
com.aris.umc.users.admin.name	User name Specifies the login name of the administrator in ARIS Administration.	String	superuser
com.aris.umc.users.admin.password	Initial password Specifies the initial password of the administrator in ARIS Administration.	String	
com.aris.umc.users.email.required	E-mail address required Specifies whether the **E-mail address** box must be specified for a user.	true, false	
com.aris.umc.users.email.validation.active	Validate e-mail address Specifies whether a check is performed when entering the e-mail address of a user to determine whether the e-mail address is valid.	true, false	
com.aris.umc.users.name.length.max	Maximum login name length Specifies the maximum length of the login names.	Integer > 0	
com.aris.umc.users.service.create	Generate, if not available Specifies whether the user **arisservice** is generated at startup, if not yet available.	true, false	
com.aris.umc.users.service.email	E-mail address Specifies the e-mail address of the user **arisservice**.	String	
com.aris.umc.users.service.name	User name Specifies the login name of the user **arisservice**.	String	

Key	Description	Valid input	Example
com.aris.umc.users.service.password	Initial password Specifies the initial password of the user **arisservice**.	String	
com.aris.umc.users.guest.create	Generate, if not available Specifies whether the user **guest** is generated at startup, if not yet available.	true, false	
com.aris.umc.users.guest.email	E-mail address Specifies the e-mail address of the user **guest**.	String	
com.aris.umc.users.guest.name	User name Specifies the login name of the user **guest**.	String	
com.aris.umc.users.guest.password	Initial password Specifies the initial password of the user **guest**.	String	
com.aris.umc.users.guest.allow.auto.log in	Automatically log in visitors Specifies that visitors are automatically logged in as a guest when accessing the ARIS Connect portal.	true, false	
com.aris.umc.users.system.create	Generate, if not available Specifies whether the user **system** is generated at startup, if not yet available.	true, false	
com.aris.umc.users.system.email	E-mail address Specifies the e-mail address of the user **system**.	String	
com.aris.umc.users.system.name	User name Specifies the login name of the user **system**.	String	
com.aris.umc.users.system.password	Initial password Specifies the initial password of the user **system**.	String	
com.aris.umc.sessio n.system.ttl.max	Session duration (max) Specifies the maximum duration of a system user session in minutes.	Integer > 0	

Key	Description	Valid input	Example
com.aris.umc.session.system.ttl	Session duration (initial) Specifies the initial duration of a system user session in minutes.	Integer > 0	
com.aris.umc.session.ttl	Session duration (initial) Specifies the initial life span of a standard user session in minutes.	Integer > 0	
com.aris.umc.session.ttl.max	Session duration (max) Specifies the maximum life span of a standard user session in minutes.	Integer > 0	
com.aris.umc.impoersonation.targets	Impersonation target users Specifies the users for which you want to allow impersonation (page 147).		
com.aris.umc.chart.display.defaultUsers.enabled	Display technical users Specifies whether or not user statistics and charts are also displayed for technical users such as **system**, **arisservice**, and **guest**.	true, false	

3.8.4 Document storage

3.8.4.1 Export configuration

You can export configurations in order to import them into any tenant or installation and use them there.

Prerequisite

- You have the **Technical configuration** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Click **Export current configuration as a file**.

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

3.8.4.2 Import configuration

You can import configurations into any tenant or installation and use them there.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Click **Import configuration as a file**.

The **Import configuration file** dialog opens. Navigate to the location where the configuration file is stored and import it. The new configuration is active immediately and no system restart is required.

3.8.4.3 Configure full-text search

You can display the settings for the full-text search in your document storage.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Select **Full-text search** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

Use full-text search

Specifies whether the full-text search can be used. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.active

Host

Specifies the Elasticsearch host. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.host

Port

Specifies the Elasticsearch port. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.port

Schema

Specifies the schema for the Elasticsearch URL. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.scheme

Advanced settings

Maximum document size

Specifies the maximum document size in Elasticsearch. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.document.maxsize.kb

Storage limit

Specifies the storage limit for the Elasticsearch parser. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.parser.memory.threshold.kb

Maximum number of parallel threads

Specifies the maximum number of threads for parallel processing when indexing documents. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.parser.thread.count

Maximum queue size

Specifies the maximum size of the queue for indexing documents. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.search.elastic.parser.queue.size

6. Click **Edit**.
7. Adjust your settings.
8. Click **Save**.

The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

3.8.4.4 Customize infrastructure settings

You can configure the infrastructure for your document storage.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Select **Infrastructure** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

Batch job schedule

Specifies the time at which a lock should be automatically removed. The time must be specified as a CRON expression. This corresponds to the following property: com.idsscheer.aris.ads.batch.fire

Maximum number of revisions

Specifies the maximum number of revisions. This corresponds to the following property: com.idsscheer.aris.ads.batch.document.revision.maxcount

Maximum revision age

Specifies the maximum revision age. This corresponds to the following property: com.idsscheer.aris.ads.batch.document.revision.maxagedays

Maximum lock age

Specifies the maximum lock age. This corresponds to the following property: com.idsscheer.aris.ads.batch.document.lock.maxAgeHour

Path for mobile uploads

Specifies the path where to store files uploaded from mobile devices. This corresponds to the following property: com.aris.ads.mobile.upload.path

Build version

This ARIS document storage version is currently installed. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.ads.version

ADVANCED SETTINGS

Configuration cache lifetime

Specifies the TTL for internal caches. Cross-tenant property that cannot be changed. This corresponds to the following property: com.aris.ads.config.cache.ttl

Encrypted properties

Specifies a comma-separated list of encrypted property keys. This corresponds to the following property: com.aris.ads.config.encrypted

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.
8. Click **Save**.

You have customized your document storage configuration.

3.8.4.5 Configure third-party document management system

You can configure a third-party document management system. Only one external document management system may be used.

Available are:

- Microsoft® SharePoint 2010
- Microsoft® SharePoint 2013

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Select **Document management system** in the list box.
5. Click a configuration category. The following categories are available:

CONNECTION

Use third-party document maanagement system

Specifies whether or not a third-party document management system can be used. This corresponds to the following property: com.idsscheer.aris.ads.dms.active

Type

Specifies which third-party document management system is to be used, e.g. Microsoft® SharePoint 2010 or 2013. This corresponds to the following property: com.idsscheer.aris.ads.dms.type

Server URL

Specifies the URL of the server on which the third-party document management system is installed. This corresponds to the following property: com.idsscheer.aris.ads.dms.url

User name

Specifies the user that is granted access to the third-party document management system. This corresponds to the following property: com.idsscheer.aris.ads.dms.user

Password

Specifies the password for accessing a third-party document management system. This corresponds to the following property: com.idsscheer.aris.ads.dms.password

Root folder

Specifies the name under which access to a third-party document management system is granted. This corresponds to the following property: com.idsscheer.aris.ads.dms.root

Web site collection

Specifies the subsites or a collection of Web sites that are included in the third-party document management system. This corresponds to the following property: com.idsscheer.aris.ads.dms.site.collection

DOCUMENT ATTRIBUTE MAPPINGS

Description

Specifies the description field for a document in the third-party document management system. This corresponds to the following property: com.idsscheer.aris.ads.dms.document.description

Person responsible

Specifies a document owner in the third-party document management system. This corresponds to the following property: com.idsscheer.aris.ads.dms.document.owner

Tags

Specifies a third-party document management system property containing the tags of the document (metadata). This corresponds to the following property: com.idsscheer.aris.ads.dms.tags.holder

Search fields

Specifies a comma-separated list of strings that contains the names of the fields used to search for documents in a repository of a third-party document management system. The assistance of an administrator knowing which fields were configured is required. This corresponds to the following property: com.idsscheer.aris.ads.dms.search.fields

ADVANCED SETTINGS

Folder data type

Specifies the ID of the internal data type directory of the third-party document management system. Changing this ID is possible only in case of errors and requires consultation with the administrator of the third-party document management system. This corresponds to the following property: com.idsscheer.aris.ads.dms.foldertypeid

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.
8. Click **Save**.

You have customized your document storage configuration.

3.8.4.6 Customize persistence settings

You can configure the persistence for your document storage.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Select **Persistence** in the list box.
5. Click a configuration category. The following categories are available:

GENERAL

Use CouchDB

Specifies whether or not any document management system can be used as the default document system (com.idsscheer.aris.ads.couchdb.active=false). Otherwise, ARIS document storage is used. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.active

Host

Specifies the CouchDB host. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.host

Port

Specifies the CouchDB port. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.port

User name

Specifies the administrator user name for the CouchDB. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.admin.username

Password

Specifies the administrator password for the CouchDB. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.admin.password

ADVANCED SETTINGS

Number of access attempts

Specifies the number of repository access attempts before a timeout occurs. The default value is 10 attempts.

This value should be increased only if problems occur with new clients when they log in to document storage for the first time. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.create.retry.count

Number of connection attempts before timeout

Specifies the number of attempts allowed to connect to the repository. The default value is 10. This corresponds to the following property: com.idsscheer.aris.ads.couchdb.create.retry.timer

6. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

7. Adjust your settings.
8. Click **Save**.

You have configured the persistence for your document storage.

3.8.4.7 Customize quota and restrictions

You can configure the quota and restrictions for your document storage.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Select **Quota and restrictions** in the list box.
5. Click **General**.

Maximum file size

Specifies the maximum allowed size (in kilobytes) for file uploads. This corresponds to the following property: com.aris.ads.config.max.filesize

Quota limit

Specifies the maximum total size (in kilobytes) of the document storage available to a tenant. This corresponds to the following property: com.aris.ads.config.storage.quota.limit

Quota usage

Amount of storage already used (in kilobytes) by uploaded documents. This corresponds to the following property: com.aris.ads.config.storage.quota.usage

Restrict file types

Specifies whether or not the file type filter (file extensions) is activated. The default is **not enabled** (default value **false**). This corresponds to the following property: com.aris.ads.config.supported.filetypes.filter.active

Valid file extensions

Specifies the list of allowed file extensions. This corresponds to the following property: com.aris.ads.config.supported.filetypes.filter

Restrict file types

Specifies whether or not the file type filter (MIME types) is activated. The default is **not enabled** (default value **false**). This corresponds to the following property: com.aris.ads.config.supported.mimetypes.filter.active

Allowed file types

Specifies the list of allowed file types (MIME types). This corresponds to the following property: com.aris.ads.config.supported.mimetypes.filter

6. Click **Edit**.
7. Adjust your settings.
8. Click **Save**.

You have configured the quota and restrictions for your document storage.

3.8.4.8 Configure WebDAV

You can display the WebDAV settings in your document storage.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Document storage**.
4. Select **WebDAV** in the list box.
5. Click a configuration category. The following categories are available:

   General

Tenant

Specifies the tenant for which a WebDAV mapping exists. Cross-tenant property that cannot be changed. This corresponds to the following property: com.softwareag.ads.webdav.tenant

Repository

Specifies the name of the repository for which WebDAV is to be available. There can only ever be one repository per tenant. Cross-tenant property that cannot be changed. This corresponds to the following property: com.softwareag.ads.webdav.repository

1. Click **Edit**.
2. Adjust your settings.
3. Click **Save**.

The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.

3.8.4.9 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.8.4.9.1 Which properties for the full-text search are available?

You can display (page 185) the settings for the full-text search in your document storage.

Key	Description	Valid input	Example
com.idsscheer.aris.ads.search.active	Use full-text search Specifies whether the full-text search can be used.	true, false	true
com.idsscheer.aris.ads.search.elastic.document.maxsize.kb	Maximum document size Specifies the maximum document size in Elasticsearch. Cross-tenant property that cannot be changed.	Integer > 0	2000
com.idsscheer.aris.ads.search.elastic.host	Host Specifies the Elasticsearch host.	String	Server name.domain.domain addition
com.idsscheer.aris.ads.search.elastic.port	Port Specifies the Elasticsearch port.	Integer > 0	
com.idsscheer.aris.ads.search.elastic.parser.memory.threshold.kb	Storage limit Specifies the storage limit for the Elasticsearch parser. Cross-tenant property that cannot be changed.	Integer > 0	500
com.idsscheer.aris.ads.search.elastic.parser.queue.size	Maximum queue size Specifies the maximum size of the queue for indexing documents. Cross-tenant property that cannot be changed.	Integer > 0, default value is 10.	40
com.idsscheer.aris.ads.search.elastic.parser.thread.count	Maximum number of parallel threads Specifies the maximum number of threads for parallel processing when indexing documents. Cross-tenant property that cannot be changed.	Integer > 0	10

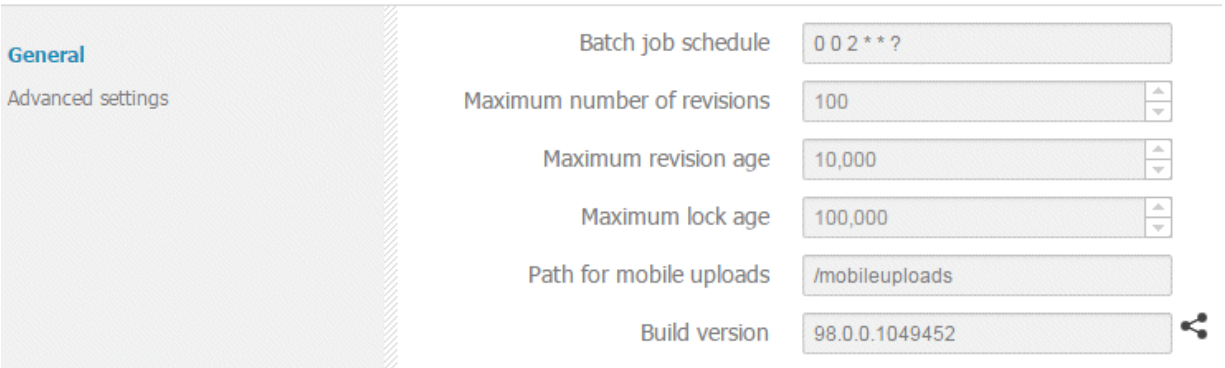
Key	Description	Valid input	Example
com.idsscheer.aris.ads.search.elastic.scheme	Schema Specifies the schema for the Elasticsearch URL.	http or https; the ZooKeeper value is used as the default value.	http

3.8.4.9.2 Which infrastructure properties are available?

You can configure the infrastructure (page 187) for your document storage.

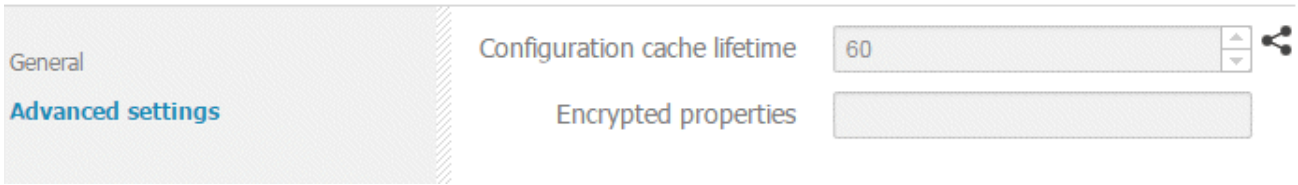
GENERAL

Key	Description	Valid input	Example
com.idsscheer.aris.ads.batch.fire	Batch job schedule Specifies the time at which a lock should be automatically removed.	CRON expression	0 0 2 * * ?
com.idsscheer.aris.ads.batch.document.revision.maxcount	Maximum number of revisions Specifies the maximum number of revisions.	Integer > 0	10
com.idsscheer.aris.ads.batch.document.revision.maxagedays	Maximum revision age Specifies the maximum revision age.	Integer > 0	10000
com.idsscheer.aris.ads.batch.document.lock.maxAgeHour	Maximum lock age Specifies the maximum lock age.	Integer > 0	100000000
com.aris.ads.mobile.upload.path	Path for mobile uploads Specifies the path where to store files uploaded from mobile devices.	Path	/root/mobileuploads
com.aris.ads.version	Build version This ARIS document storage version is currently installed. Cross-tenant property that cannot be changed.	Number	11.0.1.123456



ADVANCED SETTINGS

Key	Description	Valid input	Example
com.aris.ads.config.cache.ttl	Configuration cache lifetime Specifies the TTL for internal caches. Cross-tenant property that cannot be changed.	Integer > 0	
com.aris.ads.config.encrypted	Encrypted properties Specifies a comma-separated list of encrypted property keys.	List	

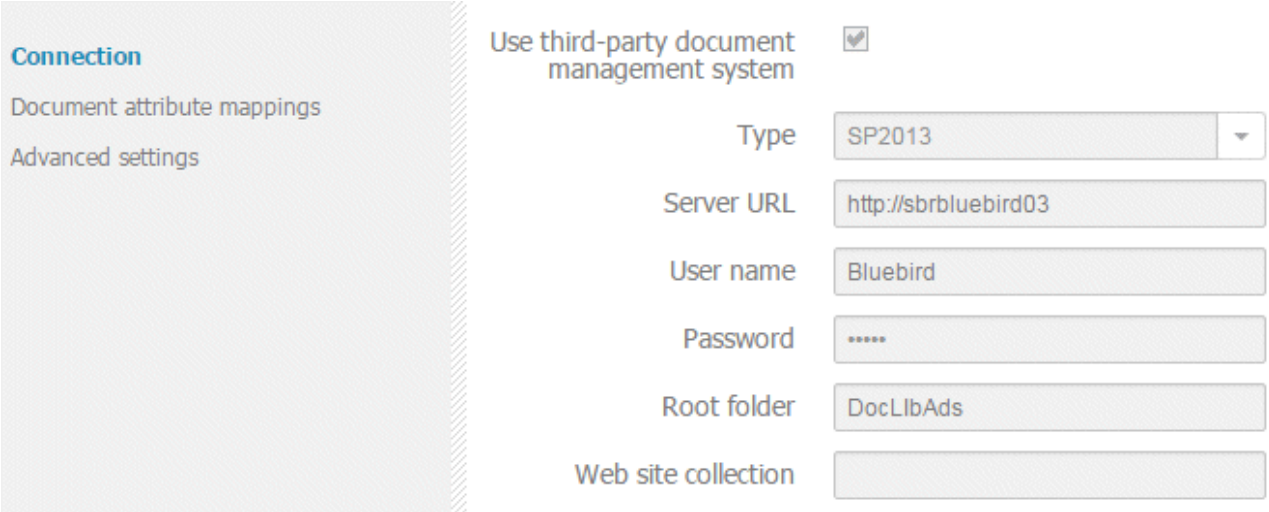


3.8.4.9.3 Which document management system properties are available?

You can configure a third-party document management system (page 189). Only one external document management system may be used.

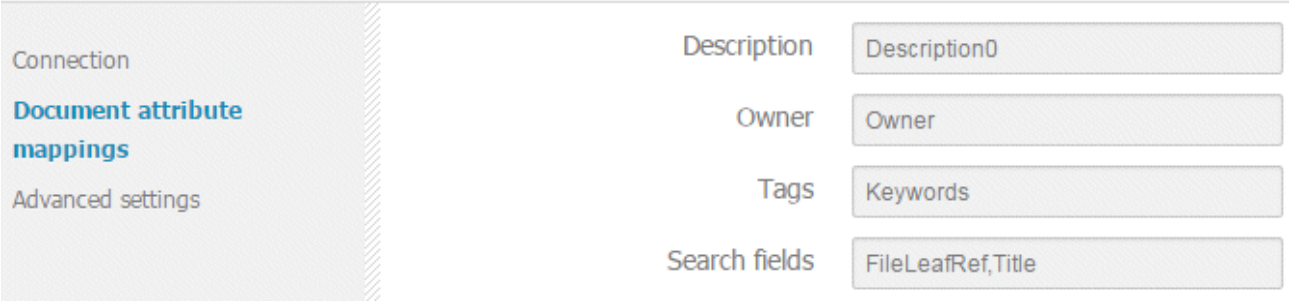
CONNECTION

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.active	Use third-party document management system Specifies whether or not a third-party document management system can be used.	true, false	
com.idsscheer.aris.ads.dms.type	Type Specifies which third-party document management system is to be used, e.g. Microsoft® SharePoint 2010 or 2013.	SP2010, SP2013	SP2013
com.idsscheer.aris.ads.dms.url	Server URL Specifies the URL of the server on which the third-party document management system is installed.	URL	
com.idsscheer.aris.ads.dms.user	User name Specifies the user that is granted access to the third-party document management system.	String	
com.idsscheer.aris.ads.dms.password	Password Specifies the password for accessing a third-party document management system.	String	
com.idsscheer.aris.ads.dms.root	Root folder Specifies the name under which access to a third-party document management system is granted.	String	
com.idsscheer.aris.ads.dms.site.collection	Web site collection Specifies the subsites or a collection of Web sites that are included in the third-party document management system.	Comma-separated list	



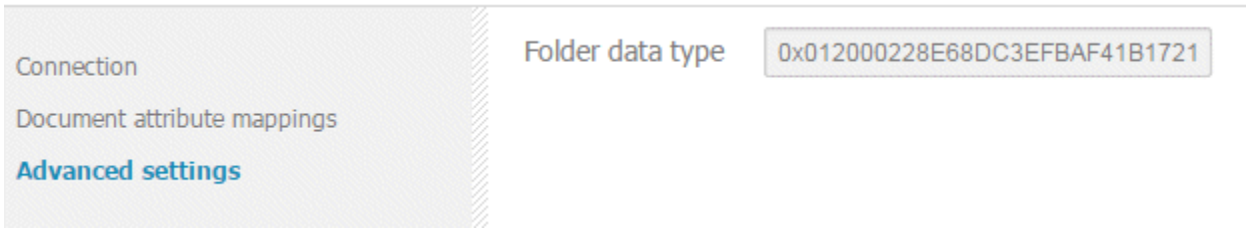
DOCUMENT ATTRIBUTE MAPPINGS

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.document.description	Description Specifies the description field for a document in the third-party document management system.	String	
com.idsscheer.aris.ads.dms.document.owner	Person responsible Specifies a document owner in the third-party document management system.	String	
com.idsscheer.aris.ads.dms.tags.holder	Tags Specifies a third-party document management system property containing the tags of the document (metadata).	Comma-separated list	
com.idsscheer.aris.ads.dms.search.fields	Search fields Specifies a comma-separated list of strings that contains the names of the fields used to search for documents in a repository of a third-party document management system. The assistance of an administrator knowing which fields were configured is required.	Comma-separated list	FileLeafRef, Title



ADVANCED SETTINGS

Key	Description	Valid input	Example
com.idsscheer.aris.ads.dms.foldertypeid	Folder data type Specifies the ID of the internal data type directory of the third-party document management system. Changing this ID is possible only in case of errors and requires consultation with the administrator of the third-party document management system.	String	239847348760298



3.8.4.9.4 Which persistence properties are available?

You can configure the persistence (page 191) for your document storage.

Key	Description	Valid input	Example
com.idsscheer.aris.ads.couchdb.admin.password	Password Specifies the administrator password for the CouchDB. Cross-tenant property that cannot be changed.	String. Initially, a password is set but it is not shown. This password can be overwritten.	
com.idsscheer.aris.ads.couchdb.admin.username	User name Specifies the administrator user name for the CouchDB. Cross-tenant property that cannot be changed.	String. Initial user name, which is not displayed. This user can be overwritten.	
com.idsscheer.aris.ads.couchdb.create.retry.count	Number of access attempts Specifies the number of repository access attempts before a timeout occurs. The default value is 10 attempts. This value should be increased only if problems occur with new clients when they log in to document storage for the first time.	Integer > 0, the default value is 10 attempts.	10
com.idsscheer.aris.ads.couchdb.create.retry.timer	Number of connection attempts before timeout Specifies the number of attempts allowed to connect to the repository. The default value is 10.	Integer > 0	1000
com.idsscheer.aris.ads.couchdb.host	Host Specifies the CouchDB host. Cross-tenant property that cannot be changed.	Fully qualified name	Server name.domain.domain addition
com.idsscheer.aris.ads.couchdb.port	Port Specifies the CouchDB port. Cross-tenant property that cannot be changed.	Integer > 0, but less than 65535	19975

Key	Description	Valid input	Example
com.idsscheer.aris.ads.couchdb.active	Use CouchDB Specifies whether or not any document management system can be used as the default document system (com.idsscheer.aris.ads.couchdb.active=false). Otherwise, ARIS document storage is used. The default is **allowed** (default value **true**). Cross-tenant property that cannot be changed.	true, false	

3.8.4.9.5 Which properties are available for quota and restrictions?

You can configure the quota and restrictions (page 193) for your document storage.

Key	Description	Valid input	Example
com.aris.ads.config.max.file size	Maximum file size Specifies the maximum allowed size (in kilobytes) for file uploads.	Integer > 0	0
com.aris.ads.config.storage. quota.limit	Quota limit Specifies the maximum total size (in kilobytes) of the document storage available to a tenant.	Integer > 0	0
com.aris.ads.config.storage. quota.usage	Quota usage Amount of storage already used (in kilobytes) by uploaded documents.	Integer > 0	9678
com.aris.ads.config.supporte d.filetypes.filter	Valid file extensions Specifies the list of allowed file extensions.	String	jpeg,jpg, png,gif,p df,doc,do cx,ppt,pp tx,pps,pp sx,odt,xls ,xlsx
com.aris.ads.config.supporte d.filetypes.filter.active	Restrict file types Specifies whether or not the file type filter (file extensions) is activated. The default is **not enabled** (default value **false**).	true, false	false
com.aris.ads.config.supporte d.mimetypes.filter	Allowed file types Specifies the list of allowed file types (MIME types).	String	text/plain ,text/pdf
com.aris.ads.config.supporte d.mimetypes.filter.active	Restrict file types Specifies whether or not the file type filter (MIME types) is activated. The default is **not enabled** (default value **false**).	true, false	false

3.8.4.9.6 Which WebDAV properties are available?

You can display the WebDAV settings (page 194) in your document storage.

Key	Description	Valid input	Example
com.softwareag.ads.webdav.repository	Repository Specifies the name of the repository for which WebDAV is to be available. There can only ever be one repository per tenant.	String	apg
com.softwareag.ads.webdav.tenant	Tenant Specifies the tenant for which a WebDAV mapping exists.	String	default

3.8.5 Collaboration

3.8.5.1 Customize Collaboration

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

Prerequisite

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

Procedure

1. Click **Configuration**.
2. Click **Collaboration**.
3. Click **Edit** in the row of the property you want to configure.

   If Collaboration is deactivated, the properties are also deactivated and cannot be edited.
4. Click a configuration category. The following categories are available:

GENERAL SETTINGS

Activate Collaboration

Activates Collaboration. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.enableECP

Create groups

Specifies whether or not creating groups in Collaboration is allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowCreationOfGroups

Create filter

Specifies whether or not creating filters in Collaboration is allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowCreationOfFilters

Enable Like button

Specifies whether or not the **Like** button is displayed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.enableLikeButton

Create comments

Specifies whether or not comments on content are allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowCommenting

Share content

Specifies whether or not sharing of content is allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowSharing

Create bookmarks

Specifies whether or not creating bookmarks is allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowBookmarks

Create tags

Specifies whether or not creating tags is allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowTags

Flag activities

Specifies whether or not flagging content is allowed. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowFlags

Allow tag filtering (My feed)

Specifies whether or not filtering using tags is allowed on the Collaboration start page. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowTagFilterInMainStream

Allow tag filtering (Portal)

Specifies whether or not filtering using tags is allowed in the **My activities** area. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowTagFilterInFullStream

Allow tag filtering (My portal feeds)

Specifies whether or not filtering using tags is allowed in the portal. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.allowTagFilterInCommentStream

Public access to portal feeds

Specifies whether posts to model feeds are visible only if a user is following the model feed or is a member of a group that is following the model feed.The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.filterPrivateFeeds

Use search operator 'OR' instead of 'AND'

Specifies whether or not filtering using tags is allowed in **My feed**. If an additional tag is activated, more entries are displayed in the list. The default is **allowed** (default value **true**). This corresponds to the following property: collaboration.optionsPage.tagsCloudSearchOperator

CONFIGURE USER GROUP

Enable all user groups

Enables that all ARIS user groups are displayed when posting in Collaboration. This corresponds to the following property: enableAllUserGroups

Configure visibility of user groups in the collaboration

Enables a single ARIS user group to be displayed when posting in Collaboration. This corresponds to the following property: userGroupsToHaveOwnFeedInCollaboration

You have configured your Collaboration.

3.8.5.2 Which properties are available for Collaboration?

The following can be customized in Collaboration.

Key	Description	Valid input
collaboration.optionsPage.enableECP	Activate Collaboration Activates Collaboration. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowCreationOfGroups	Groups Specifies whether or not creating groups in Collaboration is allowed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowCreationOfFilters	Filters Specifies whether or not creating filters in Collaboration is allowed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.enableLikeButton	Enable Like button Specifies whether or not the **Like** button is displayed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowCommenting	Create comments Specifies whether or not comments on content are allowed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowSharing	Share content Specifies whether or not sharing of content is allowed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowBookmarks	Create bookmarks Specifies whether or not creating bookmarks is allowed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowTags	Create tags Specifies whether or not creating tags is allowed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowFlags	Flag activities Specifies whether or not flagging content is allowed. The default is **allowed** (default value **true**).	true, false

Key	Description	Valid input
collaboration.optionsPage.allowTagFilterInMainStream	Allow tag filtering (My feed) Specifies whether or not filtering using tags is allowed on the Collaboration start page.	true, false
collaboration.optionsPage.allowTagFilterInFullStream	Allow tag filtering (Portal) Specifies whether or not filtering using tags is allowed in the **My activities** area. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.allowTagFilterInCommentStream	Allow tag filtering (My portal feeds) Specifies whether or not filtering using tags is allowed in the portal. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.filterPrivateFeeds	Public access to portal feeds Specifies whether posts to model feeds are visible only if a user is following the model feed or is a member of a group that is following the model feed. The default is **allowed** (default value **true**).	true, false
collaboration.optionsPage.tagsCloudSearchOperator	Use search operator 'OR' instead of 'AND' Specifies whether or not filtering using tags is allowed in **My feed**. If an additional tag is activated, more entries are displayed in the list. The default is **allowed** (default value **true**).	true, false
enableAllUserGroups	Enable all user groups Enables that all ARIS user groups are displayed when posting in Collaboration.	true, false
userGroupsToHaveOwnFeedInCollaboration	Configure visibility of user groups in the collaboration Enables a single ARIS user group to be displayed when posting in Collaboration.	true, false

3.8.6 Process Governance

3.8.6.1 Export configuration

You can export configurations in order to import them into any tenant or installation and use them there.

Prerequisite

- You have the **Technical configuration** function privilege.
- You have allowed pop-ups for the pages of ARIS Administration.

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Click **Export current configuration as a file**.

You can save the configuration file of Process Governance for further use at the relevant location.

3.8.6.2 Import configuration

You can import configurations into any tenant or installation and use them there.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Click **Import configuration as a file**.

The **Import configuration file** dialog opens. Navigate to the location where the configuration file is stored and import it. The new configuration is active immediately and no system restart is required.

3.8.6.3 Customize infrastructure settings

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Select **Infrastructure** in the list box.
5. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.
6. Adjust your settings.

Encrypted properties

Specifies the configuration properties with encrypted values in a comma-separated list. This corresponds to the following property: com.idsscheer.age.config.encrypted

Web service read timeout

Specifies the timeout for read access to a Web service in milliseconds. This corresponds to the following property: com.idsscheer.age.activity.ws.call.timeout

Log level

Specifies the log level relevant for logging messages in a log file. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.log.dblogger.severity

Log file output path

Specifies the output path for the system monitoring log files. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.log.monitoring.output.path

Maximum query result size

Specifies the maximum number of items that are to be returned by a single query. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.query.maxResults

Maximum execution time

Specifies the maximum execution time in milliseconds for activities that support a timeout. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.xe.maxExecDuration

Archive folder

Specifies the location of the folder used for archiving automatically generated processes. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.autodeploy.archive

Input folder

Specifies the location of the folder used for storing automatically generated processes. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.autodeploy.model

Stop process instance if notification fails

Specifies that running an process instance should fail if a notification cannot be successfully sent. This corresponds to the following property: com.aris.age.email.fail.instance.on.error

Simulate notifications

Specifies that notifications are not to be sent to their recipients. This corresponds to the following property: com.aris.age.email.simulate.only

Build number

Process Governance build number. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.version

7. Click **Save**.

You have customized your system configuration.

3.8.6.4 Customize Publishing

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Select **Publishing** in the list box.
5. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.
6. Adjust your settings.

Export to server hard drive

Specifies that a static export is to be saved on a hard drive of the server. This works only in a non-distributed scenario in which everything is installed on a single server.

If this value is set to false, the export is saved as a ZIP file to ARIS document storage and a link is generated. This corresponds to the following property:
com.idsscheer.age.serviceenabling.staticExport.exportToDisk

Static export directory

Specifies the directory for the static export. This corresponds to the following property:
com.idsscheer.age.serviceenabling.staticExport.exportDir

Static export link template

Specifies the template for the link to a static export that is generated via Web service. Cross-tenant property that cannot be changed. This corresponds to the following property:
com.idsscheer.age.serviceenabling.staticExport.wsServer

7. Click **Save**.

You have customized your system configuration.

3.8.6.5 Customize Reporting

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Select **Reporting** in the list box.
5. Click **Edit**.
6. Adjust your settings.

Default method language

Specifies the default method language for the ARIS services. This corresponds to the following property: com.idsscheer.age.serviceenabling.scriptrunner.defaultLanguage

7. Click **Save**.

You have customized your system configuration.

3.8.6.6 Customize workflow policies

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Select **Workflow policies** in the list box.
5. Click **Edit**.
6. Adjust your settings.

Exclude weekend

Specifies whether only work days are to be considered in an escalation. This corresponds to the following property: com.idsscheer.age.days.workingdays.enabled

Weekend days

Specifies which days of the week represent the weekend in a five-day week. The week starts on Sunday (day 1) and ends on Saturday (day 7). This corresponds to the following property: com.idsscheer.age.days.off

Public holidays

Defines the public holidays. This corresponds to the following property: com.idsscheer.age.days.publicholidays

E-signature (double authentication)

Specifies whether or not reentering the password is necessary when completing tasks. This corresponds to the following property: com.idsscheer.age.e.signature.enabled

Reminder notification threshold

Specifies whether a reminder notification is to be sent when X% of the amount of time that is expected to elapse until the due date have already been consumed. This corresponds to the following property: com.idsscheer.age.reminder.notification.time

Notify when a substitute is activated

Specifies whether or not a notification is sent when a substitute is configured for ARIS Process Board. This corresponds to the following property: com.idsscheer.age.substitution.notification.enabled

Allow task delegation

Specifies whether or not delegation of tasks to other users (Delegate/Substitution) is allowed. This corresponds to the following property: com.idsscheer.age.taskList.delegation.enabled

Confirm start of task execution

Specifies centrally for all users whether or not the confirmation dialog is displayed when a task is started in ARIS Process Board for the first time. This corresponds to the following property: com.idsscheer.age.taskList.startTaskConfirmation.enabled

7. Click **Save**.

You have customized your system configuration.

3.8.6.7 Customize pools

You can customize your system configuration to meet your requirements. You carry out this part of the configuration in ARIS Administration.

Prerequisite

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

Procedure

1. Click your user name and select **Administration**.
2. Activate the **Configuration** tab.
3. Click **Process Governance**.
4. Select **Pools** in the list box.
5. Click **Edit**.

   The **Cross-tenant** symbol indicates that the settings made apply to all tenants on this server and cannot be changed.
6. Adjust your settings.

Job service thread pool size

Specifies the number of threads to be used by the job service. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.job.service.threadsNumber

Simulation pool size

Specifies the size of the pool containing simulated process instances. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.simulation.instanceExecutorsPool.size

Dispatch worker thread pool size

Specifies the pool size for dispatch worker threads. Cross-tenant property that cannot be changed. This corresponds to the following property: com.idsscheer.age.xe.dispatch.workersPool.size

7. Click **Save**.

You have customized your system configuration.

3.8.6.8 Set up sending notifications to Process Governance administrators

You can specify that Process Governance administrators receive e-mail notifications if problems occur during process execution.

USERS MODELED IN AN ORGANIZATIONAL CHART RELEVANT TO PROCESS GOVERNANCE

Procedure

1. Assign the relevant users Process Governance administrator privileges.
2. Also, specify the **E-mail address** attribute for the Process Governance administrators.

   Make sure that the following entry is specified in the file **age-configuration.properties** in the installation directory of **ARIS\server\bin\work\work_apg_s\base\config**: **com.idsscheer.age.errorNotification.toPA.enable** (enables Process Governance administrators to receive e-mails; value: **true**).

   Depending on the installation, the subdirectory **work_apgs** may also be called **work_apgm** or **work_apgl**.

The Process Governance administrators will automatically receive an e-mail if problems occur during process execution, e.g., if an error occurs during execution of an automated task or if the recipient of an e-mail message has not been entered as a user.

USERS NOT MODELED IN AN ORGANIZATIONAL CHART RELEVANT TO PROCESS GOVERNANCE

Procedure

1. Make sure that the following entry is specified in the file **age-configuration.properties** in the installation directory of **ARIS\server\bin\work\work_apg_s\base\config**: **com.idsscheer.age.errorNotification.toPA.enable** (enables Process Governance administrators to receive e-mails; value: **true**).

   Depending on the installation, the subdirectory **work_apgs** may also be called **work_apgm** or **work_apgl**.
2. Ensure that the following entries are specified:

   - **com.idsscheer.age.admin.address** (e-mail address of the Process Governance administrator)

   - **com.idsscheer.age.errorNotification.toPA.enable** (enables Process Governance administrators to receive e-mails; value: **true**)
3. Save and close the file.
4. Restart Process Governance.

Users for whom you have specified the relevant information will automatically receive an e-mail if problems occur during process execution, e.g., if an error occurs during execution of an automated task or if the recipient of an e-mail message has not been entered as a user.

3.8.6.9 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.8.6.9.1 Which infrastructure properties are available?

You can configure your infrastructure (page 211) of Process Governance.This is where you find an overview of keys and value pairs.

Key	Description	Valid input	Example
com.idsscheer.age.config.encrypted	Encrypted properties Specifies the configuration properties with encrypted values in a comma-separated list.	String	
com.idsscheer.age.activity.ws.call.timeout	Web service read timeout Specifies the timeout for read access to a Web service in milliseconds.	43200000	Number > 0
com.idsscheer.age.log.dblogger.severity	Log level Specifies the log level relevant for logging messages in a log file. Cross-tenant property that cannot be changed.		Number > 0
com.idsscheer.age.log.monitoring.output.path	Log file output path Specifies the output path for the system monitoring log files. Cross-tenant property that cannot be changed.	Path on a server	
com.idsscheer.age.query.maxResults	Maximum query result size Specifies the maximum number of items that are to be returned by a single query. Cross-tenant property that cannot be changed.		
com.idsscheer.age.xe.maxExecDuration	Maximum execution time Specifies the maximum execution time in milliseconds for activities that support a timeout. Cross-tenant property that cannot be changed.	43200000	Number > 0

Key	Description	Valid input	Example
com.idsscheer.age.autodeploy.archive	Archive folder Specifies the location of the folder used for archiving automatically generated processes. Cross-tenant property that cannot be changed.		
com.idsscheer.age.autodeploy.model	Input folder Specifies the location of the folder used for storing automatically generated processes. Cross-tenant property that cannot be changed.		
com.aris.age.email.fail.instance.on.error	Stop process instance if notification fails Specifies that running an process instance should fail if a notification cannot be successfully sent. The default is **allowed** (default value **true**).	true, false	true
com.aris.age.email.simulate.only	Specifies that notifications are not to be sent to their recipients. The default value is **false**.	true, false	false
com.idsscheer.age.version	Build number Process Governance build number. Cross-tenant property that cannot be changed.		

3.8.6.9.2 Which publishing properties are available?

You can configure the publishing (page 213) of Process Governance. This is where you find an overview of keys and value pairs.

Key	Description	Valid input	Example
com.idsscheer.age.serviceenabling.staticExport.exportToDisk	Export to server hard drive Specifies that a static export is to be saved on a hard drive of the server. This works only in a non-distributed scenario in which everything is installed on a single server. If this value is set to false, the export is saved as a ZIP file to ARIS document storage and a link is generated.	true, false; the default value is true.	true
com.idsscheer.age.serviceenabling.staticExport.exportDir	Static export directory Specifies the directory for the static export.	<Installation directory>/server/bin/work/work_apg_m/base/webapps/aris/apgstatic	D:/ARIS9.5/server/bin/work/work_apg_m/base/webapps/aris/apgstatic
com.idsscheer.age.serviceenabling.staticExport.wsServer	Static export link template Specifies the template for the link to a static export that is generated via Web service. Cross-tenant property that cannot be changed.	http://Process Governance_server/aris/apgstatic/<GUID>	http://Process Governance_server/aris/apgstatic/234ekmfhkdsau4w58

3.8.6.9.3 Which reporting properties are available?

You can configure Reporting (page 214) of Process Governance. This is where you find an overview of keys and value pairs.

Key	Description	Valid input	Example
com.idsscheer.age.serviceenabling.scriptrunner.defaultLanguage	Default method language Specifies the default method language for the ARIS services.	en_US	en_US, de_DE

3.8.6.9.4 Which properties are available for workflow policies?

You can configure the workflow policies (page 215) of Process Governance.

Key	Description	Valid input	Example
com.idsscheer.age.days.workingdays.enabled	Exclude weekend Specifies whether only work days are to be considered in an escalation.	true, false	
com.idsscheer.age.days.off	Weekend days Specifies which days of the week represent the weekend in a five-day week. The week starts on Sunday (day 1) and ends on Saturday (day 7).	String	1,7 Weekends Saturday and Sunday.
com.idsscheer.age.days.publicholidays	Public holidays Defines the public holidays.	Date	01.01,07.01,08.03,...
com.idsscheer.age.e.signature.enabled	E-signature (double authentication) Specifies whether or not reentering the password is necessary when completing tasks.	true, false	false
com.idsscheer.age.reminder.notification.time	Reminder notification threshold Specifies whether a reminder notification is to be sent when X% of the amount of time that is expected to elapse until the due date have already been consumed.	Number > 0	75
com.idsscheer.age.substitution.notification.enabled	Notify when a substitute is activated Specifies whether or not a notification is sent when a substitute is configured for ARIS Process Board.	true, false	false
com.idsscheer.age.taskList.delegation.enabled	Allow task delegation Specifies whether or not delegation of tasks to other users (Delegate/Substitution) is allowed.	true, false	true
com.idsscheer.age.taskList.startTaskConfirmation.enabled	Confirm start of task execution Specifies centrally for all users whether or not the confirmation dialog is displayed when a task is started in ARIS Process Board for the first time.	true, false	true

3.8.6.9.5 Which properties are available for pools?

You can configure thread pool (page 216)s of Process Governance. This is where you find an overview of keys and value pairs.

Key	Description	Valid input	Example
com.idsscheer.age.job.service.threadsNumber	Job service thread pool size Specifies the number of threads to be used by the job service. Cross-tenant property that cannot be changed.	Integer > 0	8
com.idsscheer.age.simulation.instanceExecutorsPool.size	Simulation pool size Specifies the size of the pool containing simulated process instances. Cross-tenant property that cannot be changed.	Integer > 0	5
com.idsscheer.age.xe.dispatch.workersPool.size	Dispatch worker thread pool size Specifies the pool size for dispatch worker threads. Cross-tenant property that cannot be changed.	Integer > 0	16

3.9 Documents

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

Access restriction (page 227) 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 (page 245) are deleted automatically after the executable process is terminated. Permanent documents (page 245) 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 2010 or Microsoft® Sharepoint 2013 to ARIS.

3.9.1 Use ARIS document storage with WebDAV

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

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

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

Procedure

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

6. Restart Microsoft® Windows.

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

3.9.2 Log in to ARIS document storage

Before you can use ARIS document storage, you must log in to ARIS document storage.

Prerequisite

You have a ARIS Connect Server license.

Procedure

1. If you use ARIS Connect, enter the URL for ARIS Connect in the following form:

   `<Your ARIS Connect server>`
2. Log in to ARIS document storage.
3. Click **Documents**.

You can now work with ARIS document storage.

3.9.3 Folder

3.9.3.1 Create folder in ARIS document storage

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the arrow to open the menu.
5. Click **Add folder**.
6. Enter a name for the folder, and click **OK**.

You have created a new folder.

3.9.3.2 Display folder properties

You can view the properties of a folder.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder, and click the arrow to open the menu.
4. Click **Properties**.

The properties (page 253) of the folder are displayed.

