



# **ARIS Connect**

# **DESIGNER USER MANUAL**

Version 9.8 - Service Release 7

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This document applies to ARIS Version 9.8 and to all subsequent releases. Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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## 1 ARIS Connect

ARIS Connect is an integrated environment in which you can create, display, and change processes, as well as discuss and improve them jointly with other ARIS 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 designer, you can create new models, edit existing models, and version models. You can assign documents to models and objects from <\_ads>. In addition, you can create groups in databases in order to store your models in a structured way and to version selected models.

News on ARIS is available in ARIS Community.

Note: You can view videos for some procedures in the help. 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

16. Click your user name. The menu opens.
17. Click **Search**.

The Search area (page 81) 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](http://www.ariscommunity.com/aris-access-certification-inquiry-form)).

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

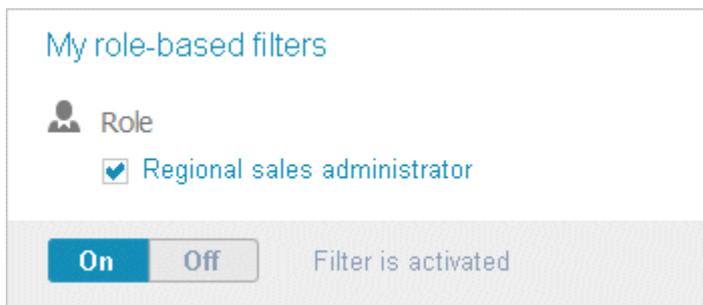
### 3.1 Classic view

The classic view shows all content relevant to you in a clear structure under Home (page 9), Groups (page 10), and Glossary (page 40).

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page **Error! Bookmark not defined.**).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 62) 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 64), 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 **Error! Bookmark not defined.**), these are offered to you for selection . 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.

### 3.1.1 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 56).

##### **Find people** ()

Activates  Collaboration where you find people (page 111) you want to discuss with, for example.

##### **Start discussion** ()

Activates  Collaboration where you can start a new discussion (page 111).

##### **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 81) 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 112) or in the portal (page 61).

## FAVORITES

Offers the direct access to saved filter criteria (Seite 68) of the **Favorites** area of the search.

## CONTACTS

Lists your contacts.

### 3.1.2 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 61) and **Comment** (page 55) and the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

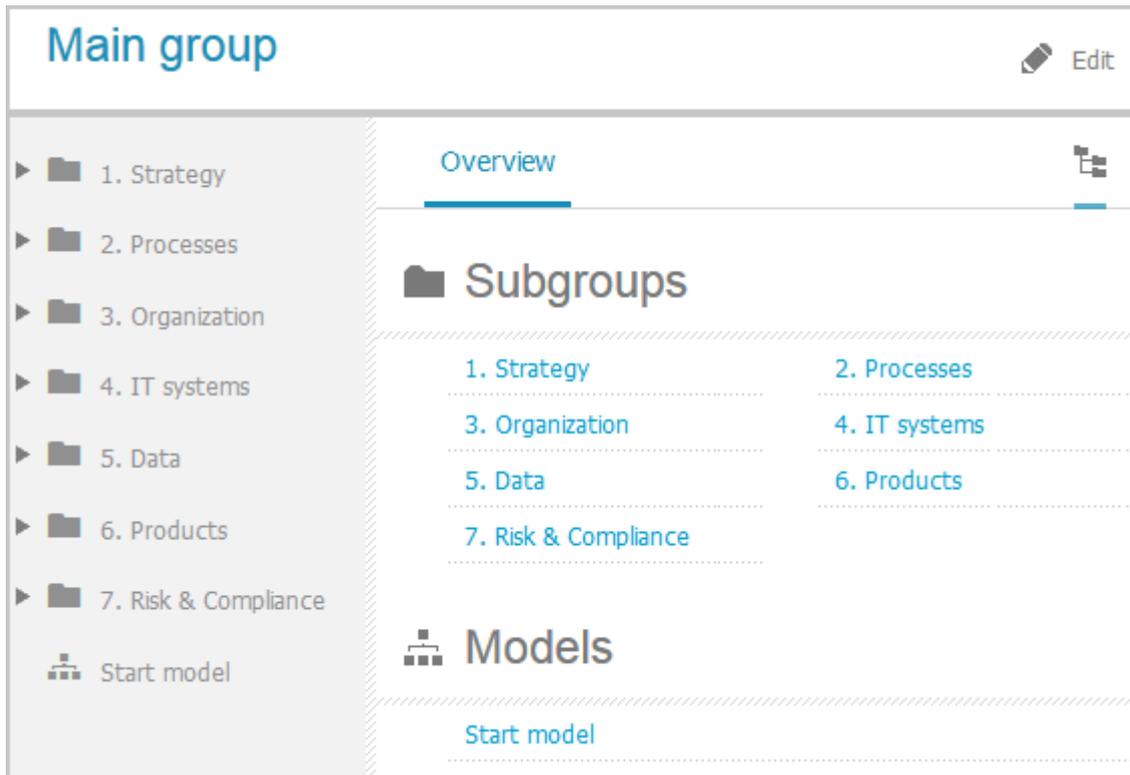
Click  **Share model** to share models with other users (page 60). Click  **Submit change request** to send change requests to the process manager (page 44). The function  **Start governance process** (page 67) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes (page 58) 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 89), create new or reuse existing items (page 84), as well as delete items (page 86).

#### **Group items of ARIS models**

## OVERVIEW

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



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

### Sales order processing

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

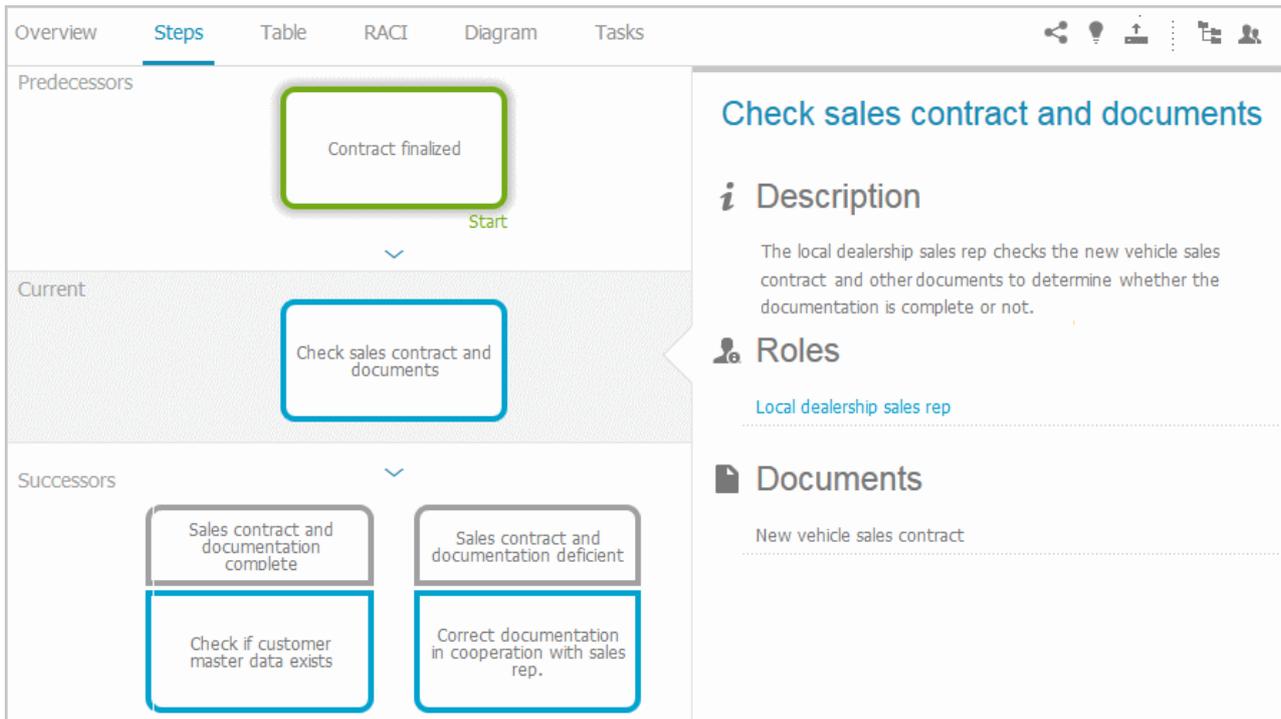
Overview **Steps** Table RACI Diagram More ▾

#### Activities

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

### STEPS

Transparently displays all steps of a process (EPC) (page 64). 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 <b>Table</b> 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 <b>Table</b> RACI   More ▾		
↓ Functions	Roles	
	Local dealership sales rep	Regional sales administrator
Check sales contract and documents	<input checked="" type="checkbox"/>	
Correct documentation in cooperation with sales rep.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check if customer master data exists		<input checked="" type="checkbox"/>
Create customer master data		<input checked="" type="checkbox"/>
Enter vehicle data and details		<input checked="" type="checkbox"/>

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

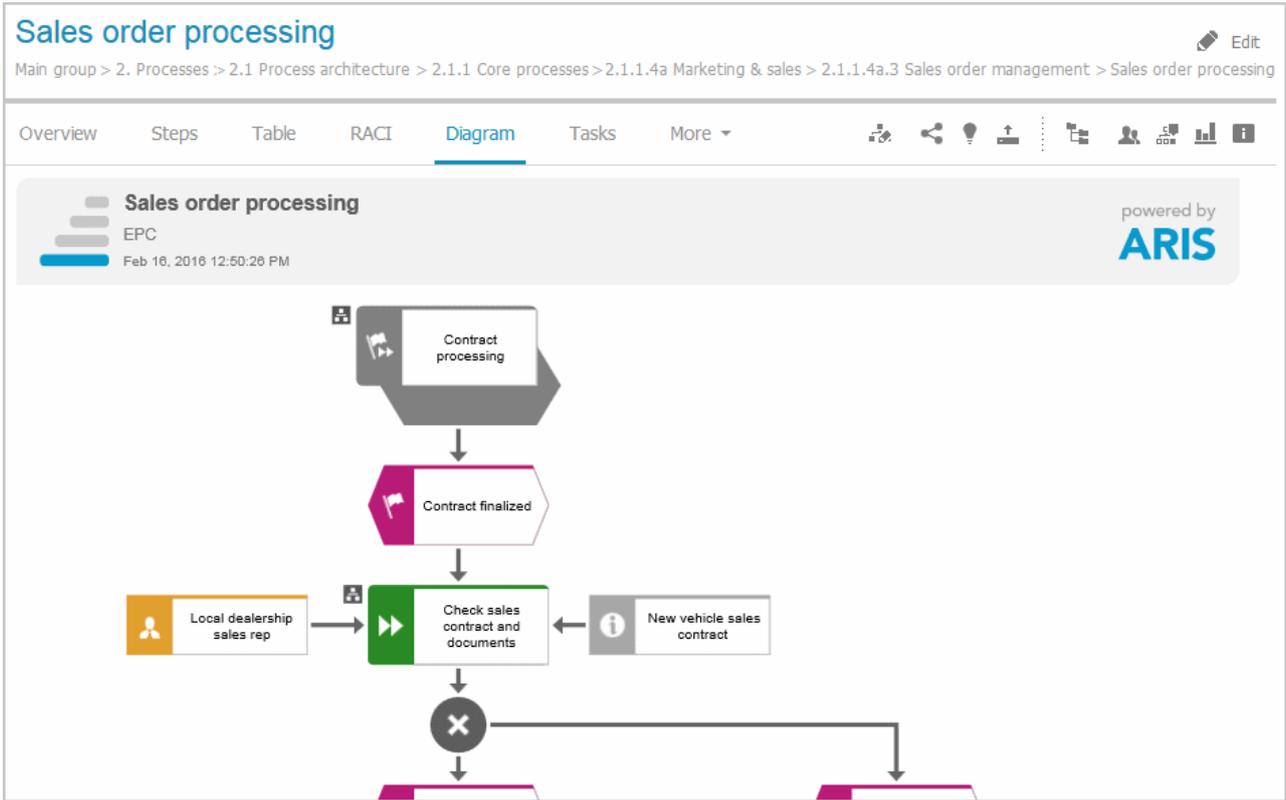
## RACI

RACI matrices are displayed only if RACI information is available for this process (page 101). Using the button you can sort the matrices by process flow.

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

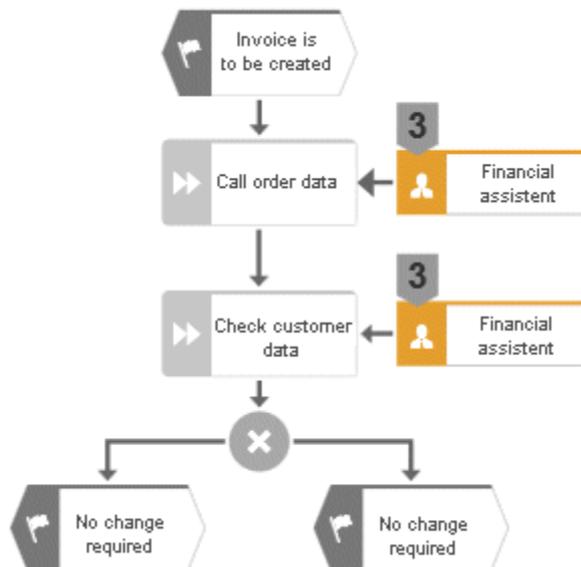
Attributes <span>More ▼</span>	
Attribute	Attribute value
Name	Organizational chart
Remark/Example	Organization
Type	Structural element
Time of generation	Apr 18, 2017 11:20:25 AM
Creator	w.becker
Last change	Aug 18, 2019 11:25:00 AM
Last user	system

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).

Task	Priority	Status
New document submitted: Assigned Nov 26, 2016		New

## TRANSACTIONS

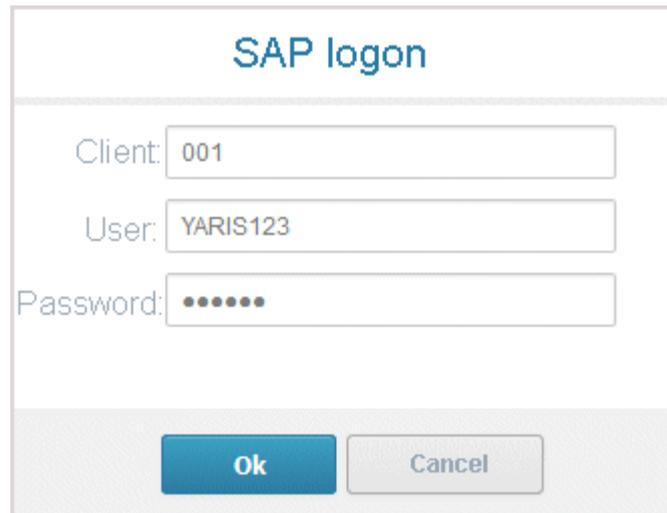
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page **Error! Bookmark not defined.**) in the portal.

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

You can start (page 97) 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.

<input checked="" type="checkbox"/>	16 A08 Solution Manager 7.1
<input type="checkbox"/>	18 S04 Solution Manager 7.0
	SAP URL
	Logon data Reset data

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

The image shows a dialog box titled "SAP logon" in blue text. Below the title bar, there are three input fields: "Client:" with the value "001", "User:" with the value "YARIS123", and "Password:" with six black dots. At the bottom of the dialog, there are two buttons: a blue "Ok" button and a grey "Cancel" button.

SAP logon

Client: 001

User: YARIS123

Password: ●●●●●●

Ok Cancel

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 98). 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 98) them.

Overview <span style="float: right;">▶ ▾ ⌵</span>	
Transaction code	 Supported processes
SDQ1 (Expiring Quotations)	<a href="#">Customer qualification (to-be)</a> <a href="#">Sales process (to-be)</a> <a href="#">Contract negotiation and completion in ERP (to-be)</a>
Type	Activities
SAP transaction	<a href="#">Quotation processing in ERP (to-be)</a>
Logical component	 Documents
ZSAP ECC 50	<a href="#">Quotation processing in ERP</a>
	 Roles
	<a href="#">Head of regional sales</a>
	<a href="#">Regional sales</a>
	Transaction siblings
	<a href="#">Display quotation</a>
	<a href="#">Change quotation</a>
	<a href="#">Create quotation</a>
	<a href="#">List of incomplete quotations</a>
	<a href="#">Batch processing of quotations</a>

## 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 **Error! Bookmark not defined.**) 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 **Error! Bookmark not defined.**) are deleted automatically after the executable process is terminated. Permanent documents (page **Error! Bookmark not defined.**) 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>).