3.9.3.3 Edit folder properties

You can edit the properties of a folder.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder, and click the arrow to open the menu.
4. Click **Properties**. The properties (page 253) of the folder are displayed.
5. Click **Edit**.

You can edit the properties (page 253) of the folder.

3.9.3.4 Delete folder in ARIS document storage

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the arrow to open the menu.
5. Click **Delete**. The **Confirmation** dialog opens.
6. Click **OK**.

You have deleted the folder.

3.9.3.5 Restrict access to folders

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

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder, and click the arrow to open the menu.
4. Click **Properties**.
5. Click **Access privileges** (page 253).
6. Click **Change user group association**. The **Associate user groups** (page 253) dialog opens.
7. Enable the check boxes of the relevant items in the box of the available items, and click **Add**. The items are transferred to the box of the assigned items. To remove items from the **Assigned items** box, enable the check boxes of the relevant items in this box, and click **Remove**.
8. Click **Save**.

You have restricted access to ARIS document storage folders.

3.9.4 Work with documents

3.9.4.1 Add documents to ARIS document storage

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click **Upload**. The **Upload document** (page 249) dialog opens.
5. Enter the relevant optional additional information, and click **OK**.

You have added a document to ARIS document storage.

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

3.9.4.2 Open/Download document

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.

   Click **Download** in the document row.

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

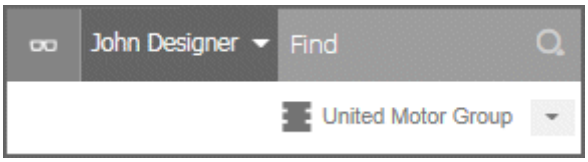
The document opens if the software required for opening the document is available on your local system.

3.9.4.3 Find a document

You can begin the search (page 321) for items directly on the start page of ARIS Connect.

Procedure

1. If necessary, select the database (page 289) 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 328) will be shown as you enter the term. As you complete the term, the list will be updated.
4. In the list, click the entry to which you want to navigate.

The document will open.

3.9.4.4 Show links of a document

You can display the links of a document, for example, the ARIS models in which the document is used.

Procedure

1. Log in to ARIS document storage (page 224).
2. Click a folder in the navigation.
3. Click the relevant document.
4. Click **Open properties**.
5. Click **Relationships**.

The properties of the document are displayed.

3.9.4.5 Select document manager

You can edit the properties of a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Open properties**.
6. Click **Edit**.
7. Next to the **Person responsible** box, click **Edit**.

   The **Select person responsible** dialog opens.

You can select the person responsible for the document.

3.9.4.6 Upload version of a document

If you have edited a document after downloading it and want to update this version in ARIS document storage, you can upload the new version in your ARIS document storage.

Prerequisite

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

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click **Upload new version of this document** in the document row.

The dialog for uploading a document opens.

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

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

3.9.4.7 Sort versions of a document

You can sort versions of a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click a document.
5. Click **Versions**.
6. Click a column title.

The document versions are sorted.

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

3.9.4.8 Move document

You can move a document to another folder.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click **Move to another folder** in the **Actions** bar of the relevant document. The **Move document** dialog opens.
5. Select the relevant folder, and click **OK**.

You have moved the document to another folder.

3.9.4.9 Show version history

You can show the version history of a document. If a document is changed and uploaded again, a version history is created automatically.

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Versions**.

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

3.9.4.10 Show version of a document

You can show the version history of a document. If a document is changed and uploaded again, a version history is created automatically.

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Versions**.
6. In the row of the relevant version, click **Open version**.
7. Select **Open with** in your browser.

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

3.9.4.11 Delete version of a document

If a document is changed and uploaded again, a version history is created automatically. You can delete all versions of a document except for the last.

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Versions**.
6. In the row of the relevant version, click **Delete**.
7. Click **Delete version**.
8. A confirmation prompt is displayed. Click **OK**.

You have deleted this version of the document from ARIS document storage.

3.9.4.12 Lock document

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Lock document**.

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

3.9.4.13 Unlock document

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Unlock document**.

The document can be edited by other users.

3.9.4.14 Rename document

You can rename a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Enter the new name in the **File name** box.
6. Click **Save**.

The name has been changed.

3.9.4.15 Browse ARIS document storage

You can search for a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. Depending on your installation, you can also click **Attributes** to refine your search so that you restrict the search to metadata, to contents, or to metadata and contents. You can also specify that the term is to be searched only in the current version.
3. Enter the search term.

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

3.9.4.16 Delete document

You can delete documents from ARIS document storage.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the arrow to navigate in the structure, and select the folder containing the relevant document.
5. Click **Delete** in the **Actions** bar of the relevant document. A confirmation prompt is displayed.
6. Click **OK**.

The document is deleted.

Tip

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

3.9.4.17 Delete documents permanently

You can delete documents permanently from ARIS document storage.

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click **Administrative actions**.
5. Click **Permanently delete deleted documents from document storage**. A confirmation prompt is displayed.
6. Click **OK**.

All documents already deleted in this folder are deleted permanently.

3.9.4.18 Upload multiple documents

You can upload multiple documents.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click **Upload new version of this document** in the document row.

   The dialog for uploading a document opens.
5. Enter the relevant optional additional information, and click **OK**.

You have uploaded documents.

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

3.9.4.19 Download multiple documents

You can download multiple documents.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Enable the check boxes in front of the relevant documents.
5. Click **Download selected documents**.

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

Tip

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

3.9.4.20 Move multiple documents

You can move documents to another folder.

Prerequisite

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

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Enable the check boxes in front of the relevant documents.
5. Click **Move to another folder**. The **Move document** dialog opens.
6. Select the relevant folder, and click **OK**.

You have moved the document to another folder.

Tip

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

3.9.4.21 Delete several documents at once

You can delete several documents at once.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click in the check boxes of the documents you want to delete.
5. On the top right, click **Delete selected documents**. A confirmation prompt is displayed.
6. Click **OK**.

The selected documents are deleted.

Tip

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

3.9.5 Metadata for documents

3.9.5.1 Define custom metadata for documents

You can define custom metadata for documents saved in ARIS document storage. You can define attributes of type **String** or **Value**. If you define an attribute of type **Value**, you need to specify the allowed value range. For example, this user-defined metadata could be the color (green, blue, yellow) or the company size (small, medium, large). This metadata can be used to classify documents and is displayed in the properties (page 241) of a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. Click **ARIS document storage**.
3. Click the arrow to open the menu.
4. Click ARIS document storage, and click the arrow to open the menu.
5. Click **Properties**. The properties (page 253) of the folder are displayed.
6. Click **Attribute types**.
7. Click Add. The **Add attribute type** dialog opens.

You have defined custom metadata.

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

3.9.5.2 Edit values of custom metadata

You can delete custom metadata.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. Click **ARIS document storage**.
3. Click the arrow to open the menu.
4. Click ARIS document storage, and click the arrow to open the menu.
5. Click **Properties**. The properties (page 253) of the folder are displayed.
6. Click **Attribute types**.
7. Select the custom attribute type to be edited and click **Edit**.

You have edited values of custom metadata.

3.9.5.3 Delete custom metadata

You can delete custom metadata.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. Click **ARIS document storage**.
3. Click the arrow to open the menu.
4. Click ARIS document storage, and click the arrow to open the menu.
5. Click **Properties**. The properties (page 253) of the folder are displayed.
6. Click **Attribute types**.
7. Select the custom attribute type to be deleted and click **Delete**.

You have deleted custom metadata.

3.9.5.4 Display document properties

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Open properties**.

The properties of the document are displayed.

3.9.5.5 Edit document properties

You can edit the properties of a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Open properties**.
6. Click **Edit**.

You have edited the properties of the document.

3.9.5.6 Edit document tags

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

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Open properties**.
6. Click **Edit**.
7. Enter a new tag and click **Add**.

You have edited the tags of the document.

3.9.5.7 Delete tags of a document

You can delete the tags of a document.

Prerequisite

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

Procedure

1. Log in to ARIS document storage (page 224).
2. In the navigation, click the arrow next to **ARIS document storage**.
3. Click a folder in the navigation.
4. Click the relevant document.
5. Click **Open properties**.
6. Click **Edit**.
7. Enter a new tag and click **Delete**.

You have deleted a tag.

3.9.6 Display charts for documents

You can display various charts for documents.

Prerequisite

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

Procedure

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

The charts for documents are displayed.

3.9.7 Log out of ARIS document storage

You can log out of ARIS document storage.

Procedure

Click **Log out**.

The entire ARIS Administration closes.

3.9.8 Configure jobs for ARIS document storage

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

Procedure

1. Click **Configuration**.
2. Click **Document storage**.
3. Find the string **com.idsscheer.aris.ads.batch.fire** and enter the time at which a lock should be automatically removed - e.g., **0 0 2 * * ?**, if a job is supposed to run every night at 2:00 a.m.

   The time in the strings must be a CRON expression.

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

3.9.9 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

3.9.9.1 What are permanent documents?

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

You can set up (page 227) access restrictions on the folder level for permanent documents.

If you use Process Governance, it is recommended that you specify that documents are to be saved permanently in ARIS document storage when modeling a dialog for an executable process, otherwise the location for these documents within ARIS document storage cannot be specified in the dialog. These documents are called temporary documents (page 245).

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

3.9.9.2 What are temporary documents?

Temporary documents are documents that were not explicitly uploaded to ARIS document storage, but were added to the process during process instance runtime if you use Process Governance. They can be transformed into permanent documents and added (page 228) to ARIS document storage, if required.

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

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

3.9.9.3 Which options are available for models or objects?

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

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

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

The second option includes direct attachment to an object or model in the ARIS Connect Model Editor (page 375). This is marked by the or link symbols.

3.9.9.4 Which external document management systems can you use?

Only one external document management system may be used. This is where permanent documents (page 245) are managed. The storage for temporary documents (page 245) is not affected by this.

These are available:

- Microsoft® SharePoint 2010
- Microsoft® SharePoint 2013

3.9.9.5 What charts are available for documents?

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

This chart displays just an information.

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

3.9.9.5.2 What does the 'Used space' chart show?

This chart is a speedometer display.

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

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

This chart is a bar chart.

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

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

This chart is a bar chart.

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

3.9.9.5.5 What does the 'Largest documents' chart show?

This chart is a bar chart.

It shows the 20 largest documents including their file size.

3.9.9.5.6 What does the 'Latest documents' chart show?

This chart is a simple list.

This chart shows the 15 latest documents.

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

This chart is a pie chart.

It shows the distribution and number of documents in the various document statuses. Document statuses are **In progress**, **Under review**, **Reviewed**, **Rejected**, and **Published**.

3.9.9.5.8 What does the 'Outdated documents' chart show?

This chart is a simple list.

This chart shows the 15 oldest documents.

3.9.10 Pages

3.9.10.1 'Add attribute type' page

Enables the definition of custom metadata for documents saved in ARIS document storage.

Type
Specifies the type of the attribute.

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

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

Add
Adds a value to the list of allowed values for an attribute of type **Value**.

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

3.9.10.2 'Associate user groups' page

Restricts folder access privileges to the user groups associated.

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

AVAILABLE USER GROUPS

User group name
Displays the name of the user group.

Add
Adds the selected user group to the list of selected user groups.

Add all
Adds all user groups displayed to the list of selected user groups.

Remove
Removes the selected user group from the list of selected user groups.

Remove all
Removes all user groups from the list of selected user groups.

SELECTED USER GROUPS

User group name
Displays the name of the user group.

Save
Saves the settings specified.

Cancel
Discards the settings and closes the dialog.

3.9.10.3 'Select person responsible' page

Displays all ARIS Design Server users.

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

User name
Displays the user names.

Full name
Displays the full name of the user.

3.9.10.4 'Upload document' page

Enables the upload of the required document.

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

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

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

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

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

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

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

Delete individual tag

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

Delete all tags

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

Find

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

3.9.10.5 'Select document' page

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

ARIS document storage

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

Microsoft® SharePoint 2010

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

Properties

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

Previous version

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

Add to selection

Adds the selected document to the document selection.

Clear selection

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

Remove document

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

EXPLORER TAB

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

Selected documents

Displays the list of documents already included in the selection.

FIND TAB

Find what

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

Search result
Displays the documents that match the search criteria.

Selected documents
Displays the list of documents already included in the selection.

3.9.10.6 'Associate user groups' page

Displays the access privileges for a folder in ARIS document storage.

Associated user groups
Shows the user groups with access to the selected folder in ARIS document storage.

3.9.10.7 'Document details' page

Displays document properties.

DOCUMENT DETAILS

File name
Displays the name of the document.

Path
Displays the path to the document.

Title
Displays the title of the document.

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

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

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

ID
Displays the ID of the document.

File size
Displays the size of the file.

Person responsible
Shows the name of the owner of this document.

Locked by
Displays who has opened or locked the selected document.

Created by
Displays who created the document in ARIS document storage.

Created on
Displays the creation date of the document.

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

Link
Displays the link to the physical location.

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

Add tags
Input field for new tags. These are transferred when you click the plus sign.

3.9.10.8 'Document versions' page

Displays the list of document versions.

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

Size
Displays the size of the file.

Changed on
Displays the change date of the respective document version.

Changed by
Displays who edited this version of the document.

Comment
Comment that was entered during the upload of a new version of the document.

3.9.10.9 'Select folder' page

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

New folder
Creates a new folder.

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

3.9.10.10 'Folder details' page

Displays the properties of a folder.

DETAILS

Folder name
Displays the name of the folder.

Path
Displays the path to the folder.

ID
Displays the ID of the folder.

Created by
Displays who created the folder in ARIS document storage.

Created on
Displays the creation date of the folder.

Access privileges
Displays, who has access privilieges to the specific folder.

3.9.10.11 'Select tags' page

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

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

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

3.9.10.12 'Access privileges' page

Displays the properties of a folder in ARIS document storage.

Pass on access privileges to all subfolders
Activates the function based on which the privileges defined for a folder also apply to its subordinate folder.

Add
Allows the users of the selected user groups to access this folder from ARIS document storage.

Add all
Allows access to the selected folder for the users of all user groups.

Remove
Removes the access privilege for the users of the selected user group for this folder in ARIS document storage.

Remove all
Removes the access privileges for all user groups.

Save
Saves the access privileges for the user groups.

Cancel
Discards all changes to settings.

3.9.10.13 'Versions' page

Displays the versions of a document.

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

Size
Displays the size of the file.

Changed on
Shows the date a document version was changed.

Changed by
Shows which user changed a version of a document.

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

3.9.10.14 'Relationships' page

Displays the relationships of a document.

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

- The document is connected to a model via a link (**ARIS document storage** attribute type group)

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

- The document is connected directly to a model (**ARIS_Model**)

- The document is connected directly to an object (**ARIS_OBJECT**)

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

3.9.10.15 'History' page

Displays the history of a document.

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

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

Event
Shows the change made, e.g., an update of the document relationship or a change to a document's metadata.

Details
Shows the event in detail.

4 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 (page 65), and the published databases (page 64) your administrator selected, the function and content of the portal may vary. In the following, the functions of the classic view (page 90) and the default view (page 91) are described.

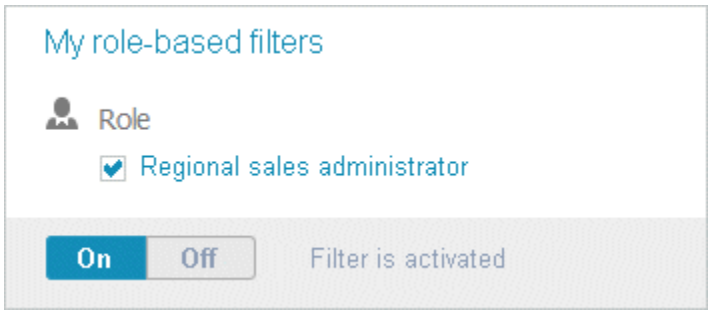
4.1 Classic view

The classic view shows all content relevant to you in a clear structure under Home (page 257), Groups (page 258), and Glossary (page 288).

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page 13).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 310) to your user in models and the portal has been configured for the use of role filters.

To activate the relevant role, click **Select role filter** on the left of your user name, and click **On**.



In the portal, you now see only information from all models in which the selected role occurs. Models of **Value-added chain diagram** type is always shown with an active role filter independent if the model contains the role or not.

WHAT INFORMATION IS FILTERED?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 312), 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.

If your administrator has published multiple databases (page 64), these are offered to you for selection United Motor Group . You can switch between the published databases as required.

You can adjust window partitioning by changing the bar size, e.g., the size of the **Navigation** and **Attributes** bars.

To adjust the space for specific window areas, drag the mouse pointer to the dashed border of a bar. The mouse pointer shows the directions in which you can drag the bar border:

Keep the mouse button pressed, drag the mouse pointer in the required direction, and release the mouse button.

4.1.1 Home

The **Overview** page provides a well-structured entry point for accessing the portal.

The overview is divided into the **Start** and **Recent changes** tabs.

START

The following links are available on the tab:

Create model ( )
Opens the **Create model** dialog that you use for easily creating models (page 304).

Find people ( )
Activates Collaboration where you find people (page 359) you want to discuss with, for example.

Start discussion ( )
Activates Collaboration where you can start a new discussion (page 359).

Process Board ( )
Opens the 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 329) 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 have been changed recently.

MY CONTENT

Shows the current activities you are following in Collaboration (page 360) or in the portal (page 309).

FAVORITES

Offers the direct access to saved filter criteria (Seite 316) of the **Favorites** area of the search.

CONTACTS

Lists your contacts.

4.1.2 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 309) and **Comment** (page 303) and the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

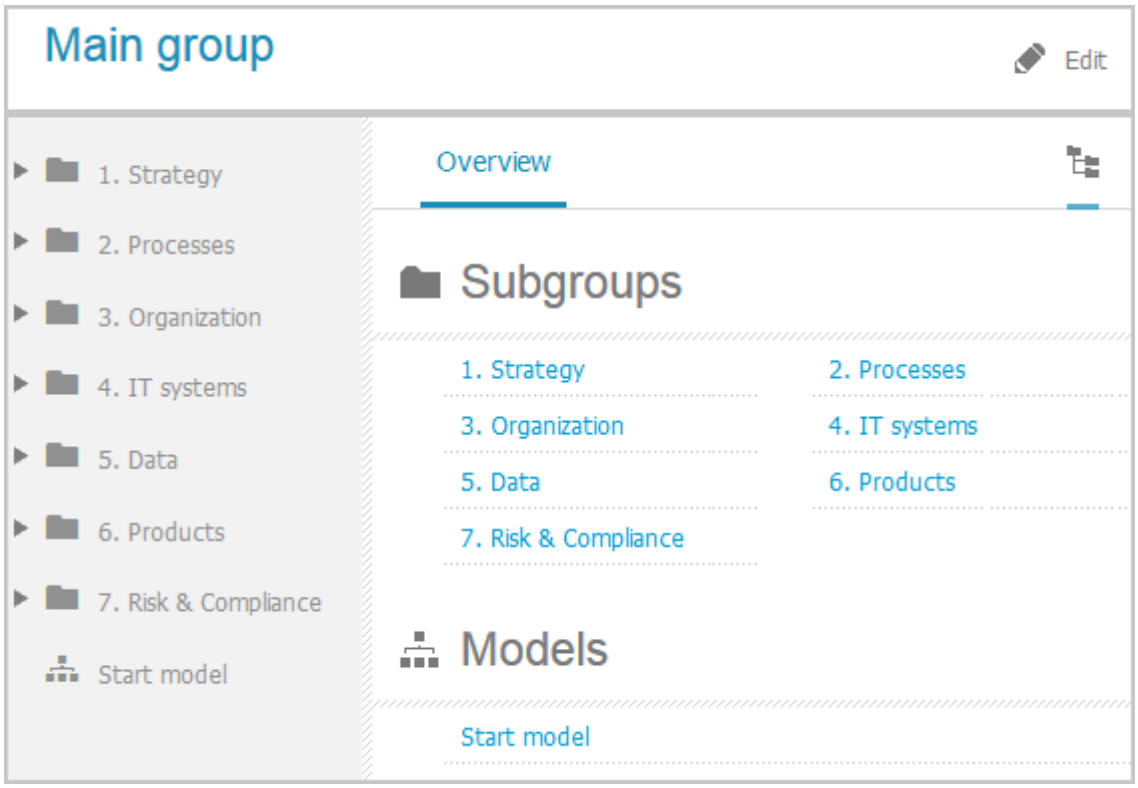
Click **Share model** to share models with other users (page 308). Click **Submit change request** to send change requests to the process manager (page 292). The function **Start governance process** (page 315) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes (page 306) 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 337), create new or reuse existing items (page 332), as well as delete items (page 334).

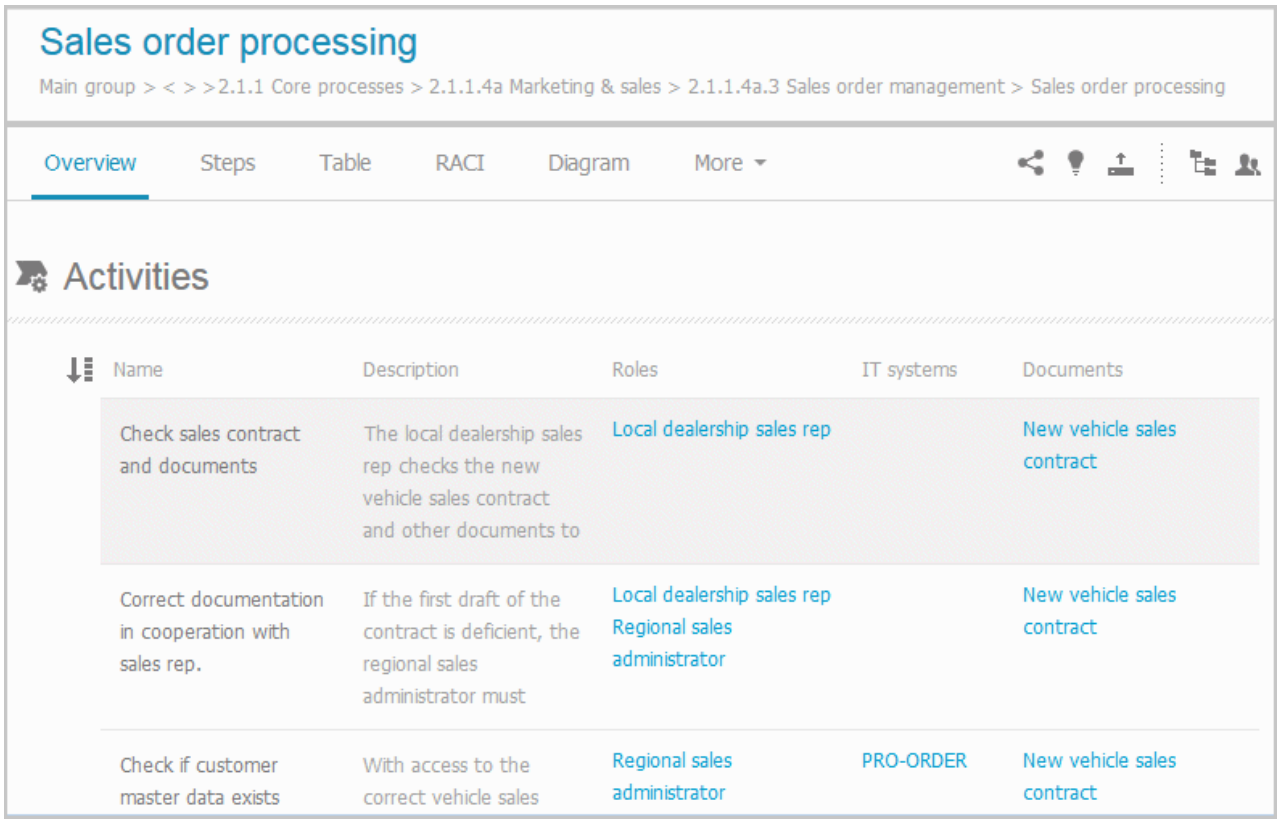
Group items of ARIS models

OVERVIEW

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

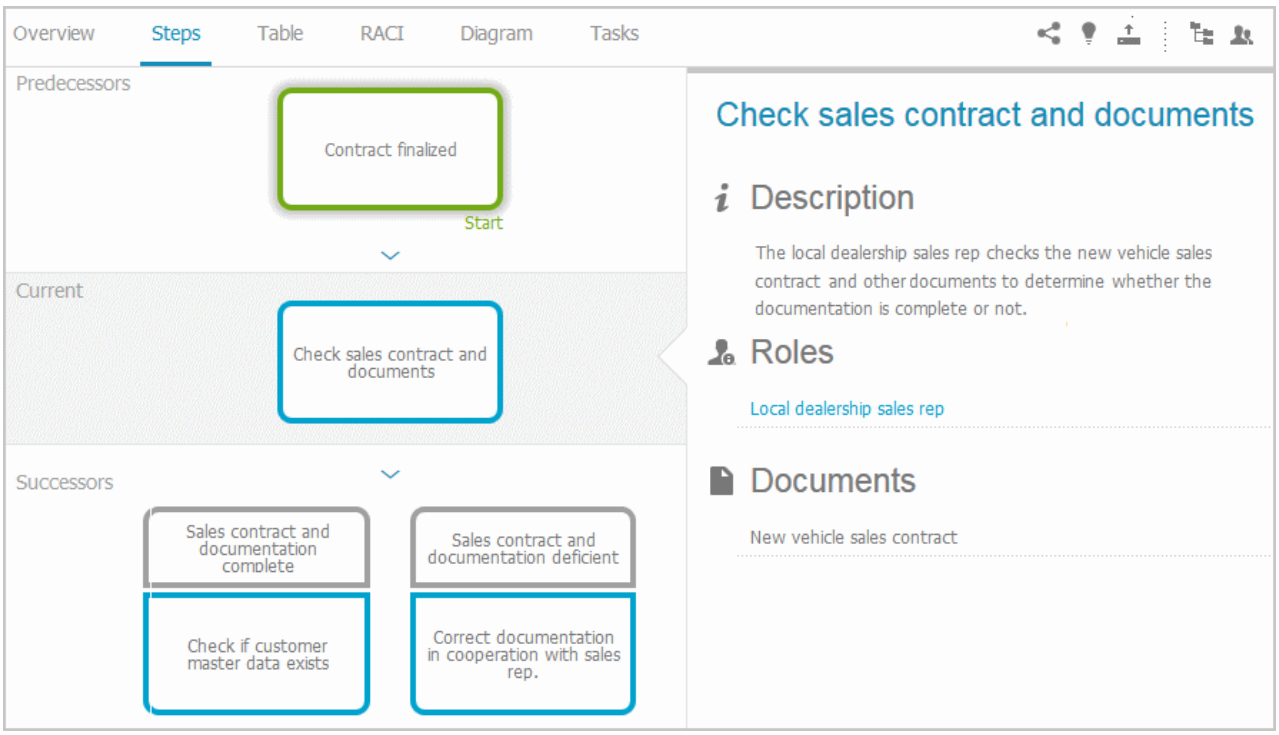


The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



STEPS

Transparently displays all steps of a process (EPC) (page 312). 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

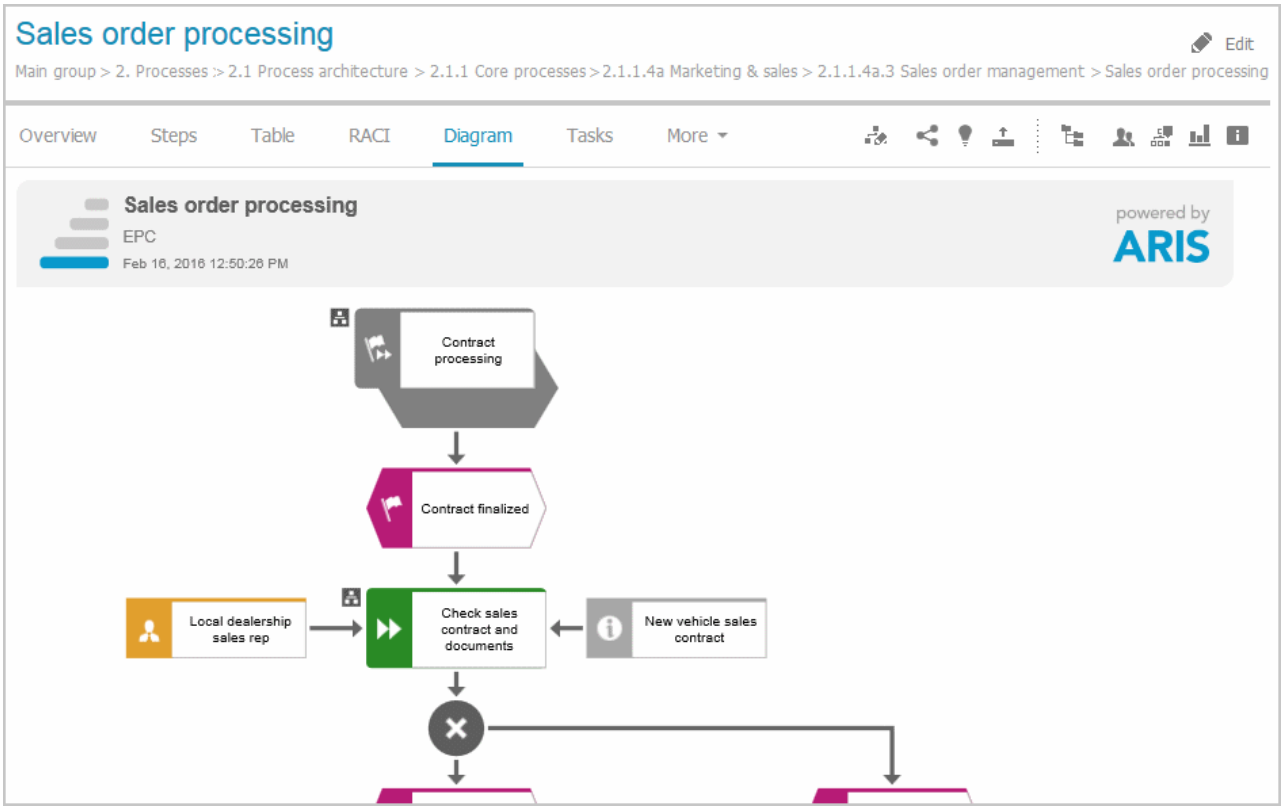
RACI matrices are displayed only if RACI information is available for this process (page 349). Using the button you can sort the matrices by process flow.

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.

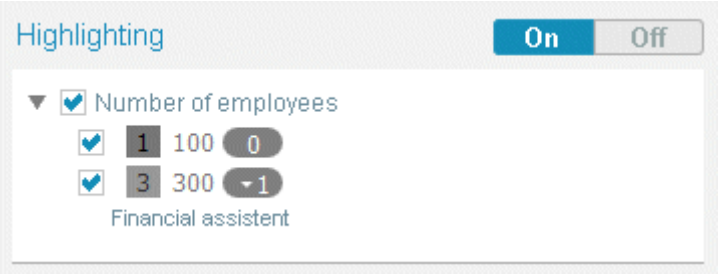
Click **Properties** to view all attributes specified. If you have selected an object, the attributes for that object are displayed. Click **More** to see related objects or occurrences. The model's properties are shown if no object is selected.

Attributes More

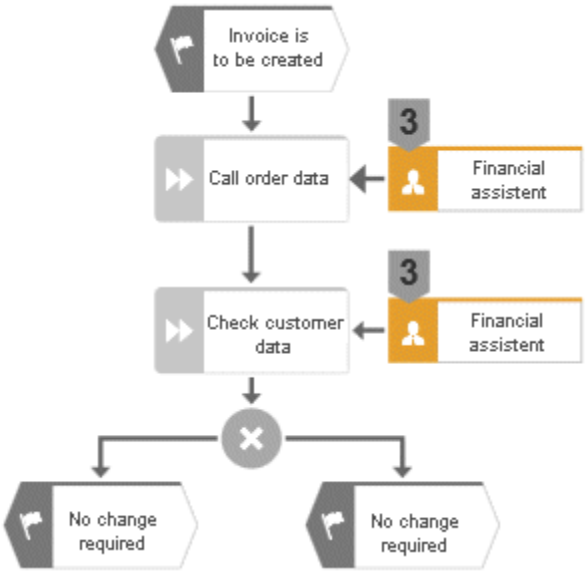
Attribute	Attribute value
Name	Organizational chart
Remark/Example	Organization
Type	Structural element
Time of generation	Apr 18, 2017 11:20:25 AM
Creator	w.becker
Last change	Aug 18, 2019 11:25:00 AM
Last user	system

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

Highlighting is not a standard functionality. They are integrated in the demo database only as an example. Before you can use highlighting, this needs to be configured. Please contact your local Software AG sales organization (http://softwareag.com).



The objects are then highlighted in the diagram. In this example, the **Financial assistant** object is highlighted because it meets the **Number of employees = 300** criterion. All other objects are displayed in grayscale.

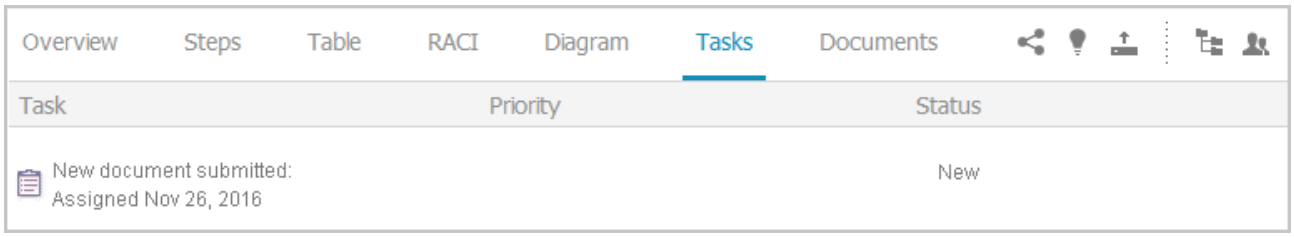


ASSIGNMENTS

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.

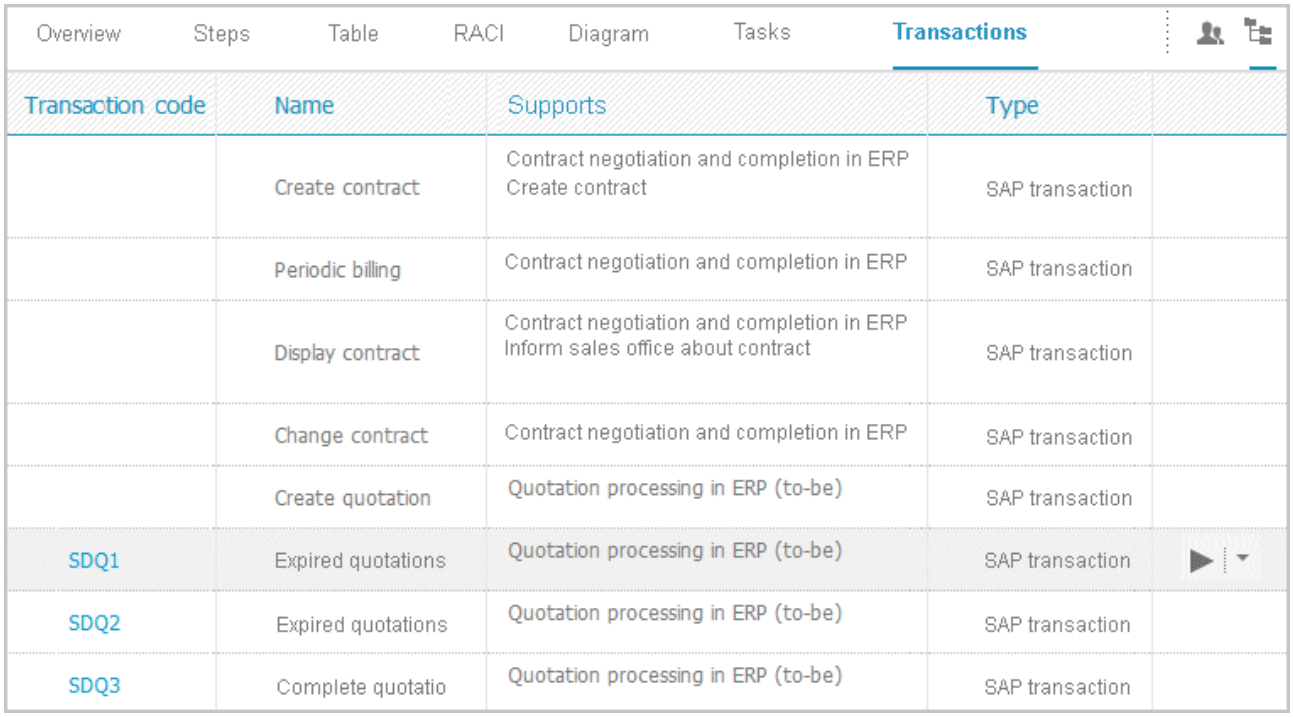
TASKS

Shows your tasks, e.g., mini workflows or APG processes and opens them for editing in ARIS Process Board (page 4).

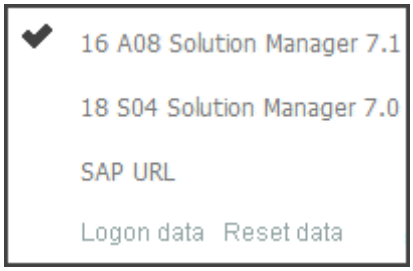


TRANSACTIONS

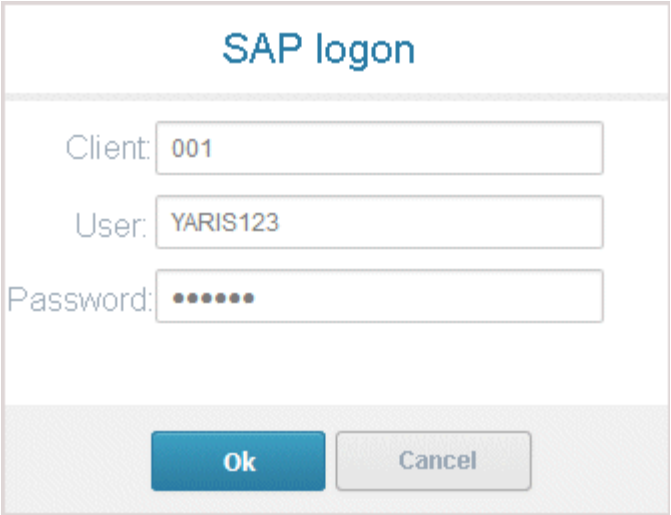
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page 67) in the portal.



You can start (page 345) 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.

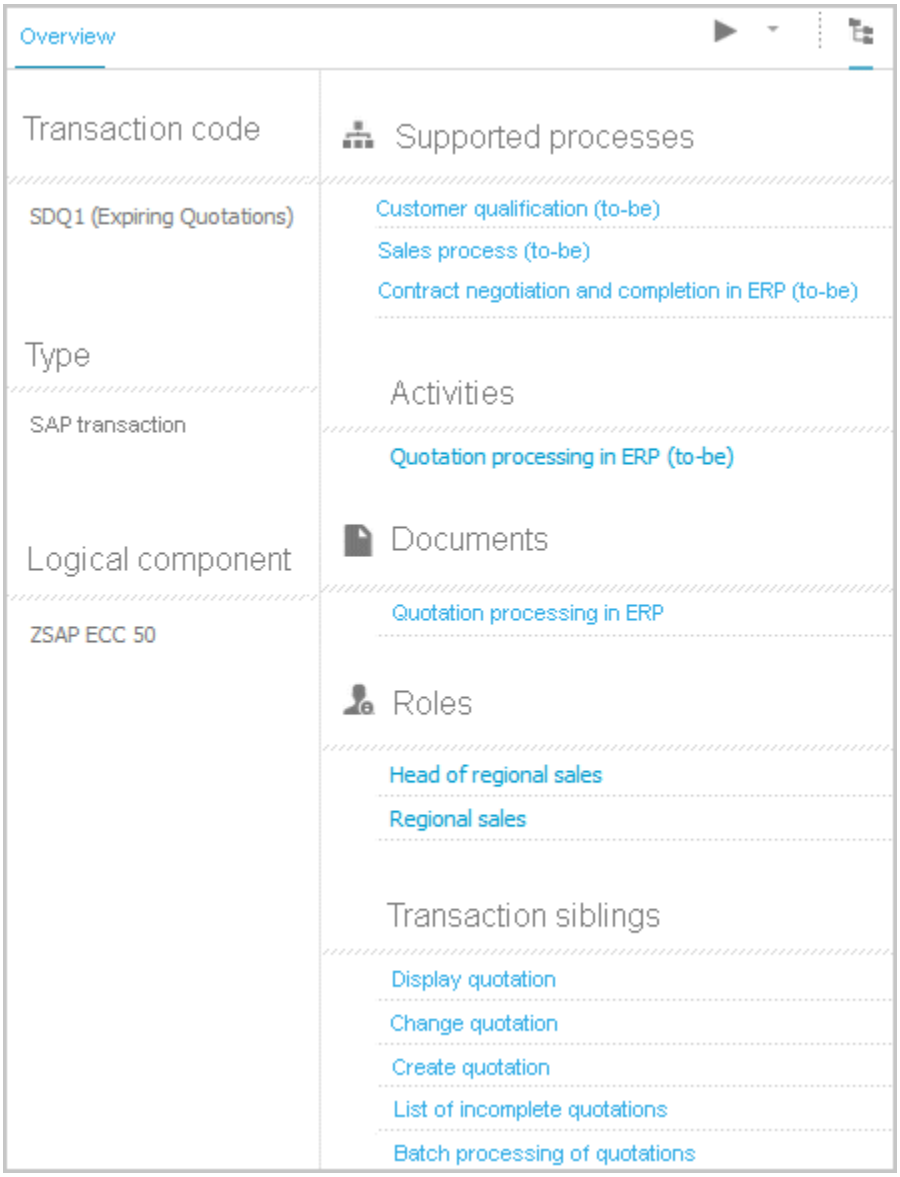


To start the transaction, click an SAP Server or a URL. The Login dialog opens.



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 346). 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 346) 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 (page 227) 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.

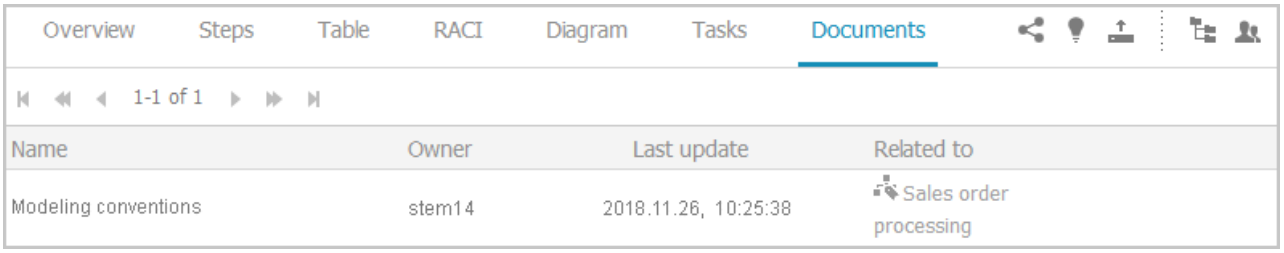
All file formats are allowed for documents.

Temporary documents (page 245) are deleted automatically after the executable process is terminated. Permanent documents (page 245) 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).