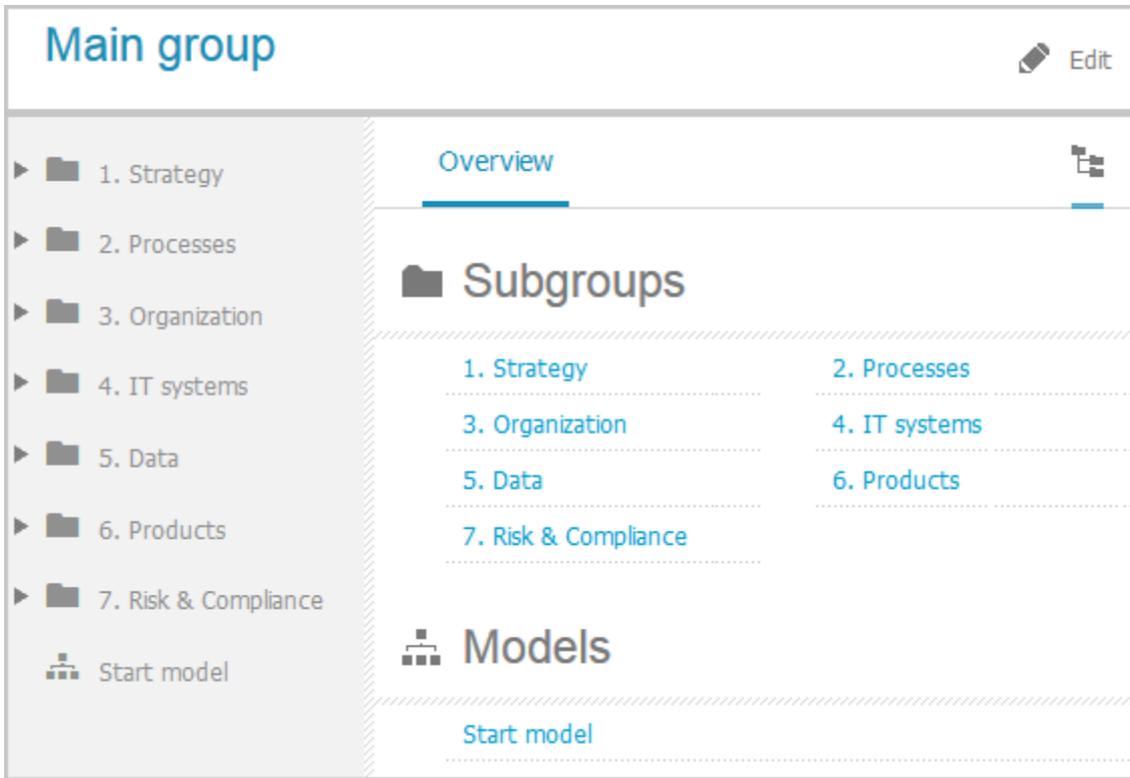
If you want to use the full range of functions of a document management system, including archiving and audit compliance, or you want to use very large numbers of documents, you can link Microsoft® Sharepoint 2010 or Microsoft® Sharepoint 2013 to ARIS.

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

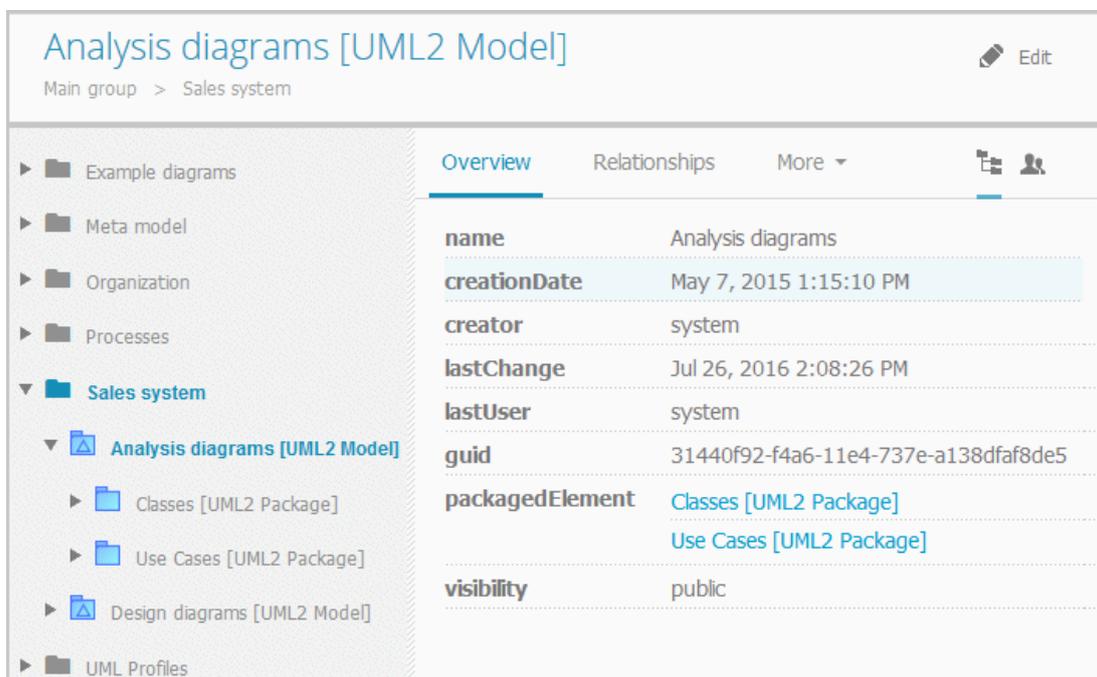
## GROUP ITEMS OF UML ELEMENTS

### OVERVIEW

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



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



## RELATIONSHIPS

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

## REUSED OBJECTS

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

## LINKED DIAGRAMS

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

## PRESENTATIONS

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

## STEREOTYPES

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

## PROFILES

Lists the profiles that were applied to the selected element.

## TAGGED VALUES

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

## DIAGRAM

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

### 3.1.3 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 89), create new or reuse existing items (page 84), as well as delete items (page 86).

Home   Groups <u>Glossary</u>			
Glossary			 Edit
Process	▲ Name	Description	Departments
Chain	Accountant	The accountant belongs to the organizational unit Accounting. He/she takes care of the accountancy and bookkeeping.	Accounting
<b>Role</b>	Financial assistant	The financial assistent belongs to the organizational unit Accounting. He/she is responsible for various aspects of financial services.	Accounting
Document	Financial clerk	The financial clerk belongs to the organizational unit Accounting. He/she is responsible for record keepin, filing, staffing service counters, etc.	Accounting
System			

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

## 3.2 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

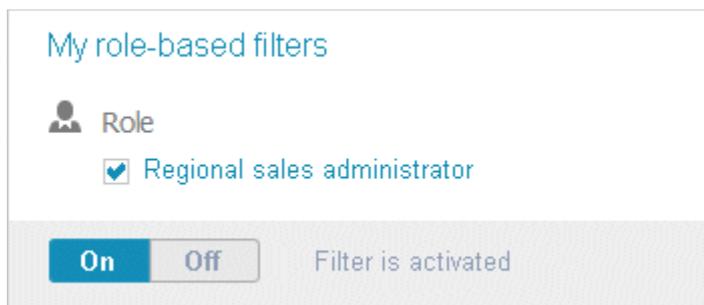
Shows the current activities you are following in Collaboration or in the portal (page 112).

This view shows all content relevant to you in a clear structure in the form of fact sheets under Processes (page 25), Organization (page 36), IT systems (page 37), and Glossary (page 40).

You only see information in the portal that is relevant to you. This is controlled by administrators in user management (page **Error! Bookmark not defined.**).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 62) 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 64), 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 **Error! Bookmark not defined.**), 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.

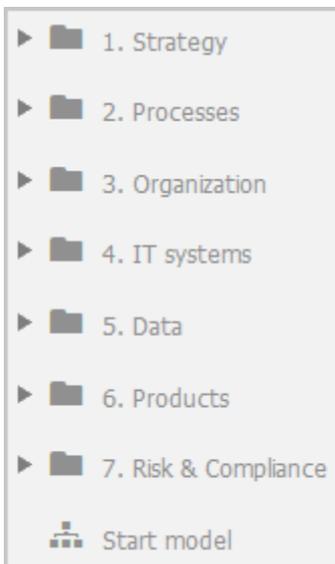
To adjust the space for specific window areas, drag the mouse pointer to the dashed border of a bar. The mouse pointer shows the directions in which you can drag the bar border:



Keep the mouse button pressed, drag the mouse pointer in the required direction, and release the mouse button.

### 3.2.1 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.



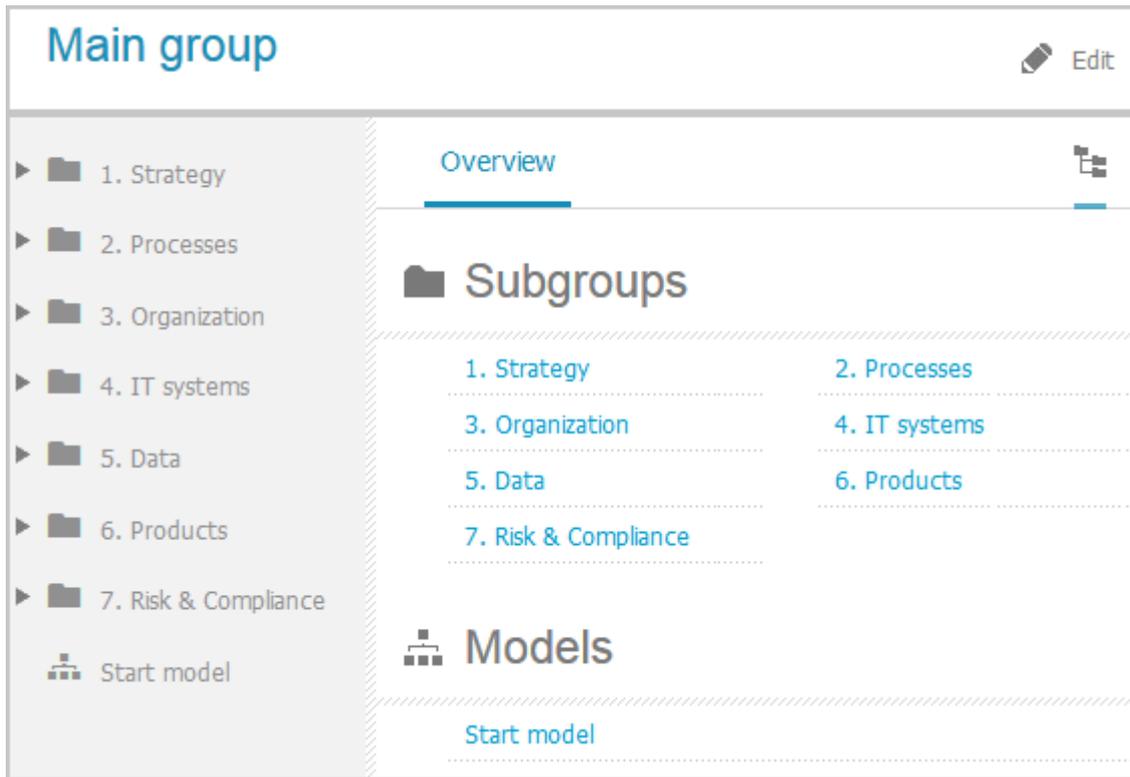
Depending on the contents selected and the type of a diagram, different functions are available.

Using the bar panel buttons  **Comment** and  **Navigation**, you can show or hide the Collaboration functions **Follow** (page 61) and **Comment** (page 55) and the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

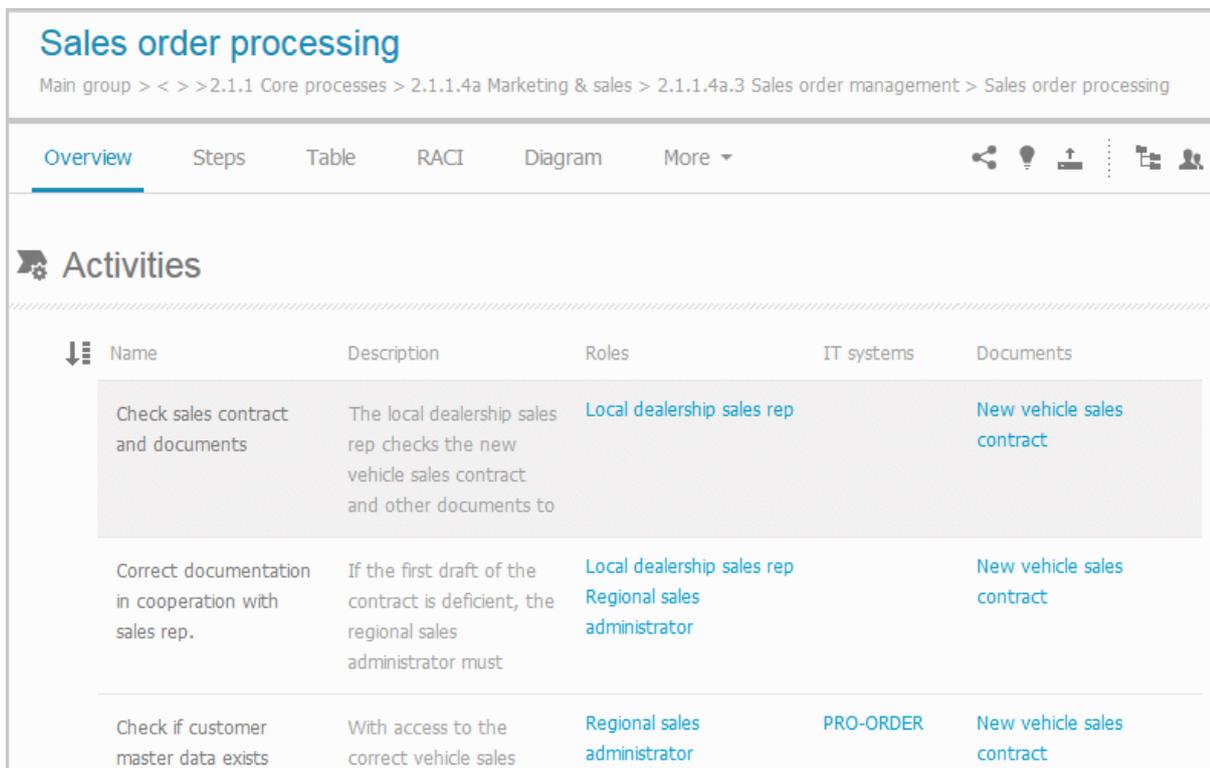
Click  **Share model** to share models with other users (page 60). Click  **Submit change request** to send change requests to the process manager (page 44). The function  **Start governance process** (page 67) is provided only if an executable process is available. Users with the function privilege **ARIS Connect Designer** can change processes using the  **Edit** button (page 58).

**OVERVIEW**

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

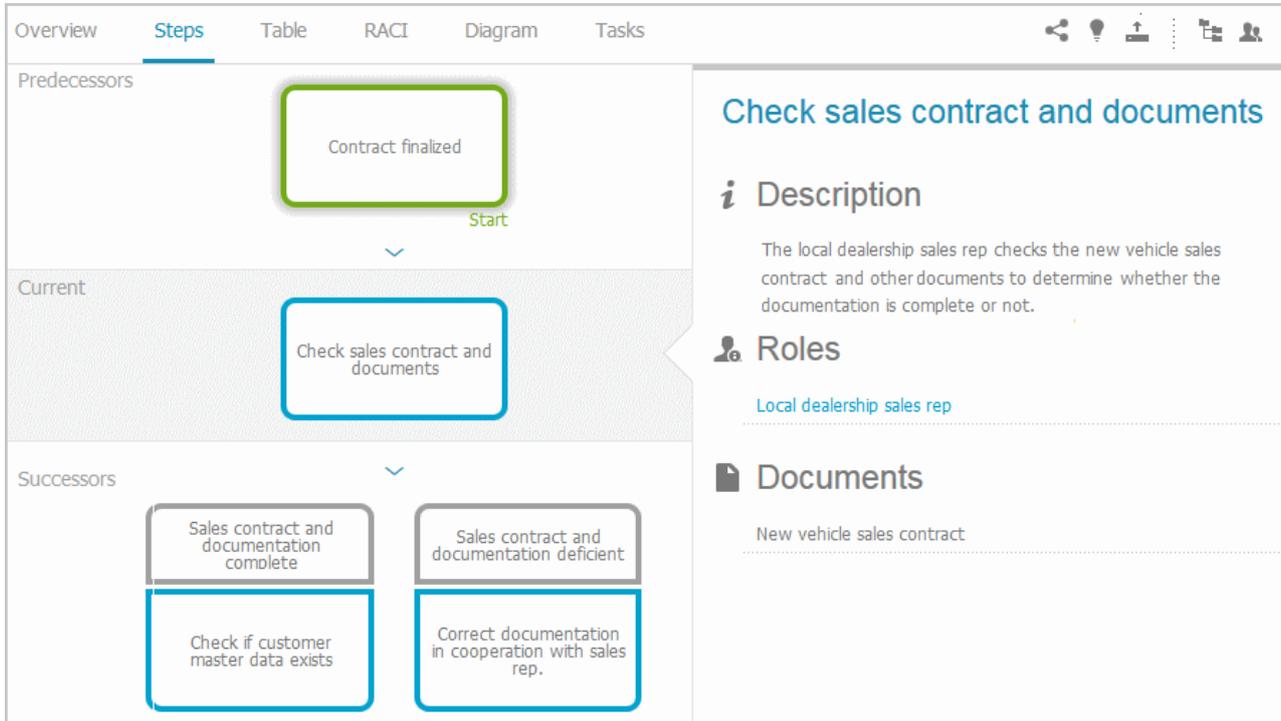


The relevant content is displayed based on the item selected. For example, if you have selected a model, additional headings are shown depending on the context. Breadcrumb navigation simplifies navigation to superior elements.