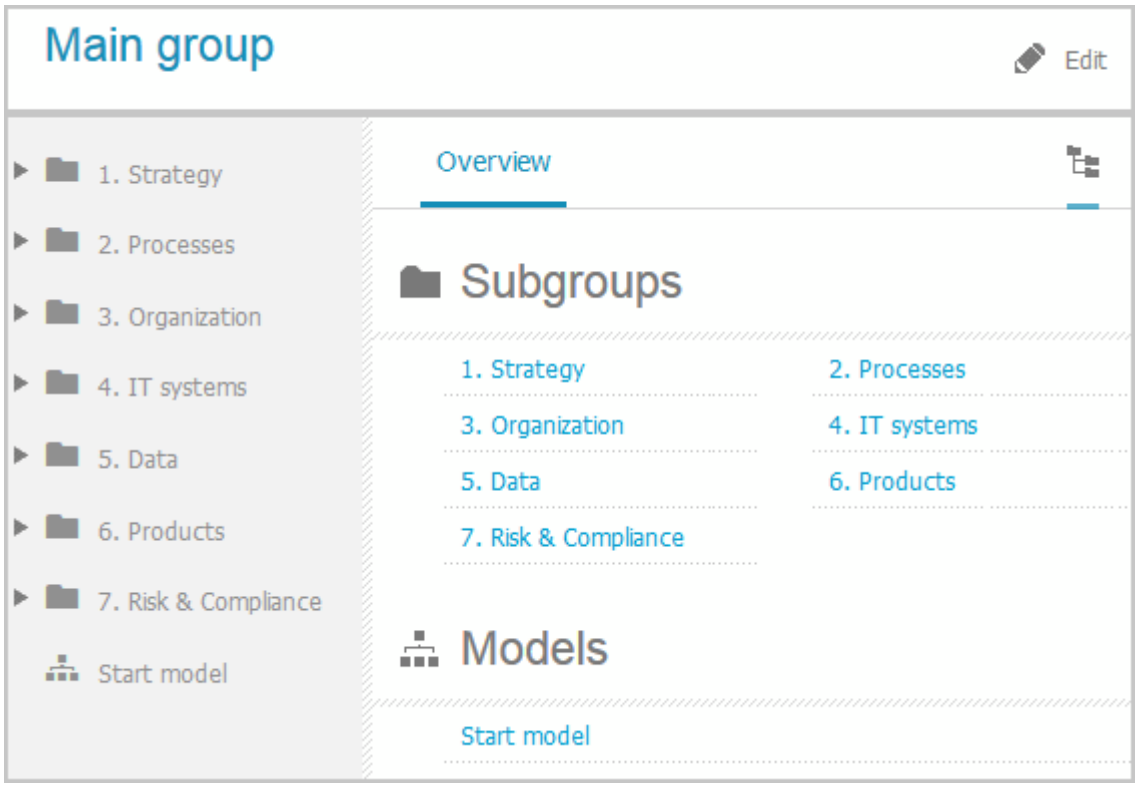
If you want to use the full range of functions of a document management system, including archiving and audit compliance, or you want to use very large numbers of documents, you can link Microsoft® Sharepoint 2010 or Microsoft® Sharepoint 2013 to ARIS.



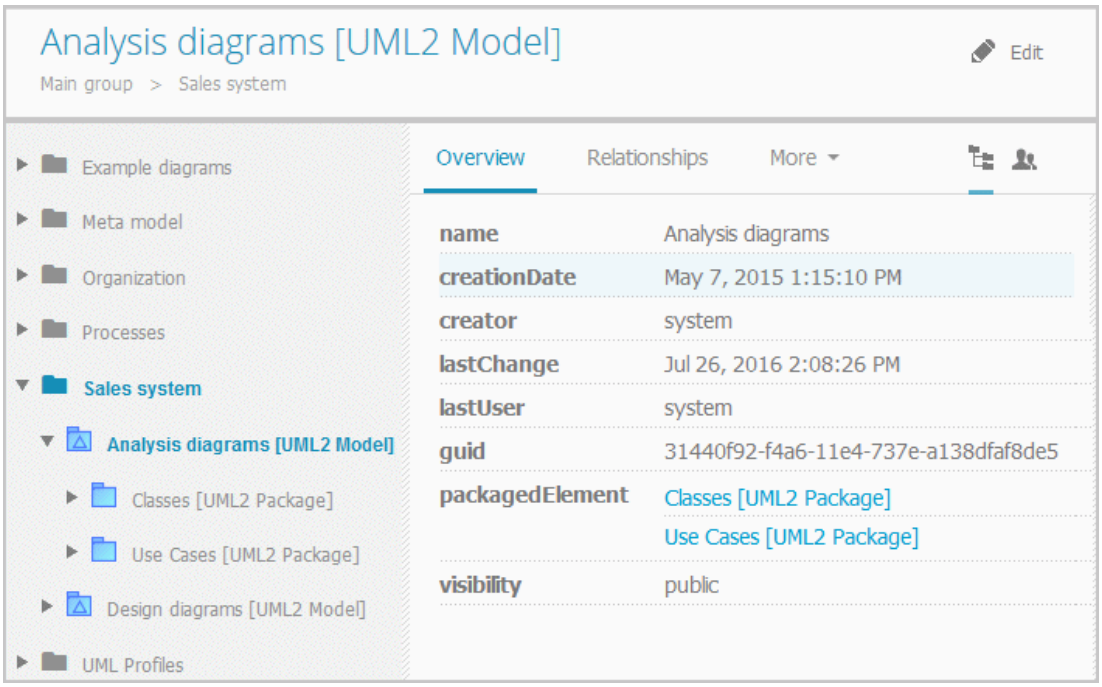
GROUP ITEMS OF UML ELEMENTS

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.

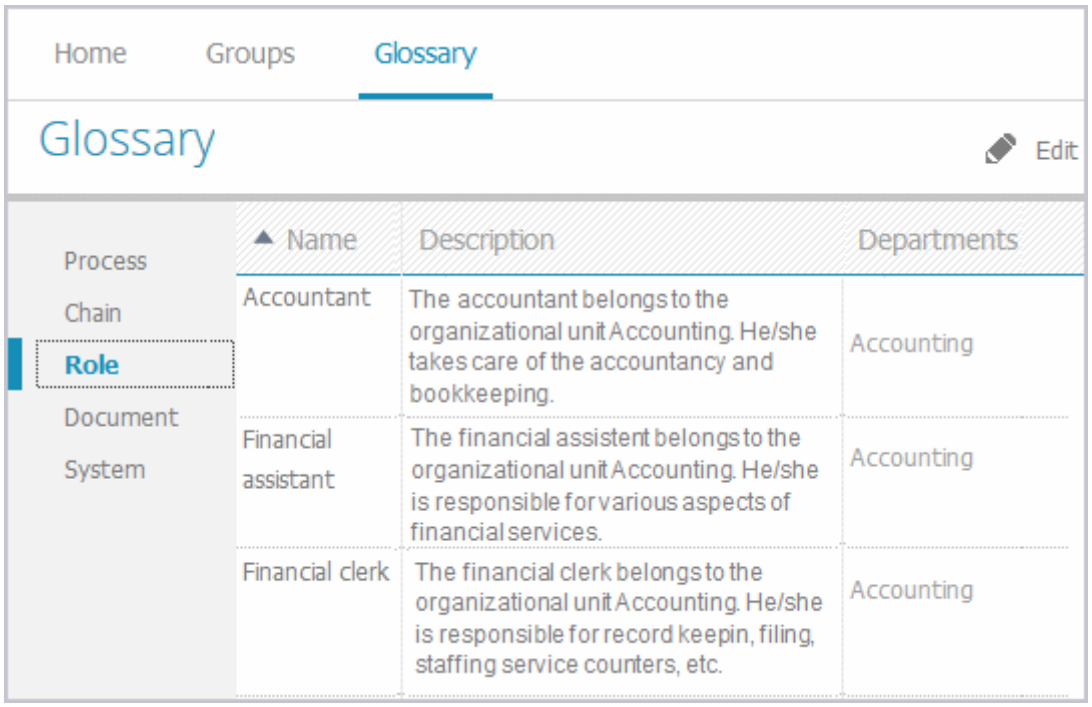
DIAGRAM

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

4.1.3 Glossary

The **Glossary** page shows descriptions of processes, value-added chains, roles, documents, and IT systems in tables. Depending on the selected context, persons responsible, departments, business processes, and occurrences in business processes are listed.

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 337), create new or reuse existing items (page 332), as well as delete items (page 334).



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

4.2 Default view

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

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

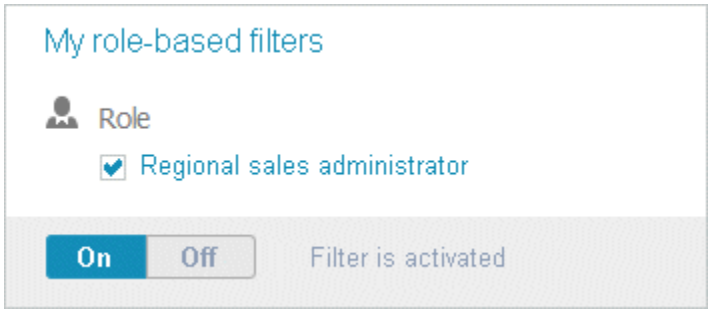
Shows the current activities you are following in Collaboration or in the portal (page 360).

This view shows all content relevant to you in a clear structure in the form of fact sheets under Processes (page 273), Organization (page 284), IT systems (page 285), and Glossary (page 288).

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page 13).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 310) to your user in models and the portal has been configured for the use of role filters.

To activate the relevant role, click **Select role filter** on the left of your user name, and click **On**.



In the portal, you now see only information from all models in which the selected role occurs. Models of **Value-added chain diagram** type is always shown with an active role filter independent if the model contains the role or not.

WHAT INFORMATION IS FILTERED?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 312), 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.

If your administrator has published multiple databases (page 64), these are offered to you for selection United Motor Group . You can switch between the published databases as required.

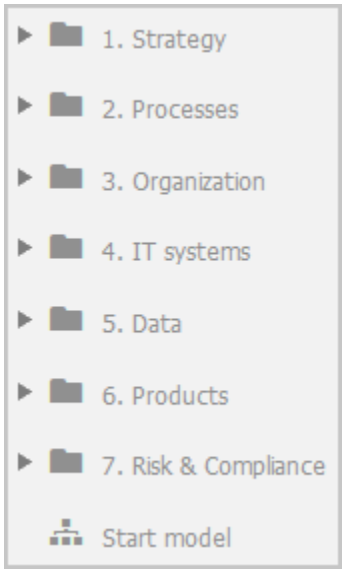
You can adjust window partitioning by changing the bar size, e.g., the size of the **Navigation** and **Attributes** bars.

To adjust the space for specific window areas, drag the mouse pointer to the dashed border of a bar. The mouse pointer shows the directions in which you can drag the bar border:

Keep the mouse button pressed, drag the mouse pointer in the required direction, and release the mouse button.

4.2.1 Processes

Gain a quick overview of all processes that are relevant to you. Navigate via value-added chains to the process chains of the portal selected.



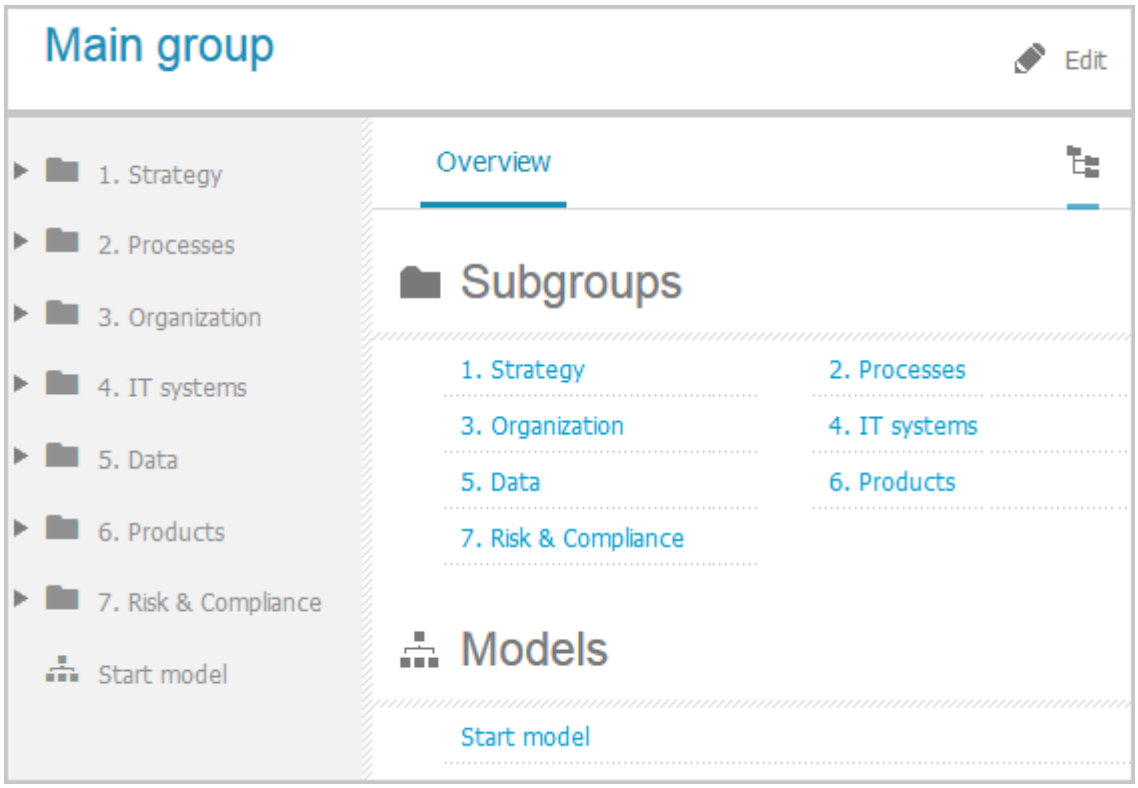
Depending on the contents selected and the type of a diagram, different functions are available.

Using the bar panel buttons **Comment** and **Navigation**, you can show or hide the Collaboration functions **Follow** (page 309) and **Comment** (page 303) and the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

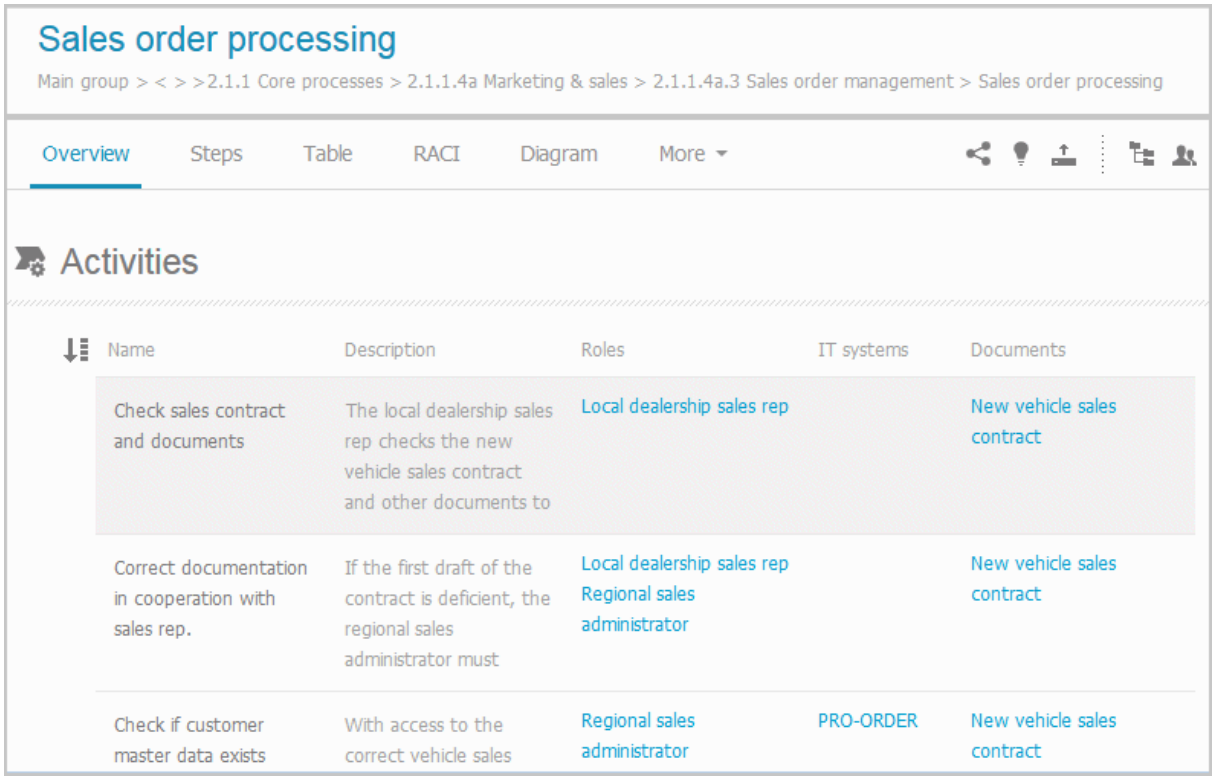
Click **Share model** to share models with other users (page 308). Click **Submit change request** to send change requests to the process manager (page 292). The function **Start governance process** (page 315) is provided only if an executable process is available. Users with the function privilege **ARIS Connect Designer** can change processes using the **Edit** button (page 306).

OVERVIEW

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

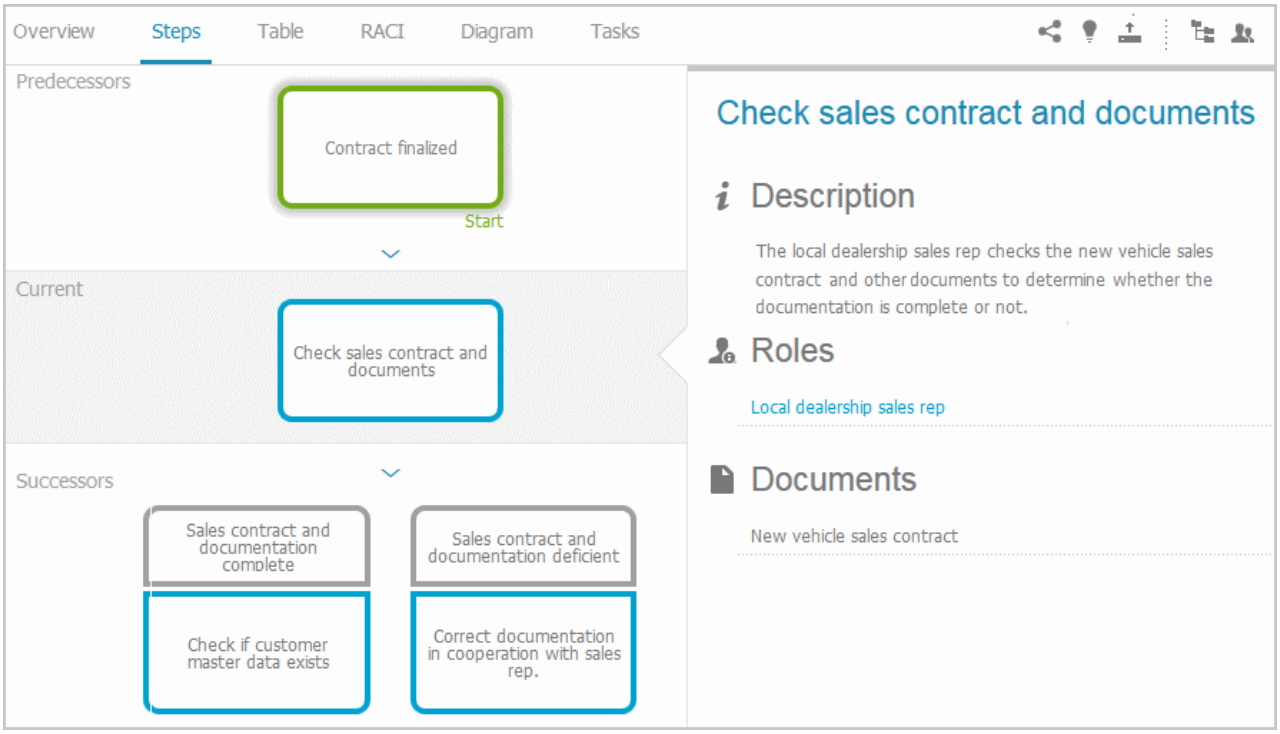


The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



STEPS

Transparently displays all steps of a process (EPC) (page 312). 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

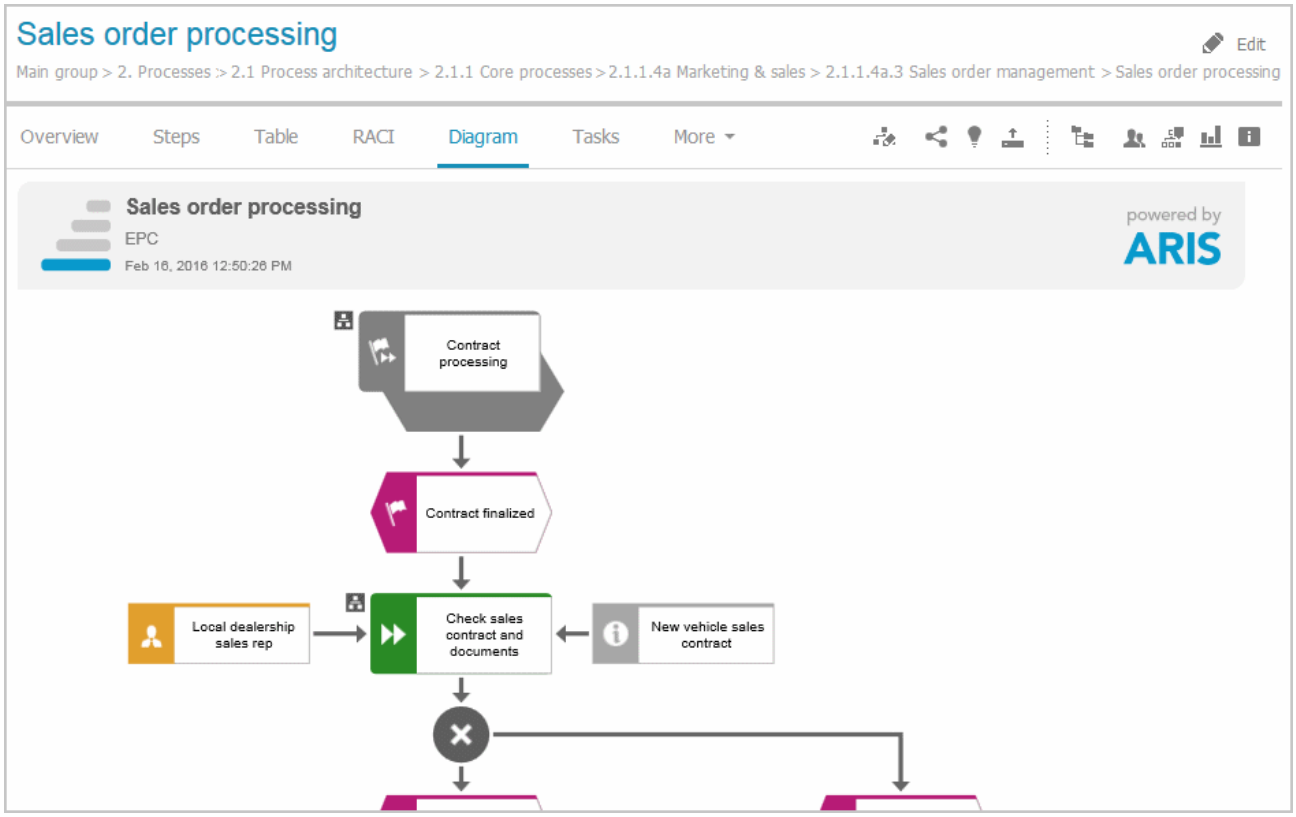
RACI matrices are displayed only if RACI information is available for this process (page 349). Using the button you can sort the matrices by process flow.

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.

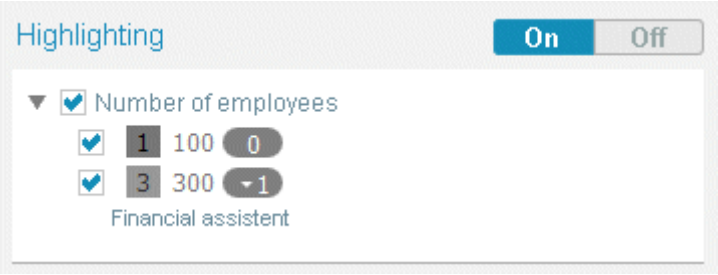
Click **Properties** to view all attributes specified. If you have selected an object, the attributes for that object are displayed. Click **More** to see related objects or occurrences. The model's properties are shown if no object is selected.

Attributes More

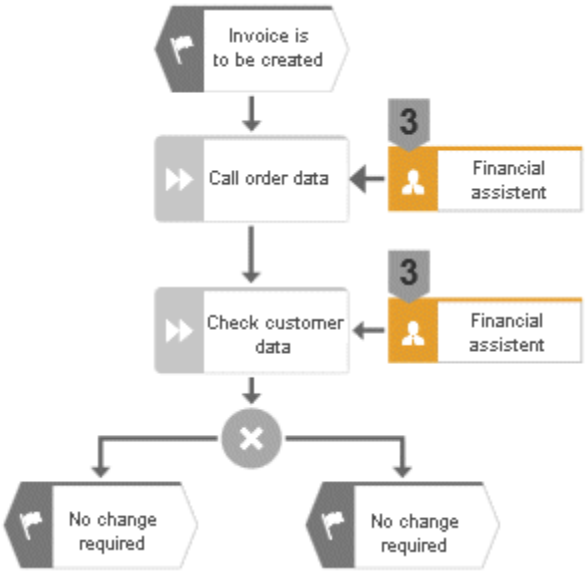
Attribute	Attribute value
Name	Organizational chart
Remark/Example	Organization
Type	Structural element
Time of generation	Apr 18, 2017 11:20:25 AM
Creator	w.becker
Last change	Aug 18, 2019 11:25:00 AM
Last user	system

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

Highlighting is not a standard functionality. They are integrated in the demo database only as an example. Before you can use highlighting, this needs to be configured. Please contact your local Software AG sales organization (http://softwareag.com).



The objects are then highlighted in the diagram. In this example, the **Financial assistant** object is highlighted because it meets the **Number of employees = 300** criterion. All other objects are displayed in grayscale.

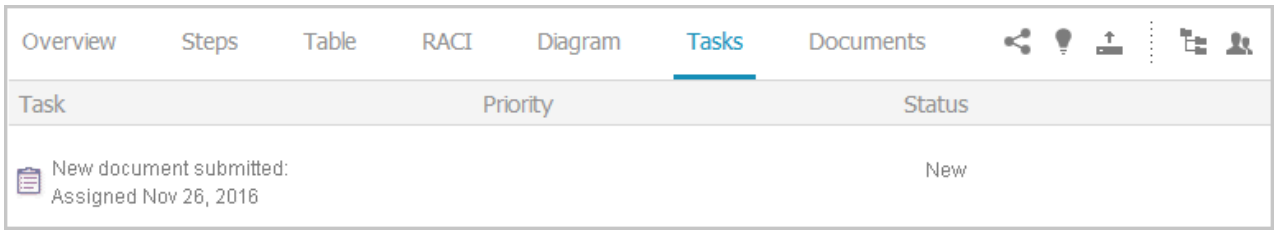


ASSIGNMENTS

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.

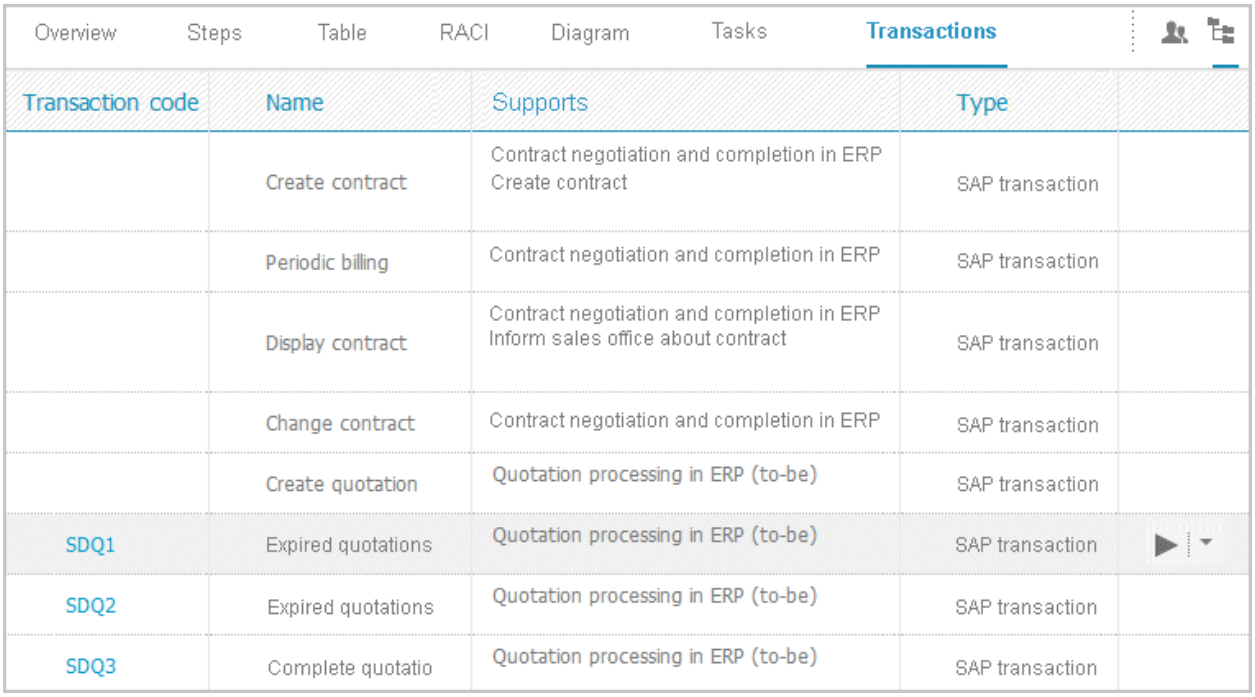
TASKS

Shows your tasks, e.g., mini workflows or APG processes and opens them for editing in ARIS Process Board (page 4).

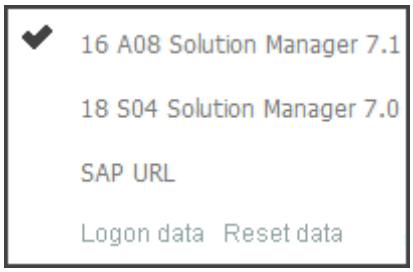


TRANSACTIONS

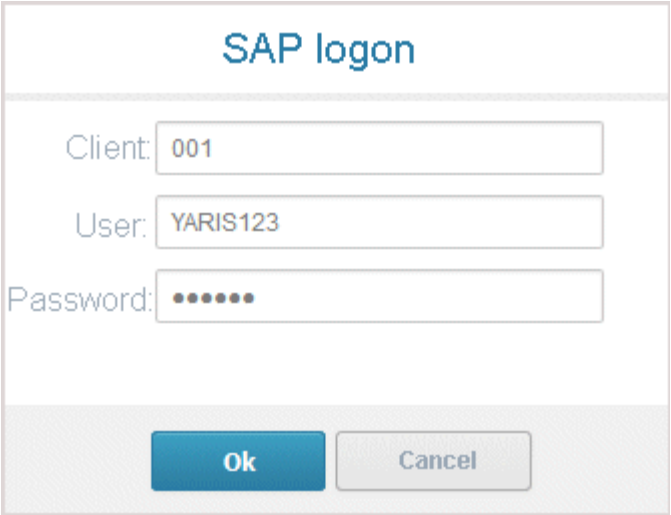
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page 67) in the portal.



You can start (page 345) 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.

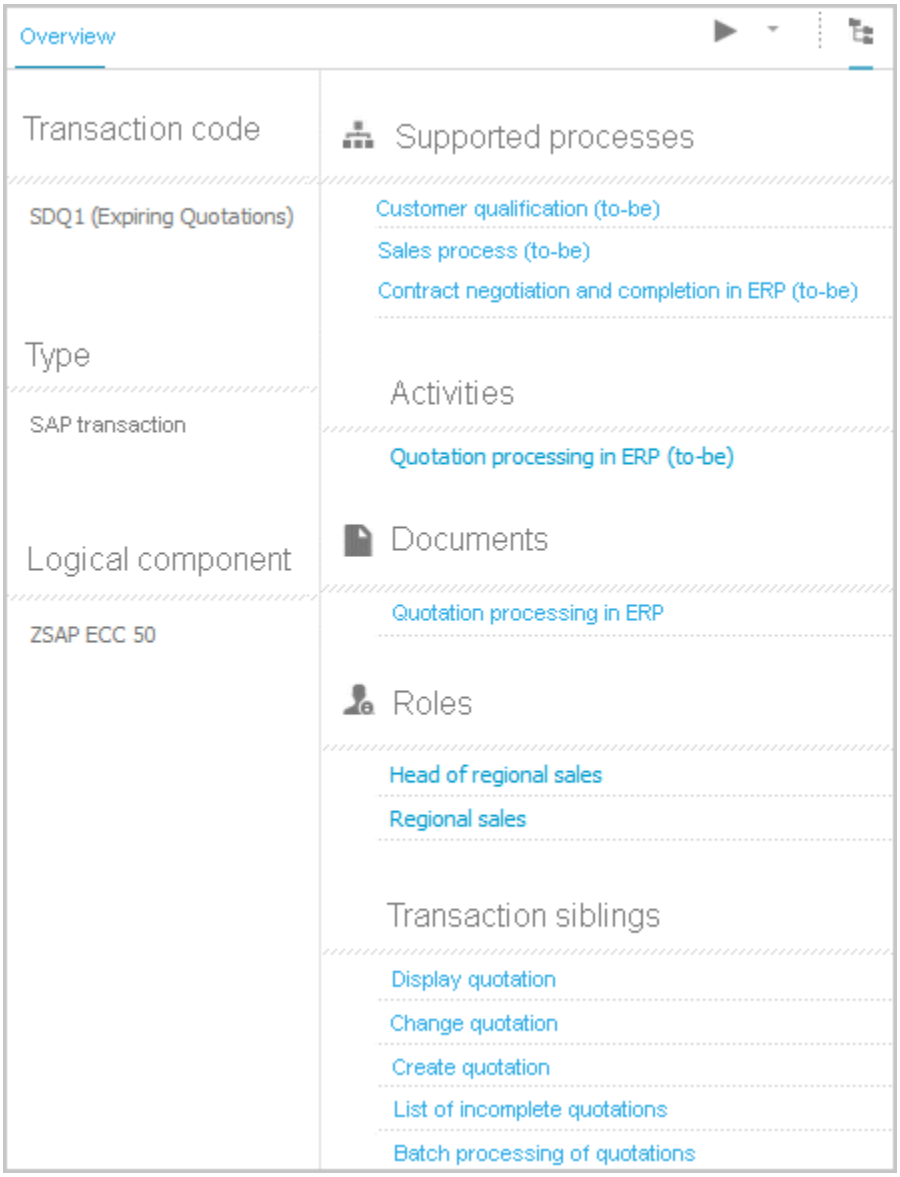


To start the transaction, click an SAP Server or a URL. The Login dialog opens.



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 346). 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 346) 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 (page 227) 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.

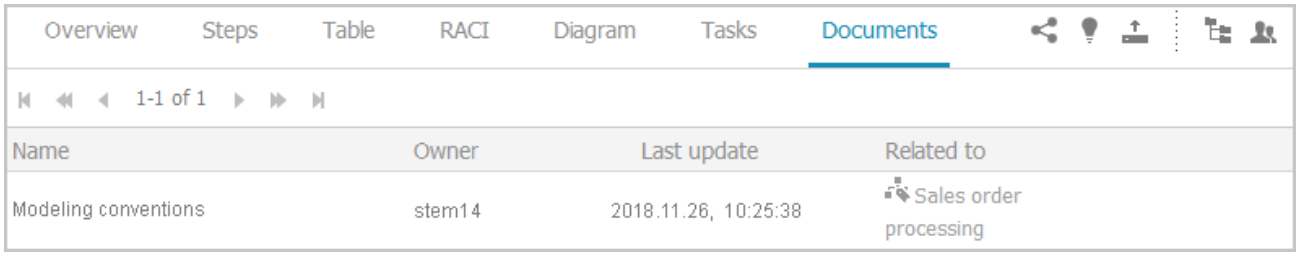
All file formats are allowed for documents.

Temporary documents (page 245) are deleted automatically after the executable process is terminated. Permanent documents (page 245) 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 2010 or Microsoft® Sharepoint 2013 to ARIS.



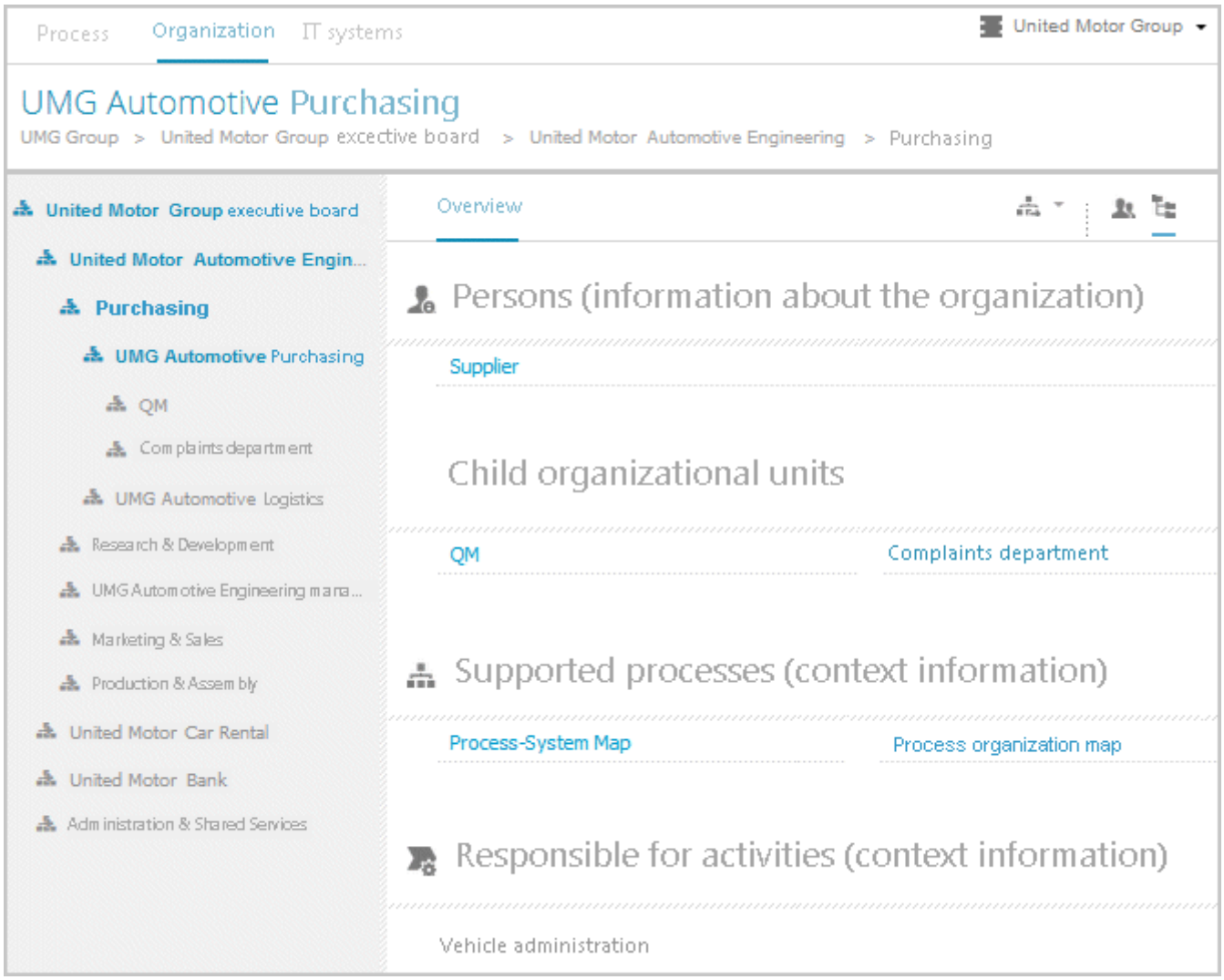
4.2.2 Organization

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 273) is displayed. IT information (page 285) 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 309) and **Comment** (page 303) and 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 315) is provided only if an executable process is available.



4.2.3 IT systems

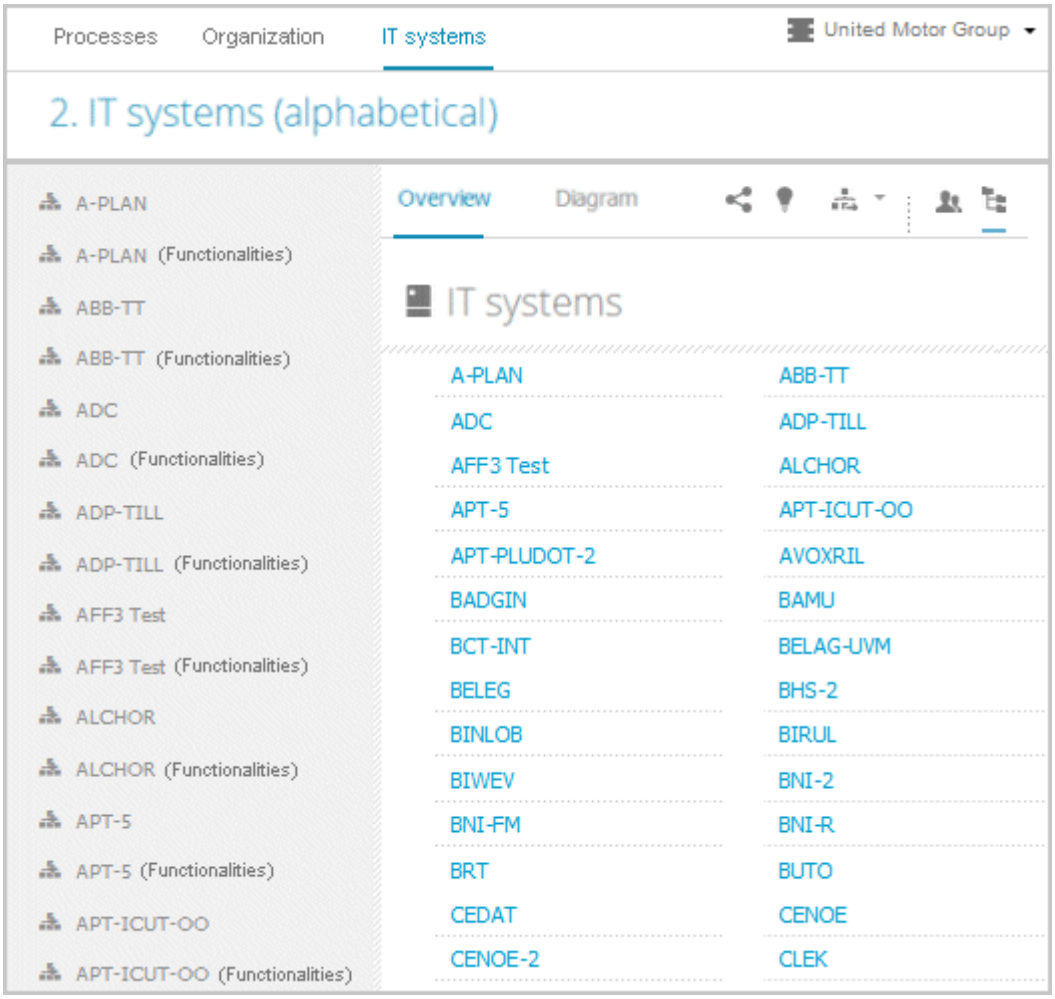
Quickly gain an overview of the IT landscape. Use the Explorer tree to navigate to all IT systems of the portal selected. Breadcrumbs simplify navigation to superior elements.

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 309) and **Comment** (page 303) and the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

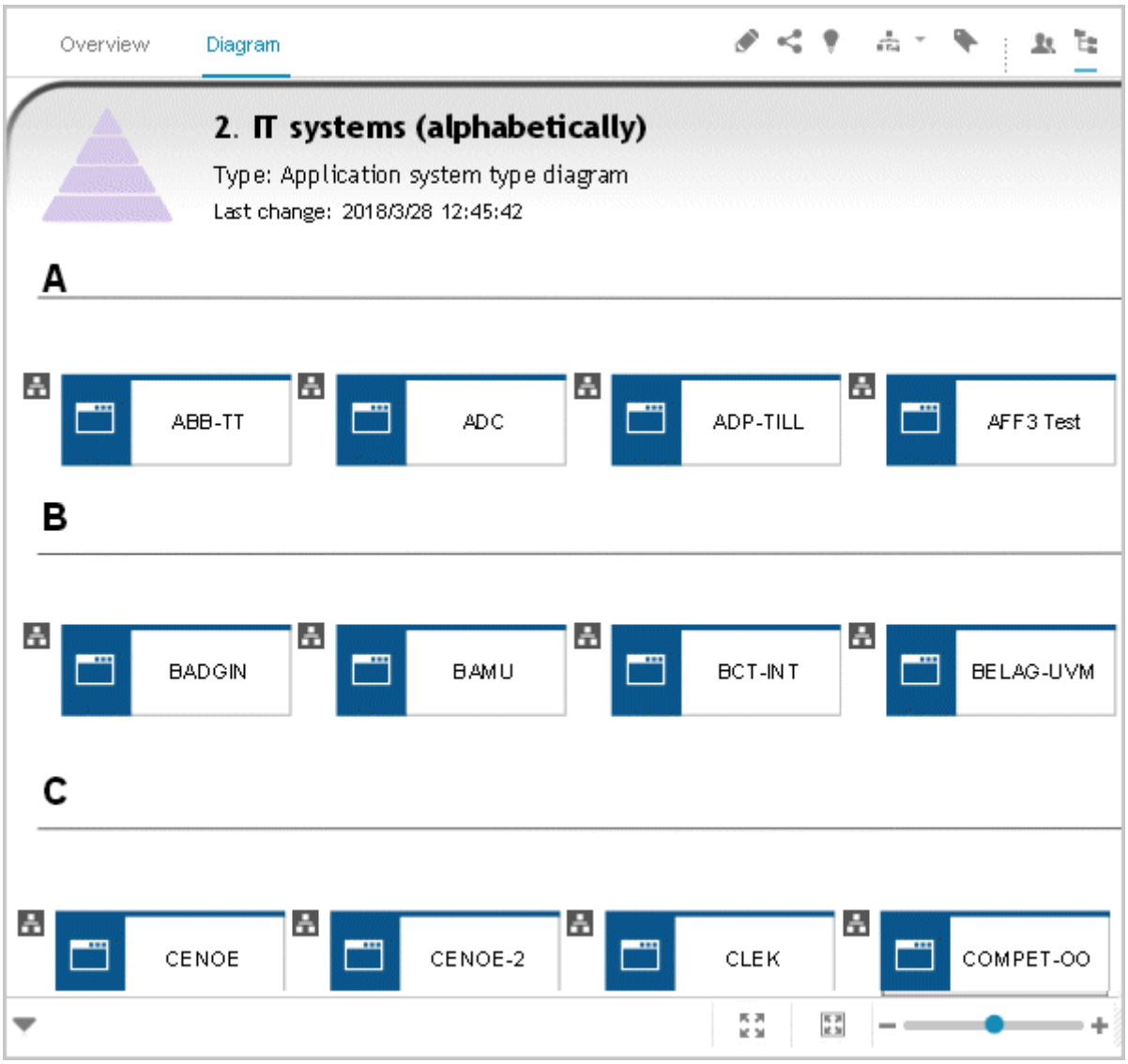
Click **Share model** to share models with other users (page 308). Click **Submit change request** to send change requests to the process manager (page 292). The function **Start governance process** (page 315) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes (page 306) 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 337), create new or reuse existing items (page 332), as well as delete items (page 334).

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 (OVERVIEW)



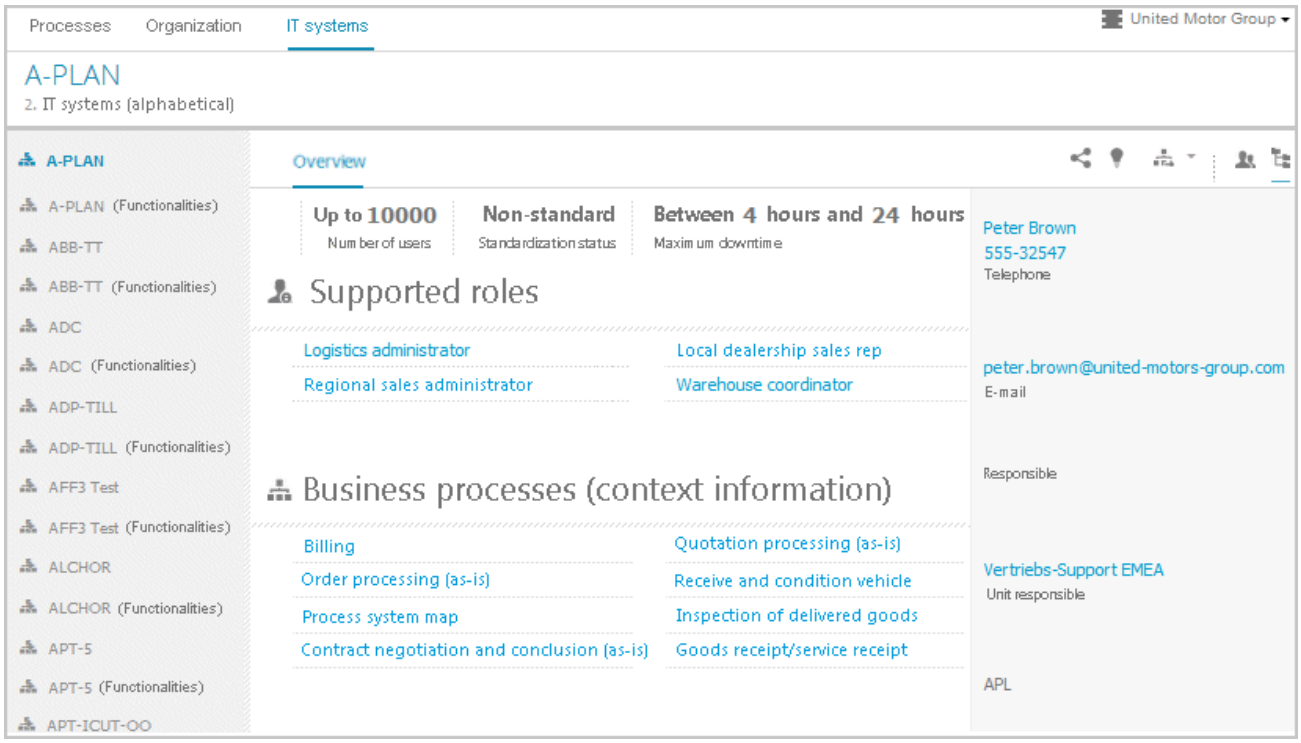
All information is also available via the application system type diagram containing all IT systems.

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 see related objects or occurrences. The model's 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

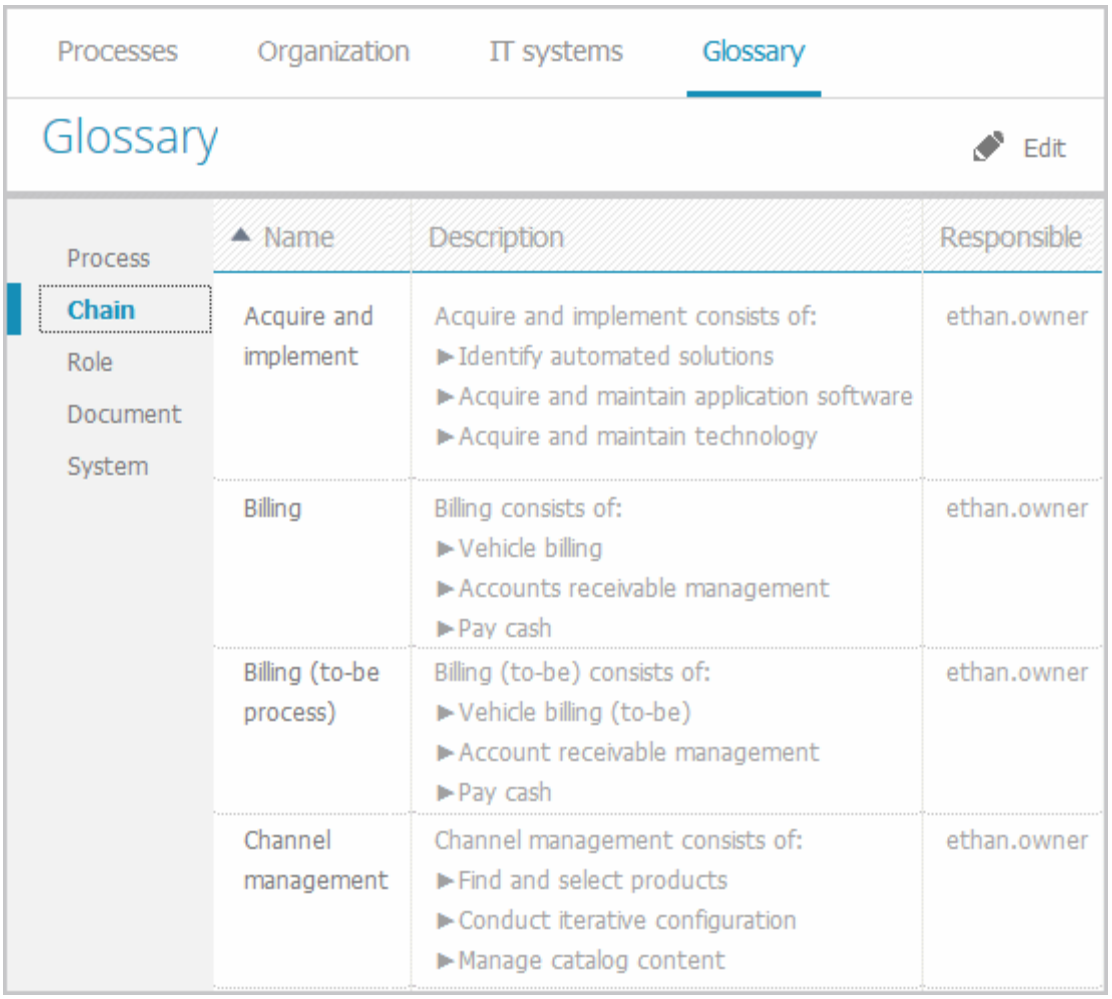


If you click an IT system in the Explorer tree or Overview, the IT system fact sheet will provide you with important information at a glance.

4.2.4 Glossary

The **Glossary** page shows descriptions of processes, value-added chains, roles, documents, and IT systems in tables. Depending on the selected context, persons responsible, departments, business processes, and occurrences in business processes are listed.

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 337), create new or reuse existing items (page 332), as well as delete items (page 334).



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

4.3 Select database

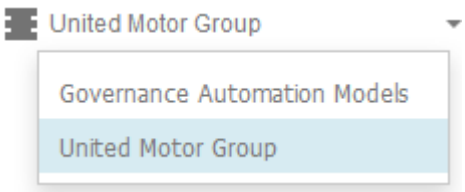
You can select one of the databases offered in the portal to access its content.

Prerequisite

Several databases have been published. If only one database has been published, database selection is not displayed.

Procedure

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



   In the ARIS Connect views that are delivered as standard, database selection is displayed at the top right.
   The list of available databases opens.

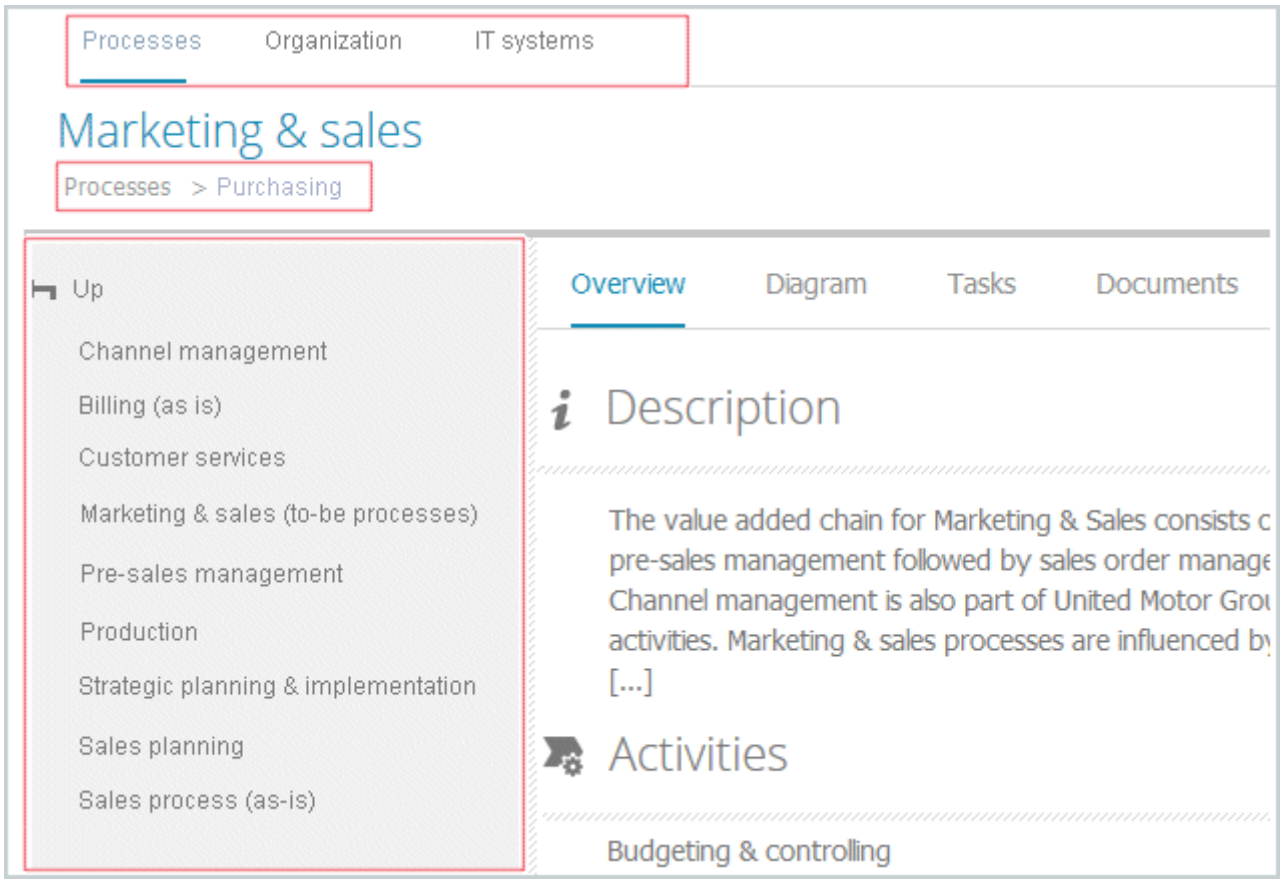
2. Click the name of the database you want to use.

The name of the selected database is displayed. The **Recent changes** area is updated according to the selected database. A search (page 321) is performed based on the current database.

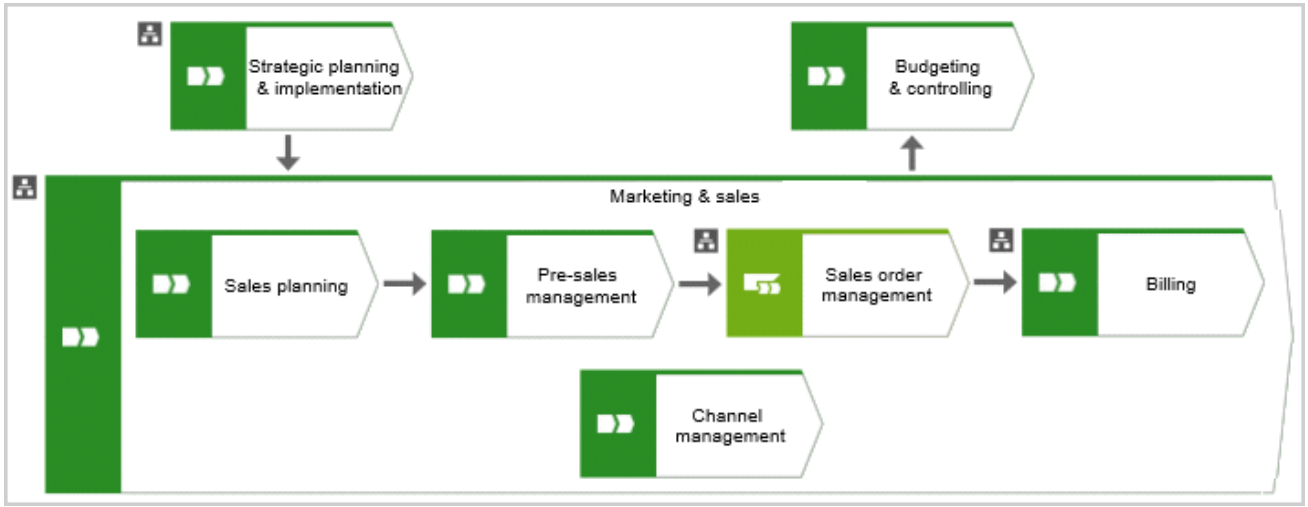
4.4 Navigate

With the help of hierarchies, administrators control (page 80) 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. If you click **Up**, the same information is shown for the superior process. The breadcrumb navigation is shown below the process title. It enables you to navigate up to the top element of the hierarchy.



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.



4.5 Submit change request

You can send change requests for models to the process manager.

Prerequisites

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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 send notification is displayed.
11. Click **OK**.

The process manager 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 process manager 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 process manager 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 manager has selected (**Approve**, **Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

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

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

4.6 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 used view, 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**.

4.7 Add new documents to a model or object

You can link new documents with a model or object.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Navigate to a group and click a model.
4. Click **Diagram** if not enabled yet.
5. Click **Edit**. The model opens in an individual tab.
6. Click **Properties**. The **Properties** bar opens.
7. Activate the **Documents** tab.
8. Click in the model background or an object.
9. Click **Add document**. The dialog opens.
10. Navigate to the target folder.
11. Click **Upload new document**. The **Select new document** dialog opens.
12. Click **Select file** and select a document.
13. Enter a title and, if required, specify further document properties.
14. Click **Upload**.
15. Select the relevant documents and click **OK**.

The documents are linked with the model or object.

4.8 Add existing documents to a model or object

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

Prerequisite

You have the ARIS Connect Designer license.

Procedure

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

The documents are linked with the model or object.

4.9 Submit a change request for a document

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

'DOCUMENTS' TAB

Prerequisites

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

Procedure

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

The document manager receives the change request by e-mail with a link to the relevant document and a link to edit the associated task in ARIS Process Board.

Once the document manager has processed the request, the applicant receives a message by e-mail.

If the change request is accepted, the person who is to implement the changes receives an e-mail including a link to the associated task in ARIS Process Board and the information added. After processing and approval - or rejection -, the applicant receives an e-mail including the information that the change requests have been implemented - or rejected.

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

IN A MODEL

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Open (page 306) the model that contains the document you want to submit a change request for.
4. Click **Diagram** if not enabled yet.
5. Click **Edit**.
6. Click **Properties**.
7. Activate the **Documents** tab.
8. Select the document for which you want to submit a change request.
9. Click **Submit change request**. The dialog opens.
10. Enter a title and a description for your request.
11. Select the priority with which the request is to be handled.
12. Click **Send**.

You will automatically receive a confirmation notification.

The document manager receives the change request by e-mail with a link to the relevant document and a link to edit the associated task in ARIS Process Board.

Once the document manager has processed the request, the applicant receives a message by e-mail.

If the change request is accepted, the person who is to implement the changes receives an e-mail including a link to the associated task in ARIS Process Board and the information added. After processing and approval - or rejection -, the applicant receives an e-mail including the information that the change requests have been implemented - or rejected.

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

4.10 Have document approved

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

'DOCUMENTS' TAB

Prerequisites

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Open ARIS Connect and log in with your user name and password.
3. Click **Portal** if it is not activated yet.
4. Depending on the used view, click **Groups** or **Processes**.
5. Click **Navigation** if the navigation bar is not shown.
6. Click a model or object.
7. Activate the **Documents** tab.
8. Click the document you want to have approved.
9. Click **Request approval**. The dialog opens.
10. Enter a comment describing what you changed.
11. Click **Send**.

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

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

IN A MODEL

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Open (page 306) the model that contains the document that you want to have approved.
4. Click **Diagram** if not enabled yet.
5. Click **Edit**.
6. Click **Properties**.
7. Activate the **Documents** tab.
8. Select the relevant document.
9. Click **Request approval**. The dialog opens.
10. Click **Send**.

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

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

4.11 Share document

You can share documents with other users.

'DOCUMENTS' TAB

Prerequisites

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

Procedure

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

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

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

IN A MODEL

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Open (page 306) the model that contains the document you want to submit a change request for.
4. Click **Diagram** if not enabled yet.
5. Click **Edit**.
6. Click **Properties**.
7. Activate the **Documents** tab.
8. Select the document you want to share with another user.
9. Click **Share document**. The dialog opens.
10. Select the user you want to share the document with.
11. Enable **Send copy to me** to receive a copy of the message, if required.
12. You can also enter a subject and a comment.
13. Click **Send**.

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

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

4.12 Remove document from a model or object

You can remove a document from a model or object.

Prerequisite

You have the ARIS Connect Designer license.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Open (page 306) the model you want to remove the document from.
4. Click **Diagram** if not enabled yet.
5. Click **Edit**.
6. Click **Properties**.
7. Activate the **Documents** tab.
8. Click **Remove selected document**.

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

4.13 Comment on portal content

Add comments to models and post information (page 358) that could be of interest to your colleagues.

Prerequisite

You have the relevant access privilege (page 373) 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 372) 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.

4.14 Create model

You can quickly and easily create new models.

Prerequisites

- You have the **ARIS Connect Designer** license privilege.
- The classic view or another view (page 65) based on it is selected for the portal.
- The relevant model type must be included in the database filter. If this is not the case, the portal page is displayed again after the **Create model** dialog closes.

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Create model** on the **Home** tab. The dialog opens.
4. Enter a name for the new model in the **Model name** box.
5. Click the **Model type** box and enter part of the model type name. All model types (page 453) are displayed whose names contain the term you entered.
6. Select the required model type. The **Target** area displays the database and group names. This is where the new model will be stored.
7. Click **Change** if you want to store the model in a different database and/or group. The **Select target group** dialog opens.
8. Select the required database in the **Database** box.
9. Select the required group.
10. Click **OK**. The **Select target group** dialog closes.
11. Check your input.
12. Click **OK**. The **Create model** dialog closes.

The model is created and opens in a new tab (page 386).

4.15 Approve model

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 license privilege **ARIS Connect Viewer** license.
- 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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click the model you want to edit.
6. Click **Diagram** if not enabled yet.
7. Click **Edit**. The model opens in an individual tab.
8. Make the required changes.
9. Click **Collaboration** if it is not activated yet.
10. Click **Request approval**. The **Confirmation** dialog opens and you can confirm that the model changes are saved and the model is reopened read-only.
11. Click **OK**. The model is reopened read-only and the **Request approval** dialog opens.
12. If required, select a person in charge to approve the model if the **Person responsible** attribute has not been specified at the model.
13. Enter a comment to explain the request approval.
14. Click **Send**. A send notification is displayed.
15. 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**.

4.16 Edit models

You can edit models in ARIS Connect.

Prerequisite

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

Procedure

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

Your changes are saved in the model.

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

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

4.17 Open assignment

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

Procedure

1. Click Groups (page 258) in the classic view (page 90).
2. Select the required model in the navigation. The bar panel is shown.
3. Click **Diagram** if you have not already selected this view 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.

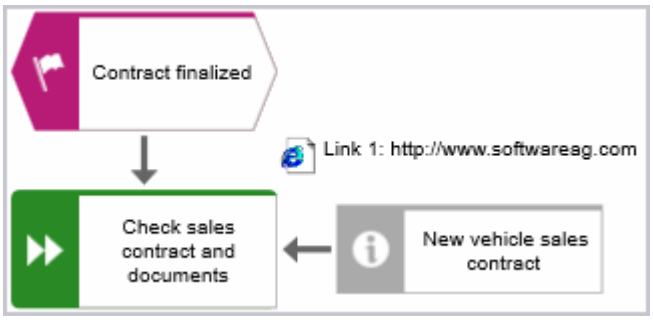
All assigned diagrams are offered for selection in a dialog. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

4.18 Open placed link attributes

In Model Viewer, you can open placed link attributes.

Procedure

1. Click Groups (page 258) in the classic view (page 90).
2. Select the required model in the navigation. The bar panel is shown.
3. Click **Diagram** if you have not already selected this view 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.

4.19 Share model

You can share models with other users.

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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**.

4.20 Follow processes in the portal

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

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

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

4.21 Request feedback on processes

You can request feedback on processes from other users.

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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 372) 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**.

4.22 Assign roles

In order to enable users to use role filters 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 311) the role filter, only information from models in which the selected role occurs will be displayed.

4.23 Activate role filter

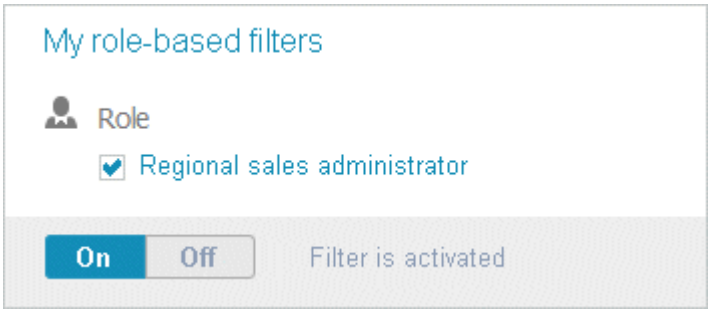
Using role filters, you restrict the content in such a way that you only see information from processes in which certain roles are involved.

Prerequisite

A role has been assigned (page 310) to your user.

Procedure

1. Click **Select role filter**.
2. Click **On** and activate the relevant role.



In the portal, you now see only information from all models in which the selected role occurs. Models of **Value-added chain diagram** type is always shown with an active role filter independent if the model contains the role or not.

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 312), 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.

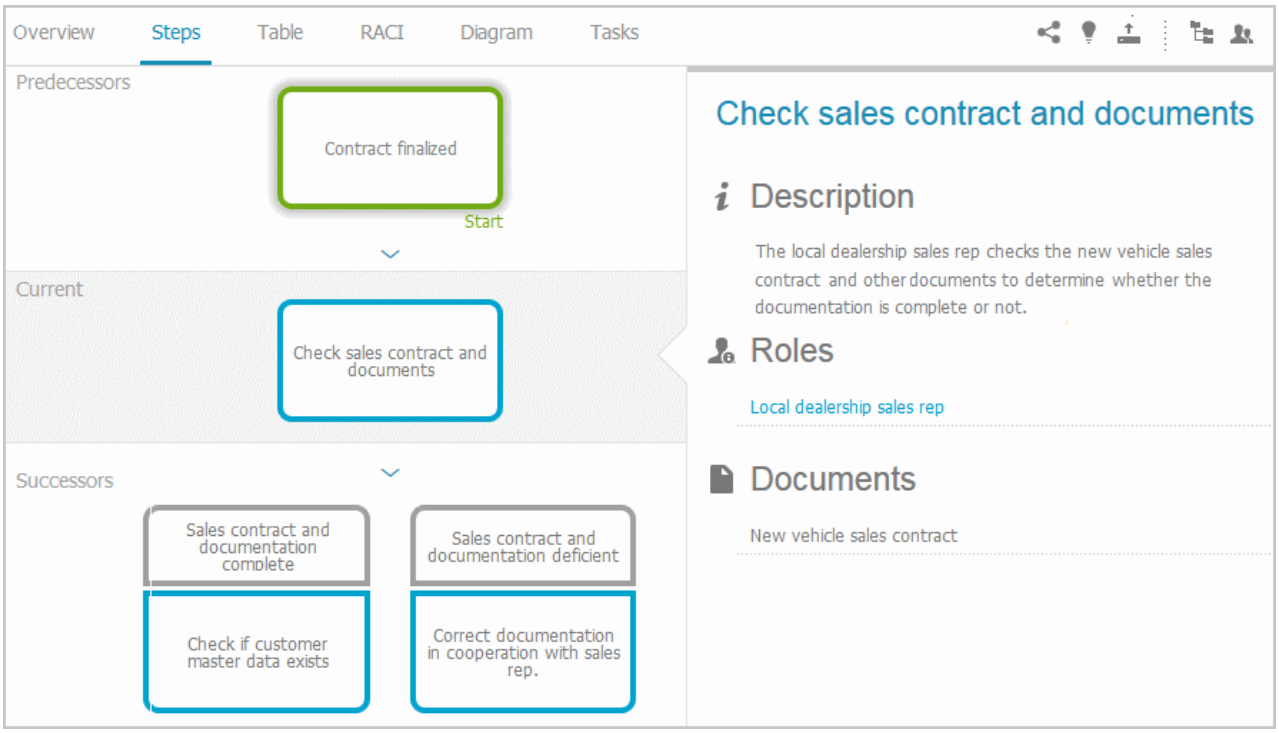
4.24 Navigate step by step

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

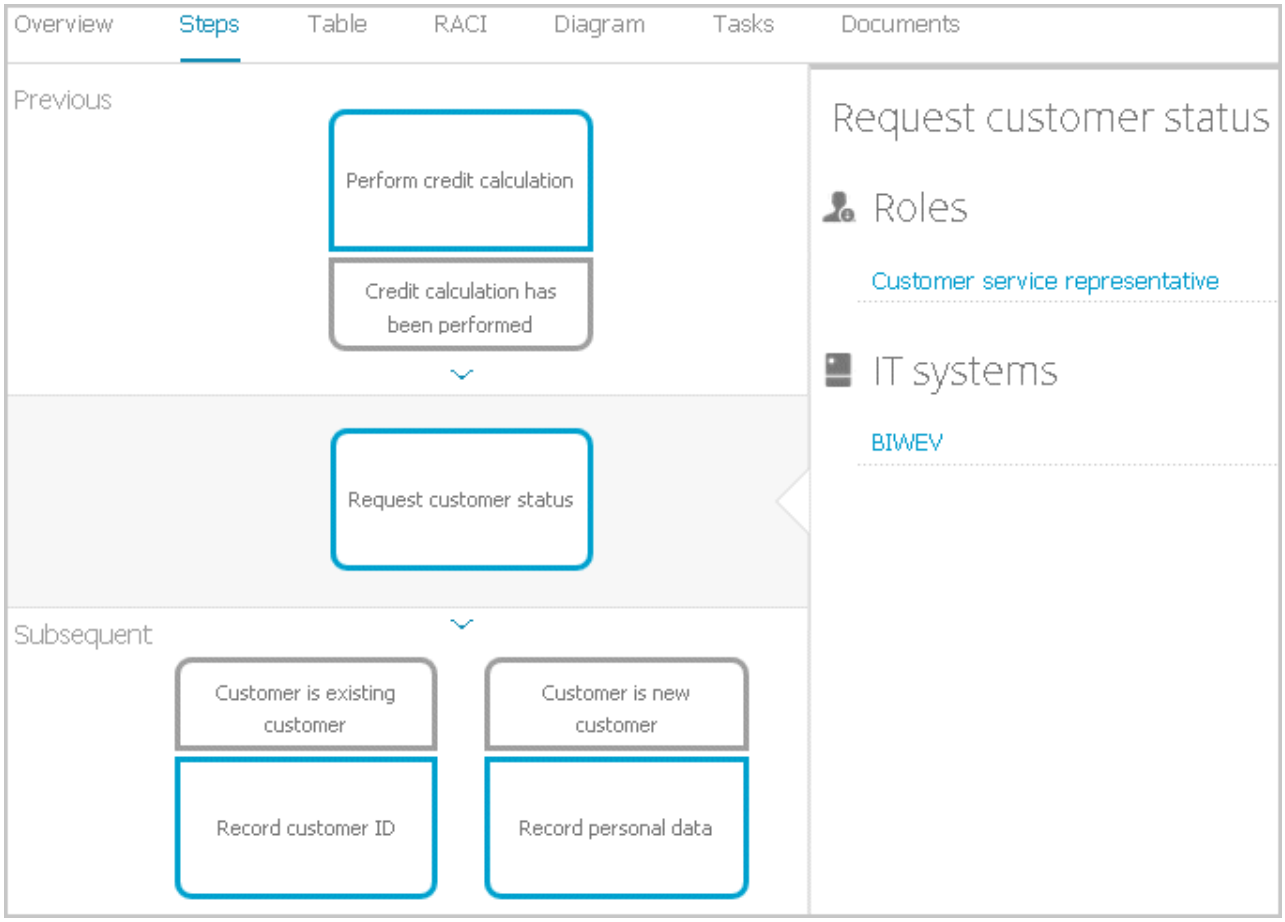
1. In the Groups area (page 258), select a model of the **EPC** type. You are offered the steps of the EPC.

Transparently displays all steps of a process (EPC) (page 312). 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.



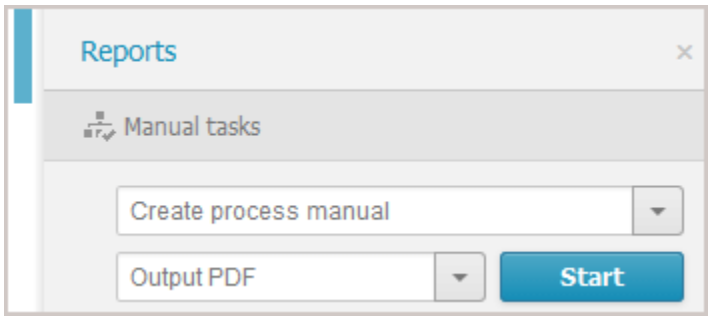
You navigate through a proces step by step.

4.25 Start report

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

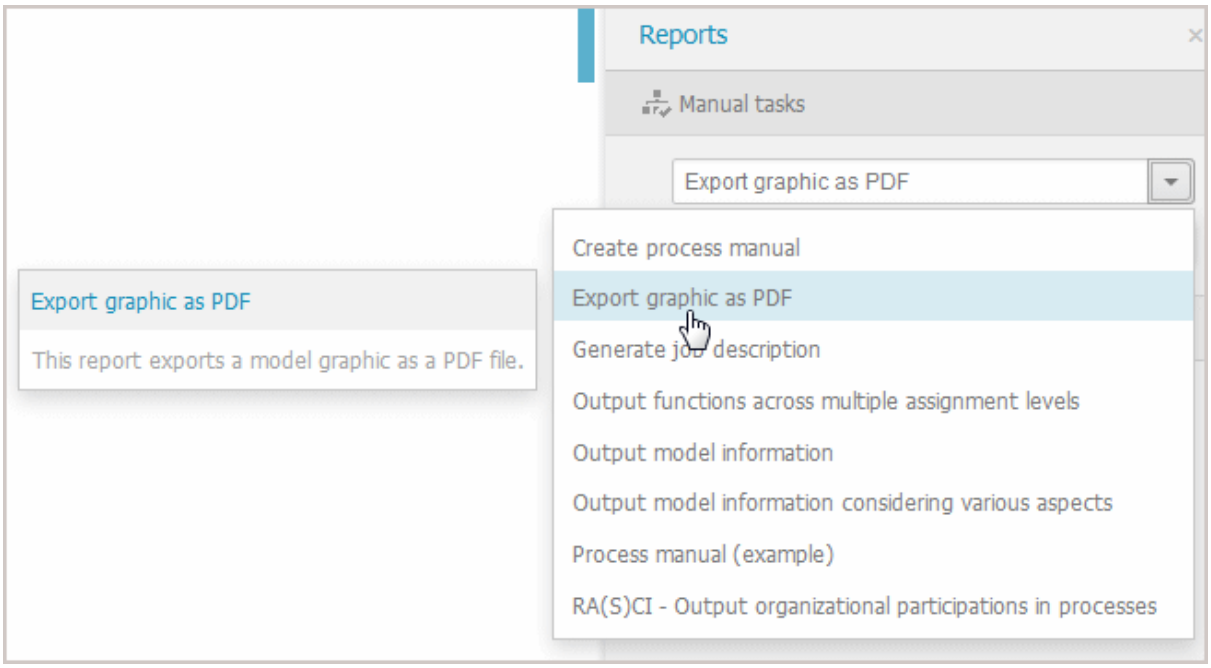
Procedure

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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click the model for which you want ot create a report.
6. Click **Diagram** if not enabled yet.
7. Click **Reports**. The **Reports** dialog opens.



All reports you can start for this diagram are displayed.

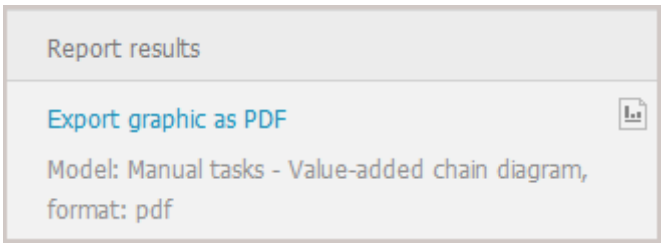
8. Select the relevant report.



9. Select the output format.

10. Click the output format, e.g., **Output PDF.** The report is started.

After the report is complete, it is shown in the link list of reports run.



If you click a link, the report output opens. Only information you are authorized to view is output.

4.26 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 320).

Procedure

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

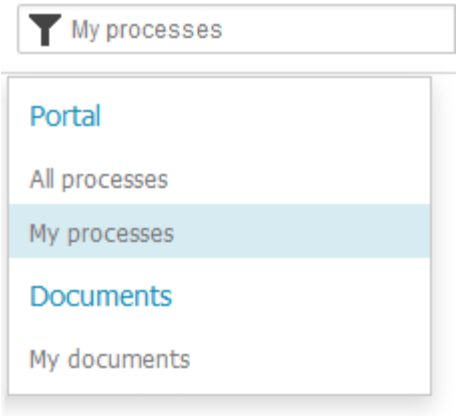
The executable process will start.

4.27 Using the Favorite tab in the Portal

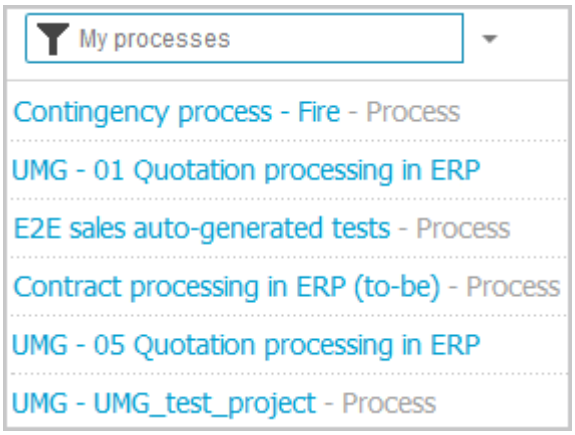
In the Portal, you have direct access to all saved filter settings (Seite 324) to filter the content of the selected database.

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



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

5. Click on the page numbers to display the content of the pages.
6. Click the name of the item. The item opens.

You have filtered database content and opened one of your favorites using the **Favorite** tab.

4.28 Show the occurrence usage

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

Procedure

1. Click **Navigation**. The **Groups** area opens.
2. Open the group where the desired model is stored.
3. Click the name of the model. The factsheet of the model is opened.
4. Click **Diagram**. The **Diagram** view opens.
5. Select the desired 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 exist in the current model, the number of the selected occurrence and the total number of occurrences are displayed behind the object name.
8. Click the arrow to left or right to select the next occurrence in the model. The next occurrence is selected and the number of the selected occurrence is updated.
9. To directly select an occurrence, click the drop-down list and 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 is opened and the first occurrence of the object selected. If there is no diagram view for the occurrence, the first fact sheet tab is shown, e.g. **Overview**.

In the **In other models** area all models are displayed to which you have at least read access.

You switched between the occurrences of an object using the navigation controls.

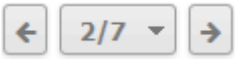
4.29 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

4.29.1 In which order are object occurrences displayed?

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

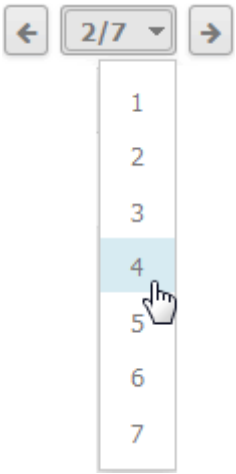
The navigation controls consists of arrows and a drop down list:



If you click an arrow, the next occurrence is selected. The order of the occurrences depends on the vertical position in the model. The occurrence at the top most position is occurrence number 1.

The first number of the drop down list specifies the selected occurrence, the second number the total amount of occurrences in a model.

Using the drop down list, you can directly select a desired object occurrence:



4.29.2 When can UML content be displayed?

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

- You use the classic view (page 256).
- The database with UML content you are using has been assigned a filter (page 457) that allows UML content. This may be the **Entire method** filter or a filter you have defined in which all UML elements are available.
- The database has been published (page 64) by an administrator. It is therefore available in the portal.
- You have logged in as a user with the **UML Viewer** function privilege.

4.29.3 Where is UML content displayed?

UML content is displayed in the same way as other ARIS content. You can use the groups (page 258) to navigate in the database.

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

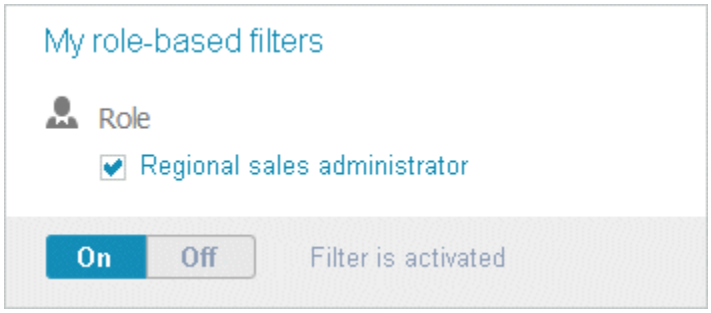
- Thus, UML namespace hierarchies are also displayed together with the group path.
- If you select a UML element, you can display its typical UML-specific properties such as stereotypes and tagged values.
- If you select a diagram, you can of course display it graphically.
- The search also finds UML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

4.29.4 What are role filters?

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page 13).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 310) to your user in models and the portal has been configured for the use of role filters.

To activate the relevant role, click **Select role filter** on the left of your user name, and click **On**.



In the portal, you now see only information from all models in which the selected role occurs. Models of **Value-added chain diagram** type is always shown with an active role filter independent if the model contains the role or not.

WHAT INFORMATION IS FILTERED?

When you open a diagram, all information is displayed unfiltered. You can also navigate using assignments. If you view processes step by step (page 312), 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.

4.29.5 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.

4.30 Search

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

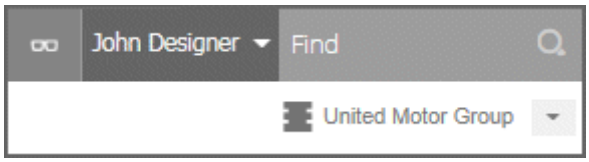
You can use the quick search (page 321) on the start page to access items directly. Or you can use the Search area (page 322) to define the search context beforehand and filter the search results.

4.30.1 Start quick search

You can begin the search (page 321) for items directly on the start page of ARIS Connect.

Procedure

1. If necessary, select the database (page 289) 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 328) 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.

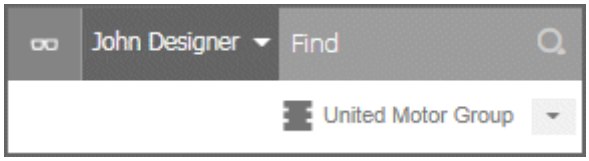
The item will open. For example, if you click the name of an object, it will be displayed in the portal. If you click a comment, it will be output in Collaboration. If you click the name of a model, the model will open in Model Editor.

4.30.2 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 289) 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.

4.30.3 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 289) 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 289) your search is to be based on.
2. If you are not in the portal, click **Portal**.
3. Click **Search**.

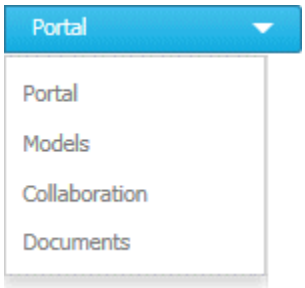
The Search area opens and you can browse ARIS Connect for the relevant terms.

4.30.4 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 289) 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 323).

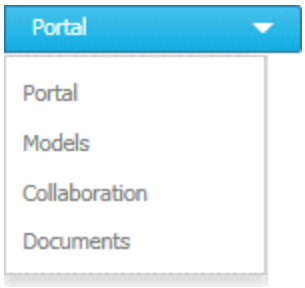
The result of the search will be updated to reflect the search context and filter criteria you specified.

4.30.5 Use search context and filters

You can restrict the result in the Search area (page 322) 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**.

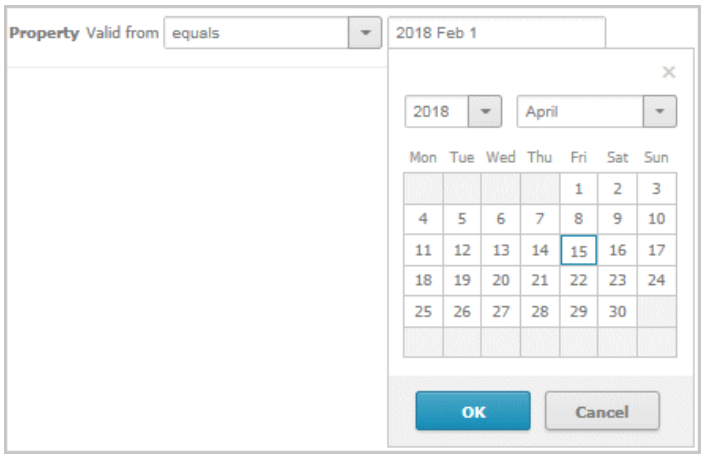


   The search result will be restricted to the range you selected. If the search result can be filtered, filter criteria will be listed in the **Filters** area.