## STEPS

Transparently displays all steps of a process (EPC) (page 64). 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 <b>Table</b> 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 <b>Table</b> RACI   More ▾      	
 Functions	Roles
	Local dealership sales rep Regional sales administrator
Check sales contract and documents	<input checked="" type="checkbox"/>
Correct documentation in cooperation with sales rep.	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Check if customer master data exists	<input type="checkbox"/> <input checked="" type="checkbox"/>
Create customer master data	<input type="checkbox"/> <input checked="" type="checkbox"/>
Enter vehicle data and details	<input type="checkbox"/> <input checked="" type="checkbox"/>

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

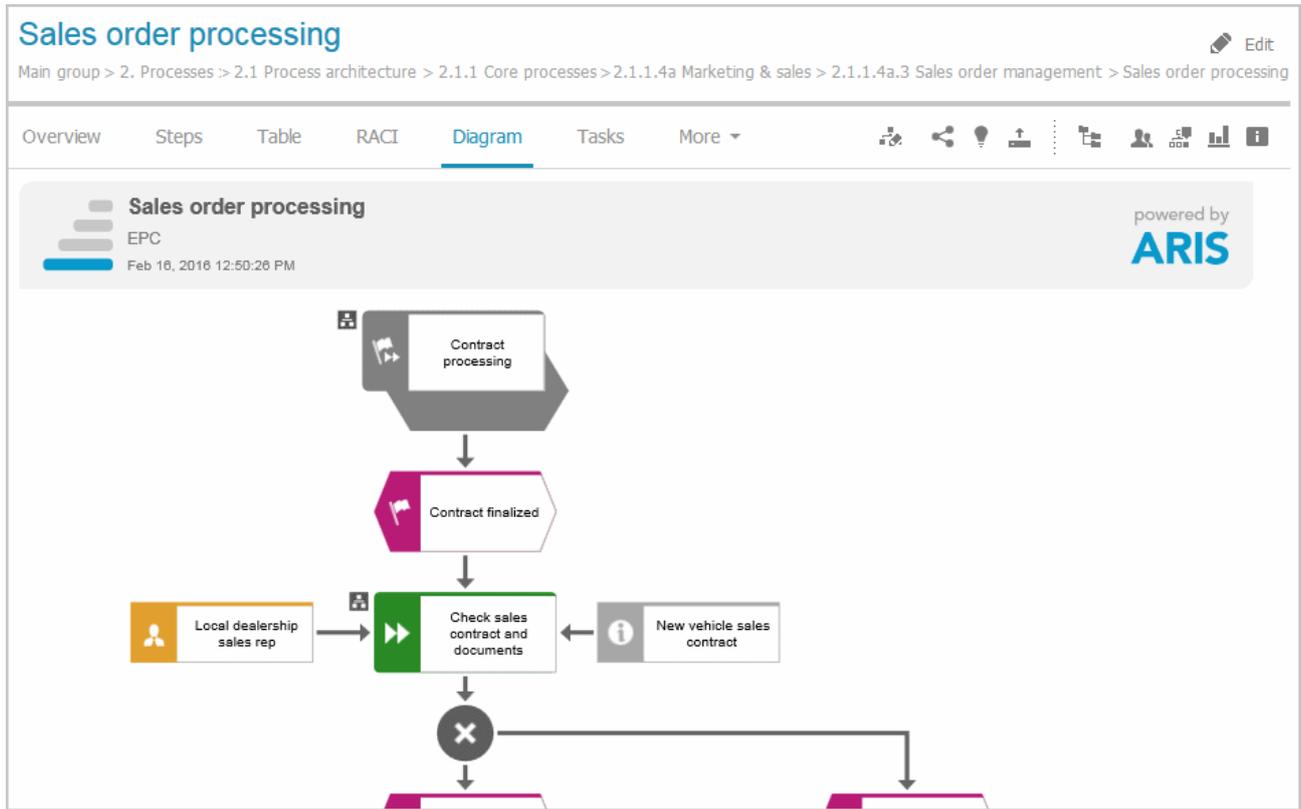
## RACI

RACI matrices are displayed only if RACI information is available for this process (page 101). Using the button you can sort the matrices by process flow.

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

## DIAGRAM

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



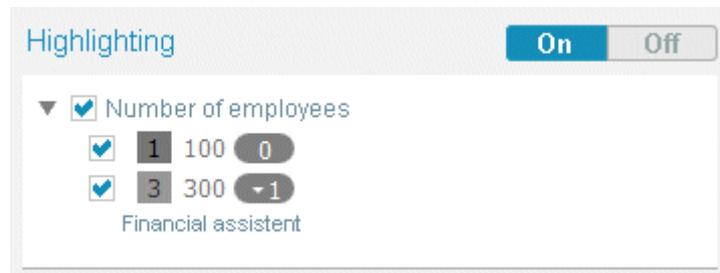
Using the functions of the view bar you can change the size of appearance. Navigate in the model using the small frame of the thumbnail view above the slider. Clicking the ▼ arrow head will hide the bar.

Click **i 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.

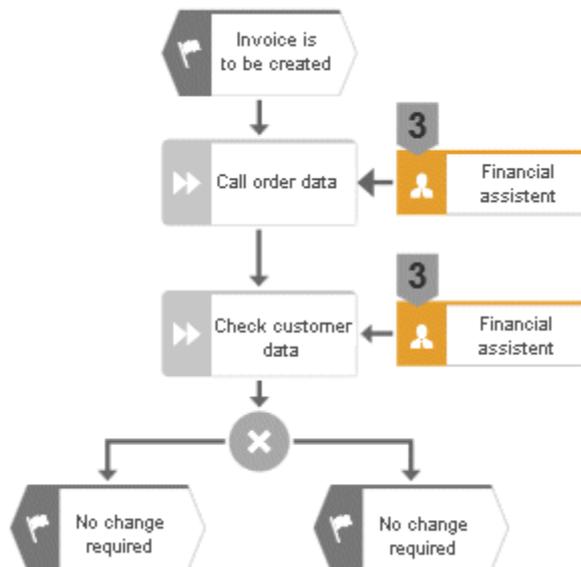
Attributes <span>More ▼</span>	
Attribute	Attribute value
Name	Organizational chart
Remark/Example	Organization
Type	Structural element
Time of generation	Apr 18, 2017 11:20:25 AM
Creator	w.becker
Last change	Aug 18, 2019 11:25:00 AM
Last user	system

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).

Task	Priority	Status
 New document submitted: Assigned Nov 26, 2016		New

## TRANSACTIONS

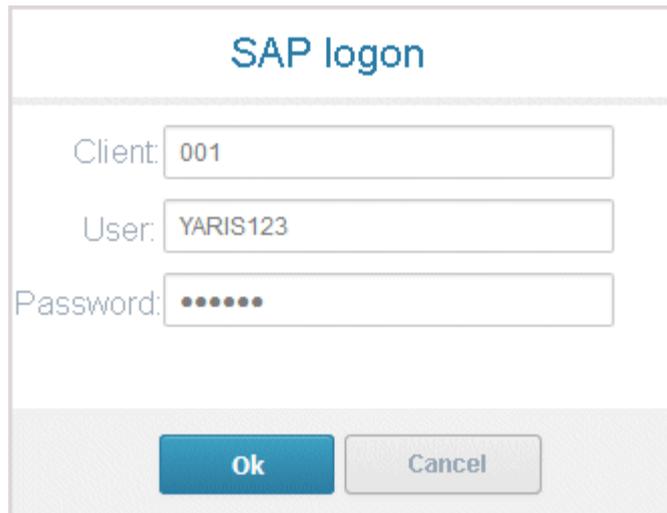
Transactions are displayed if you are using Process-driven Management for SAP and if this function has been configured (page **Error! Bookmark not defined.**) in the portal.

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

You can start (page 97) 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.

<input checked="" type="checkbox"/>	16 A08 Solution Manager 7.1
<input type="checkbox"/>	18 S04 Solution Manager 7.0
	SAP URL
	Logon data <a href="#">Reset data</a>

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



The image shows a dialog box titled "SAP logon". It contains three input fields: "Client:" with the value "001", "User:" with the value "YARIS123", and "Password:" with six dots. At the bottom, there are two buttons: "Ok" (highlighted in blue) and "Cancel".