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 subordinated filter criteria will be attached to the **Filters** area.
3. Click additional criteria. The selected criteria will be displayed in the Search area and restrict the search result.
   e. Selected filter criteria are listed:

   f. 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 × **Remove**. 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.

4.30.6 Save filter settings as favorite

In the Search area (page 329), you can save your filter settings. Thus, you can filter the content based on specific filters any time later on.

Procedure

1. Select the filter criteria (page 323) to define your filter.
2. Click ☆ **Save filters as favorite**. The dialog opens.
3. Enter a name.
4. Click **OK**.

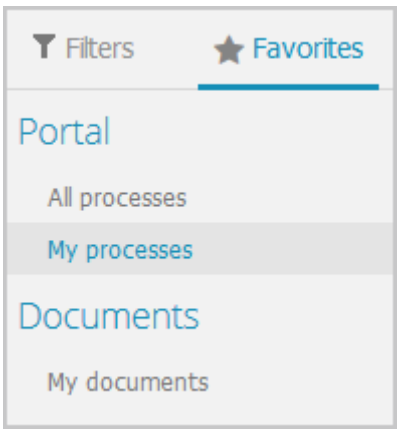
The filter settings are saved in the **Favorites** area. You can filter the content based on these settings (Seite 324) any time later on.

4.30.7 Using a favorite in the Search area

In the Search area (page 329), you can open a favorite to filter the content on predefined filter criteria.

Procedure

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



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

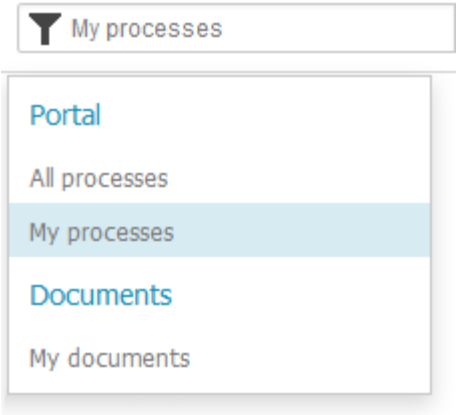
The filter criteria of the selected favorite are immediately applied and the the list of matches updated.

4.30.8 Using a favorite in the Favorites area

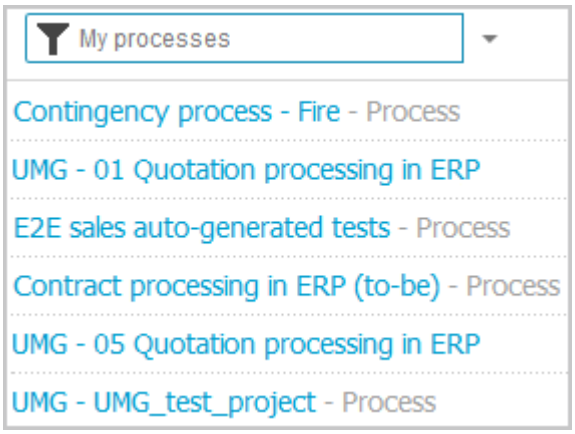
In the Favorites area (page 330), you can open a favorite to filter the content on predefined filter criteria.

Procedure

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



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



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

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

You have filtered database content and opened one of your favorites using the **Favorite** tab.

4.30.9 Clear filters

You can clear filter criteria in many ways.

REMOVE A SELECTED FILTER CRITERION

You can remove a single filter criterion.

Procedure

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

The filter criterion is removed and the list of matches updated.

CLEAR CRITERIA OF THE MAIN FILTER AREA

You can remove all filter criteria of the main filter area. The main filter area is the upper part of the filter bar located to the left of the list of matches.

Procedure

Click **Show all** in the **filter** bar.

All filter criteria are removed and the the list of matches updated.

CLEAR FILTER CRITERIA OF THE SUBORDINATED FILTER AREA

You can remove the filter criteria of the subordinated filter area. When you have selected the model context for filtering, the subordinated filter criteria for models are located in the **filter** access bar below the main filter area.

Procedure

Click **Clear subordinated filters** in the **filter** bar.

The filter criteria of the subordinated filter area are removed and the the list of matches updated.

CLEAR ALL FILTER CRITERIA

You can remove all filter criteria.

Procedure

Click **Clear all filters** top right.

All filter criteria are removed and the list of matches updated.

4.30.10 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 322).
2. Hold down the **Ctrl** key, and click the name of the relevant item.

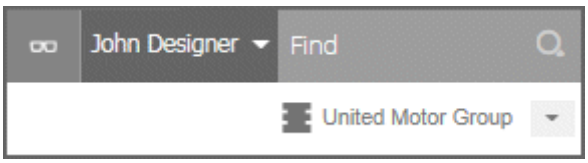
The item will open on a separate tab.

4.30.11 Valuable information

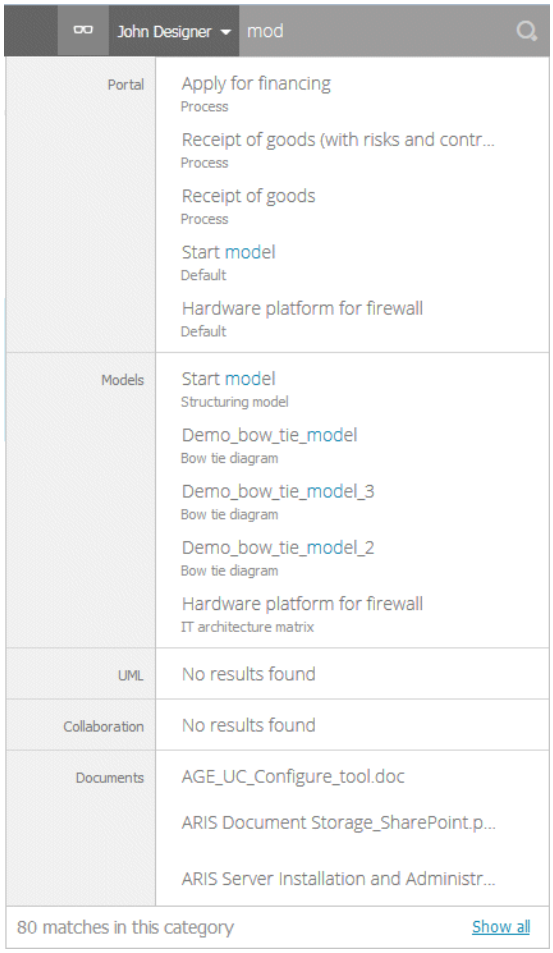
This section provides you with background information that will assist you in carrying out the relevant procedures.

4.30.11.1 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 329).

4.30.11.2 How is the Search area structured?

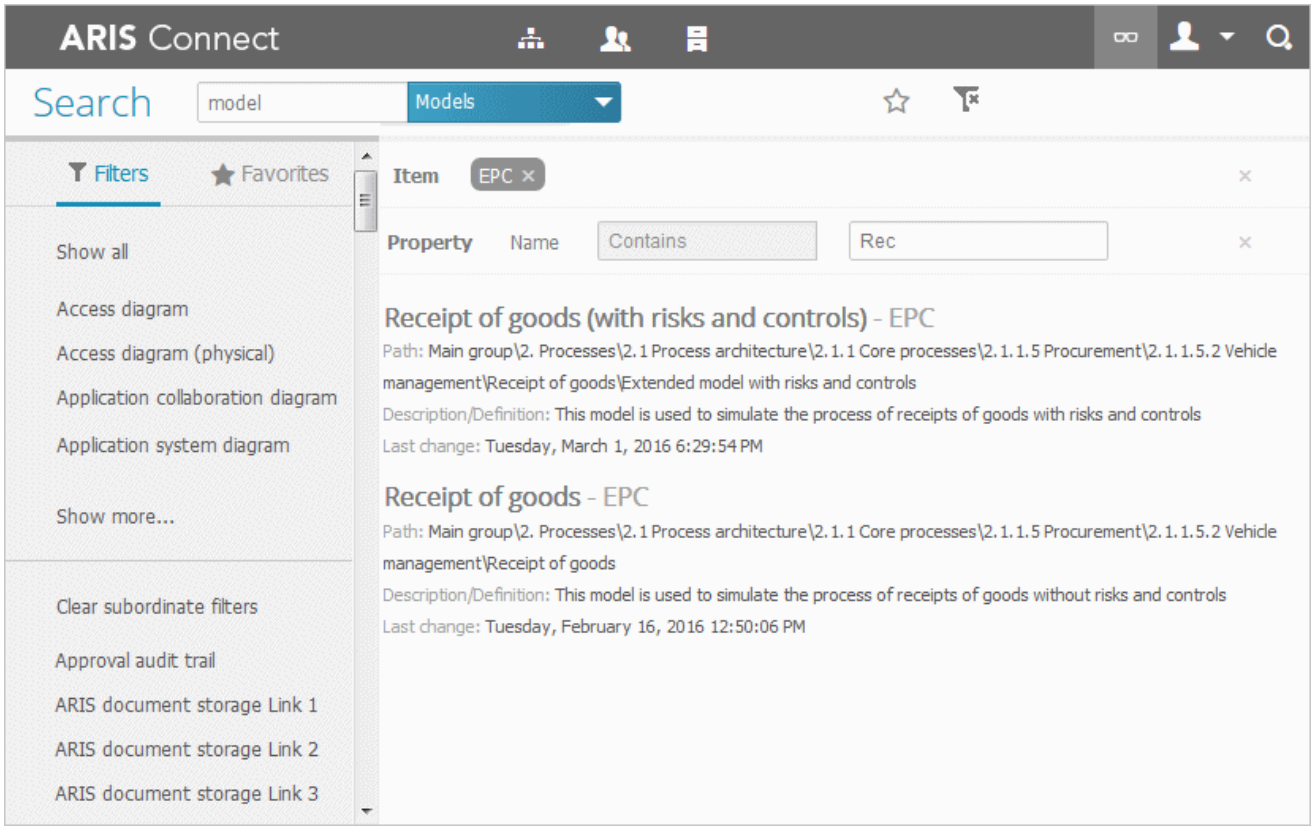
The Search area (page 322) includes a list of all matches.

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.

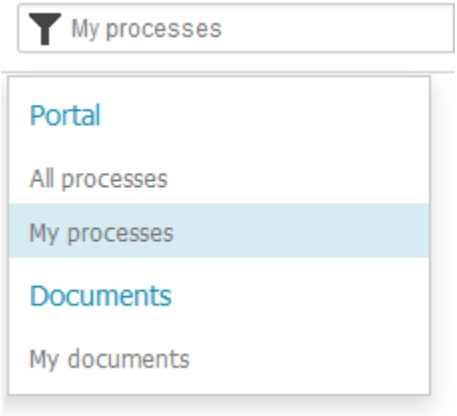
For certain filter criteria, such as the file name, you can enter properties as the search criterion, e.g., a term that should be present in the name.

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.



4.30.11.3 How is the favorite 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.



4.30.11.4 How can search results be influenced?

If you use quick search (page 321) or the Search area (page 322) to find items, the list of results will be influenced by the selected database (page 289) 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.

4.31 ARIS Viewer Contribution

If you have both the **ARIS Connect Viewer** and **Contribution** license privilege, you are able to change values of specific items (page 337), create new or reuse existing items (page 332), as well as delete items (page 334) in the portal.

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

4.31.1 Change values of items

You can change values of items (page 337) 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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click **Edit**. The edit mode (page 336) 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 340) 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 340) if you do not enter a numerical value.

4.31.2 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 340). 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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click **Edit**. The edit mode (page 336) 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 344) and added to the list, or the existing role will be reused. If you selected a role to which the risk was already assigned, no new entry is added to the table.

4.31.3 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 340). 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 (page 375).

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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click **Edit**. The edit mode (page 336) 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 344) are added to the list, or existing application system types will be reused. Occurrences of new application system types are placed in the diagram window.

4.31.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 340). 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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click **Edit**. The edit mode (page 336) 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.

4.31.5 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 340). It uses the example of an application system type diagram.

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 (page 375).

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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click **Edit**. The edit mode (page 336) 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.

4.31.6 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

4.31.6.1 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 (page 256), default view (page 272), or a view derived from these views.

4.31.6.2 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** 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 340) is another clear indication that the edit mode is active.

4.31.6.3 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

4.31.6.4 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 340) 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 340) if you do not enter a numerical value.

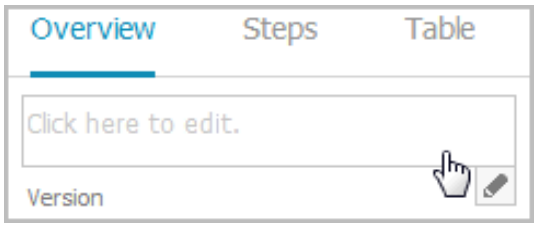
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

4.31.6.5 Which editing options are available?

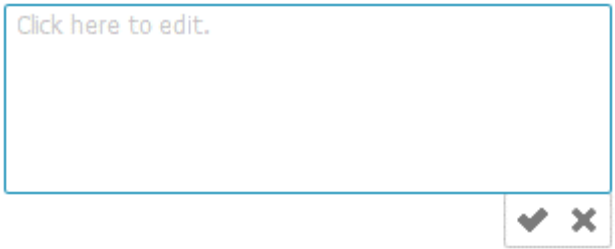
Depending on the attribute (page 339), various editing options are available.

Edit box

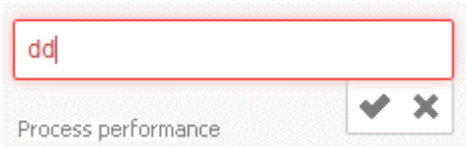
If the edit mode is active (page 336), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 331), the hint **Click here to edit.** is displayed:



Clicking in the field will open it for editing:



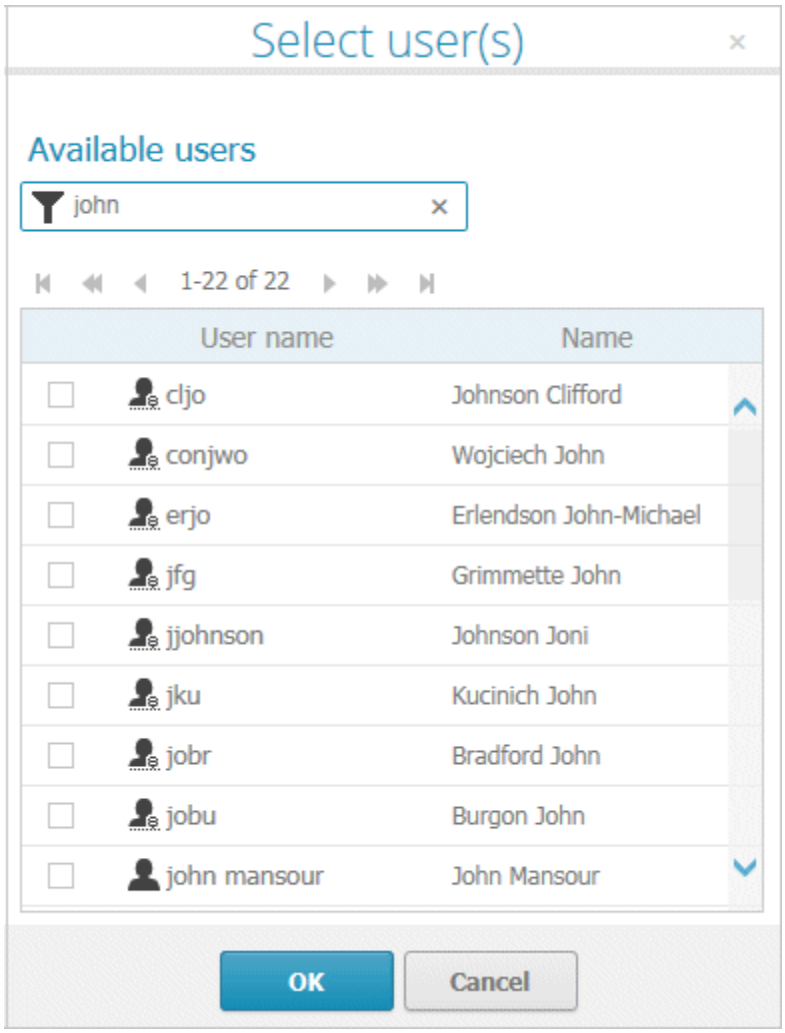
The field indicates whether or not the input corresponds to the type expected. If an entry differs from the type expected, the field is displayed with a red border:



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

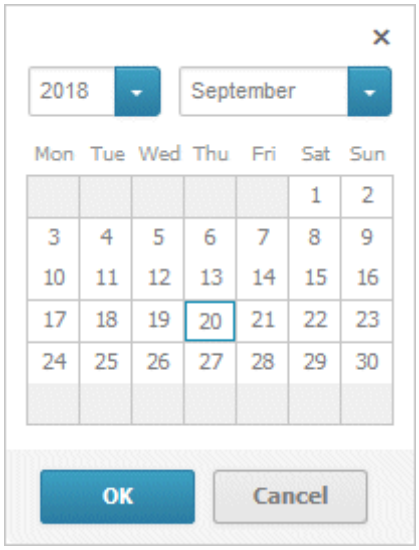
SELECT USER(S)

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

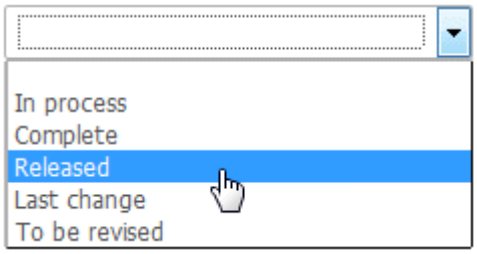
You can enter dates using the calendar. It opens when you click in the edit box:



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:

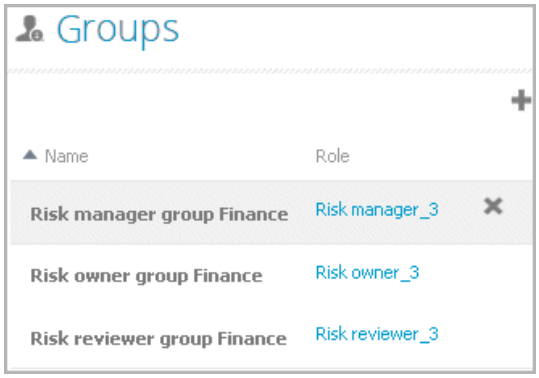
Clicking in the field will offer possible values for selection:



CREATE AND REUSE OBJECTS

TABLE

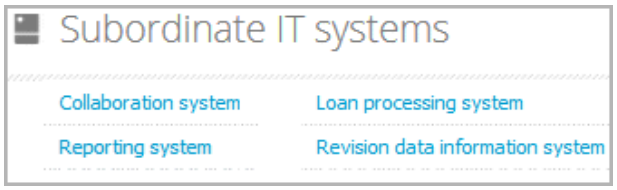
Existing objects are listed in a table. Additional information is displayed in the individual rows:



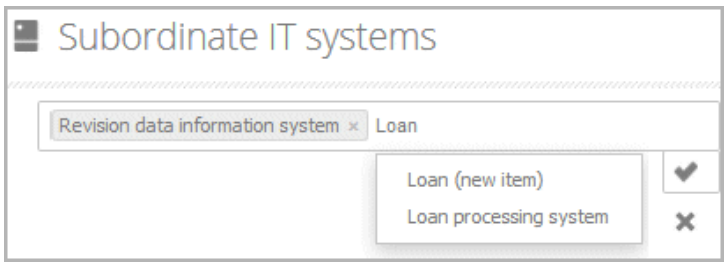
You can add individual objects to the table (page 332) or remove objects from the table (page 334).

LIST

Existing objects are displayed in a list:



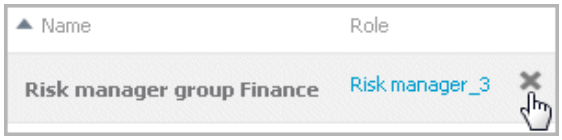
You can create new or reuse existing objects. It is possible to add multiple items at once. Click in the field and enter the names for the required items. Once your input is complete, click ✔ **Change**:



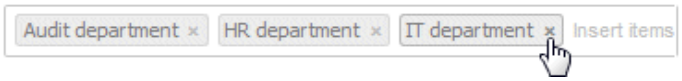
DELETE OBJECTS

You can delete objects from tables (page 334) and lists (page 334):

Table



LIST



4.31.6.6 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.

4.32 Process-Driven Management for 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.

4.32.1 Run SAP® transaction

Run transactions in the connected SAP system.

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- You are using Process-driven Management for SAP.
- Your administrator has configured the portal for the use of SAP content (page 67).

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 used view, 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.

4.32.2 Reset SAP® logon data

Change the logon information for running transactions.

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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 345) you need to log on to the SAP system again.

4.32.3 Download SAP® documents

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

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- You are using Process-driven Management for SAP.
- Documents are available.
- This function has been configured in the portal (page 67).

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 used view, 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.

4.32.4 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 Connect 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 Connect 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**.

4.32.5 Start ARIS Online Guide

If your administrator has provided (page 67) ARIS Online Guide via ARIS Connect, you can open the relevant portal pages from SAP screens using the F1 key. All transactions are shown there in relation to the process. Details are summarized in corresponding fact sheets.

Prerequisites

- This function has been configured in the portal (page 67).
- You have configured the help call (page 347).

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.

4.33 RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process (page 351). 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.
- **I**nformed specifies who must be informed. It indicates who is kept up to date on the progress or completion of a task.

If you use the corresponding objects and connections in the process models, these can be evaluated by means of the RACI matrix, which is output in ARIS Connect.

In the portal, process participations are displayed by default as a RACI matrix in classic view (page 258) and default view. You can configure the representation as RASCI matrix. Please contact your local Software AG sales organization (http://softwareag.com).

You can output these process models using the report **RA(S)CI - Output organizational participations in processes**. By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g_bRASCI** variable to **true**.

4.33.1 Create process model for RACI matrix

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

Procedure

1. Create a process model (page 351).
2. Use objects (page 351) and connections that can be evaluated by the RACI matrix.
3. Save the process.

You have modeled a process for which the relevant responsibilities can be represented using a RACI matrix (page 350).

4.33.2 Display RACI matrix

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

Procedure

1. Activate the portal if it is not activated yet.
2. If your administrator has published multiple databases (page 64), select the required database by clicking the current database name next to the database symbol and then clicking the name of the relevant database.
3. Click **Groups**.
4. Show the **Navigation** bar if it is not visible yet.
5. In the **Navigation**, open the group in which the required process (page 351) 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 258) 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 484) report to output the RACI matrix in Microsoft Excel format from an open process model (page 386). By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g_bRASCI** variable to **true**.

4.33.3 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

4.33.3.1 Which diagrams can be used for a RACI matrix?

A RACI matrix can be based on the following diagramms:

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

4.33.3.2 Which objects can be used for a RACI matrix?

The following objects are evaluated by a RACI matrix:

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

4.33.3.3 Which connections can be used for a RACI matrix?

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

RESPONSIBLE (R)

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

ACCOUNTABLE (A)

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

CONSULTED (C)

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

INFORMED (I)

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

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

SUPPORTIVE (S)

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

4.34 Mini workflows

4.34.1 Edit models

You can edit models in ARIS Connect.

Prerequisite

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

Procedure

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

Your changes are saved in the model.

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

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

4.34.2 Share model

You can share models with other users.

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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**.

4.34.3 Approve model

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 license privilege **ARIS Connect Viewer** license.
- 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 used view, click **Groups** or **Processes**.
4. Click **Navigation** if the navigation bar is not shown.
5. Click the model you want to edit.
6. Click **Diagram** if not enabled yet.
7. Click **Edit**. The model opens in an individual tab.
8. Make the required changes.
9. Click **Collaboration** if it is not activated yet.
10. Click **Request approval**. The **Confirmation** dialog opens and you can confirm that the model changes are saved and the model is reopened read-only.
11. Click **OK**. The model is reopened read-only and the **Request approval** dialog opens.
12. If required, select a person in charge to approve the model if the **Person responsible** attribute has not been specified at the model.
13. Enter a comment to explain the request approval.
14. Click **Send**. A send notification is displayed.
15. 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**.

4.34.4 Submit change request

You can send change requests for models to the process manager.

Prerequisites

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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 send notification is displayed.
11. Click **OK**.

The process manager 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 process manager 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 process manager 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 manager has selected (**Approve**, **Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

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

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

4.34.5 Request feedback on processes

You can request feedback on processes from other users.

Prerequisite

- You have at least the license privilege **ARIS Connect Viewer** license.
- 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 used view, 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 372) 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**.

5 Collaboration

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.

5.1 Open Collaboration

Open Collaboration to exchange information, share knowledge, etc.

Prerequisites

- Collaboration is activated in ARIS Administration configuration.
- You have at least the license privilege **ARIS Connect Viewer** license.
- You have the relevant access privilege (page 373) in ARIS Architect.

Procedure

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

Collaboration opens.

5.2 Getting started

These five steps are an optimal start to Collaboration:

1. Create (page 358) a user profile.
2. Search (page 359) for groups and people who provide interesting content.
3. Create filters and check (page 365) for new information.
4. Comment on (page 363), share, flag posts, etc.
5. Invite (page 367) others to Collaboration.

5.3 Create or change 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 your title 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.

5.4 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.

5.5 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 relevant access privilege (page 373) 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 372) 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 will be posted, and the processes you follow will be displayed under **My portal feeds** in Collaboration. To stop following content, click **Unfollow** in the row of the relevant content.

5.6 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 relevant access privilege (page 373) 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.

5.7 Publish posts

Post information that could be of interest to your colleagues, or start a discussion on a particular topic.

Prerequisite

You have the relevant access privilege (page 373) 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 372) 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 371) by entering the first letters of the relevant group, then select one of the options displayed. Per 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 information is also displayed in the company feed and in your feed, if you are following this feed. 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.

5.8 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 relevant access privilege (page 373) 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 thereof, if they have made 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 **More > Edit** to change or correct a post or comment you already published. Editing is possible, as long as nobody liked or commented.
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.

5.9 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.

Procedure

1. Enter your post (page 362) or comment in 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.

5.10 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.

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. 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. Click **OK**.

Your settings are saved. In the future, you will be notified in the selected situations.

5.11 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**.

5.12 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. Enter your post (page 362) in 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 372) 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.

5.13 Filter feeds by means of tags

Use tags (page 372) 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.

5.14 Use hashtags

Use hashtags to categorize posts using keywords or topics. This enables other users to find posts on interesting topics more easily.

Procedure

1. Enter your post (page 362) or comment in 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 362) the post.

Your post is published and the keyword entered as a hashtag is highlighted in color as a link. Tags are automatically created for hashtags so that they can be used to filter feeds.

If a user clicks the hashtag, all post and comments subsequently entered are displayed on a separate page. A hashtag can be saved as a filter (page 365). 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

5.15 Create 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 361).
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.

5.16 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 368) 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**).

5.17 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.

5.18 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 373) 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.

REVOKE/REMOVE

The **Remove** button removes the user from the group. The **Revoke** button revokes the user's coordinator privileges.

5.19 As Collaboration administrator check activities flagged as inappropriate

Check content flagged as inappropriate and decide whether it needs to be deleted.

Prerequisite

- Flagging activities is activated in ARIS Administration configuration.
- You have the **Collaboration administrator** function privilege.

Procedure

1. Click **Administration > Check flagged activities**. The activities flagged as inappropriate are displayed.
2. Verify whether the Collaboration terms of use have been violated.
3. Click **Allow** if the content does not violate the terms of use.
4. Click **Delete** if the content violates the terms of use and **OK**.

The flagged activity has been checked and is either deleted or will continue to be shown depending on the result.

Alternatively, you can check the flagged activities in your notifications.

5.20 Clean up activities as a Collaboration administrator

You can delete activities from before a specifiable date, to remove outdated content from Collaboration. This makes the feed overview more transparent.

Prerequisite

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

Procedure

1. Click **Administration > Clean up activities**.
2. Click the **Delete all activities older than** box. The calendar opens.
3. Select the date from which all earlier posts are to be deleted.
4. Click **OK**.
5. Click **Delete**.
6. Click **OK**.

The activities older than the date entered will be deleted.

5.21 Manage portal feeds as a Collaboration administrator

Edit portal feed subscriptions of Collaboration users. You can cancel subscriptions completely or just for individual users. Canceled subscriptions cannot be added here again.

Prerequisite

- You have the **Collaboration administrator** function privilege.
- You have the relevant access privilege (page 373) in ARIS Architect.

Procedure

1. Click **Administration > Manage portal feeds**. The followed items are displayed.
2. Click **Unfollow** in the row for the item for which you want to cancel the subscription.
3. To cancel the subscription for individual followers, click **Edit** in the row for the relevant item. The followers are displayed.
4. Click **Unfollow** in the row for the follower whose subscription you want to cancel.
5. Click **OK**.

The selected subscriptions will be canceled. The corresponding feed will no longer be displayed in **My portal feeds** for the selected users.

5.22 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 372) **#Help**.

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

5.23 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

5.23.1 What is a feed?

Feeds contain the posts (page 362) in Collaboration, which for example, can be commented (page 363) 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.

5.23.2 Which target groups can be assigned to posts?

These target groups are selectable for posts (page 362):

- **Private**

  Only the creator can see it. It is useful for own notes.
- **Public**

  All users can see it.
- **Public Collaboration group**

  Only members of the selected public group(s) can see it. Multiple selection is possible.
- **Private Collaboration group**

  Only members of the selected public group(s) can see it. Multiple selection is possible, but you can only assign groups you are a member of.
- **ARIS user group (ARIS Administration)**

  Only members of the selected ARIS user group(s) can see it. Multiple selection is possible, but you can only assign groups you are a member of.

Per default a new post is public. Combinations of ARIS user groups, public and private Collaboration groups are possible. It is not possible to assign users.

In a post you can move the mouse pointer over the group icon ( ) to view the names of the assigned groups.

The Collaboration administrator can see all posts, even the private ones.

5.23.3 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.

5.23.4 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**.

5.23.5 What is a timestamp?

A timestamp (page 363) indicates when a post was last updated in Collaboration, e.g., **2 h**.

5.23.6 What is a tag?

Tags are used to categorize posts using keywords, making them easier to find (page 366). 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.

5.23.7 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 365). 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

5.23.8 What does flagging a post mean?

You can send (page 363) posts you deem inappropriate to the Collaboration administrator for review. The administrator decides (page 369) whether the post will be deleted or not.

5.23.9 Which group types exist?

Groups can be created (page 367) 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 368) to the group.

5.23.10 What are the privileges of coordinators and Collaboration administrators?

COORDINATORS

They are responsible for managing (page 368) the group profile, privileges, access, and feed activity facilitation. Coordinators can delete their groups.

As the creator of a group, you are automatically the coordinator. You can assign (page 368) coordinator privileges to other group members, as well.

COLLABORATION ADMINISTRATORS

Have the same privileges as coordinators. In addition, they manage the posts that users have flagged as inappropriate (page 369). You can view all posts and delete them. Collaboration administrator is a function privilege assigned in ARIS Administration.

5.23.11 Which access rights of ARIS Architect are relevant for Collaboration?

For some interactions of Collaboration users need special access rights, which are set in <aba>. For example for posts on portal feeds. These database access rights are relevant for Collaboration:

- **No access (----)**

  Portal content is not displayed.
- **Read (r---)**

  Portal content is displayed. Users can read posts of models and they can like, share, bookmark, tag and flag them, but they can not comment on models.
- **Read + Comment (rc--)**, **Read + Write (rw--)** (and all versions of rw access)

  Portal content is displayed. Users can use all functions of Collaboration.

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

6 Repository

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 **Repository**, all databases of the tenant are displayed and you can use the Model Editor (page 375) to work in the database groups for which you have the required privileges.

7 Model Editor

The Model Editor allows you to edit existing and new models (page 376) in ARIS Connect. Using the **ARIS Connect Designer** license privilege you can create new models (page 376) directly in the portal (page 8), as well as edit (page 386) or create models (page 376) in the repository (page 374).

You can access the entire modeling functionality of Model Editor via buttons and bars (page 448) that you can use to efficiently edit your models.

If you have created or opened a model you can set up the perspective (page 380) and thus, adjust it to your own needs. Modeling (page 386) your organization, processes, data, etc., is just as simple as extended model editing (page 413). In addition to the graphic information, you can add further information to your models using attributes (page 395) that can be placed in the model as a symbol (page 427) or a text (page 423), if necessary.

Of course, you can also add comments to models (page 445) and discuss models with other users.

To be able to use Model Editor, you need to have the **Designer** license.

7.1 Model Editor videos

You can learn about the operation and function of this complex topic in a video tutorial. The online video tutorial is available at ARIS Community (http://www.ariscommunity.com). Therefore, you need an internet connection to be able to watch the video.

7.2 Create/Import a model

Model Editor enables you to create new models or use models imported from ARIS Express (http://www.ariscommunity.com/aris-express).

7.2.1 Create new model

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

Prerequisite

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

Procedure

1. Open ARIS Connect and log in with your user name and password.
2. Click **Portal** if it is not activated yet.
3. Click **Create model** on the **Home** tab. The dialog opens.
4. Enter a name for the new model in the **Model name** box.
5. Click the **Model type** box and enter part of the model type name. All model types (page 453) are displayed whose names contain the term you entered.
6. Select the required model type. The **Target** area displays the database and group names. This is where the new model will be stored.
7. Click **Change** if you want to store the model in a different database and/or group. The **Select target group** dialog opens.
8. Select the required database in the **Database** box.
9. Select the required group.
10. Click **OK**. The **Select target group** dialog closes.
11. Check your input.
12. Click **OK**. The **Create model** dialog closes.

In the repository

1. Click **Repository** if it is not activated yet.
2. Select the database group in which you want to create a new model. When you select the group, its content is displayed.
3. In the upper right, click **Create model**. The dialog opens.
4. In the **Model name** box specify the name that the new model is to be created with in the selected group.
5. Click the **Model type** box and enter part of the model type name. All model types (page 453) are displayed whose names contain the term you entered.
6. Select the required model type.
7. Click **OK**.

The new model is created and opened in a new tab. You can set up Model Editor (page 380) and model the model.

7.2.2 Create a new model using an assignment

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

Procedure

1. In the open model, click the object to which you want to assign a new model.
2. Activate the Start (page 458) tab bar.
3. Click **Assignment > Create assignment**. The dialog opens.
4. Select the required model type. The model types that are allowed for the selected object by the method and by the method filter (page 457) in use are available for selection.
5. Enter the relevant model name. The name of the selected object is suggested as a model name.
6. Click **OK**.

7.2.3 Create group

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

Procedure

1. Click **Repository** if it is not activated yet.
2. Select the database group in which you want to create a new group. When you select the group, its content is displayed.
3. In the upper right, click **Create group**. The dialog opens.
4. Enter the required name in the **Name** box.
5. Click **OK**.

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

7.2.4 Import ARIS Express model

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

Prerequisite

- The model is of a model type allowed by ARIS Connect and by the method filter (page 457) you are using.
- You have a **Designer** license.

Procedure

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

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

7.2.5 Import BPMN file

You can import (page 474) data from a BPMN file and use the BPMN diagram that was generated by the import in ARIS Connect.

The following applies when importing (page 379) a BPMN 2.0 diagram:

- You can import BPMN diagrams of the **BPMN collaboration diagram (BPMN 2.0)** and **BPMN process diagram (BPMN 2.0)** type.
- **<bpmn:import>** elements are not supported (see chapter 15.3.1 **Document Structure** of the BPMN specification (http://www.bpmn.org/)).
- Existing ARIS objects are not reused. Importing the same file multiple times results in new models and definition copies. Occurrence copies of objects are not generated.
- XSD ID references are supported. QNames that can contain namespaces are not supported (see chapter 15.3.2 **References within the BPMN XSD** of the BPMN specification (http://www.bpmn.org/)). The BPMN file is validated against the official XML schema of the BPMN 2.0 specification and imported if validation is successful. If errors are found, these are displayed in a dialog.
- There are character limits for attributes in ARIS. For example, the Name (AT_NAME) attribute can have a maximum of 250 characters. If the BPMN import exceeds this number of characters, the first 250 characters are used and the remaining characters are cut off.

Prerequisites

- The method filter (page 457) you are using allows BPMN diagrams.
- You have a **Designer** license.

Procedure

7. Click **Repository** if it is not activated yet.
8. Select the database group into which you want to import the BPMN diagram. When you select the group its content is displayed and a ▼ **down arrow** is shown next to the name.
9. Click the ▼ **down arrow** and select **Import BPMN diagram**. The dialog opens.
10. Click **Select file** and navigate to the relevant BPMN file.
11. Select the BPMN file and click **Open**.

The BPMN diagram is stored in the selected group and opened it for editing on a tab.

7.3 Customize Model Editor

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

- edit models.
- create new models.
- assign models.
- output reports.
- comment on models and model items.

7.3.1 Show and hide bars

Using the bar buttons you can show or hide bars as required.

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

Procedure

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

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

7.3.2 Show/Hide header

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

Procedure

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

You have adapted the display area according to your requirements.

7.3.3 Customize Symbols bar

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

REMOVE INDIVIDUAL SYMBOLS FROM THE SYMBOLS BAR

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

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

ADD A SPECIFIC SYMBOL

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

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

OVERALL SETUP OF THE SYMBOLS BAR

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

The **Symbols** bar now provides you with the object symbols required for modeling your model. If you placed an object symbol using the **Symbols** bar, you can then use the mini toolbar (page 464) to create further objects.

RESTORE DEFAULTS

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

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

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

7.3.4 Customize Attributes tab

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

Procedure

1. Click **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Edit language** if you want to show (page 435) an additional language column for language-specific attributes. You can select an additional database language and view and edit it next to the language currently used.
4. Click **Add** on the **Attributes** tab. The **Select attribute** dialog opens.
5. Enter a search term for the attribute you want to display. A list of all attributes whose names contain the term you entered is displayed.
6. Click the relevant attribute.
7. Click **OK**. The selected attribute is added to the **Attributes** tab.
8. Click **More** next to the attribute whose visibility you want to specify.
9. Click **Hide always** if you want to hide the attribute from the **Attributes** tab even if a value has been specified. For the attribute to be displayed at a later time you need to select it explicitly by clicking **Add**.
10. Click **Hide, if not specified** if you want the attribute to be displayed in the **Attributes** tab only if a value has been specified.
11. Click **Place attribute** and the relevant position in the model window if you want the attribute value to be displayed in the model.
12. Click **Delete attribute**, if you want to delete the attribute value. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

The attributes will be displayed in line with your settings.

7.3.5 Show and hide mini toolbar

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

Procedure

1. Select an object in the model. The mini toolbar (page 464) is shown as transparent. When you move the mouse pointer over the mini toolbar it becomes opaque. Now you can configure the mini toolbar (page 383), or click the **Connection** symbol or object symbols.
2. If you want the mini toolbar to be hidden only temporarily while the mouse pointer is not over the object, move the mouse pointer away from the object until the mini toolbar is hidden. As soon as you move the mouse pointer back towards the object, the mini toolbar is shown again.
3. If you do not want the mini toolbar to be shown for a selected object anymore, move the mouse pointer several centimeters away from this object. The mini toolbar is hidden and is then no longer shown when you position the mouse pointer over the object.
   It will be visible for the object again only if you cancel the selection and select the object again.

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

7.3.6 Configure mini toolbar

You can define which object symbols the mini toolbar (page 464) should offer for the relevant object type. You are offered only the object symbols for which the creation of a connection to the selected object type is allowed by the method.

Procedure

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

Now, when you open the mini toolbar (page 383) the selected object symbols are available.

7.3.7 Change grid width

You can show a grid in the model window (page 448). Model items are aligned to the grid and inserted or moved according to the grid width. In the grid, you can specify how far apart the grid points will be.

Procedure

1. Activate the Model (page 460) tab bar.
2. Click **Grid > Change grid width**. The dialog is displayed.
3. Enter the required grid width or click the up or down arrow to change the grid width.
4. Click **OK**.

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

7.3.8 Show formatting toolbar

The formatting toolbar is enabled for selected texts, for example, for the text of placed attributes (page 395). The formatting bar is not available for attributes that the system changes, for example, for the attribute **Creator**.

Procedure

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

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

7.3.9 Assign model template

You can assign a template (page 497) to a model and thus, change its appearance as well as its attribute placements in the model window (page 448) at once automatically.

Procedure

1. Activate the Model (page 460) tab bar.
2. Click **Template**. The list of available templates is shown.
3. Click the required template.

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

7.3.10 Reset model template

You can reset the appearance of a model that was assigned templates (page 497) to the ARIS default appearance. Color and size changes and attribute placements assigned by templates are removed.

Procedure

1. Activate the Model (page 460) tab bar.
2. Click **Template**. The list of available templates is shown.
3. Click **Reset**.

The content of the model window (page 448) is adjusted immediately.

7.4 Model

Model Editor assists you in editing models, e.g., by providing a grid, a mini toolbar (page 394), graphic objects (page 392), or in-place formatting options (page 395).

7.4.1 Open model for editing

You can open models in different ways.

Prerequisite

You have a **Designer** license.

Procedure

USING THE SEARCH

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

FROM GROUPS

1. Activate the **Groups** area in the portal.
2. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the portal at the top right below the search. The groups of the selected database are displayed.
3. Select the group containing the required model. The contents of the selected group are listed.
4. Click the name of the relevant model.
5. Click **Diagram** if this display is not enabled yet. The model is displayed.
6. Click **Edit**.

FROM THE 'RECENT CHANGES' TAB

1. In the portal, activate the **Recent changes** tab of the overview. All models are listed that have recently been changed or created.
2. If you are authorized to use multiple databases, activate the database containing the contents you want to access. You can select the relevant database in the portal at the top right below the search. The display of the **Recent changes** tab is adjusted.
3. Click the name of the model you want to open. The **Groups** area opens and the model is activated.
4. Click **Diagram** if this display is not enabled yet. The model is displayed.
5. Click **Edit**.

FROM THE REPOSITORY

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

The model opens in a separate tab.

7.4.2 Change database language of a model

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

If you change the language (page 387), the text attributes are output in the selected language as long as the text attributes are specified in the target language. If this is not the case, the text attributes are displayed in the alternative language and identified by the language code added to the alternative language.

Prerequisite

The header is shown (page 380).

Procedure

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

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

7.4.3 Show grid

You can show a grid in the model window (page 448). When you place or move model items, they are inserted or moved according to the grid width (page 384). This facilitates the orderly placement of model items.

Prerequisite

The grid is not shown.

Procedure

1. Activate the Model (page 460) tab bar.
2. Click **Grid > Toggle grid**.

A dot grid is displayed in the model window. Model items are placed and moved according to the grid width. If you click **Toggle grid** again, the grid is hidden again.

7.4.4 Place object symbols

You can place object symbols in the model window (page 448) in different ways.

USING THE SYMBOLS BAR

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

The object symbol has been inserted in the model window.

USING THE SELECTION BOX IN THE SYMBOLS BAR

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

The object symbol has been inserted in the model window.

USING THE MINI TOOLBAR

Prerequisite

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

Procedure

1. Click the placed object symbol. The mini toolbar (page 464) is shown.
2. In the mini toolbar, click the symbol you want to place in the model window. A frame is displayed for the new object.
3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. If necessary, overwrite the previous name with the name of your choice and press Enter.

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

AS AN OCCURRENCE COPY

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

Prerequisite

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

Procedure

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

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

AS A DEFINITION COPY

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

Prerequisite

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

Procedure

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

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

7.4.5 Place occurrence copy

You can place occurrence copies in the model window (page 448) in different ways.

Procedure

BY PLACING AN OBJECT SYMBOL

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

The occurrence copy is placed in the model window.

BY COPYING AND PASTING

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

You have placed the occurrence copy.

7.4.6 Change object symbol

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

Prerequisite

The method filter in use (page 457) includes different symbols of the objects you selected.

Procedure

1. Click an object, or hold the **Ctrl** key pressed to select multiple objects of the same type.
2. Activate the Start (page 458) tab bar.
3. Click **Change symbol**. The list of object symbols available for the selected object(s) is shown.
4. Click the symbol you want to use from now on for the selected object/s in this model.