Log on to the SAP system in the current language and the transaction starts. The login remains valid until you log out of the portal or enter different login data (page 98). 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 98) them.

Overview <span style="float: right;">▶ ▾ ⌵</span>	
Transaction code	 Supported processes
SDQ1 (Expiring Quotations)	<a href="#">Customer qualification (to-be)</a> <a href="#">Sales process (to-be)</a> <a href="#">Contract negotiation and completion in ERP (to-be)</a>
Type	Activities
SAP transaction	<a href="#">Quotation processing in ERP (to-be)</a>
Logical component	 Documents
ZSAP ECC 50	<a href="#">Quotation processing in ERP</a>
	 Roles
	<a href="#">Head of regional sales</a>
	<a href="#">Regional sales</a>
	Transaction siblings
	<a href="#">Display quotation</a>
	<a href="#">Change quotation</a>
	<a href="#">Create quotation</a>
	<a href="#">List of incomplete quotations</a>
	<a href="#">Batch processing of quotations</a>

## 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 **Error! Bookmark not defined.**) 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 **Error! Bookmark not defined.**) are deleted automatically after the executable process is terminated. Permanent documents (page **Error! Bookmark not defined.**) 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.

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

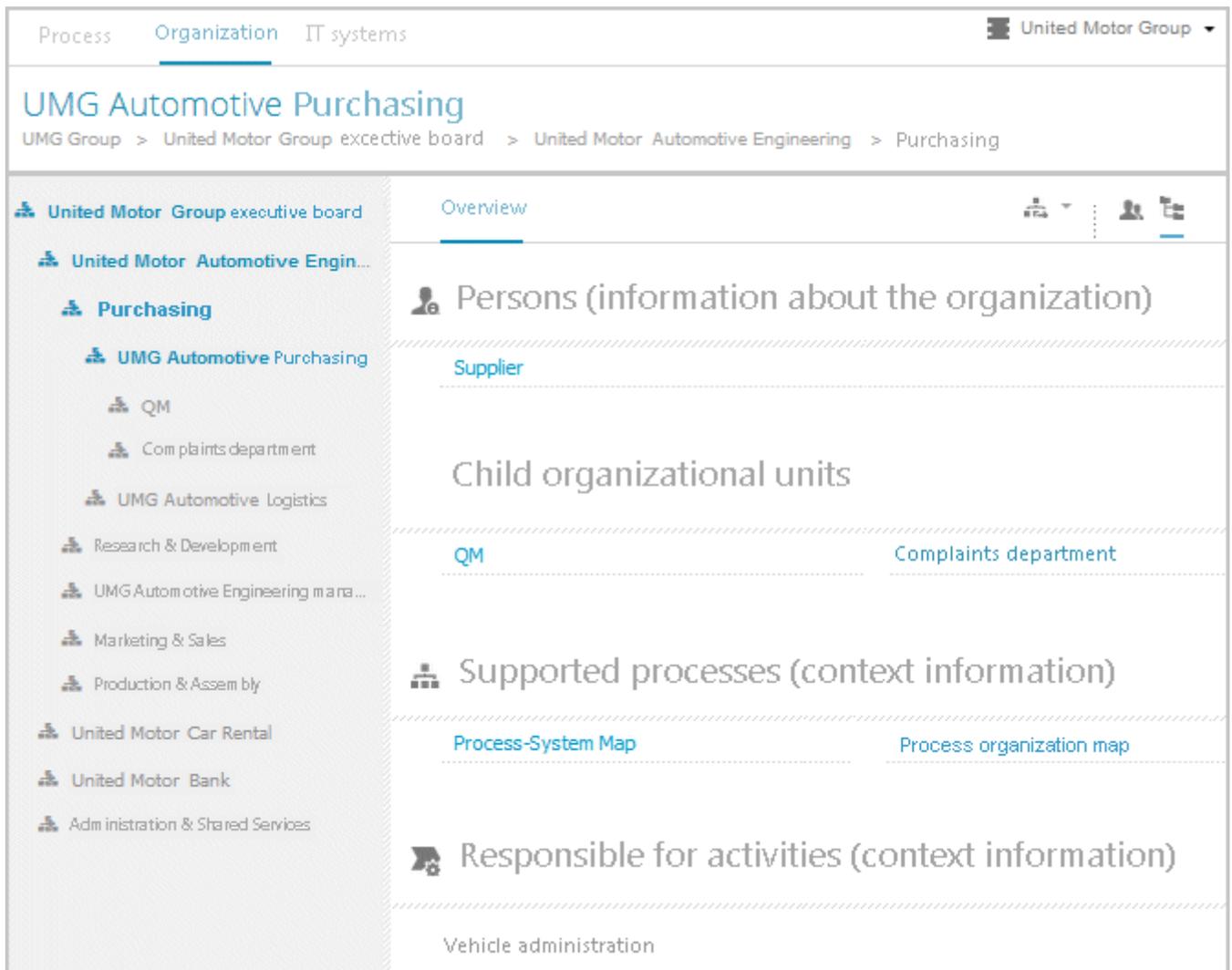
### 3.2.2 Organization

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 25) is displayed. IT information (page 37) 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 61) and **Comment** (page 55) 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 67) is provided only if an executable process is available.



### 3.2.3 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 61) and **Comment** (page 55) and the Explorer tree. Thus, more space is available, for example, to show diagrams. The buttons of visible bars are indicated in color.

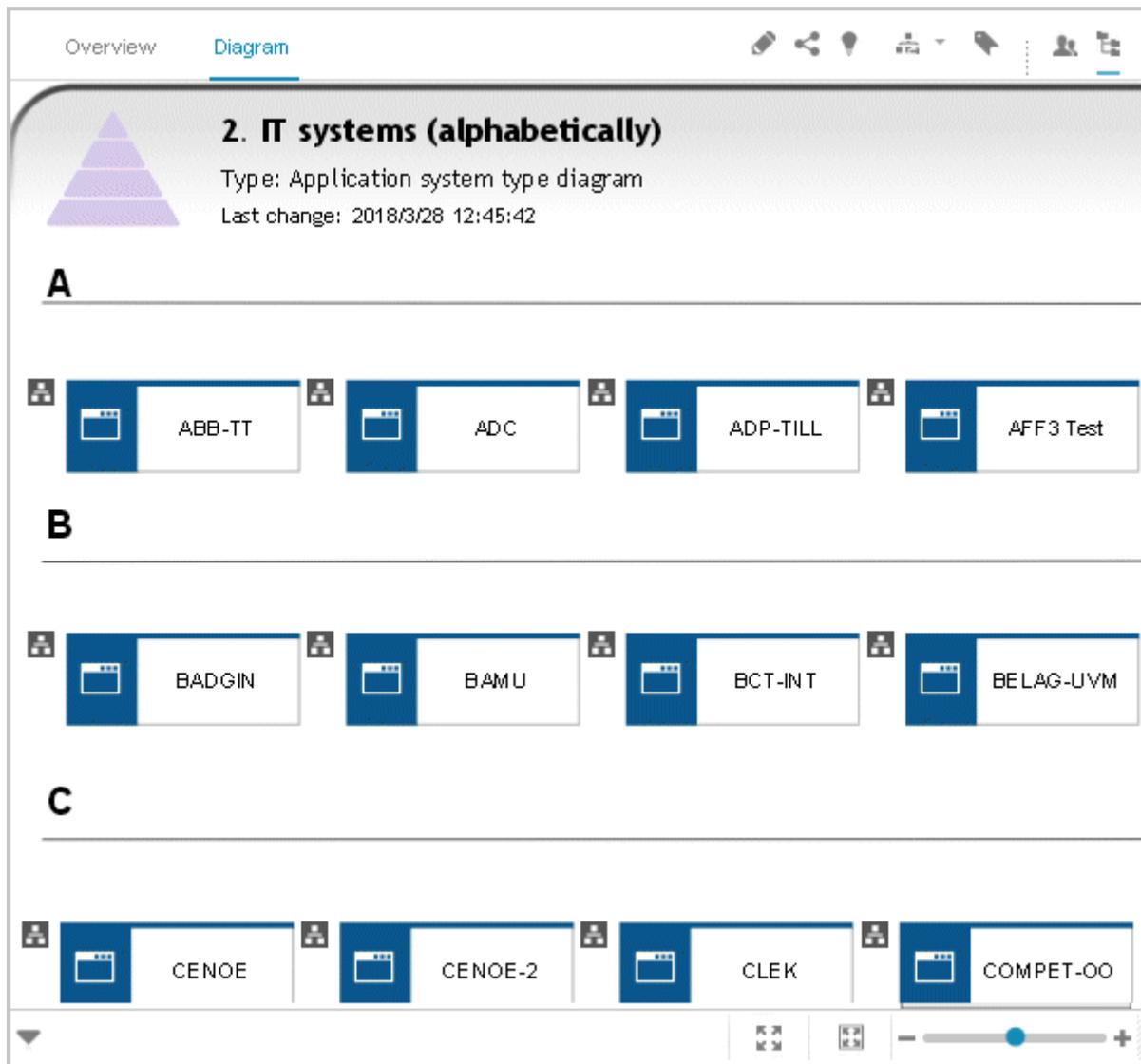
Click **Share model** to share models with other users (page 60). Click **Submit change request** to send change requests to the process manager (page 44). The function **Start governance process** (page 67) is provided only if an executable process is available. Users with the **ARIS Connect Designer** function privilege can change processes (page 58) 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 89), create new or reuse existing items (page 84), as well as delete items (page 86).