The symbol of the selected object is or the symbols of the selected objects are changed.

7.4.7 Paste copied object as an occurrence copy

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

Prerequisite

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

Procedure

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

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

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

7.4.8 Paste copied object as a definition copy

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

Prerequisite

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

Procedure

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

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

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

7.4.9 Paste copied graphic objects

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

Procedure

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

Copying and pasting graphic objects is now complete.

7.4.10 Place graphic objects

You can place graphic objects in the model window (page 448) in order to, for example, structure model content.

Procedure

PLACE CIRCLE

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

The circle is inserted in the model window. Now you can color the line (page 421) and inside (page 419), and, for example, place the graphic object behind a model area (page 428) to highlight this area.

PLACE SQUARE

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

The square is inserted in the model window. Now you can color the line (page 421) and inside (page 419), and, for example, place the graphic object behind a model area (page 428) to highlight this area.

PLACE RECTANGLE

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

The rectangle is inserted in the model window. Now you can color the line (page 421) and inside (page 419), and, for example, place the graphic object behind a model area (page 428) to highlight this area.

PLACE ELLIPSE

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

The ellipse is inserted in the model window. Now you can color the line (page 421) and inside (page 419), and, for example, place the graphic object behind a model area (page 428) to highlight this area.

PLACE POLYGON

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

The polygon is inserted in the model window. Now you can color the line (page 421) and inside (page 419), and, for example, place the graphic object behind a model area (page 428) to highlight this area.

PLACE LINE

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

The line is inserted in the model window. Now you can color the line (page 421).

Specify size when placing objects

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

1. Open the **Symbols** bar if it is not already open by clicking **Symbols**.
2. Click the graphic object **Circle/Ellipse** or **Square**.
3. In the model window, click the position where you would like the graphic object to begin, and hold down the mouse button.
4. Drag the mouse pointer in the required direction until the graphic object has taken the shape that you want to place.
5. Release the mouse button.

The graphic object is placed with the required size.

7.4.11 Modeling using the mini toolbar

You can model very effectively using the mini toolbar (page 464). By configuring (page 383) it you are quickly offered the object symbols (page 383) required for your model.

Procedure

1. Click a placed object symbol (page 388). The mini toolbar is shown.
2. In the mini toolbar, click the object symbol you want to place. A frame is displayed for the new object.
3. In the model window, click the position where you want to place the object symbol. The object symbol is placed together with a connection to the source object and the name field for overwriting.
4. Enter the relevant name.
5. Press **Enter**.

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

7.4.12 Edit attributes

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

Prerequisite

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

Procedure

1. If you want to edit model attributes, ensure that no model item is selected.
   If you want to edit object or connection attributes, select the corresponding object or connection.
2. Click **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Display the relevant attribute using the **Add** button if it is not listed.
5. Click the cell that comes after the name of the attribute. A dialog is displayed. If you can enter any text for an attribute, a dialog including the formatting toolbar is displayed. If required, you can enlarge (page 446) this dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times.
7. Click **OK**.

You have changed the attribute value.

7.4.13 Directly format placed attributes

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

Prerequisite

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

Procedure

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

You have formatted the placed attribute.

7.4.14 Create connections

You can link objects using connections in different ways in the model window (page 448).

WHEN PLACING OBJECTS USING THE MINI TOOLBAR

Prerequisite

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

Procedure

1. Click the placed object symbol. The mini toolbar (page 464) is shown.
2. In the mini toolbar, click the symbol you want to place in the model window. A frame is displayed for the new object.
3. Click the position in the model window where you want to insert the object symbol. The name of the object symbol is selected for overwriting by default.
4. If necessary, overwrite the previous name with the name of your choice and press Enter.

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

SUBSEQUENTLY USING THE SYMBOLS BAR

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

Both objects are linked by a connection.

SUBSEQUENTLY USING THE MINI TOOLBAR

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

Both objects are linked by a connection.

7.4.15 Place text

You can place text in the model window (page 448) irrespective of other model items. This way you can add additional information to your model.

Procedure

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

The text is inserted into the model window. You can format (page 395) the text in just the same way as placed text attributes.

7.4.16 Adjust size of appearance

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

Procedure

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

You have resized the model according to your requirements.

7.4.17 Delete model items

You can delete model items from the model window (page 448).

USING THE TAB BAR

1. Select the model items you want to delete.
2. Click **Delete** in the tab bar.

The selected elements are deleted without prompting. As long as you have not saved the model you can undo the deletion by clicking **Undo**.

USING THE DELETE KEY

1. Select the model items you want to delete.
2. Press the **Del** key.

The selected elements are deleted without prompting. As long as you have not saved the model you can undo the deletion by clicking **Undo**.

7.4.18 Save model

Save your model.

Procedure

1. Make the required changes.
2. Click **Save** in the tab bar.

Your changes are saved. You or others can access this model status at a later time.

7.4.19 Table-based modeling

Table-based modeling enables rapid and comfortable modeling of EPCs and BPMN diagrams (page 406). The modeling table is shown by default.

Objects are modeled in a table and simultaneously placed directly in the model displayed above. Layout takes place automatically. Table-based modeling provides a quick and easy way to model processes and process frameworks at an early stage, for example, in meetings during the project planning phase.

Moreover, additional information (page 401) can be added for models and objects.

It can also be used to navigate in the model. If an object is selected in the table, it is selected in the model and the selected object is moved into the visible area. If an object is selected in the model, it is also selected in the table and the row is displayed in the visible area.

7.4.19.1 Hide/Show modeling table

You can hide or show the modeling table.

Procedure

1. Open (page 386) a model to edit or create (page 376) a new model.
2. Click **Modeling table**.

If the modeling table is shown, it will be hidden. If it is hidden, it will be shown.

When a model is opened for the first time, the modeling table is shown. The setting made will be applied.

7.4.19.2 Switch full-screen mode on/off

You can hide or show the model above the table. By default, it is shown.

Procedure

1. Open (page 386) a model to edit or create (page 376) a new model.
2. Click **Collapse/Expand table**. The model is hidden.
3. Click **Collapse/Expand table**. The model is shown.

You have hidden or shown the model.

7.4.19.3 Show/Hide BPMN container

For BPMN diagrams, you can specify whether or not the **Belongs to container** column is displayed. This column exists only in BPMN diagrams and is displayed by default.

Procedure

1. Open (page 386) a BPMN diagram.
2. Click **Add or remove columns**.
3. Enable the **Show BPMN container column** check box to show the **Belongs to container** column. Disable the check box to hide the **Belongs to container** column.

You have specified whether or not the **Belongs to container** column is to be displayed.

7.4.19.4 Create object

You can place objects in a model. In the modeling table, a new object is always inserted below the selected object. In BPMN diagrams, pools and lanes can be created directly in the model only and not using the table. However, existing lanes can be inserted using the table (page 401).

Procedure

1. Open (page 386) a model.
2. Start typing the name of the object to be created.
3. Press **Ins**. Alternatively, click ✚ **Add new object**.
4. Select a symbol from the list and enter a name.
5. Press **Enter**.

   If you place the first object in a BPMN diagram, it is automatically placed within a pool. Click **Undo** or press **CTRL + Z**, if you don't want to use a pool. In that case, the object is placed directly in the diagram.

The object is inserted and the model items are rearranged in the model. The color of the object type is displayed in front of the name.

7.4.19.5 Create object with special object symbol

You can use an object symbol that is not directly displayed. The example description is based on the **Function (target)** object symbol, which you can add to an EPC. It must be included in the filter you are using.

Procedure

1. Open (page 386) a model.
2. Start typing the name of the object to be created. Alternatively, click ✚ **Add new object**.
3. Enter the term **target**, which is part of the name for the relevant object symbol. All object symbols and existing objects whose name contains the term are displayed.
4. Click **Function (target)** in the **Symbols** area. The symbol is inserted and the name is selected for overwriting.
5. Enter a name.
6. Press **Enter**.

You have created a new object using the **Function (target)** object symbol. The color of the object type is displayed in front of the name.

7.4.19.6 Use existing object

You can reuse existing objects in the model.

Procedure

1. Open (page 386) a model.
2. Start typing the name of the object to be created. Alternatively, click ✚ **Add new object**.
3. Enter a term that appears in the name of the existing object you want to insert. All objects whose name contains the term are displayed.
4. Select the required object in the **Existing objects** area.
5. Press **Enter**.

The selected object is reused. The color of the object type is displayed in front of the name.

7.4.19.7 Rename structurally relevant object

In the modeling table, you can edit structurally relevant objects that have already been modeled.

Procedure

1. Open (page 386) a model.
2. Select the object you want to edit.
3. Press **F2**. Alternatively, click **Edit table cell**.
4. Rename the object.
5. Press **Enter**.

You have renamed an object.

7.4.19.8 Edit Description/Definition

You can specify descriptions and definitions for objects.

Procedure

1. Open (page 386) a model.
2. If the **Description/Definition** column is not shown, add (page 404) it.
3. Select the **Description/Definition** column for the relevant object and press **F2**.

   Alternatively, double-click the **Description/Definition** column or click the **Description/Definition** column and click **Edit table cell**. The **Edit Description/Definition** dialog opens.
4. Enter the description or definition. The text can be formatted.
5. Click **OK**.

The new or changed description is saved.

7.4.19.9 Create split paths

You can use operators such as **AND**, **XOR**, or **OR** to model split paths in a model.

You can also add split paths without using any operators, if this is permitted by the method, e.g., in BPMN diagrams.

Procedure

1. Open (page 386) a model.
2. Select the object row below which the operator is to be modeled.
3. Press **Ins**. Alternatively, click **Add new object**.
4. Select an operator.

   The **OR** operator in EPCs and a **Gateway** in BPMN diagrams is displayed in the list by default.

   If you want to use a different operator, enter part of the operator name. Corresponding operators are displayed. Select the relevant operator.
5. Press **Ins**. Alternatively, click **Add new object**. Select the first object that will follow the operator and enter a name.
6. Press **Enter**. The object is placed below the operator in EPCs and beside the operator in BPMN diagrams.
7. Select the operator.
8. Press **Ctrl + Shift + Ins**. Alternatively, click **Add new object as a split path**. Select another object and enter a name. The object is placed next to the operator.
9. Press **Enter**.
10. Model (page 400) additional objects for the relevant split path.

You have modeled a split path.

The objects in a split path are outlined in the table by a thicker grid line.

7.4.19.10 Remove object from model

You can remove an object from the model. It is retained in the database and you can reuse it.

Procedure

1. Open (page 386) a model.
2. In the table, click the object you want to remove.
3. Press the **Del**.

The object is removed from the model without prompting for confirmation.

Connections from and to the deleted object are also deleted. The preceding object is linked to the following object using a connection.

7.4.19.11 Model satellites

A satellite is an object that can be inserted in a model or diagram but is not a structurally relevant object (page 500) in the model or diagram.

For example, an object of the **Organizational unit** type is a satellite in an event-driven process chain (EPC). In a model of the **Organizational chart** type, on the other hand, an object of the **Organizational unit** type is a structurally relevant object.

Model new satellites

Procedure

1. Open (page 386) a model.
2. Double-click the cell for the satellite you want to model for an object, e.g. an **Organizational unit** object.
3. Select an object symbol.
4. Enter the name and press the **Enter** key.
5. Enter more names if you want to create additional satellites of the same type. If you want to create additional satellites of a different type in the same column, first select the object type.
6. Exit the cell (page 406) when you have created the required satellites.

You have modeled one or more satellites.

Model existing satellites

Procedure

1. Open (page 386) a model.
2. Double-click the cell for the satellite you want to model for an object, e.g. an **Organizational unit** object.
3. Enter a term that appears in the name of the existing object you want to insert. All objects whose name contains the term are displayed.
4. Select the required object in the **Existing objects** area.
5. Exit the cell (page 406) when you have created the required satellites.

You have modeled one or more existing satellites.

Tip

You can also open the dialog for the relevant column by pressing **F2**. Select an object type and press the **Enter** key. You can enter a name. Press an arrow key to exit the cell.

7.4.19.12 Add object column

You can show columns for objects in the modeling table which should be displayed in the model pane. Columns are always inserted to the right of the column that is selected. If no column is selected, the new column is inserted to the right of the **Name** column.

Procedure

1. Open (page 386) a model.
2. Click **Add or remove columns**.
3. Click **Add object column**. A dialog opens.
4. Select an object with connection from the list and click **OK**.

You have added an object or attribute.

7.4.19.13 Add attribute column

You can add an attribute column to specify attributes of model elements, which aren't initially displayed. Columns are always inserted to the right of the column that is selected. If no column is selected, the new column is inserted to the right of the **Name** column.

Procedure

1. Open (page 386) a model.
2. In the table, click the object for which you want to specify attributes.
3. Click **Add or remove columns**.
4. Click **Add attribute column**. The **Add attribute** dialog opens.
5. Select an attribute.
6. Click **OK**.

The attribute column is added to the right of the selected column and you can enter an attribute value.

7.4.19.14 Edit attribute

You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, e.g., Creation date. System attribute columns have a gray background.

Procedure

1. Open (page 386) a model.
2. Select the cell for the relevant attribute.
3. Press **F2**.
4. Edit (page 410) the attribute value.
5. Exit the cell (page 406) when you have edited the attribute value.

You have edited an attribute.

7.4.19.15 Arrange columns

You can adjust the arrangement of columns to meet your requirements. In the following example, it is assumed that you want to arrange the default column **creates output to Information carrier** directly to the right of the default column **Name**.

Procedure

1. Open (page 386) a model.
2. Click **Add or remove columns**.
3. Click the Remove symbol for the **creates output to Information carrier** column.
4. Click the name of an object in the **Name** column.
5. Click **Add or remove columns**.
6. Click **Add object column**. The **Add new object column** dialog opens.
7. Select an object and a connection. In this case, select **Information carrier** as the object and the **creates output to** connection.
8. Click **OK**.

The **creates output to Information carrier** column including the objects within is placed directly after the **Name** column.

You can arrange other columns in the same way.

7.4.19.16 Remove column

You can remove columns for attributes or objects from the modeling table.

Procedure

1. Open (page 386) a model.
2. Click **Add or remove columns**.
3. Click the **Remove** symbol in front of the name of an attribute or object column.

The attribute or object column is removed from the modeling table without prompting for confirmation. The attribute value or the object is retained.

If required, you can add this attribute with the value specified or this object to the modeling table.

7.4.19.17 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

7.4.19.17.1 What models can be edited using a table?

The following model types can be edited using a table:

- EPC
- BPMN collaboration diagram (BPMN 2.0)
- Enterprise BPMN collaboration diagram
- BPMN process diagram (BPMN 2.0)
- Enterprise BPMN process diagram

If you open a model of this type, you can show and hide the Modeling table (page 399).

7.4.19.17.2 How to control the table using the keyboard

You can control the modeling table using the keyboard.

Key/Keyboard shortcut	Context	Action
Arrow keys	Table selected	Move to next column/row in direction of arrow.
Ctrl + End	Table selected	Activates the last cell in the modeling table.
Ctrl + Home	Table selected	Activates the first cell in the modeling table.
Ctrl + Shift + Ins	Operator selected	Create split paths.
Del	Object name selected	Delete object.
End	Table selected	Activates the last column in the current row.
Enter	**Name** column activated	To next row/End editing.
F2	▪ **Name** cell selected	▪ Activates the **Edit name** mode.
	▪ **Description/Definition** cell selected	▪ Opens the **Description/Definition** dialog. The description/definition can be edited.

Key/Keyboard shortcut	Context	Action
	▪ **Object** cell selected	▪ Opens the objects symbols list if symbols can be inserted
	▪ **Attribute** cell selected	▪ Opens the **Edit attribute** dialog to insert the attribute value.
Home	Table selected	Activates the first column in the current row.
Ins	Table selected	Add object row.
PageDown	Table selected	Scrolls one page down.
PageUp	Table selected	Scrolls one page up.
Shift + F2	In a **BPMN container** cell	Enables the renaming of the container.
Tab	Table selected	Activates the next cell to the right.
Tab + Shift	Table selected	Activates the next cell to the left.

7.4.19.17.3 What do different colors mean in table-based modeling?

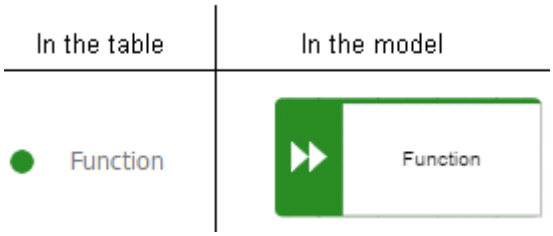
The colors help you to distinguish between the object types. They correspond to the object colors.

A flashing cursor in an empty row indicates that entries can be made.

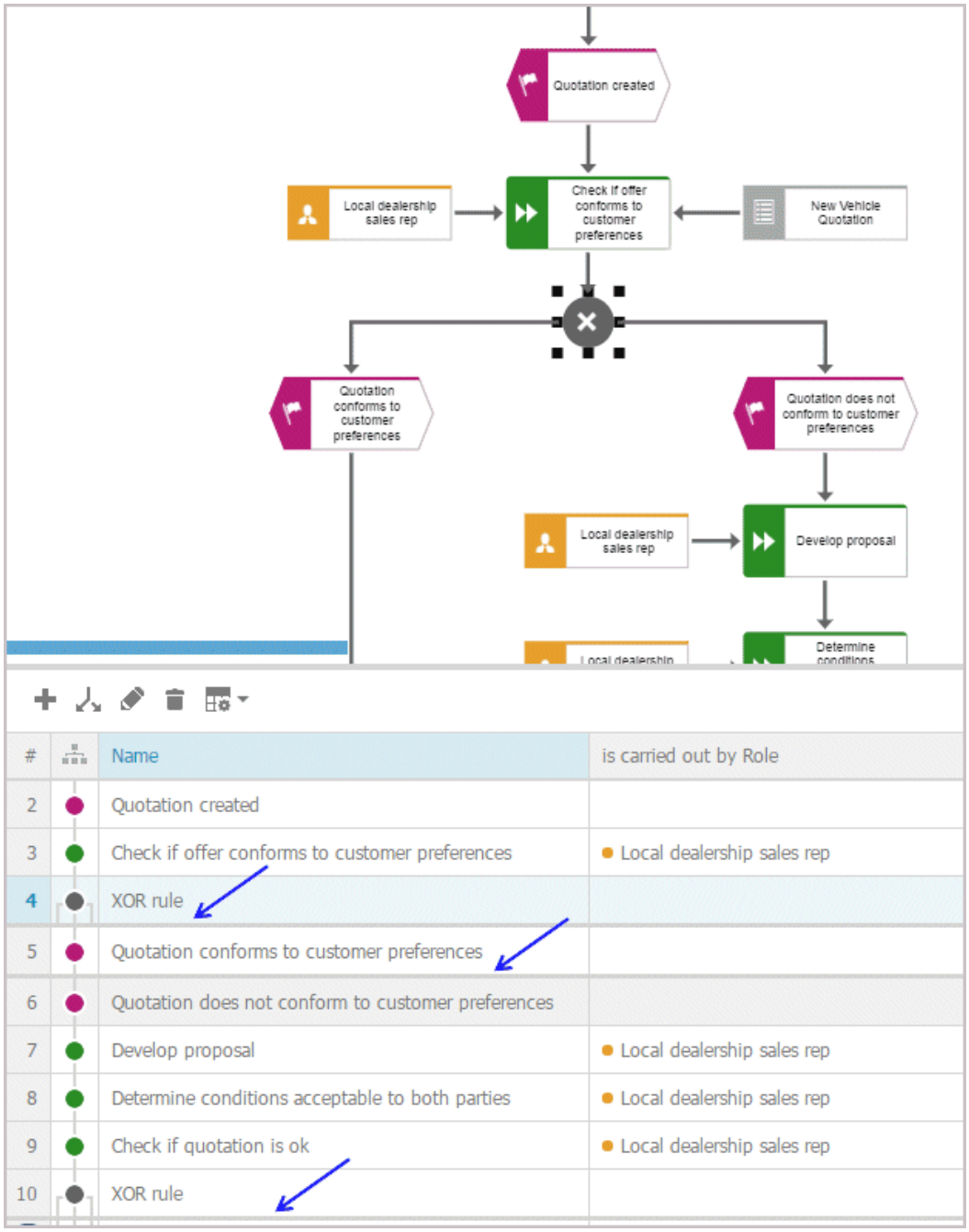
A gray background indicates that no entries can be specified.

Examples

- A table for a model of the **EPC** type contains, e.g., green highlighting for functions because functions are displayed in green in the model. In a table for a BPMN diagram, a task appears in blue, as in the diagram.



- Split paths are outlined by a thicker line.



- In BPMN models, lanes are outlined by a thicker line.

7.4.19.17.4 What default columns are available?

There are columns that are displayed by default when the modeling table is opened for the first time. However, you can hide all of them except for the numbering, color, and name column. Your setting is saved, which means that when you create or open a model, the table is displayed with the columns you specify.

IN AN EPC

- **Numbering**

  Shows the line number.
- **Color column**

  Displays the color of the object symbol.
- **Name**

  The object name is entered here.
- **Description/Definition**

  A description or definition of the object is entered here.
- **is carried out by Role**

  The performing role or job description for the object is entered here. If such an object is not permitted for an object, e.g. for an event, a message is displayed.
- **is support by Application system type**

  An application system type is inserted here. If such an object is not permitted for an object, e.g. for an event, a message is displayed.
- **receives input from Information carrier**

  An information carrier is inserted here. If such an object is not permitted for an object, e.g. for an event, a message is displayed.
- **creates output to Information carrier**

  An information carrier is inserted here. If such an object is not permitted for an object, e.g. for an event, a message is displayed.

IN A BPMN DIAGRAM

- **Numbering**

  Shows the line number.
- **Color column**

  Displays the color of the object symbol.
- **Name**

  The object name is entered here.
- **Description/Definition**

  A description or definition of the object is entered here.
- **Belongs to container**

  Shows the pool or lane to which an object belongs. This column cannot be edited.

7.4.19.17.5 What are the special features of BPMN diagrams?

For BPMN diagrams, you can specify whether or not the **Belongs to container** column is displayed. This column exists only in BPMN diagrams and is displayed by default. Lanes are automatically enlarged in table-based modeling if a new object does not fit completely into the lane.

7.4.19.17.6 What attribute values and processing types are there?

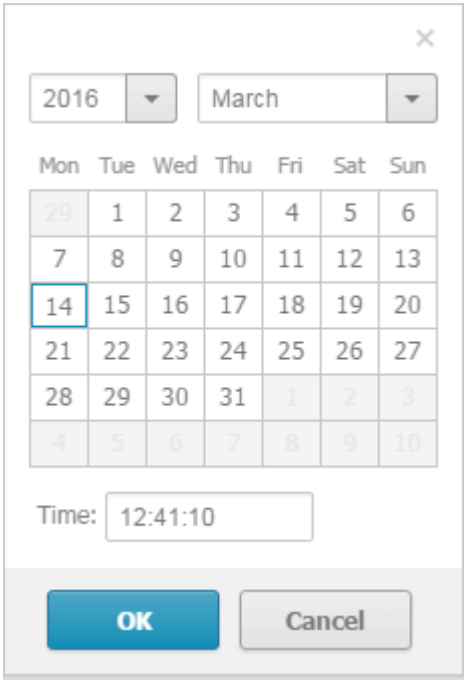
You can specify attributes in the modeling table. Attributes specified by the system cannot be edited, e.g., Creation date. System attribute columns have a gray background.

The processing of an attribute value may change depending on the attribute type. For example, if you want to process an attribute of the **Time date** type, you can do this using the calendar displayed.

The following attribute types are available:

Date attributes

The calendar is displayed when you click in the cell containing the attribute value. For an attribute of the **Time date** type, you can select a time in addition to the date.



Boolean

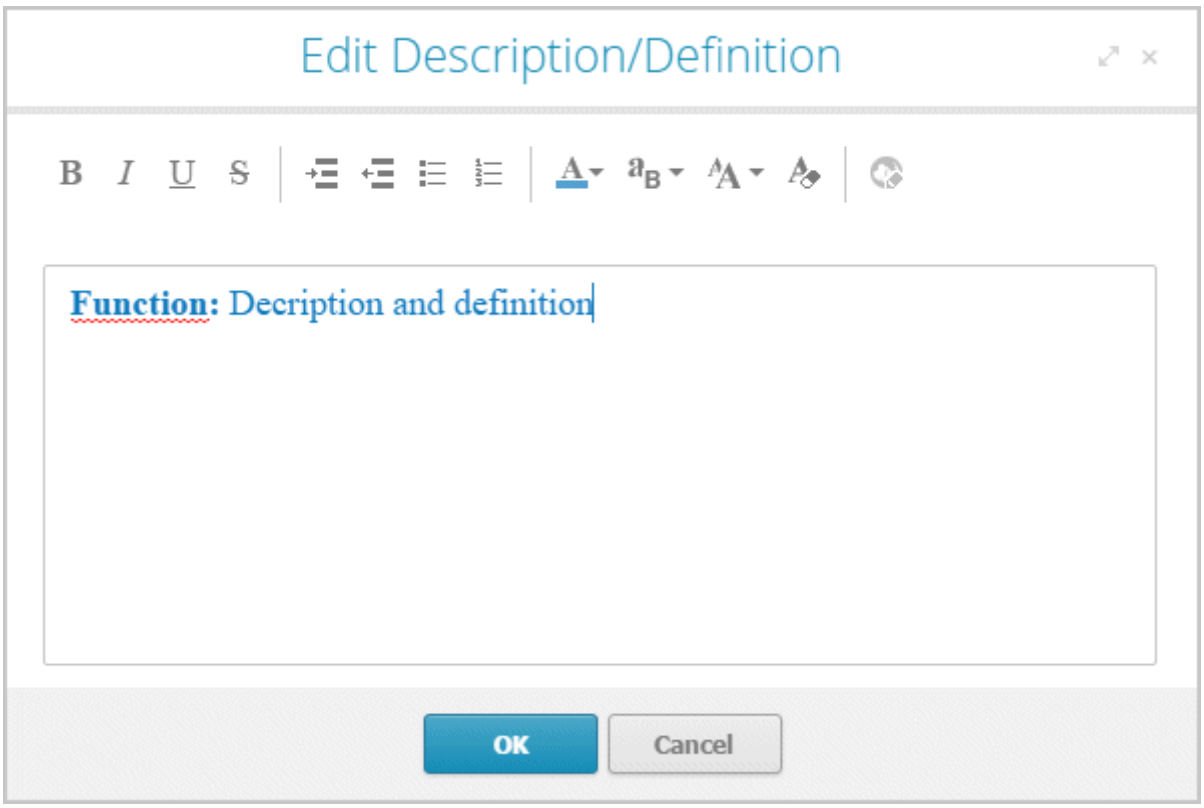
You can change the attribute value by enabling (true: ☑) or disabling (false: ☐) the check box. The check box for an attribute value that is not specified is shaded in color (■).

Text attributes

You can change the attribute value directly in the cell.

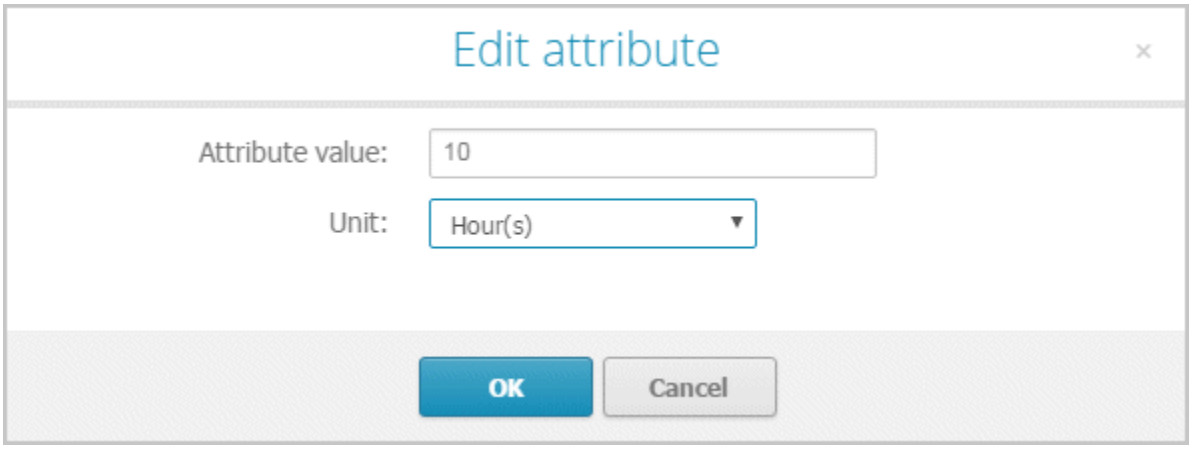
Formatable text attributes

A dialog opens. You can edit the text and formatting.



Attribute values with unit

A dialog opens. When saving the attribute value for numerical attributes, a check is made as to whether the value entered is a number. If not, you are notified.

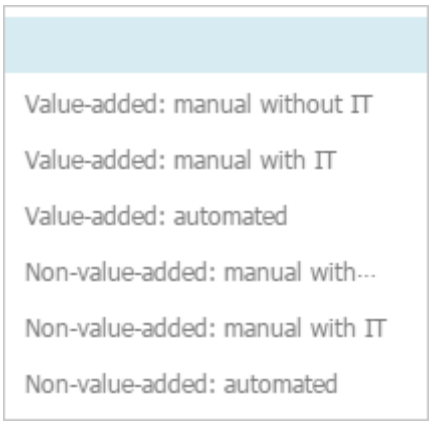


Numerical attributes

You can change the attribute value directly in the cell. When saving the attribute value, a check is made as to whether the value entered is a number. If not, you are notified.

List attributes

You can select from a list of attribute values specified by the method by clicking the relevant value.



7.5 Extended editing

Besides the basic editing options, Model Editor provides you with additional functionality, such as copying formatting (page 419), creating groupings (page 429), applying various colors (page 420), inserting user-defined descriptions (page 417), or automatic resizing of objects (page 430).

7.5.1 Find objects in an open model

You can have objects selected in the model window. If the object is not located in the visible area of the model window the visible area is moved and the object is displayed as selected in the visible area.

Procedure

1. Click the **Find** bar button. The Find bar opens.
2. Enter a part of the name or the entire name for the object to be found.
3. Click either **Search down** or **Search up**, depending on the direction in which you want to search for objects. The next object whose name contains the term entered is selected. If it is located outside of the visible area it is placed in the visible area.
4. Click **Search down** or **Search up** again. The next object with the term in its name is selected.

Each time you click the up and down buttons the next occurrence is selected. If a corresponding object cannot be found in the one direction the first occurrence is selected again.

7.5.2 Show where object occurrences are used

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

Procedure

1. Select an object in the model.
2. Click **Properties**. The Properties bar opens.
3. Click the **Occurrences** tab. The occurrences of the selected object are listed. If more than one occurrence exist in the current model, the number of the selected occurrence and the total number of occurrences are displayed behind the object name.
4. Click the arrow to left or right to select the next occurrence in the model. The next occurrence is selected and the number of the selected occurrence is updated.
5. To directly select an occurrence, click the drop-down list and the occurrence number.
6. To open a model that contains an occurrence of the selected object, click the name of the model in the **In other models** area. The model is opened and the first occurrence of the object selected. If there is no diagram view for the occurrence, the first fact sheet tab is shown, e.g. **Overview**.

In the **In other models** area all models are displayed to which you have at least read access.

You switched between the occurrences of an object using the navigation controls.

7.5.3 Place an object in an object

You can place an object in another object. The object then overlaps the object in which it is placed and has an implicit connection to this object. Implicit connections are connections that are not being displayed while an object is placed in another object.

Procedure

1. Click the object you want to place in another object, and hold down the mouse button.
2. Drag the object on top of the other object, position it inside the other object's borders, and release the mouse button. If multiple connections are available between the two objects, the connection selection is displayed. A right arrow is added to the outgoing connections of the embedded object, while a left arrow is added to the incoming connections.
3. Click the connection you want to draw between these two objects. The connection created is an implicit connection, which means that it is not displayed while the object is embedded in the other object.

The object is now placed in the other object. Due to the existing implicit connection, the embedded object is also selected or moved when the object in which it was placed is selected or moved.

Tip

You can place multiple objects of one type in an object at once.

7.5.4 Place an object on an object

You can place an object on another object. The object then overlaps the object on which it is placed, but has no implicit connection to this object. Implicit connections are connections that are not being displayed while an object is placed in another object.

Procedure

1. Click the object you want to place on another object, and hold down the mouse button.
2. Drag the object on top of the other object, position it inside the other object's borders, and release the mouse button. The connection selection is displayed.
3. Click × **No connection**. Thus, no connection is created between the two objects.

The object is now placed on the other object. Due to the lack of an implicit connection, the embedded object is neither selected nor moved when the object on which it was placed is selected or moved.

7.5.5 Upload documents

You can upload documents to ARIS document storage and assign them to models and objects (page 415) in order to supplement these with detailed descriptions and graphics, for example.

Prerequisite

The filter in use (page 457) allows the **ARIS document storage Link** attribute.

Procedure

1. Open (page 386) the relevant model.
2. Activate (page 382) the **Properties** bar.
3. Activate the **Attributes** tab if it is not activated yet.
4. Show the **ARIS document storage Link** attribute.
5. In the editing cell of the **ARIS document storage Link** attribute, click **Edit**. The **Select document** dialog opens.
6. Select **ARIS document storage** if it is not yet selected.
7. Select the folder in which you want to save the document.
8. Click **Upload new document**. The dialog opens.
9. Click **Browse**. The dialog opens.
10. Navigate to the relevant document, select it, and click **Open**.
11. The dialog closes and you may enter the document's title, a description, as well as tags (keywords) enabling the document to be identified in ARIS document storage.
12. Click **Upload**.

Once the upload of the document is complete, you can assign it to models and objects (page 415).

7.5.6 Assign documents

You can assign documents available in ARIS document storage to individual models and objects and thus supplement them with detailed descriptions and graphics, for example.

Prerequisite

The filter in use allows the **ARIS document storage Link** attribute.

Procedure

1. Open (page 386) the relevant model.
2. Select the object to which you want to assign a document, or ensure that no object is selected if you want to assign the document to the model.
3. Activate the **Properties** bar.
4. Activate the **Attributes** tab if it is not activated yet.
5. Show (page 382) the **ARIS document storage Link** attribute.
6. In the editing cell of the **ARIS document storage Link** attribute, click **Edit**. The **Select document** dialog opens.

7. Select ARIS document storage if it is not yet selected.
8. Select the folder containing the relevant document.
9. Enable the radio button of the document you want to assign.
10. Click **OK**.

The document is assigned to the item.

On the **Documents** tab, a document with the **ARIS document storage Link** attribute is marked with for objects and for models. If a document title was specified, it is shown, otherwise the complete link to the document in ARIS document storage.

You can place the attribute (page 423). To ensure that the name you specify is placed in the model instead of the link, you can show the **ARIS document storage Title** attribute from the **Attributes** tab (**Properties** bar). If you specify a name for the attribute, this name is displayed in the model instead of the contents of the placed **ARIS document storage Link** attribute.

7.5.7 Link documents

You can link documents available in ARIS document storage directly with individual models and objects and thus supplement them with detailed descriptions and graphics, for example.

Procedure

1. Open (page 386) the relevant model.
2. Select the object for which you want to create a link to a document, or ensure that no object is selected if you want to link the document with the model.
3. Click **Properties**.
4. Activate the **Documents** bar.
5. Click **Add**.
6. In ARIS document storage, click the folder containing the relevant document.
7. Enable the check box for the required document, and click **OK**.

The document is linked with the item.

On the **Documents** tab, a mark is shown: for objects and for models. If a document title was specified, it is shown, otherwise the complete link in ARIS document storage.

7.5.8 Use the Documentation attribute

You can describe database and model items (models, objects, groups, etc.) using formatted documents or other files and save these documents in the **Documentation** attribute. If you are using the Microsoft® Word file formats **DOC** and **DOCX**, a preview is available and the **Edit** button is available. You can also create the documents directly from the **Documentation** attribute.

Procedure

INSERT AN EXTERNAL DESCRIPTION

Prerequisite

You are using Microsoft® Word.

Procedure

1. Start ARIS Connect and open Model Editor.
2. Select the item to which you want to assign the description and which does not yet have an external description.
3. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 382).
4. Click **Edit** in the attribute row. Microsoft® Word opens with a blank document.
5. Enter your description and click Save.

The description is assigned to the item. When you click **Edit** again, the document opens and you can edit it.

IMPORT EXTERNAL DESCRIPTION

1. Create an external description and save it, for example, in Microsoft Word.
2. Start ARIS Connect and open Model Editor.
3. Select the item you want to assign the description to.
4. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 382).
5. Click **Import** in the attribute row. The **Select document** dialog opens.
6. Click **Select file** and select the newly created external description in the dialog.
7. Click **Open**.

The document is inserted in the **Documentation** attribute.

EDIT AN EXTERNAL DESCRIPTION

If you are using the Microsoft® Word file formats **DOC** and **DOCX**, a preview is available and the **Edit** button is available.

Warning

Due to technical restrictions external descriptions cannot be locked if they are open in the editor. Therefore, it is possible that a user deletes an external description in ARIS Connect while it is being edited by another user in the text editor. In this case, all changes of the description are deleted without the editing user being notified.

Procedure

1. If the attribute is not displayed: Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 382).
2. Click **Edit** in the attribute row. The word processor is launched and the document opens.
3. Edit and save the document.
4. Close Microsoft® Word and activate ARIS Connect.
5. If necessary, click **Update**.

The document is added to the **Documentation** attribute and a preview is displayed.

DISPLAY EXTERNAL DESCRIPTIONS READ-ONLY

1. Select the item the description of which you want to display.
2. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 382).
3. Click **Display**. Depending on your browser, you may be asked whether you want to save or open the file.
4. Select **Open**. The corresponding program launches and the file opens in read-only mode.

You can now find out about the content of the document.

If you decide to save the document, you must save it with a name that differs from its previous name. Thus, a copy is created. It is, however, not inserted into the **Documentation** attribute.

REFRESH THE PREVIEW OF THE EXTERNAL DESCRIPTION

1. Select the item the description of which you want to display.
2. Activate the **Attributes** tab of the **Properties** bar and show the **Documentation** attribute (page 382).
3. Click **Refresh**.

The display of the **Documentation** attribute is updated so that the changes you have made will be displayed.

7.5.9 Format painter

You can copy the formats of a selected item to another item or to several other items. This way, you can transfer the format of one object to all other objects and do not need to take the trouble to transfer it to each object individually.

Procedure

1. Select the model item whose format you want to copy.
2. Activate the Start (page 458) tab bar.
3. Click **Format painter**.
4. If you want to copy the format to one item: click the relevant item.
   If you want to copy the format to more than one item: use the mouse to draw a border around the relevant items. You can also press the **Ctrl** key and click the required items one after the other.

The format of the selected items is adjusted accordingly.

Which formats are copied to which items?

How are formats copied to identical and different items?

How is the format copied to placed attributes?

7.5.10 Color model items

You can assign a different color to object symbols and graphic objects.

Procedure

1. Select the model items you want to color.
2. Activate the Start (page 458) tab bar.
3. Click **Fill color**. The color palette opens.
4. Click the color you want to color the selected model item with. The selected model items are colored with the selected color. The color palette closes.

You have colored the selected model items.

7.5.11 Color model items with a user-defined color

You can assign your own color to object symbols and graphic objects.

Procedure

1. Select the model items you want to color.
2. Activate the Start (page 458) tab bar.
3. Click **Fill color**. The color palette opens.
4. Click **Choose your own color**. The **Define color** dialog opens.
5. Select your own color in one of the ways described below. Your changes will be displayed in the preview window on the right:
   a. Click the color bar and move the line to the relevant color range to select the basic color. Then click on the relevant position in the color box to select the brightness of the basic color.
   b. Enter the respective share of each color from 0 to 255 in the **Red**, **Green** and **Blue** boxes. 0 means that the corresponding color is absent. If you enter **0** in all three boxes you have selected the color **black**.
   c. Enter a hexadecimal color definition in the **Color code: #** box. The hexadecimal system uses the letters A to F in addition to the numerals of the decimal system, which means that it is based on the base 16. If you enter FFFF00, this sets the color to **Yellow**.
6. Click **OK**.

You have colored the selected model items with a self-defined color.

7.5.12 Color model items with a gradient

You can color object symbols and graphic objects with a gradient.

Procedure

1. Select the model items you want to color.
2. Activate the Start (page 458) tab bar.
3. Click **Fill color**. The color palette opens.
4. Click **Choose your own color**. The **Define color** dialog opens.
5. Enable the **Gradient** check box. Two color boxes and a list box for the direction of the gradient are displayed.
6. Click the first color box and select the start color (page 420) for the gradient.
7. Click the second color box and select the second color (page 420) for the gradient.
8. Click the list box and select the direction of the gradient.
9. Click **OK**.

You have colored the selected model items with a gradient.

7.5.13 Display model items without color

You can display object symbols and graphic objects without a color fill.

Procedure

1. Select the model items you want to display without color.
2. Activate the Start (page 458) tab bar.
3. Click **Fill color**. The color palette opens.
4. Click **No fill color**.

The selected model items are displayed without color.

7.5.14 Reset object symbol color

You can reset the color of an object symbol back to the default color if you have changed the color.

Procedure

1. Select the object symbol you colored.
2. Activate the Start (page 458) tab bar.
3. Click **Fill color**. The color palette opens.
4. Click **Reset**.

You have reset the color of the selected object symbols to their original color.

7.5.15 Color borders and lines

You can assign a different color to the borders of object symbols and graphic objects, as well as connections.

Procedure

1. Select the model items whose borders you want to color.
2. Activate the Start (page 458) tab bar.
3. Click **Line color**. The color palette opens.
4. Click the color you want to color the borders and lines of the selected model items with.

You have colored the borders and lines of the selected model items.

7.5.16 Reset border and line color

You can reset the colors of the borders and lines of model items if you changed their color.

Procedure

1. Select the model items whose borders or lines you colored.
2. Activate the Start (page 458) tab bar.
3. Click **Line color**. The color palette opens.
4. Click **Reset**.

You have reset the colors of the borders and lines of selected model items.

7.5.17 Change line style

You can assign a different style to the borders of object symbols, graphic objects, and connections.

Procedure

1. Select the model items whose border and line style you want to change.
2. Activate the Start (page 458) tab bar.
3. Click **Line style and weight**. The style selection opens.
4. Click **Dotted**, **Dashed**, or **Solid**, depending on which style you want to assign to the selected elements.

The style of the borders and lines of the selected model items is adjusted accordingly.

7.5.18 Change line weight

You can change the weight of the borders of object symbols, graphic objects, and connections.

Procedure

1. Select the model items whose line weight for borders and lines you want to change.
2. Activate the Start (page 458) tab bar.
3. Click **Line style and weight**. The weight selection opens.
4. Click **0 point**, **2 point**, **4 point**, or **8 point**, depending on which weight you want to assign to the borders and lines of the selected model items.

The weight of the borders and lines of the selected model items is adjusted accordingly.

7.5.19 Change item appearance

You can change the appearance of model items in the model window.

Procedure

1. Select the model items whose appearance you want to define.
2. Activate the Start (page 458) tab bar.
3. Click **Appearance**. The appearance selection opens.
4. Click **Shaded** if the selected items are to have a shadow. The check box is enabled. Connections cannot have a shadow.
5. Click **3-D effect** if the selected items are to be displayed in 3-D style. The check box is enabled.
   Connections cannot be displayed in a 3-D style.
6. Click **Active** if the selected items are to be displayed as inactive. The check box is disabled. Objects are displayed without color and with a gray border, connections are displayed in gray. Graphic objects cannot be displayed as inactive.

You have defined the appearance of model items. To change a setting again, click the relevant option again.

7.5.20 Place attributes at fixed positions

You can place any attribute of objects and connections, not just the name, visibly in the model window. For quick placement several fixed positions in and around the object are offered.

PLACE NEW ATTRIBUTES AT FIXED POSITIONS

1. Select the object you want to place a new attribute for.
2. Activate the Start (page 458) tab bar.
3. Click **Attribute placement**.
4. Click **Create attribute placement**. The **Select attribute** dialog opens.
5. Enable the **Show specified attributes only** checkbox. Then only the attributes with a value are made available for selection.
6. Enter the first letters of the required attribute name. All attributes are displayed whose names contain the term you entered.
7. Click the name of the attribute you want to place.
8. Click **OK**. The dialog closes and a frame for the attribute is displayed in the model window.
9. Click anywhere in the model window.
10. Click the newly placed attribute so that the handles are colored.
11. Click **Attribute placement**.
12. Click the position of the object where the attribute is to be placed, e.g., **Top right**.

The attribute is placed in the selected position at the object. You can specify that the attribute name is to be displayed for the placed attribute. You can also specify for certain attributes that they are to be displayed as a symbol.

PLACE FREELY PLACED ATTRIBUTES AT FIXED POSITIONS

1. Select the freely placed attributes you want to place at a fixed position. Their handles will be colored.
2. Activate the Start (page 458) tab bar.
3. Click **Attribute placement**.
4. Click the position of the object where the attribute is to be placed, e.g., **Top right**.

The attributes are placed at the objects at the position selected. You can specify that the attribute name is to be displayed for placed attributes. You can also specify for certain attributes that they are to be displayed as a symbol.

7.5.21 Place attributes at any position

You can place any attribute of objects and connections, not just the name, visibly in the model window. These cannot only be placed at fixed positions (page 423), but also freely.

PLACE NEW ATTRIBUTE FREELY

Select the object you want to place a new attribute for.

1. Activate the Start (page 458) tab bar.
2. Click **Attribute placement**.
3. Click **Create attribute placement**. The **Select attribute** dialog opens.
4. Enable the **Show specified attributes only** checkbox. Then only the attributes with a value are made available for selection.
5. Enter the first letters of the attribute name. All attributes are displayed whose names contain the term you entered.
6. Click the name of the attribute you want to place.
7. Click **OK**. The dialog closes and a frame for the attribute is displayed in the model window.
8. In the model window, click the position where you want to place the attribute.

The attribute is placed in the selected position in the model window.

REPOSITION A PLACED ATTRIBUTE

1. Click the placed attribute you want to reposition. The handles will be colored.
2. Hold down the mouse button.
3. Drag the attribute to the position in the model window where you want to place it and release the mouse button.

The attribute is placed in the selected position in the model window.

7.5.22 Place attributes from Attributes tab

Use the **Attributes** tab to quickly place an attribute.

Procedure

1. Select the object you want to place a new attribute for.
2. Click **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Behind the attribute you want to place, click **More**.
5. Click **Place attribute**.
6. Move the mouse pointer to the model window. A frame is displayed.
7. Drag the frame in the model window to the position where you want to place the attribute.
8. Click the relevant position.

The attribute is placed.

7.5.23 Display names of placed attributes

You can specify that the attribute name of placed attributes is to be displayed in the model window.

Procedure

1. Select the placed attribute whose attribute name you want to display in the model window.
2. Activate the Start (page 458) tab bar.
3. Click **Attribute placement**.
4. Enable the **With name** check box.

The attribute value is placed in front of the attribute name.

7.5.24 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 427).

Procedure

1. Click a placed attribute in the model window. The attribute is marked by a colored handle.
2. Press the **Ctrl** key, and click additional placed attributes you want to reposition or remove.

You can now delete or reposition (page 423) the selected attributes.

7.5.25 Edit placed attributes

You can edit placed text attributes of models, objects, and connections in the model window. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

Procedure

1. Click the placed attribute. It now has handles.
2. Click on the text attribute again. The attribute is selected for editing.
3. Change the text attribute as necessary.
4. Press the Enter key or click in the model background.

The text attribute is changed.

7.5.26 Directly format placed attributes

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

Prerequisite

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

Procedure

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

You have formatted the placed attribute.

7.5.27 Move placed attribute

You can move placed attributes of objects and connections.

Procedure

1. Click the placed attribute and hold down the mouse button. The attribute now has handles.
2. Drag the attribute to the required position and release the mouse button.

The attribute is placed at the new position.

7.5.28 Display placed attributes as a symbol

You can display certain attributes as a symbol (page 466) if they are placed.

Prerequisite

The attribute can be represented by a symbol. This is the case if you select the attribute and the **As a symbol** check box becomes available.

Procedure

1. Select the placed attribute you want to represent with a symbol.
2. Activate the Start (page 458) tab bar.
3. Click **Attribute placement**.
4. Enable the **As a symbol** check box.

The placed attribute is represented as a symbol.

7.5.29 Remove placed attribute

You can remove placed attributes from the model window. Of course, only the attribute placement is deleted and not the value that was placed. To change the attribute value, edit the attribute (page 395) on the **Attributes** tab of the Properties bar.

Procedure

1. Select the placed attribute (page 425) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

7.5.30 Remove multiple placed attributes

You can remove multiple placed model, object, or connection attributes from the model window in only one step. Of course, only the attribute placement is deleted and not the value that was placed.

Procedure

Remove directly

1. Use the Ctrl key to select the placed attributes you want to delete in the model window directly.
2. Press the **Del** key.

The placements of the selected attributes are removed without prompting for confirmation.

Use a dialog

1. Select the object or connection whose attribute placements you want to remove.
2. Activate the Start (page 458) tab bar.
3. Click **Attribute placement > Delete attribute placement**. The dialog is displayed.

4. Enable the check boxes for the placed attributes whose attribute placement you want to delete. You can enable all check boxes at once by enabling the superior check box **Attribute name**.
5. Click **OK**.

The placements of the selected attributes are removed without prompting for confirmation.

7.5.31 Assign a model to an object

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

Procedure

1. In the open model, click the object to which you want to assign a new model.
2. Activate the Start (page 458) tab bar.
3. Click **Assignment > Create assignment**. The dialog opens.
4. Select the required model type. The model types that are allowed for the selected object by the method and by the method filter (page 457) in use are available for selection.
5. Enter the relevant model name. The name of the selected object is suggested as a model name.
6. Click **OK**.

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

7.5.32 Place model items one behind the other

You can specify in which order overlappping model items are placed one behind the other in the model window.

In the example below, it is assumed that you have created the three objects **1**, **2**, and **3** in sequence. As the most recently placed objects are created at the highest level, object **3** is at the highest level and object **1** is at the lowest level. You want to reverse this sequence.

Procedure

1. Activate the Start (page 458) tab bar.
2. Select the object **3** and click **Arrange > Send backward**.
3. Select the object **1** and click **Arrange > Bring forward**.

Now, when you place the objects one behind the other they are placed in the order 1, 2, and 3.

In the same manner, you can place graphic objects such as squares or circles behind parts of objects to highlight these areas separately.

7.5.33 Group model items

You can group model items and then handle them as if they were a single object.

Procedure

1. Select the model items you want to group.
2. Activate the Start (page 458) tab bar.
3. Click **Group/Ungroup > Group**. The selected model items are combined in a group (page 495). The handles are placed around the grouping.

To select all items in a group click one of the previously independent items. You can now move them all together, for example.

7.5.34 Ungroup

You can undo the grouping of model items and move and edit the items of the group separately once again.

Procedure

1. Select the grouping you want to undo.
2. Activate the Start (page 458) tab bar.
3. Click **Group/Ungroup > Ungroup**. The grouping is ungrouped. Each item has its own handles.

When you click one of the previously grouped items, it is now selected separately once again and can be moved separately.

7.5.35 Align model items

You can quickly align selected model items relative to each other.

Procedure

1. Select the model items you want to align.
2. Activate the Start (page 458) tab bar.
3. Click **Align** and then the relevant alignment, for example **Align left** or **Distribute vertically**.

The selected model items are aligned accordingly.

7.5.36 Match size of items

You can resize selected items so that they match.

Procedure

1. Select the different-sized model items you want to match.
2. Activate the Start (page 458) tab bar.
3. Click **Match size of items** and then the relevant size change, for example, **Same height (maximum)**.

The height of the selected model items is matched to that of the tallest item.

7.5.37 Select object or model in Explorer

You can navigate from a model to the occurrence of a selected object or of the model in Explorer.

Prerequisite

Selected objects are saved.

Procedure

1. Select the object to whose occurrence you want to navigate in Explorer. If you want to navigate to the occurrence of the model, make sure that no object is selected.
2. Activate the Start (page 458) tab bar.
3. Click **Go to occurrence in Explorer**.

A new tab showing the repository opens. The group structure of the database expands and the check box in front of the selected object or model is enabled in the detail view.

7.5.38 Insert graphic

You can place images and graphics in the model window (page 448) in order to add further information to the model or to optimize the design. For example, you can optimize a model for representation purposes.

Procedure

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

The image or graphic is placed in the model window. You can change its size, drag it to another position, and place it behind model items (page 428), for example.

7.5.39 Export model as a graphic

You can export the model as a graphic and use it in other programs.

Procedure

1. Open (page 386) the relevant model.
2. Ensure that no model item is selected.
3. Activate the Model (page 460) tab bar.
4. Click **Export as a graphic** in the tab bar. The model graphic is created.
5. Decide whether to open or save the graphic. To save the graphic, confirm the Save options in the dialog.

The model graphic either opens in your graphics program or is available as a PNG file in your download area.

7.5.40 Export model items as a graphic

You can export parts of models as a graphic and use the graphic in other programs.

Procedure

1. Open (page 386) the relevant model.
2. Select the model item you want to export as a graphic.
3. Activate the Model (page 460) tab bar.
4. Click **Export as a graphic** in the tab bar. The model item graphic is created.
5. Decide whether to open or save the graphic. To save the graphic, confirm the Save options in the dialog.

The model graphic either opens in your graphics program or is available as a PNG file in your download area.

7.5.41 Export BPMN diagram

You can export (page 474) a BPMN diagram.

Procedure

1. In the repository, select the group of the database containing the BPMN diagram. The group content is displayed.
2. In the row of the relevant BPMN diagram, click **More**.
3. Click **BPMN export**. The BPMN 2.0 diagram is validated. If modeling errors occur, these are highlighted in the diagram and must be corrected. A tip for solving an error is displayed when you move the mouse pointer over the highlighting. You can open or save the BPMN file.
4. Save the file at the required location.

You can use the exported BPMN diagram in other applications.

7.5.42 Optimize layout

You can generate the layout of a model automatically.

Procedure

1. Open the model whose layout you want to generate automatically.
2. Activate the Model (page 460) tab bar.
3. Click **Layout**. The layout options are provided.
4. Specify your settings (page 491) and click **OK**.

The objects of the model are realigned.

Insert space

Remove space

7.5.43 Insert space

You can insert space between model items, either from top to bottom or from left to right. You can then insert additional model items between the items you moved.

Procedure

1. Activate the Model (page 460) tab bar.
2. Click **Horizontal space** to insert space from left to right.
   Click **Vertical space** to insert space from top to bottom.
   A horizontal or vertical line is shown in the model window.
3. Click the position from where you want to insert space.
4. Move the mouse pointer to the right to insert horizontal space, or down to insert vertical space. The covered modeling area is highlighted in green and a plus sign is added. This allows you to immediately identify which area is being freed up for new model items.
5. Click the position up to where you want to insert space. Objects, graphic objects, and free-form text are moved from the highlighted area.

You have added space between existing model items, which you can use to place other model items.

7.5.44 Remove space

You can remove space between model items, either from right to left or from bottom to top.

Procedure

1. Activate the Model (page 460) tab bar.
2. Click **Horizontal space** to remove space from right to left.
   Click **Vertical space** to remove space from bottom to top.
   A horizontal or vertical line is shown in the model window.
3. Click the position from where you want to remove space.
4. Move the mouse pointer to the left to remove horizontal space, or to the top to remove vertical space. The modeling area you select is highlighted in red and a minus sign is added. This enables you to immediately identify how much space will be reduced between the model items.
   Once you can no longer delete any space between model items, the area covered is no longer increased when moving the mouse pointer.
5. Click the position up to where you want to remove space. The model items are moved accordingly.

You have successfully removed space between model items.

7.6 Use attributes

Using attributes you can describe models, objects, and connections, and make them distinguishable. You can place attributes directly in the model window (page 424), and specify for specific attributes that they are to be displayed as a symbol (page 427).

7.6.1 Customize Attributes tab

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

Procedure

1. Click **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Edit language** if you want to show (page 435) an additional language column for language-specific attributes. You can select an additional database language and view and edit it next to the language currently used.
4. Click **Add** on the **Attributes** tab. The **Select attribute** dialog opens.
5. Enter a search term for the attribute you want to display. A list of all attributes whose names contain the term you entered is displayed.
6. Click the relevant attribute.
7. Click **OK**. The selected attribute is added to the **Attributes** tab.
8. Click **More** next to the attribute whose visibility you want to specify.
9. Click **Hide always** if you want to hide the attribute from the **Attributes** tab even if a value has been specified. For the attribute to be displayed at a later time you need to select it explicitly by clicking **Add**.
10. Click **Hide, if not specified** if you want the attribute to be displayed in the **Attributes** tab only if a value has been specified.
11. Click **Place attribute** and the relevant position in the model window if you want the attribute value to be displayed in the model.
12. Click **Delete attribute**, if you want to delete the attribute value. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.

The attributes will be displayed in line with your settings.

7.6.2 Edit attributes

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

Prerequisite

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

Procedure

1. If you want to edit model attributes, ensure that no model item is selected.
   If you want to edit object or connection attributes, select the corresponding object or connection.
2. Click **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Display the relevant attribute using the **Add** button if it is not listed.
5. Click the cell that comes after the name of the attribute. A dialog is displayed. If you can enter any text for an attribute, a dialog including the formatting toolbar is displayed. If required, you can enlarge (page 446) this dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times.
7. Click **OK**.

You have changed the attribute value.

7.6.3 Show language column

You can show a column for another language next to the original column. This enables you to compare and edit (page 436) the contents of language-dependent items in different languages. For example, you can use this option to translate language-dependent contents from one language into another.

Procedure

1. Click **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Edit language**. A second column is shown for language-dependent attributes.
4. Click the **down arrow** in the header cell and select the required language.

The contents of the language column is displayed in the language you have selected. If you change or enter attribute values, this is done in the selected language.

7.6.4 Hide language column

You can hide the shown language column (page 435) when you no longer need it.

Procedure

1. Click **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Hide language**.

The additional column for language-dependent attributes is removed, and only the column of the original language remains visible.

7.6.5 Edit attributes of various languages

You can edit model, object, and connection attributes in various languages as long as they are not system attributes.

Procedure

1. Click **Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Show the relevant attribute if it is not listed.
4. Show the required language column (page 435).
5. Click in the cell behind the attribute name. The **Edit** dialog and the selected language column are shown. If required, you can enlarge (page 446) the dialog.
6. Make your changes. Different input options are available depending on the type of attribute. While you can enter text for text attributes such as names, you can, for example, select a number and a unit for times. You cannot change or delete attribute values of attributes that the system defines. These are placed in gray cells, for example, **Last change**.
7. If you have specified your input for the language displayed and want to specify input for other languages, click the name of the selected language in the dialog. The list of available languages opens.
8. Select another language and make your entries.
9. Click **OK**.

Your changes are saved in the various languages.

7.6.6 Delete attributes

Use the Attributes bar to delete attributes.

Procedure

1. Select the object or connection whose attribute you want to delete. If you want to delete model attributes, you must ensure that no object or connection is selected so that the model attributes will be displayed on the **Attributes** tab of the **Properties** bar.
2. Click **Properties**. The Properties bar opens.
3. Click the **Attributes** tab if it is not activated yet.
4. Behind the attribute you want to delete, click **More**.
5. Click **Delete attribute**.

The value of the attribute will be deleted.

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

7.7 BPMN modeling support

If you want to model BPMN (page 492) diagrams, Model Editor can assist you by providing a suitable functionality. When placing objects you automatically receive alternative object symbols for placement. Furthermore, when you work with BPMN diagrams, a specific tab bar is shown enabling you to quickly access BPMN functionality you frequently require.

7.7.1 Add lane

You add additional lanes to placed pools and lanes.

Procedure

1. Select the lane for which you want to add an additional lane.
2. Activate the BPMN (page 463) tab bar.
3. Click **Add lane**. The options for adding lanes are displayed.
4. Click the corresponding option.

A lane is added to the selected lane according to your selection.

7.7.2 Move lane

You can subsequently reposition lanes that you have placed within pools or lanes.

Procedure

1. Click the lane you want to place at another position. The lane and all embedded objects are highlighted. Depending on where the lane is located with regard to the other lanes the corresponding options for moving are provided.
2. Activate the BPMN (page 463) tab bar.
3. Click **Move lane** and select the required direction, such as **Lane up**, **Lane down**, **Lane to the left**, or **Lane to the right**.

The lane you selected is placed at the new position.

7.7.3 Change loop type

You can use the **Loop type** attribute to specify the loop behavior for objects of the **Task** type.

Procedure

1. Select the task whose behavior you want to change.
2. Activate the BPMN (page 463) tab bar.
3. Click **Change symbol**.
4. Click **Marker**.
5. Click one of the loop behaviors **None**, **Standard**, **Multi-instance parallel** or **Multi-instance sequential**.

The loop behavior of the **Task** object has been changed.

7.7.4 Change type of sequence flow

You can change the sequence flow type in models of the **BPMN process diagram (BPMN 2.0)**, **BPMN collaboration diagram (BPMN 2.0)**, **Enterprise BPMN collaboration diagram**, and **Enterprise BPMN process diagram** type.

Procedure

1. Click the flow connection you want to change.
2. Activate the BPMN (page 463) tab bar.
3. Click **Change type of sequence flow**.
4. Click one of the available types: **Regular sequence flow**, **Default sequence flow** or **Conditional sequence flow**.

You changed the sequence flow type.

7.7.5 Collapse subprocess

You can collapse a symbol of the **Subprocess** type. This way the process modeled in the subprocess is assigned to the subprocess and the subprocess is collapsed.

Procedure

1. Select the subprocess you want to collapse.
2. Activate the BPMN (page 463) tab bar.
3. Click **Collapse subprocess**. The process contained in the subprocess is assigned to the object and, at the same time, is displayed as embedded in the object, which is indicated by a **plus sign**. If a process is not yet assigned to the subprocess, the **Create assignment** dialog opens in which you can assign a new BPMN process.
4. Click the subprocess again.

The process contained is assigned to the subprocess (page 428) and can be opened by double-clicking the assignment icon.

7.7.6 Expand subprocess

You can expand a collapsed symbol of the **Subprocess** type. This way the process modeled and assigned in this subprocess is displayed as embedded in the subprocess.

Procedure

1. Select the subprocess you want to expand.
2. Activate the BPMN (page 463) tab bar.
3. Click **Expand subprocess**.

The process contained is displayed as embedded in the subprocess. (page 428) The process remains assigned to the subprocess (page 428).

7.7.7 Assign global reference to call activity

You can assign a global process or a task to an object of the **Call activity** type. If you place a call activity, the **Select global process or task** dialog opens and you can assign the relevant global process or task. You can change the assignment later.

Procedure

1. Select the relevant call activity.
2. Activate the BPMN (page 463) tab bar.
3. Click **Select global reference**. The **Select global process or task** dialog opens.
4. Navigate to the database group in which the relevant global process or task is stored.
5. Select the global process or task.
6. Click **OK**.

The selected global process or task is assigned to the call activity.

7.7.8 Change BPMN object symbol

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

Prerequisite

The method filter in use (page 457) includes different symbols of the objects you selected.

Procedure

1. Click an object, or hold the **Ctrl** key pressed to select multiple objects of the same type.
2. Activate the BPMN (page 463) tab bar.
3. Click **Change symbol**. The list of object symbols available for the selected object(s) is shown.
4. Click the symbol you want to use from now on for the selected object/s in this model.

The symbol of the selected object is or the symbols of the selected objects are changed.

7.7.9 Export BPMN diagram

You can export (page 474) a BPMN diagram.

Procedure

1. In the repository, select the group of the database containing the BPMN diagram. The group content is displayed.
2. In the row of the relevant BPMN diagram, click **More**.
3. Click **BPMN export**. The BPMN 2.0 diagram is validated. If modeling errors occur, these are highlighted in the diagram and must be corrected. A tip for solving an error is displayed when you move the mouse pointer over the highlighting. You can open or save the BPMN file.
4. Save the file at the required location.

You can use the exported BPMN diagram in other applications.

7.8 General procedure

Model Editor not only offers specific functionality, but also general access and editing options. You can easily navigate to diagrams assigned (page 428) to objects, open assigned models (page 443), enter comments (page 445), add columns and rows (page 445) to lane models, or output information on models by running reports (page 447).

7.8.1 Display occurrences in an open model

You can display the usage of the selected object and connection occurrences in the open model.

Procedure

1. Click **Properties**. The Properties bar opens.
2. Select the relevant occurrence in the model window.
3. Click the **Occurrences** tab if it is not activated yet. The usage of the selected occurrence is displayed in the areas **In this model** and **In other models**.
4. Navigate to the individual occurrences in the model, if multiple occurrences exist. To do this, use the navigation buttons in the **In this model** area.
   a. From top to bottom or left to right: Click the right arrow.
   b. From bottom to top or right to left: Click the left arrow.
   c. Select occurrence directly: Click 3/5 direct selection and then the number of the relevant occurrence.

The occurrence selected is highlighted. If it is placed outside the visible area, the model display is moved automatically so that the selected occurrence is placed in the visible area.

7.8.2 Display occurrences in other models

You can display the usage of the selected object and connection occurrences in other models than the open model.

Procedure

1. Click **Properties**. The Properties bar opens.
2. Select the relevant occurrence in the model window.
3. Click the **Occurrences** tab if it is not activated yet. The usage of the selected occurrence is displayed in the areas **In this model** and **In other models**.
4. In the **In other models** area, click the name of the model in which the occurrence is to be selected.

The selected model opens in a new tab and the occurrence is highlighted. If multiple occurrences of the object exist in this model, the top one is highlighted.

7.8.3 Display relationships of selected objects

You can display the relationships of selected objects (page 464).

Procedure

1. Click **Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet.

The relationships of the selected object are listed. If a relationship has an occurrence as a connection, you can select the object (page 442) that is linked to the selected object by the connection. You can also delete connections that do not have any occurrences in models.

7.8.4 Select connected object

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

Procedure

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

The connected object is selected in the model window.

7.8.5 Display and select connection

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

Procedure

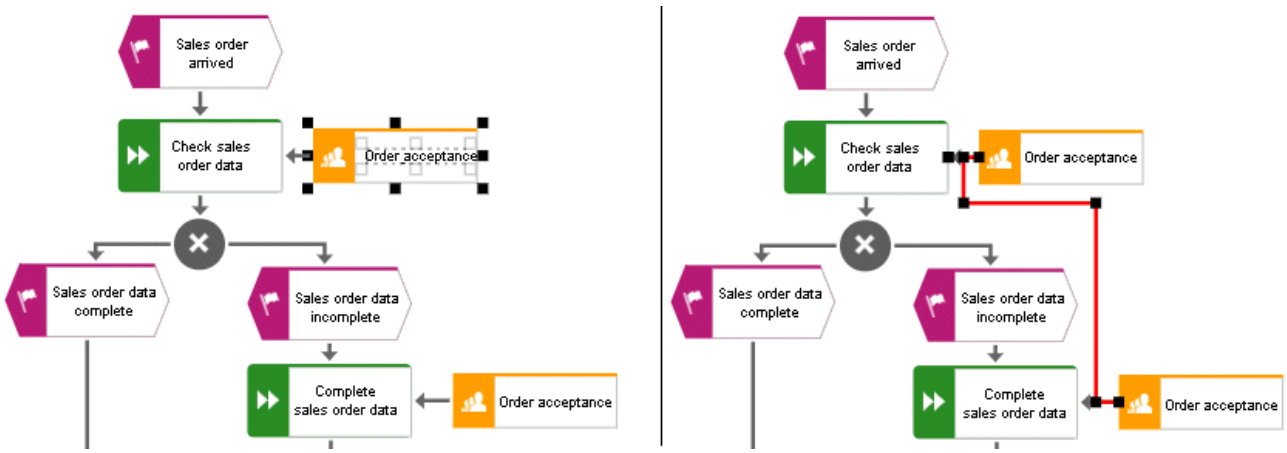
1. Click **Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet. The relationships of the selected object are listed.
4. Next to the name of the occurrence of a relationship (connection),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

The connection between source and target object is selected.

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

The following graphic shows two occurrences of the **Order acceptance** object. If you select one of the two occurrences and enable the **Display connection** function for the **carries out** connection linking the selected occurrence to the **Check sales order data** object, a **carries out**

connection is also created to the target object from the other object occurrence that had a connection only to the **Complete sales order data** object before.



7.8.6 Delete connection

You can delete connections that do not have any occurrences in models for specific objects.

Procedure

1. Click **Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet. The relationships of the selected object are listed.
4. Next to the name of a relationship that has no occurrences in a model (connection), click **More > Delete**.

If the connection no longer has any occurrences in any model, it is deleted. If it still has an occurrence in a model, a message is displayed and the connection is not deleted.

7.8.7 Open assigned model

You can open models that you assigned to objects.

Procedure

1. Navigate to the object for which you want to open an assigned model.
2. Double-click the assignment icon.
   If multiple models are assigned to the object, the **Select model** dialog is shown, where you can select the model you want to open.
   If only one model is assigned to the object, it will open without prompting.

The assigned model opens and you can use it.

7.8.8 Delete model assignments

You can delete the relationship between objects and assigned models.

Procedure

1. Click the object with the assignment that you want to delete.
2. Activate the Start (page 458) tab bar.
3. Click **Assignment > Delete assignment**. The **Delete model assignment** dialog opens.
4. Enable the check box(es) of the model(s) for which you want to delete the assignment relationships.
5. Click **OK**.

The selected assignment relationships are deleted without prompting for confirmation.

7.8.9 Open assigned document

You can easily open an assigned document.

Procedure

Placed attribute

You have placed the **ARIS document storage Link** attribute in the model.

Procedure

Double-click the placed attribute.

From the Attributes bar

1. Activate (page 382) the **Attributes** bar.
2. Show the **ARIS document storage Link** attribute.
3. Click the entry in the editing cell.

You can either open or save the assigned document.

7.8.10 Open linked document

You can easily open an assigned document.

Procedure

1. Activate (page 382) the **Documents** bar.
2. Click a document.

You can either open or save the linked document.

7.8.11 Enter comments

You can compose comments about models, which can be read and answered by other users. This way you can participate in improving your own models and those of others.

Procedure

1. Click **Comment**. The Comment bar opens.
2. Enter a comment or answer an existing comment.
3. Enter an http link to a Web site that provides additional information,
   e. g., **http://www.ariscommunity.com**. The entry must start with **http://**.
4. Click **Post**.

Your comment or reply is added and can be read by the other users. Accordingly, users can react to your input and you can improve the model together with them as required.

7.8.12 Add a column/row to lane models

You can add new columns/rows to lane models (page 497). In the example, a row is added. The procedure for columns is the same.

Procedure

1. Click the relevant row header. The **Add column/row** button is displayed.
2. Click **Add column/row**. The **Insert lane** dialog opens.
3. Select the lane type you want to add.
4. Click **OK**.

The selected row is inserted under the marked row.

7.8.13 Delete a column/row from lane models

You can delete columns/rows from lane models (page 497). In the example, a row is deleted. The procedure for columns is the same.

Procedure

1. Click the relevant row header. The **Delete column/row** button is displayed.
2. Click **Delete column/row**.
   If the row is not mandatory and contains no objects, it is deleted without prompting.
   If the row is mandatory and must always exist in the model, you are informed of this and the row is not deleted.
   If the row contains objects, you will be asked whether you want to delete the objects because the row can only be deleted after doing this.
3. Click **OK** if you are sure that the objects can be deleted together with the row.

The objects and the selected rows are deleted.

7.8.14 Increase size of attribute editing dialog

You can increase the size of the attribute editing dialog so that you can conveniently edit comprehensive content.

Procedure

1. Open the dialog (page 395) for the attribute you want to edit.
2. Click **Zoom in**. The size of the dialog increases and offers more space for editing the attribute.
3. Click **Zoom out** to display the dialog in the original size again.

You have resized the attribute editing dialog according to your requirements.

7.8.15 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 427).

Procedure

1. Click a placed attribute in the model window. The attribute is marked by a colored handle.
2. Press the **Ctrl** key, and click additional placed attributes you want to reposition or remove.

You can now delete or reposition (page 423) the selected attributes.

7.8.16 Remove placed attribute

You can remove placed attributes from the model window. Of course, only the attribute placement is deleted and not the value that was placed. To change the attribute value, edit the attribute (page 395) on the **Attributes** tab of the Properties bar.

Procedure

1. Select the placed attribute (page 425) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

7.8.17 Refresh model appearance

You can refresh the model appearance in order to display current content from the database. This is useful if several people work with the model items. For example, names of objects that have an occurrence in the model you have opened may have been changed.

Procedure

1. Make the relevant changes in your model.
2. Click **Refresh** if you want to compare the most current state of your model with the changes from other users.

The current data is read from the database and the appearance of your model is refreshed. If for example, the names of the objects used in the model were changed the new names are displayed.

7.8.18 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 474).
   To select a different report format, click the **Down arrow** next to **Output PDF** and select the format you want to use. The **Output PDF** button is given the name of the selected report format.
6. Click the button. The report is created and listed in the Reports bar (page 448).
7. Click the name of the listed report to download and open the report.

You generated the report for the open model.

What reports are available?

7.9 Valuable information

This section provides you with background information that will assist you in carrying out the relevant procedures.

7.9.1 How is the Model Editor structured?

The Model Editor from ARIS Connect has the following areas.

HEADER

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

If you change the language (page 387), the text attributes are output in the selected language as long as the text attributes are specified in the target language. If this is not the case, the text attributes are displayed in the alternative language and identified by the language code added to the alternative language.

BAR BUTTONS

Using the bar buttons you can show or hide the Search and the Comment, Properties, Reports, and Symbols bars. You can also hide or show the header, depending on whether you need more space for the model window or want to be able to see the information provided in the header.

TAB BARS

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

All tab bars contain frequently used buttons (page 458). This means that you do not need to switch between tab bars to access these buttons.

START TAB BAR

The **Start** tab bar groups the functions related to the representation and placement of model items (page 458).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 460).

FORMAT TAB BAR

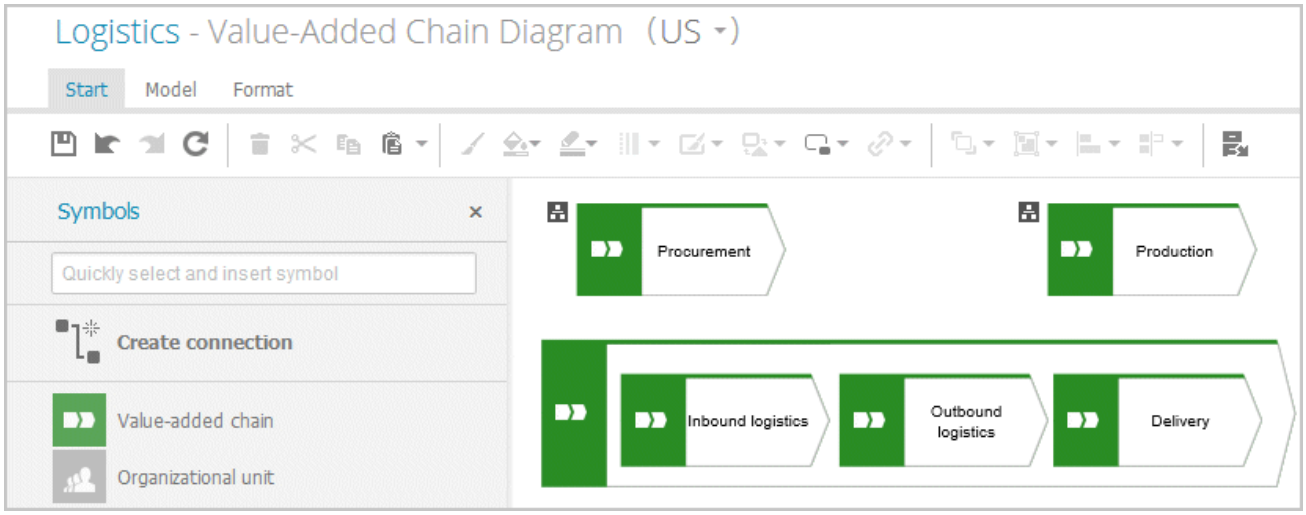
The **Format** tab bar groups the functions related to the presentation of written data in models (page 461).

BPMN TAB BAR

The BPMN tab bar is displayed if you have opened a BPMN diagram. It groups the functions that are used for the convenient editing of BPMN diagrams (page 463).

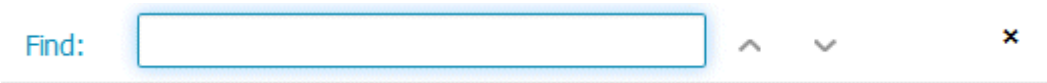
MODEL WINDOW

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



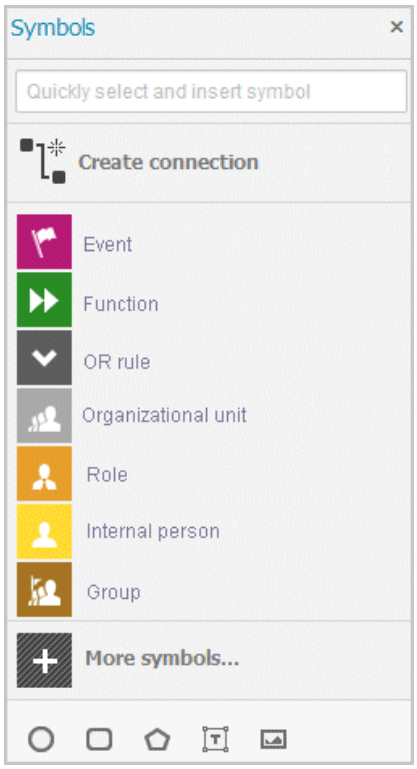
FIND BAR

Click **Find** in the bar buttons to show the Find bar that you can use to have objects selected in the model (page 413).



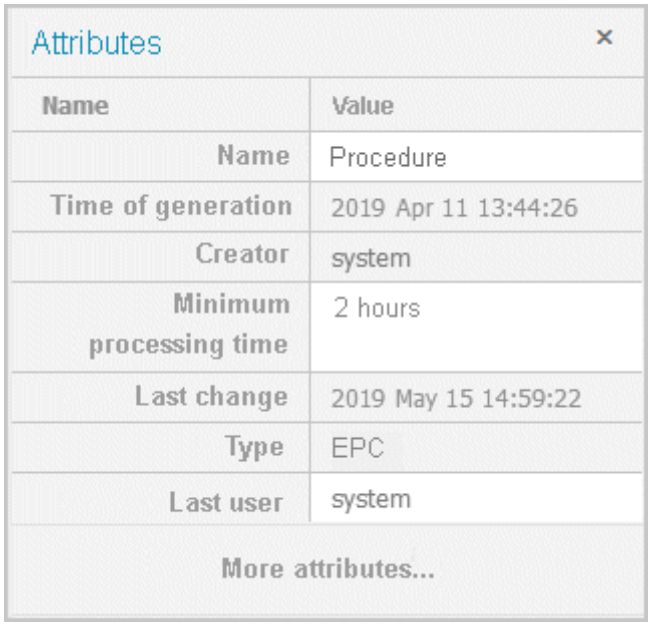
SYMBOLS BAR

The **Symbols** bar provides object symbols (page 388), graphic objects (page 392), and text (page 397) for insertion into the model window. It also allows you to filter the available object symbols by entering names and create connections between (page 396) objects.



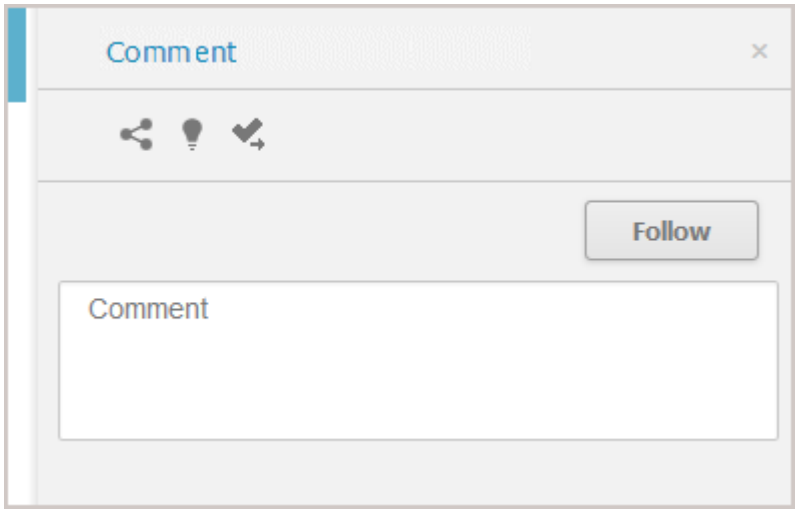
PROPERTIES BAR

Click **Properties** in the bar buttons to show the Properties bar where you can edit attributes (page 395), or view occurrences (page 441) and relationships of objects (page 442), for example.



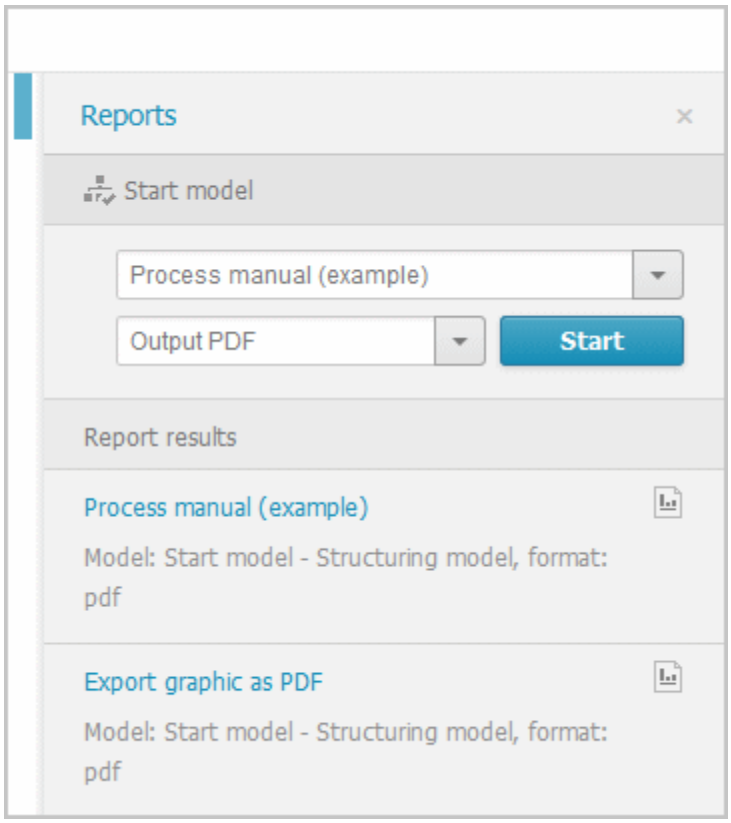
COMMENT BAR

Click **Comment** in the bar buttons to show the **Comment** bar that you can use to enter notes, improvement proposals, questions, etc., pertaining to the model (page 445).



REPORTS BAR

Click **Reports** in the bar buttons to show the Reports bar and generate reports (page 447).



DISPLAY BAR

The Display bar is located at the bottom of the model window. You can use this bar to quickly define which model areas are to be displayed in the visible window pane (page 397).

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

7.9.2 What model types are available in ARIS Connect?

The following model types are available: Depending on the filter you are using (page 457) not all model types are available.

Requirements tree
Requirement allocation diagram
Application collaboration diagram
Application collaboration diagram (physical)
Application system diagram
Application system type diagram
ArchiMate model
Attribute allocation diagram (Solution Design)
Task allocation diagram
Survey management
Bow tie diagram
BPMN allocation diagram (BPMN 2.0)
BPMN collaboration diagram (BPMN 2.0)
BPMN conversation diagram (BPMN 2.0)
BPMN process diagram (BPMN 2.0)
BSC Cause-and-effect diagram
Business controls diagram
Business footprint diagram
Quick model
CtX-tree
Data Warehouse model
eERM
eERM attribute allocation diagram
Data type diagram (Solution Design)
Document structure (Solution Design)
DW structure
eERM

eERM attribute allocation 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)
Technical terms model
Fishbone diagram
Questionnaire template allocations
Function mapping
Functions mapping (SAP Solution Manager)
Function tree
Function allocation diagram
Business segment matrix
Business rule architecture diagram
Business rule allocation diagram
Structuring model
IE Data model
Information carrier diagram
IT architecture mapping
IT architecture matrix
KPI tree
KPI allocation diagram
Class diagram
Product/Service exchange diagram
Product/Service tree
Screen design
Screen design (Solution Design)

Screen diagram
Screen navigation
Network diagram
Network topology
Organizational chart
Product selection matrix
Product tree
Product allocation diagram
Program flow chart
Work breakdown structure
Work breakdown structure
Process selection diagram
Process selection matrix
RAD
Risk diagram
Role diagram
SAP NetWeaver Business Warehouse data flow model
SAP NetWeaver Business Warehouse mapping multi provider
SAP NetWeaver Business Warehouse structure
SAP NetWeaver Business Warehouse transformation
SAP Solutions organizational elements mapping
SAP Solutions allocation diagram
SAP functions mapping (SAP Solution Manager)
Service architecture diagram
Service collaboration diagram
Service allocation diagram
SIPOC
Strategy diagram
Strategy allocation diagram
SWOT diagram
System environment

Table diagram
Technical resources
TOGAF diagram
Value-added chain diagram
Value stream map
Knowledge map
Knowledge structure diagram
XML model
Objective diagram
Access diagram
Access diagram (physical)

7.9.3 Which method filter is used?

When you open and edit models, your work is based on one of the method filters (page 497) assigned to you ARIS Architect. Database administrators specify which method filter a user may use in ARIS Connect. To do this, a database administrator assigns the relevant method filter to the database and user in ARIS Architect.

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

- If you were assigned only one filter, that filter is applied.
- If you were assigned multiple filters:

  a. The method filter assigned to the database is used (default filter of the database).

  b. If the default filter of the database does not exist, the filter named **Default** is used.

  c. If the **Default** filter does not exist either, the **Entire method** filter is applied.

  d. If the **Entire method** filter also does not exist, the first method filter of the alphabetically sorted list is used.

7.9.4 What are tab bars for?

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

All tab bars contain frequently used buttons (page 458). This means that you do not need to switch between tab bars to access these buttons.

START TAB BAR

The **Start** tab bar groups the functions related to the representation and placement of model items (page 458).

MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 460).

FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 461).

BPMN TAB BAR

The BPMN tab bar is displayed if you have opened a BPMN diagram. It groups the functions that are used for the convenient editing of BPMN diagrams (page 463).

7.9.5 What general buttons are available?

The following general buttons are available for each tab bar.

Save: Saves your changes in the database.

Undo: Undoes editing steps.

Redo: Redoes editing steps that were undone.

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

Delete: Deletes selected model items.

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

Copy. Copies selected items to the clipboard.

Paste: Pastes the content of the clipboard into the model.

7.9.6 What buttons does the Start tab bar have?

The **Start** tab bar provides the following buttons.

Format painter: Transfers the format (page 419) from one item to another.

Fill color: Colors the item in the selected color (page 419).

Line color: Colors the line of the item in the selected color (page 421).

Equation 1: Edit

Line style and weight: Assigns selected items a different style (page 422) (**Dotted**, **Dashed**, or **Solid**) and defines the weight (page 422).

Appearance: Assigns other properties to or removes properties from selected items (page 423), such as **Shaded**, **3-D effect**, and in addition, **Active** for objects.

Change symbol: Changes the symbol (page 390) of a selected object or the symbols of all selected objects of a type.

Place attribute: Places text attributes at the preset positions.

Create assignment: Assigns a new model to the selected object (page 428). The type and name of the new model can be selected.

Arrange: Positions selected items (page 428) behind or in front of other items.

Group/Ungroup: Groups selected items (page 429), so that they can be treated like a single item or ungroups them (page 429).

Align: Aligns selected items on the modeling area with regard to each other (page 429).

Match size of items: Matches the size of selected model items with each other (page 430).

Go to occurrence in Explorer: Opens a new tab showing the repository for the selected object or model and enables the relevant check box.

7.9.7 What buttons does the Model tab bar have?

The **Model** tab bar provides the following buttons.

Optimize layout: Automatically creates a new layout for the model.

Horizontal space: Inserts space in your model (page 432) from left to right.

Vertical space: Inserts space in your model (page 432) from top to bottom.

Export graphic: Exports the graphic of the model (page 431) to your download area.

Grid: Shows and hides the grid in the model window.

Template: Provides the available model templates for selection (page 384).

7.9.8 What buttons does the Format tab bar have?

The **Format** tab bar provides the following buttons.

Format painter: Transfers the format (page 419) from one item to another.