#### OVERVIEW

The screenshot shows the 'IT systems' overview page. At the top, there are tabs for 'Processes', 'Organization', and 'IT systems', with 'IT systems' being the active tab. The page title is '2. IT systems (alphabetical)'. On the left, there is a navigation tree listing various IT systems and their functionalities. The main content area is titled 'IT systems' and displays a grid of system names. The grid is organized into two columns. The first column lists: A-PLAN, ADC, APT-5, BCT-INT, BELEG, BINLOB, BIWEV, BNI-FM, BRT, CEDAT, and CENOE-2. The second column lists: ABB-TT, ADP-TILL, ALCHOR, APT-ICUT-OO, AVOXRIL, BAMU, BELAG-UVM, BHS-2, BIRUL, BNI-2, BNI-R, BUTO, CENOE, and CLEK.

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 **i 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

The screenshot displays the 'IT SYSTEM FACT SHEET' for the 'A-PLAN' system. The interface includes a top navigation bar with 'Processes', 'Organization', and 'IT systems' tabs, and a 'United Motor Group' logo. The main content area is divided into several sections:

- Overview:**
  - Up to 10000** (Number of users)
  - Non-standard** (Standardization status)
  - Between 4 hours and 24 hours** (Maximum downtime)
- Supported roles:**
  - Logistics administrator
  - Local dealership sales rep
  - Regional sales administrator
  - Warehouse coordinator
- Business processes (context information):**
  - Billing
  - Quotation processing (as-is)
  - Order processing (as-is)
  - Receive and condition vehicle
  - Process system map
  - Inspection of delivered goods
  - Contract negotiation and conclusion (as-is)
  - Goods receipt/service receipt
- Contact Information:**
  - Responsible:** Peter Brown
  - Telephone: 555-32547
  - E-mail: peter.brown@united-motors-group.com
  - Unit responsible: Vertriebs-Support EMEA
  - APL

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.

### 3.2.4 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 89), create new or reuse existing items (page 84), as well as delete items (page 86).

Processes   Organization   IT systems <u>Glossary</u>			
Glossary			 Edit
Process	▲ Name	Description	Responsible
<b>Chain</b>	Acquire and implement	Acquire and implement consists of: <ul style="list-style-type: none"> <li>▶ Identify automated solutions</li> <li>▶ Acquire and maintain application software</li> <li>▶ Acquire and maintain technology</li> </ul>	ethan.owner
Role	Billing	Billing consists of: <ul style="list-style-type: none"> <li>▶ Vehicle billing</li> <li>▶ Accounts receivable management</li> <li>▶ Pay cash</li> </ul>	ethan.owner
Document	Billing (to-be process)	Billing (to-be) consists of: <ul style="list-style-type: none"> <li>▶ Vehicle billing (to-be)</li> <li>▶ Account receivable management</li> <li>▶ Pay cash</li> </ul>	ethan.owner
System	Channel management	Channel management consists of: <ul style="list-style-type: none"> <li>▶ Find and select products</li> <li>▶ Conduct iterative configuration</li> <li>▶ Manage catalog content</li> </ul>	ethan.owner

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

### 3.3 Select database

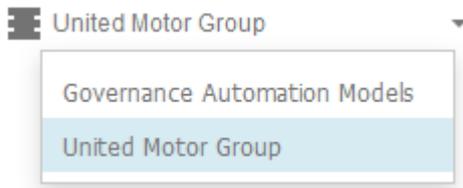
You can select one of the databases offered in the portal to access its content.

#### 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.

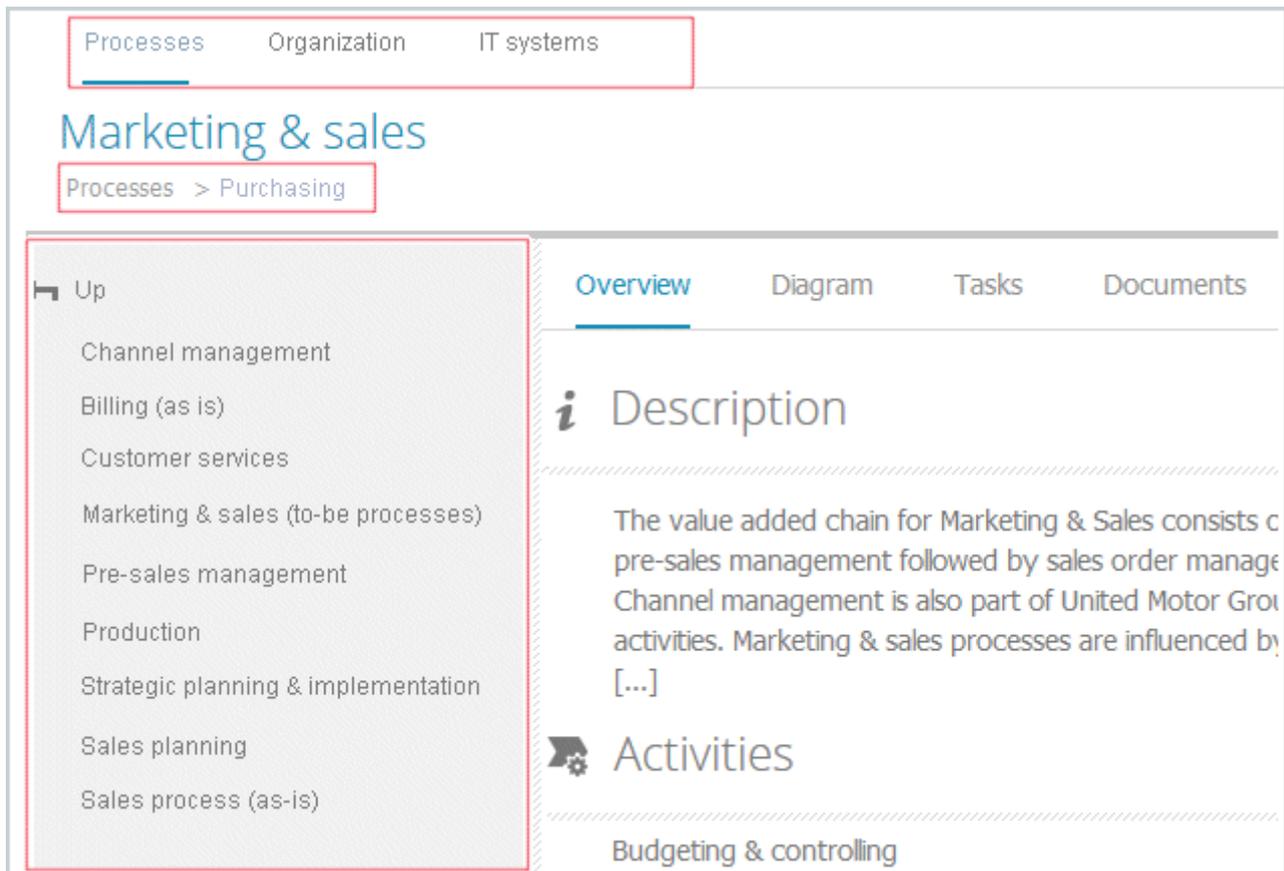
2. Click the name of the database you want to use.

The name of the selected database is displayed. The **Recent changes** area is updated according to the selected database. A search (page 73) is performed based on the current database.