Standard

Font format: Provides the available font formats for selection.

Bold: Applies bold formatting to a text.

Italic: Applies italic formatting to a text.

Underline: Applies underline formatting to a text.

Strikethrough: Applies strikethrough formatting to a text.

Increase indent: Increases the text indent towards the right.

Decrease indent: Decreases the text indent towards the left.

Bullets: Applies a bullet to each paragraph of the selected text.

Numbering: Applies a consecutive number to the paragraphs of the selected text from top to bottom starting at one.

Font color: Opens the color palette for you to change the color of the selected text.

Font: Provides all fonts available for you to change the font of the selected text.

Font size: Enables you to change the font size for the selected text.

Reset character formatting: Undoes all formatting changes.

Align left: Aligns selected text to the left.

Centered: Aligns selected text to the center.

Align right: Aligns selected text to the right.

7.9.9 What buttons does the BPMN tab bar have?

The **BPMN** tab bar provides the following buttons.

Change symbol: Changes the symbol (page 390) of a selected object or the symbols of all selected objects of a type.

Add lane: Adds a new lane (page 438) to a pool or lane.

Move lane: Moves the selected lane in the desired direction.

Transform into call conversation: Transforms communication elements into call conversations.

Change type of sequence flow: Specifies the type of a sequence flow (page 439).

Collapse subprocess: Collapses a subprocess object (page 439).

Expand subprocess: Expands a subprocess object (page 439).

Edit: Opens the process contained in the subprocess (page 439) on a separate tab for editing.

7.9.10 What is the mini toolbar for?

The mini toolbar provides you with exactly the object symbols that can be linked to the selected object using a connection.

When you place an object symbol from the mini toolbar in the model window a connection between the selected object and the new object symbol is created at the same time. In addition, you can use the mini toolbar to create connections to existing objects.

The mini toolbar is configured for each object type. When you click an object, the mini toolbar provides the object symbols you selected for the underlying object type.

7.9.11 How are object relationships displayed by symbols?

The relationships are identified by the following symbols:

Symbol for relationships for which an occurrence or an implicit connection exists in the current model.

Symbol for assignment relationships (implicit relationships).

Symbol for relationships for which no occurrences exist in the current model and that are not implicit either.

For example, if a connection was created between objects **A** and **B** and object **B** has been deleted, the relationship is displayed when object **A** is selected.

7.9.12 Which placed attribute has an object?

If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window.

If you want to place more attributes, it is useful to place them near the object to which they belong. It can however occur that in the layout objects are positioned very close to one another making it difficult to say which object a placed attribute belongs to. In addition, it is also possible to place attributes freely. If an attribute was placed farther away from its object it may be difficult to assign the placed attribute after the layout is changed.

By clicking on an object it is given colored handles as a marker and its attributes are given handles that are not colored. This enables you to identify which placed attributes an object has. This also applies to placed attributes that do not have an attribute value. They are invisible in the model window until you assign them a value. If the associated object is selected the "invisible" placed attribute receives attribute handles, too.

7.9.13 What to consider when placing objects in/on objects

You can place objects on other objects (page 414) or in other objects (page 414). The difference between these two procedures is as follows: When placing an object **on** another object you specify that no implicit connection will be created between the objects. In contrast, when placing an object **in** another object you specify that an implicit connection is to be created between the objects.

You can place multiple objects of one type in an object at once. If you want to embed two objects at once and object 1 already has a connection to the enclosing object while object 2 has none, proceed as follows when creating connections:

- Select the connection that exists between object 1 and the enclosing object: This connection now links both objects to the enclosing object.
- Select a connection other than the one that exists between object 1 and the enclosing object: Object 1 is now linked to the enclosing object via two connections - the existing connection and the one you have selected. Object 2 uses the new connection.

Objects that were placed in other objects are also moved when the enclosing object is moved. If an enclosing object is selected, the embedded object is selected as well. This indicates clearly that an object is embedded in another object. In contrast, a non-embedded object is neither selected nor moved when the object on which it was placed is selected or moved.

You can drag an embedded object from an enclosing object to the modeling area. The connections linking the objects are then displayed.

7.9.14 What does place attribute as a symbol mean?

Attributes of objects can be placed in the model window which allows them to emphasize additional, important aspects in the model.

A symbol can be placed instead of a value for some attributes, which allows the attribute value to be identified immediately.

If such an attribute was specified and placed, e. g., the **Existence** attribute, the **As a symbol** check box becomes available. If you enable the check box, a plus sign is placed in the modeling area instead of **Yes** for the **Existence** attribute, and a minus sign instead of **No**.

7.9.15 What does place attribute as a symbol mean?

There are attributes for which a default symbol is defined.

If such an attribute was specified and placed, e. g., the **Existence** attribute, the **As a symbol** check box becomes available. If you enable the check box, a plus sign is placed in the modeling area instead of **Yes** for the **Existence** attribute, and a minus sign instead of **No**.

Other attributes can be assigned attribute symbols for placement by a user with the **Configuration administrator** function privilege. This is done on the **Administration** tab in ARIS Architect.

7.9.16 How can documents be linked?

Documents can be linked to models or objects in two ways:

- Using the attributes of a model or object (page 415)
- Directly using the Documents tab (page 416)

7.9.17 What happens to placed attributes that have no attribute value?

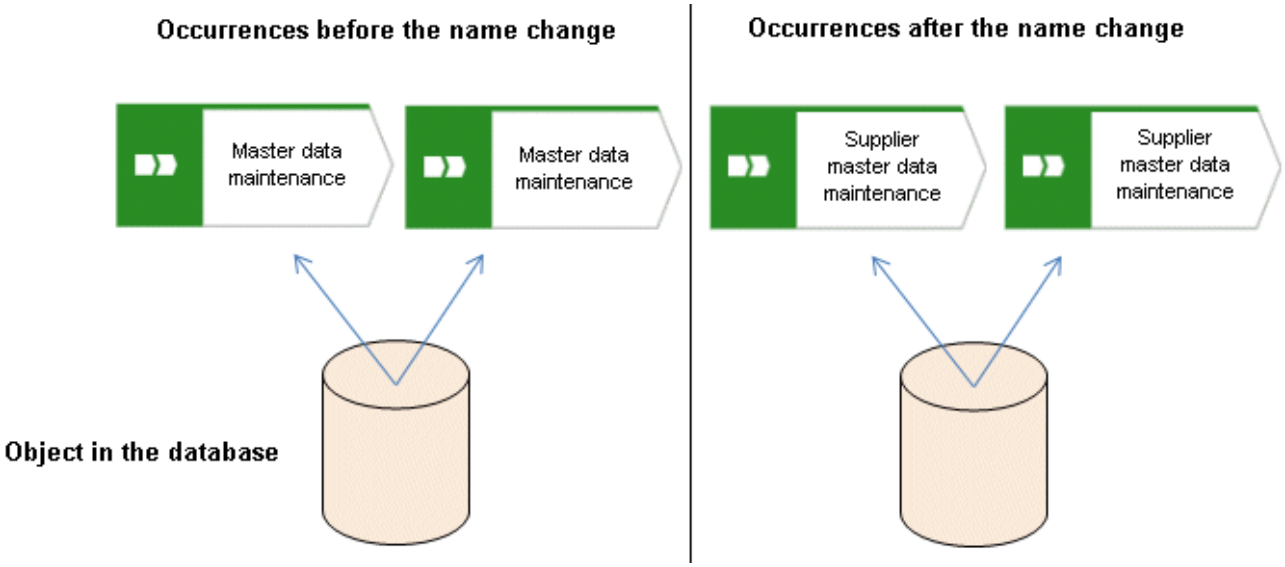
If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window. The usual procedure is to place attributes with an attribute value that can be seen directly in the model.

However, it may be useful to place attributes that are assigned a value at a later point in time. If, for example, it was defined that, as a rule, the maximum processing time is to be placed to the upper left of the **Function** object type this may happen even if the attribute value of this attribute has not been entered for all functions. If the value is entered later it is automatically displayed in the model window.

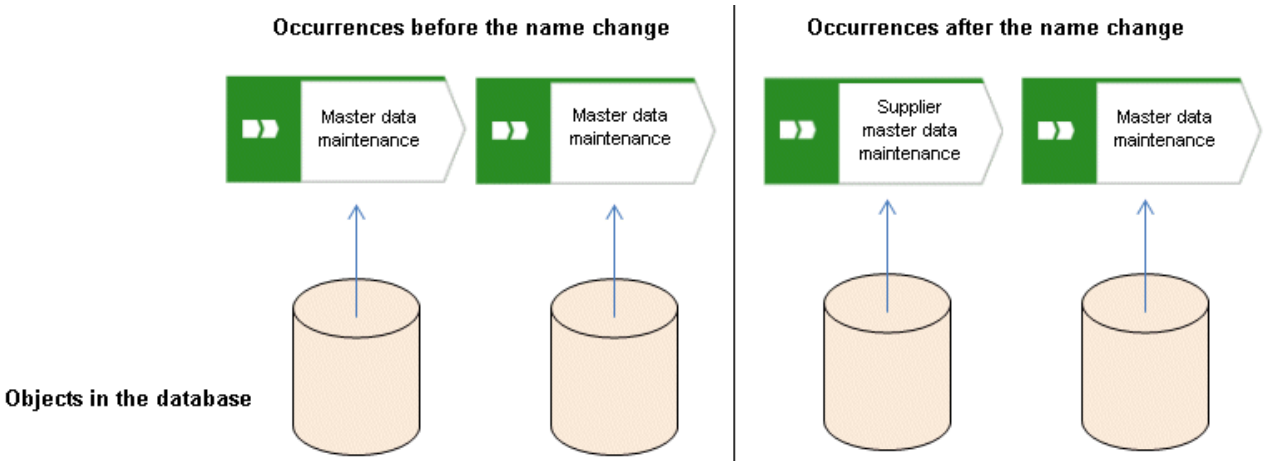
If a placeholder is to be used to make the placement of attributes without a value visible in the model window, you can define that they are to be placed with an attribute name. In our example, **Max. processing time:** would then be output for the relevant functions, and a value entered would appear behind the colon.

7.9.18 What is the difference between occurrence copy and definition copy?

An occurrence copy is only the copy of a graphical representation of an object. Thus, when you create an occurrence copy, a graphic is created that references the copied object:



When you create a definition copy, an entirely new object is created whose attributes are identical with those of the copied object:



If attributes of an object are changed, this change also applies to the corresponding attributes in all occurrences of the object. This becomes clear when changing the **Name** attribute:

	Source object	Occurrence copy	Definition copy
Before the name change	Master data maintenance	Master data maintenance	Master data maintenance
After the name change	Supplier master data maintenance	Supplier master data maintenance	Master data maintenance

7.9.19 Which items can be copied from one model to another?

You can copy graphic objects, such as circles, free-form texts, graphics, and objects, from one model to another.

However, for an object to be pasted in the target model it has to be allowed there by the method. For example , if you copy functions and organizational units in the source model, only the organizational units will be pasted into a model of the **Organizational chart** type because functions are not allowed in this model type. The corresponding information is provided by the preview frames of the copied functions being crossed through with an X when they are pasted into the organizational chart.

7.9.20 Which formats are copied to which items?

You can copy the formats of a selected item to another item or to several other items. This depends on whether the format has been copied to one or more items and also the items between which the format is copied.

THE FOLLOWING FORMATS ARE COPIED:

- Fill color, including transparency and gradient
- Line style, weight, and color
- Shadow
- Active information of objects and connections
- Connection direction arrow (if the source and target connections are of the same connection type)

THE FORMAT CAN BE COPIED BETWEEN THE FOLLOWING ITEMS:

- Object occurrences
- Connection occurrences
- Attribute occurrences
- Graphic objects, e.g., circle, square, etc.
- Free-form texts and placed model attributes
- Groupings (as the target, with the formats being copied to all items in the grouping as if the items were selected individually)

FORMAT COPYING AFFECTS THE FOLLOWING ATTRIBUTE PLACEMENT CHARACTERISTICS:

- Placement and sorting
- Font formats and individual characters as well as paragraph formatting for attribute definitions if the formatting includes the entire text.
- Alignment
- **With attribute name** and **As a symbol** settings

WHEN A FORMAT IS COPIED, IT AFFECTS THE FOLLOWING CHARACTERISTICS OF FREE-FORM TEXTS/PLACED MODEL ATTRIBUTES/ATTRIBUTE OCCURRENCES:

- Font formats
- Alignment
- **As a comment** setting
- **Character formatting** setting
- General character formatting.

7.9.21 Which formats are not copied?

You can copy the formats of a selected item to another item or to several other items. This depends on whether the format has been copied to one or more items and also the items between which the format is copied.

However, some formats are not copied:

- Model properties, e.g., background color, grid, and print settings, and the **New connections only right-angled** setting are not copied for models.
- In terms of attribute placements, the text area size is not copied.
- The size is not copied for objects, free-form text/placed model attributes/attribute occurrences in order not to destroy the layout of models.

How are formats copied to identical and different items?

How is the format copied to placed attributes?

7.9.22 How are formats copied to identical and different items?

You can copy the formats of a selected item to another item or to several other items. This depends on whether the format has been copied to one or more items and also the items between which the format is copied.

It is possible to copy formats from one item to another identical item, but also from one item to a different item, e.g., from an object occurrence to a connection occurrence. The items can be placed in different models.

Of course, the formats copied between different items are based on the formats that are available for all these items. Below, we will use the example of object occurrences to explain how formats are copied.

The object symbol size is not copied in order not to destroy the layout of models.

SOURCE AND TARGET OCCURRENCES ARE IDENTICAL

Object occurrences are identical if they are based on the same object type and have the same object symbol. All formats are copied.

PLACED SOURCE AND TARGET ATTRIBUTES ARE IDENTICAL

The copy format function causes the attribute placements of the source object occurrence to be transferred to the target object occurrence. This means that the target object occurrence receives the attribute placements of the source object occurrence.

SOURCE AND TARGET OBJECT OCCURRENCES DIFFER

- The source object occurrence is based on another object type than are the target object occurrences/All target object occurrences are identical: All formatting except for the fill color is copied.
  For example, the formatting of an activity can be copied to a group of organizational units or graphic objects.

- The source object occurrence is based on another object type than are the target object occurrences/Target object occurrences differ: The formats are copied only to object occurrences that are identical to the source object occurrence. None of the other objects change at all.
  This enables you to use the mouse to select modeling areas and copy the format without having to consider whether object occurrences will be changed unintentionally.

PLACED SOURCE AND TARGET ATTRIBUTES DIFFER

The copy format function copies the formats only from placed attributes that exist in both the source and target object occurrences. The position is not copied. If the source and target attributes have different placements, the attribute placements are not deleted or created.

7.9.23 How is the format copied to placed attributes?

You can copy the formats of a selected item to another item or to several other items. The following applies to placed attributes and free-form texts:

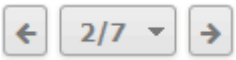
- If object or connection occurrences are the target, all of the placed attributes of the target are modified. The position is not changed.
- If placed attributes or free-form texts are the target, the target text is modified. The position is not changed.

How are formats copied to identical and different items?

7.9.24 In which order are object occurrences displayed?

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

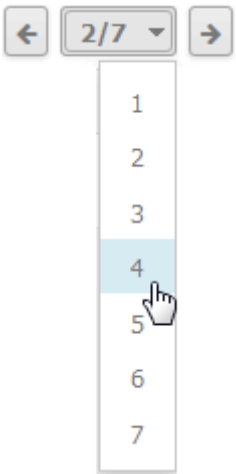
The navigation controls consists of arrows and a drop down list:



If you click an arrow, the next occurrence is selected. The order of the occurrences depends on the vertical position in the model. The occurrence at the top most position is occurrence number 1.

The first number of the drop down list specifies the selected occurrence, the second number the total amount of occurrences in a model.

Using the drop down list, you can directly select a desired object occurrence:



7.9.25 How to import a BPMN file

The following applies when importing (page 379) a BPMN 2.0 diagram:

- You can import BPMN diagrams of the **BPMN collaboration diagram (BPMN 2.0)** and **BPMN process diagram (BPMN 2.0)** type.
- **<bpmn:import>** elements are not supported (see chapter 15.3.1 **Document Structure** of the BPMN specification (http://www.bpmn.org/)).
- Existing ARIS objects are not reused. Importing the same file multiple times results in new models and definition copies. Occurrence copies of objects are not generated.
- XSD ID references are supported. QNames that can contain namespaces are not supported (see chapter 15.3.2 **References within the BPMN XSD** of the BPMN specification (http://www.bpmn.org/)). The BPMN file is validated against the official XML schema of the BPMN 2.0 specification and imported if validation is successful. If errors are found, these are displayed in a dialog.
- There are character limits for attributes in ARIS. For example, the Name (AT_NAME) attribute can have a maximum of 250 characters. If the BPMN import exceeds this number of characters, the first 250 characters are used and the remaining characters are cut off.

7.9.26 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

XML

7.9.27 What reports are available?

The Reports bar provides the following 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.

Output functions across multiple assignment levels (page 479)

Export graphic as PDF (page 476)

Output model information (page 481)

Output model information considering various aspects (page 482)

Output object information (page 483)

Process manual (example) (page 483)

Create process manual (page 475)

RA(S)CI - Output organizational participations in processes (page 484)

Generate job description (page 477)

7.9.27.1 Create process manual

USE

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

CONTEXT

Models of type:

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

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

What reports are available?

7.9.27.2 Export graphic as PDF

USE

This report exports a model graphic as a PDF file.

CONTEXT

Models

OUTPUT FORMAT

PDF

What reports are available?

7.9.27.3 Generate job description

USE

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

The following information can be output for each function:

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

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

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

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

Script administrators can change the content of the output.

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

CONTEXT

MODELS OF TYPE

- EPC
- FAD
- Office process
- VACD

OBJECTS OF TYPE

- Group
- Organizational unit
- Organizational unit type
- Person

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

OUTPUT FORMAT

- DOC
- XLS
- PDF
- DOCX
- ODT

What reports are available?

7.9.27.4 Output functions across multiple assignment levels

USE

Outputs the following information for the selected models:

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

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

THE FOLLOWING INFORMATION IS OUTPUT FOR EACH MODEL EVALUATED

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

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

ASSIGNED MODELS ARE HANDLED AS FOLLOWS

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

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

OUTPUT

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

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

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

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

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

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

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

CONTEXT

Model

OUTPUT FORMAT

- PDF
- DOC

- DOCX
- ODT
- RTF
- HTML

What reports are available?

7.9.27.5 Output model information

USE

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

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

CONTEXT

Models

OUTPUT FORMAT

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

Output model information considering various aspects

What reports are available?

7.9.27.6 Output model information considering various aspects

USE

Outputs model information including group structure as an Excel table.

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

The following aspects can be output:

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

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

CONTEXT

Models and groups

OUTPUT FORMAT

- XLS
- XLSX

What reports are available?

7.9.27.7 Output object information

USE

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

The output is in table format.

CONTEXT

Object

OUTPUT FORMAT

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

7.9.27.8 Process manual (example)

USE

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

CONTEXT

Objects

OUTPUT FORMAT

- PDF
- DOC
- DOCX
- ODT
- RTF

What reports are available?

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

USE

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

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

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

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

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

- **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

What reports are available?

8 Versioning

In ARIS Connect you can version models and thus store different model states.

The different model versions can be opened for information, while the workspace model is the only one available for editing.

Within the scope of Release Cycle Management (RCM) you can identify and explain specific model versions. The change lists are used to continuously document the changes to models, which means that the documentation can be used both internally and externally.

The permanent locking (page 488) and versioning functions support key aspects of Release Cycle Management.

Versioning is not performed automatically when saving; it is performed when the content is suitable for versioning. "Suitable for versioning" means that a model has reached a state that is to be archived.

8.1 Version models

You can version models, for example, to use them in Release Cycle Management (RCM).

Prerequisite

- You have opened a versionable database.
- You have the **Version** access privilege.

Procedure

1. In the repository, navigate to the database group containing the models you want to version. When you select the group, its content is displayed.
2. If you want to version a model, move the mouse pointer to the row with the model and click **More**.
   If you want to version multiple models, enable the check boxes for the relevant models and click **More** above the item list. The menu is displayed.
3. Click **Versioning**. The **Enter description** dialog opens.
4. Enter a change description. This description informs users of the changes made since the last versioning and why they were made.
5. Click **OK**.

The model/s is/are saved as a version and a change list including the description is created.

8.2 Show versions

You can display a list of versions of a model.

Procedure

1. In the repository, navigate to the database group containing the model whose versions you want to view. When you select the group, its content is displayed.
2. Move the mouse pointer to the row with the relevant model and click **More**. The menu is displayed.
3. Click **Show versions**. The **Version overview** dialog opens.

All versions of the model are displayed. The date it was saved, its change list numbers, and the version descriptions are shown.

8.3 Open version

You can open a version of a model for information purposes.

Procedure

1. In the repository, navigate to the database group containing the model whose version you want to open. When you select the group, its content is displayed.
2. Move the mouse pointer to the row with the relevant model and click **More**. The menu is displayed.
3. Click **Show versions**. The **Version overview** dialog opens.
4. Click the name of the version you want to open.

The write-protected version of the model opens in Model Editor and you can obtain information on the model's contents. Furthermore, you can view reports on the model or selected objects (page 447).

9 Lock

You can permanently lock models and objects to prevent editing by other users and unlock locked items again.

Locking models and objects is useful during Release Cycle Management (RCM), for example, to perform an assessment of the required items.

The versioning (page 486) and permanent locking functions support key aspects of Release Cycle Management.

You can lock:

- objects
- models
- content of groups

9.1 Lock models

You can lock models so that they cannot be edited, for example, to perform a review. As long as the lock is enabled, only the user who applied it can edit the locked items.

Prerequisite

- The models must not be opened by any user, not even by yourself.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the repository, navigate to the database group containing the content you want to lock. When you select the group, its content is displayed.
2. If you want to lock a model, move the mouse pointer to the row with the model and click **More**.
   If you want to lock multiple models, enable the check boxes for the relevant models and click **More** above the item list. The menu is displayed.
3. Click **Lock**. The lock is applied and you will be informed of the result. If it was impossible to lock one or multiple objects of a model, you will be informed of the items that were locked and those that could not be locked.

Locked models and objects can only be edited by you. The locked items remain locked until you or a system user unlock them again.

9.2 Lock objects

You can lock objects so that they cannot be edited, for example, to perform a review. As long as the lock is enabled, only the user who applied it can edit the locked items.

Prerequisite

- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the repository, navigate to the database group containing the content you want to lock. When you select the group, its content is displayed.
2. If you want to lock an object, move the mouse pointer to the row with the object and click **More**.
   If you want to lock multiple objects, enable the check boxes for the relevant objects and click **More** above the item list. The menu is displayed.
3. Click **Lock**. The lock is applied and you will be informed of the result. If it was impossible to lock one or multiple objects, you will be informed of the objects that were locked and those that could not be locked.

Locked objects can only be edited by you. The locked objects remain locked until you or a system user unlock them again.

9.3 Unlock models

You can unlock locked models in order to release them for editing for all users with the corresponding privilege.

Prerequisite

- The models must not be opened by any user, not even by yourself.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the repository, navigate to the database group containing the content you want to unlock. When you select the group, its content is displayed.
2. If you want to unlock a model, move the mouse pointer to the row with the model and click **More**.
   If you want to unlock multiple models, enable the check boxes of the relevant models and click **More** above the item list. The menu is displayed.
3. Click **Unlock**. The lock is removed and you will be informed of the result. If it was impossible to unlock one or multiple objects of a model, you will be informed of the items that were unlocked and those that could not be unlocked.

The dialog closes and the models (and objects, if applicable) are unlocked.

9.4 Unlock objects

You can unlock locked objects in order to release them for editing for all users with the corresponding privilege.

Prerequisite

- The models must not be opened by any user, not even by yourself.
- You have the **Lock permanently** function privilege or are a system user.

Procedure

1. In the repository, navigate to the database group containing the content you want to unlock. When you select the group, its content is displayed.
2. If you want to unlock an object, move the mouse pointer to the row with the object and click **More**.
   If you want to unlock multiple objects, enable the check boxes of the relevant objects and click **More** above the item list. The menu is displayed.
3. Click **Unlock**. The lock is removed and you will be informed of the result. If it was impossible to unlock one or multiple objects of a model, you will be informed of the objects that were unlocked and those that could not be unlocked.

The dialog closes and the objects are unlocked.

10 Glossary

A

Access privilege

With the access privileges you can control which content is accessible to specific users or user groups. Depending on their privilege, users can see, create/edit, delete or version models and objects. You assign access privileges to users, user groups, or database groups on the properties pages. Administrators manage users, user groups, cross-database and cross-product privileges and licenses for all ARIS products in ARIS Administration.

No access (----)

Users see the group structure of the database. Group contents are not displayed.

Read (r---)

The group content is displayed. Users can open models but neither change models and objects, nor add or delete new items.

Read + Write (rw--)

The group content is displayed. Users can change models and objects, add new items, delete object occurrences from models, but not object definitions.

Read + Write + Delete (rwd-)

The group content is displayed. Users can modify models and objects and add and delete items.

Read + Version (r--v)

The group content is displayed. Users can open and version models but neither change models and objects, nor add or delete new items.

Read + Write + Version (rw-v)

The group content is displayed. Users can change models and objects, add new items, delete object occurrences from models, and version models. Object definitions cannot be deleted.

Read + Write + Delete + Version (rwdv)

The group content is displayed. Users can modify models and objects, add and delete items, and version models.

Alternative language

Database language in which database content is displayed if attribute values are not specified in the database language used. When you create a database, **English (United States)** is selected automatically. On the **Administration** tab, you can change the alternative language.

ARIS Administration

Manages users, user groups, privileges, licenses, documents, configurations, and processes for a tenant (page 502).

ARIS Connect Governance Inbox

As soon as the first change request is made, the **ARIS Connect Governance Inbox** database is automatically created in ARIS. It contains a Requirements inbox for each process manager 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 manager has selected (**Approve**, **Reject**). This enables all change requests to be monitored in the **ARIS Connect Governance Inbox** database.

Assignment

A model assigned to an object by an assignment relationship.

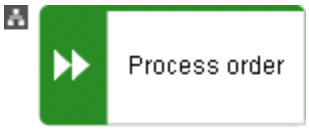
If a model is assigned to an object, this can be indicated by an assignment icon. An assignment enables you, e.g., to use a model to describe objects in detail and thus get from a rough plan to a detailed plan.

Assignment icon

Icon that shows that one or more models are assigned to an object by an assignment relationship.

You can open assigned models by double-clicking the assignment icon. The assignment icon is displayed if you have disabled the **Hide assignment icons** option.

The assignment icon may look different and may be placed at different points in the object depending on the model template you are using.



You can also assign an assignment icon of your own to a database. It is displayed to the right of the icons.

Assignment relationship

Relationship of an object to a model assigned to it.

You can create an assignment relationship using drag and drop or using the object properties dialog. The assignment relationship is displayed at the object by an assignment icon.

B

BPMN

Business **P**rocess **M**odel and **N**otation (**BPMN**) is a graphical notation used to describe business processes.

C

Change list (versioning)

Includes selected content of a database. This may comprise individual models, multiple models without interdependencies, related models, group content, or the entire database contents. They will be versioned together and saved under one change list number. Change lists are sorted in ascending order.

A description of the change list characterizes the versioned contents. The change list description records who versioned which database content, when, and why. Opening a change list displays the database content you selected for versioning. This can be a model, or the entire database content.

Change list number (versioning)

Number and description of a version of the database content. Change list numbers can be used to select particular versions for viewing. You have only read access for the content.

Change lists are sorted in ascending order. (Versioning state)

CRON expression

String consisting of six to seven fields that is separated by a space and represents a time.

Normally, a CRON expression is used to define routine jobs that are executed automatically at certain times by the system.

Fields

- Seconds, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Minutes, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Hours, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Day in month, mandatory field, valid value: **0-59**, valid characters: *****, **/**, **,** **-**.
- Month, mandatory field, valid value: **0-12** or **JAN-DEC**, valid characters: *****, **/**, **,** **-**.
- Day of the week, mandatory field, valid value: **0-7** or **SUN-SAT**, valid characters: *****, **/**, **,** **-**, **?**, **L**, **C**, **#**.
- Year, not a mandatory field, valid value: **1970-2010**, valid characters: *****, **/**, **,** **-**.

Current version (versioning)

Corresponds to the last versioned database content. This version includes the entire versioned content of a database. You have only read access for the content.

In principle, this is the last change list created for a database (versioning state).

E

Escalation manager

The escalation manager is the user who is notified when a human task is not completed by any executor by the due date.

F

Function privilege

Controls tasks that users can perform.

You can use function privileges to provide users with specific functionality and thus control their authorizations across a database in ARIS Architect. Function privileges are assigned on the properties pages of users or user groups. In ARIS Administration, administrators manage users, user groups, cross-database and cross-product privileges and licenses for all ARIS products.

D

Definition copy

Copy of the object definition, i.e. of the entire object, rather than just the occurrence as is the case with the occurrence copy.

The definition copy creates a new object. The occurrence, which is created when creating the definition copy, refers to the new object.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It makes sense to create a definition copy for an existing object if a new object is to have properties similar to those of the source object.

For example, you have modeled the object **Plant 1** and specified its properties. You now wish to create the object **Plant 2**, which has properties similar to Plant 1. In this case, it is advisable to create a definition copy of Plant 1. Object **Plant 2** is thus given all the properties of object Plant 1, but exists independently of it. You now simply need to change the properties that differ from those of object Plant 1, for example, by changing the name to **Plant 2**.

This involves significantly less work for you than creating the object from scratch and having to enter all the properties again.

Some attributes are not copied when the definition copy is created. For example, it does not make sense to copy the identifier of an object because the identifier represents a unique ID of an object.

G

Graphic objects

Graphic elements without implicit semantic meaning. They can be used, for example, to indicate model areas, to specially highlight objects that are thematically linked, or to prepare models so that they are suitable for presentation.

Graphic elements include circles, squares, and polygons.

Grid

Placement markings in the model window in the form of dots that you can show for modeling support.

These mark the minimum spacing between one model item and another. If you move an item, it is moved by increments of one gridline accordingly.

Grouping

Grouped model items (page 429).

They can be moved, enlarged or reduced, and deleted as if they were one item.

GUID

Globally **U**nique **Id**entifier (GUID).

The GUID is a string that renders items unique anywhere in the world.

I

Impersonation

Impersonation enables a user to perform actions on behalf of a different user account, e.g., back up and restore tenants. This requires the creation (page 139) of a user in the user management for the infrastructure tenant, e.g., **master**. This user must be assigned all licenses and privileges that are needed for the action.

Infrastructure tenant

Specifies the tenant with special privileges for managing other tenants, components, and the configuration in ARIS Administration.

By default, the **master** tenant is the infrastructure tenant. The system users **system** and **superuser** have administrative privileges, i.e., they can access ARIS Administration and Tenant Management.

Users with the relevant privileges can specify other infrastructure tenants in ARIS Administration.

J

JAAS

Java **A**uthentication and **A**uthorization **S**ervice (**JAAS**).

A Java interface that enables you to provide services for authentication and access privileges in Java programs. JAAS supports user-based authentication.

K

Connection

Visible relationship between objects, which is created during modeling. It is thus a graphical representation of a relationship.

A connection is usually represented by lines in the model window. If a direction is relevant, the line is added an arrow. One example is the connection of the **is predecessor of** type between functions in models of the **EPC** (event-driven process chain) type.

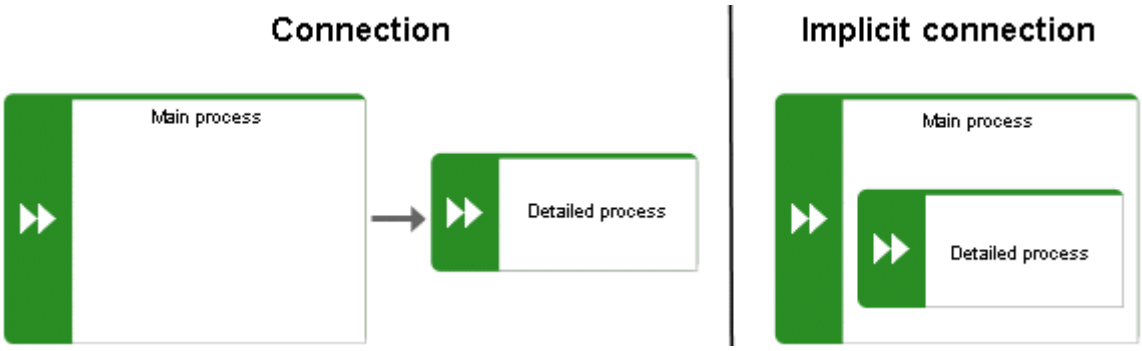
Connection, implicit

Invisible connection.

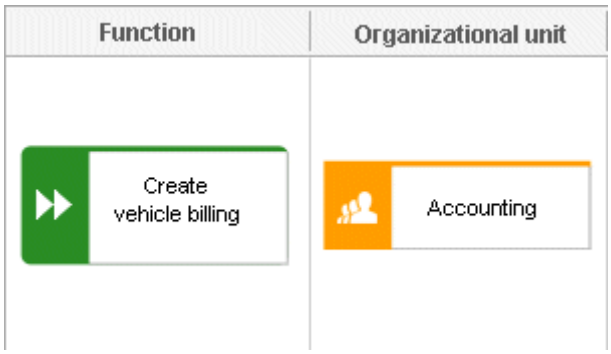
Implicit connections are created if the **Create implicit connections for overlapping objects** option is enabled and objects are placed within objects. In the displayed dialog, you can decide whether to hide any connections and, if so, which connections to hide for these objects. The difference between implicit connections and implicit relationships is that an implicit connection can be represented by a line in the model window. This line is displayed again, for example, if you drag an object from another object down into the free area of the model window.

Example of implicit connections:

Place a function on another function in a model of the **EPC** type.



In a model of the **PCD** type, place a function in the **Function** column and an organizational unit in the **Organizational unit** column. An implicit connection of the 'carries out' type is automatically created from the organizational unit to the function.



This needs to be differentiated from implicit relationships (page 499).

L

Lane model

Model represented using columns/rows or a table.

Lanes are columns and/or rows. They include only specific object types and they structure the modeled information. An implicit relationship is often created between objects in a row.

A model of the **EPC (table display)** type is a lane model.

M

Method filter

Filter restricting the total number of ARIS Method items and thus offering only those items for modeling that are actually required.

By applying a specific method filter, only the model types included in this method filter will be offered for selection when creating new models. When modeling, all object, connection, and attribute types are available for the model type that are contained in the method filter. Thus, the content offered is exactly the content you need for performing your tasks. Method filters are an effective means of supporting uniform modeling and make it possible to provide users with only the information and methods relevant to them.

Mini toolbar

Toolbar of objects (page 394) that are used for placing and drawing connections.

It is shown if you select an object in the model.

Model template

Basic settings that change the appearance and attribute placements of models all at once when being assigned. This enables you to apply settings defined once to all relevant models. Templates can be assigned additively. This means that all changes from templates assigned one after the other are valid. If, for example, you assign a template that removes the fill color of objects, and

then assign a template that places the name attribute above the objects, both changes take effect.

O

Occurrence

Graphical representation of objects, connections, and free-form texts.

It is used to represent items in a model.

With an occurrence copy several occurrences of an object can be created. These can differ within a model and/or in different models, i.e., object symbol, size, color, and attribute placements can be set individually and thus be different.

If the placed text attributes of an occurrence are changed, the changes are applied to all occurrences at which the text attribute has also been placed. For example , if the name an object is changed, the change is displayed for all occurrences.

Occurrence copy

Copy of the occurrence, i.e., only the graphical representation of an object, rather than the entire object as with the definition copy.

All of the occurrence copies of an object represent the underlying object definition.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It is helpful to create a copy of the object symbol for an existing object - i.e., only a copy of the occurrence of an object - if exactly the same object is used at various positions in the model or in different models.

For example, if, in the model you are creating, Plant 1 supplies goods at various points of the model, it is advisable to use occurrence copies at these points. These refer to the same object, and any changes to this object apply to all occurrence copies.

If you want to rename Plant 1 to **Plant A**, for example, you only need to do this for ONE of the occurrences: All other occurrences are changed to **Plant A** at the same time.

OLE object

OLE objects are objects from various external applications, which can be used in ARIS. When you start the objects from within ARIS, they are opened in the external application.

For them to open, specific requirements must be met. For example, the security policy of the Web browser must allow opening, and saved objects must be stored in a local drive.

OTP

One-**T**ime **P**ad (**OTP**).

This one-time pad is a symmetric encryption method for transferring secret messages. This encryption method is characterized by the fact that it uses a key of the same length as the

message itself. The OTP is information-theoretically secure and has proven to be impossible to crack – provided that it is used properly.

P

ARIS Process Board

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

R

Relationship

Connection that can exist between model elements and among models.

Relationships include connections, implicit connections, implicit relationships, assignment, and variant relationships. Therefore, the term **relationship** is a superordinate term for all links that can exist between objects and models.

Relationship, implicit

Assignment relationship, i.e., a relationship between objects for which no visible connection is drawn.

You create this relationship by assigning a model to an object.

This needs to be differentiated from implicit connections.

Root element

Model or object that is used as the top element in a hierarchy in the portal. This element is displayed when you open the hierarchy in the portal.

S

SAML

Security **A**ssertion **M**arkup **L**anguage (**SAML**).

XML framework for exchanging authentication and authorization information. SAML provides functions to describe and transfer security-related information.

Satellite

A satellite is an object that can be inserted in a model or diagram but is not a structurally relevant object (page 500) in the model or diagram.

For example, an object of the **Organizational unit** type is a satellite in an event-driven process chain (EPC). In a model of the **Organizational chart** type, on the other hand, an object of the **Organizational unit** type is a structurally relevant object.

Single sign-on (SSO)

The advantage of using SSO is that users need to remember only one password when logging in to the network. After entering the password at their workspace, they have access to all

computers, services and programs for which they have the required privileges, without having to enter the password again.

SSL

Secure **S**ocket **L**ayer (**SSL**).

Security software for encrypting data that is exchanged between programs.

Structurally relevant objects

Basic model objects.

These are objects that indicate the distinctive feature of a model. For a model of the **Organizational chart** type, the objects **Organizational unit**, **Role**, and **Person** are structurally relevant objects, for example. Using these items, you can build the typical hierarchy of an organizational chart.

The **Event** and **Function** objects are typical for the **EPC** model type and are thus structurally relevant to a business process. You can use these to establish the typical control flow. The **Organizational unit**, **Role**, and **Person** objects can also be inserted into an **EPC**. However, these objects do not constitute the distinctive feature of a business process. As structurally irrelevant objects, they act as satellites, and add more detailed information to the process model. For example, you can insert **organizational units** and link them to functions to illustrate who carries out those functions.

An object that can be inserted in a model or diagram but is not a structurally relevant object is known as a satellite (page 499).

superuser

The user **superuser** is created automatically. By default, this user is assigned the **User management**, **License management**, and **Configuration administrator** function privileges. This user can also activate this function privilege for other users. The **superuser** user does not use up a license. The **superuser** user manages the system administration, but cannot use ARIS products due to license restrictions. The default password is **superuser**. You should change the default password to prevent unauthorized access. You can change all user data except for the user name.

system

The system user **system** (page 39) assumes the administrator role of the system administrator and has all function and access privileges in all databases. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP, for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. If you forgot the passwords of all your system users, the full range of functions and access to the data in this database are no longer available to you.

System users

System users are users who have all function and access privileges in a database and who have the required privileges (page 39) in ARIS Administration. System users can be created by the system administrator (user **system**) or by another system user.

The system user **system** is created automatically. The name **system** cannot be changed. A system user should immediately change the password **manager** in the ARIS Administration to prevent unauthorized access. The function and access privileges of system users cannot be changed at database level. To withdraw privileges from a system user, another system user must disable the **System user** check box on the former user's **Function privileges** properties page. As a result, the user's privileges can be changed. After this, the user has no access privileges.

The system user **system** (page 39) assumes the administrator role of the system administrator and has all function and access privileges in all databases. Authorized persons can use this emergency user to log in to any database, even if you are using an external system, such as LDAP, for authentication.

The name **system** cannot be changed. The **System user** check box for this user (**Function privileges** properties page) cannot be disabled either. You should immediately change the password **manager** to prevent unauthorized access.

To avoid problems, you should create additional system users. If you forgot the passwords of all your system users, the full range of functions and access to the data in this database are no longer available to you.

What is the user 'arisservice'?

System database

This database manages the content of the **Configuration** and **Evaluations** folders, which is displayed on the **Administration** tab. This includes filters, templates, and font formats, but also ARIS Method and all evaluation scripts and macros.

The system database is created automatically while the first user is logging in to ARIS. The content is available for all databases of this tenant. The ARIS Service Administrator commands **backupsystemdb**, **restoresystemdb**, and **updatesystemdb** can be used to save and restore this data centrally.

Updates the system configuration of the tenant (filters, templates, and scripts) after installing an update based on the system database supplied (ARIS_DVD\Content\SystemDB*.adb).

When updating, all ARIS standard scripts and JS files are overwritten and customer-specific changes are discarded. Export these files before you update the system database. Copied scripts and files are not overwritten. Changes in copies are retained.

Syntax

```
updatesystemdb <archive>
```

Restores the central system database that contains data such as filters, model templates, and scripts from a previously saved system database (ADB file) **<archive>**. When updating, all ARIS standard scripts and JS files are overwritten and customer-specific changes are discarded. Export these files before you update the system database. Copied scripts and files are not overwritten. Changes in copies are retained.

You can also update the system database using the updatesystemdb command.

Updates the system configuration of the tenant (filters, templates, and scripts) after installing an update based on the system database supplied (ARIS_DVD\Content\SystemDB*.adb).

When updating, all ARIS standard scripts and JS files are overwritten and customer-specific changes are discarded. Export these files before you update the system database. Copied scripts and files are not overwritten. Changes in copies are retained.

Syntax

```
updatesystemdb <archive>
```

Syntax

```
restoresystemdb <archive>
```

Saves the central system database that contains data such as filters, model templates, and scripts in an ADB file in a directory **<archivedir>**.

Syntax

```
backupsystemdb <archivedir> [<alternatename>]
```

T

Tenant

Provides a user with a particular functionality and specific data depending on their license. One ARIS Administration exists for each tenant. All ARIS clients use tenants to access database servers and thus work with a common data basis. For each tenant, there is a configuration on the **Administration** tab that defines ARIS Method and the modeling conventions. These are used by all databases on that tenant.

All tenants are managed using the Infrastructure tenant.

TLS

Transport **L**ayer **S**ecurity (**TLS**).

TLS is known under the name of its predecessor **S**ecure **S**ockets **L**ayer (**SSL**) and is an encryption protocol for the secure transfer of data on the Internet.

U

UML (Unified Modeling Language)

UML is a graphical modeling language for specifying, constructing, and documenting software, parts of software, and other systems. This "unified" modeling language specifies the notations of the modeling terms and their relationships. It also defines the graphical notation, the static structures, and the dynamic processes.

URI

String that is used to uniquely identify an abstract or physical resource.

URIs are used to describe resources (such as Web sites, other files, calls for Web services) on the Internet.

URIs can be incorporated as a string (encoded with a character set) into digital documents, particularly those in HTML format, or written by hand. A link from one Web site to another is called a hyperlink.

URL

Uniform **R**esource **L**ocator, a particular type of URI (**U**niform **R**esource **I**dentifier).

URLs identify a resource via the network protocol used (e.g., http or ftp) and the **location** of the resource (e.g., of a service) in a network.

The term URL is often used synonymously with URI because URLs were the first and are still the most frequently used type of URI.

User name

Name of a user (e.g., **system**) for access to a database. The user name does not necessarily have to correspond to a person's real name.

Access to a database is possible if a user logs in to it with the combination of user name and password that has previously been stored for the database. This is the case when the system administrator or a user with the **User management** function privilege creates the new user.

V

Version

A model that remains fixed and can no longer be changed in a change list.

The versioning state of the last version created is the current version.

Version number

Number assigned to a model during versioning.

The number relates to the model whose versions are numbered in ascending order.

Versioning state

Image of database content recorded at a certain point in time.

A versioning state can include models of different versions with different or identical version numbers that represent a specific state. While Workspace represents a state that is editable but has not yet been versioned, the versions are included in the Current version state and in the revisions associated with the Change list numbers.

W

Workspace (versioning)

Indicates the database content that has not yet been versioned. It can be edited. (Versioning state)

11 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

12 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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