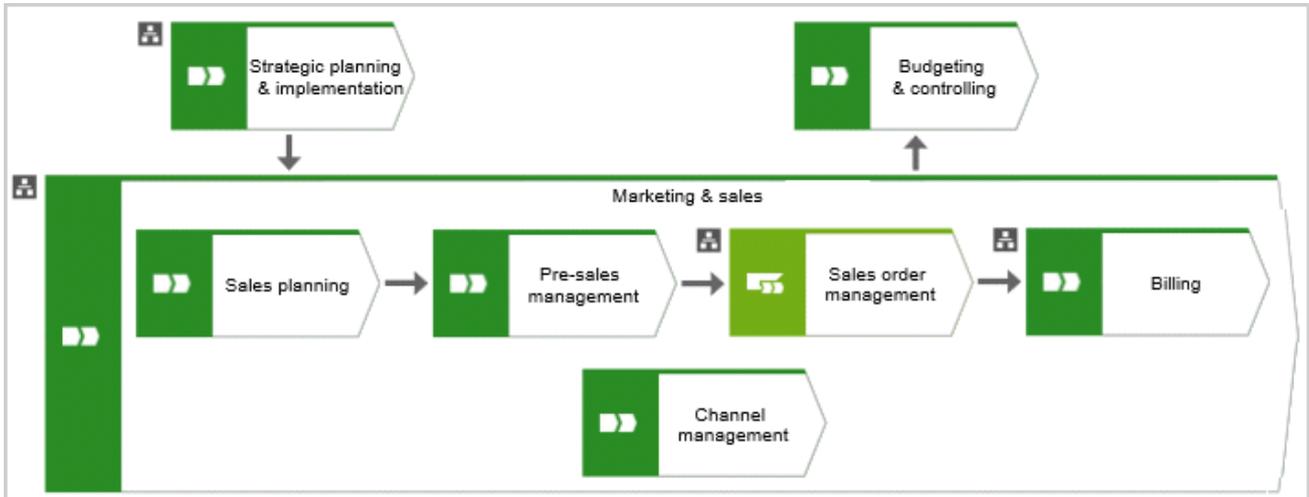
### 3.4 Navigate

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

In the example for the **default** view, the **Processes**, **Organization**, and **IT systems** hierarchies are defined. 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.



## 3.5 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**.

## 3.6 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**.

## 3.7 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.

## 3.8 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.

## 3.9 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 58) 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**.

## 3.10 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 58) 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**.

## 3.11 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 58) 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**.

## 3.12 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 58) 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.

### 3.13 Comment on portal content

Add comments to models and post information (page 110) that could be of interest to your colleagues.

#### Prerequisite

You have the relevant access privilege (page 125) 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 124) in the tag input box, e.g., BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press the Enter key after each keyword.
6. Click  **Link**.
7. Insert a link to a Web site that contains more detailed information.
8. Click **Add link**. The link is checked and added.
9. Click  **File**. The **Select document** dialog is displayed.
10. Click  **Upload new document** to upload one of your own documents. The dialog opens.
11. Select the file you want to upload and enter the relevant additional information.
12. Click **Upload**.
13. Enable the check box of the document you want to add to your post.
14. Click **OK**.

Your comment is posted.

## 3.14 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 **Error! Bookmark not defined.**) 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 205) 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 138).

## 3.15 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**.

## 3.16 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**.

## 3.17 Open assignment

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

### Procedure

1. Click Groups (page 10) in the classic view (page **Error! Bookmark not defined.**).
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.

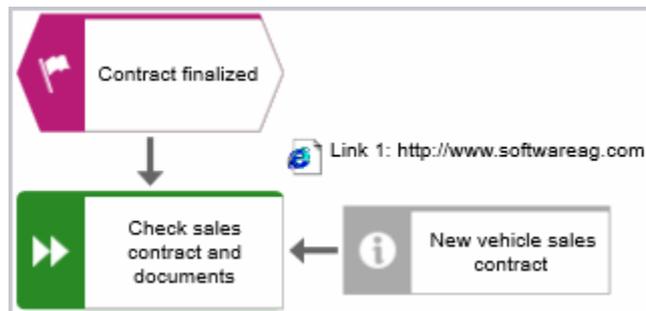
All assigned diagrams are offered for selection in a dialog. If only one diagram is assigned, that diagram opens directly. Assigned diagrams contain detailed information on the object that the diagrams are assigned to, for example.

## 3.18 Open placed link attributes

In Model Viewer, you can open placed link attributes.

### Procedure

1. Click Groups (page 10) in the classic view (page **Error! Bookmark not defined.**).
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.

## 3.19 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**.

## 3.20 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**.

## 3.21 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 124) in the tag input box, e.g., BPM. Alternatively, select an existing tag from the list of tags. It is displayed as soon as you enter a letter that is part of an existing tag. Press the Enter key after each keyword.
10. Click  **Link**.
11. Insert a link to a Web site that contains more detailed information.
12. Click **Add link**. The link is checked and added.
13. Click  **File**. The **Select document** dialog is displayed.
14. Click  **Upload new document** to upload one of your own documents. The dialog opens.
15. Select the file you want to upload and enter the relevant additional information.
16. Click **Upload**.
17. Enable the check box of the document you want to add to your post.
18. Click **OK**.

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

## 3.22 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 63) the role filter, only information from models in which the selected role occurs will be displayed.

### 3.23 Activate role filter

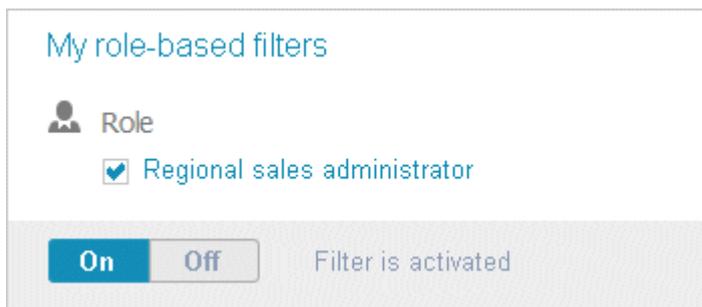
Using role filters, you restrict the content in such a way that you only see information from processes in which certain roles are involved.

#### Prerequisite

A role has been assigned (page 62) 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 64), all steps are displayed. The detailed information about the satellites is filtered according to the selected role.

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

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

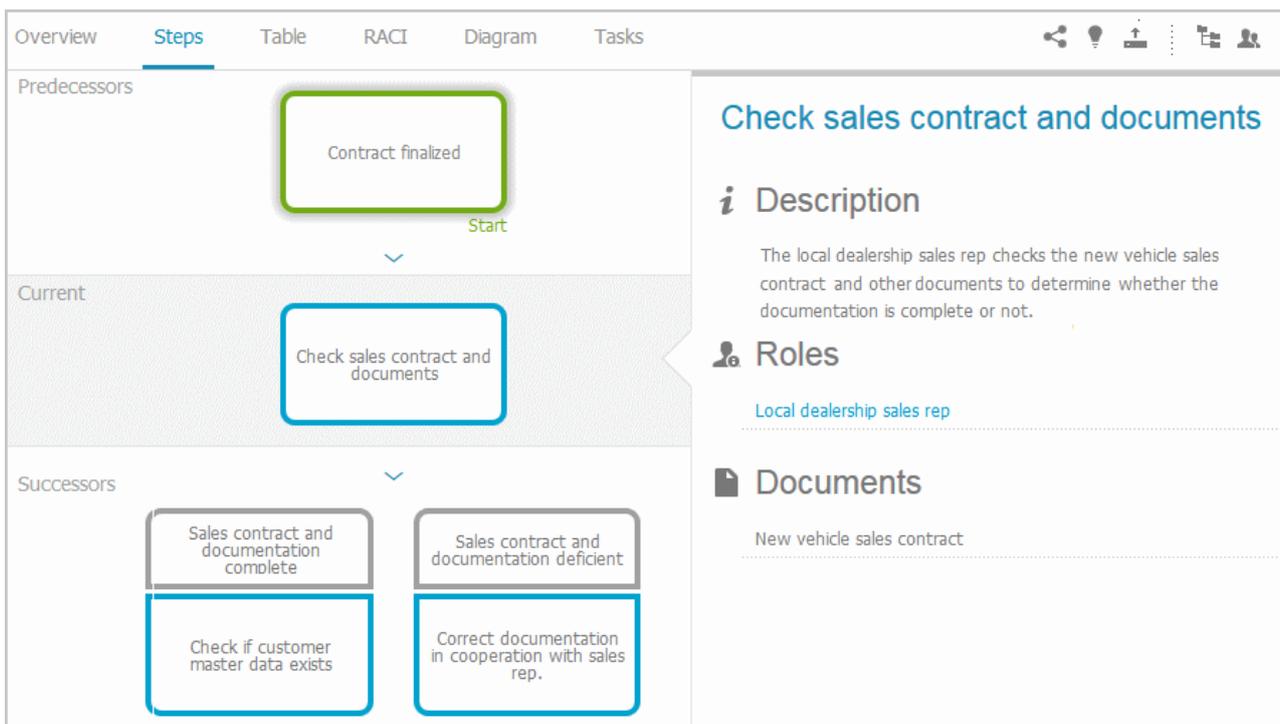
## 3.24 Navigate step by step

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

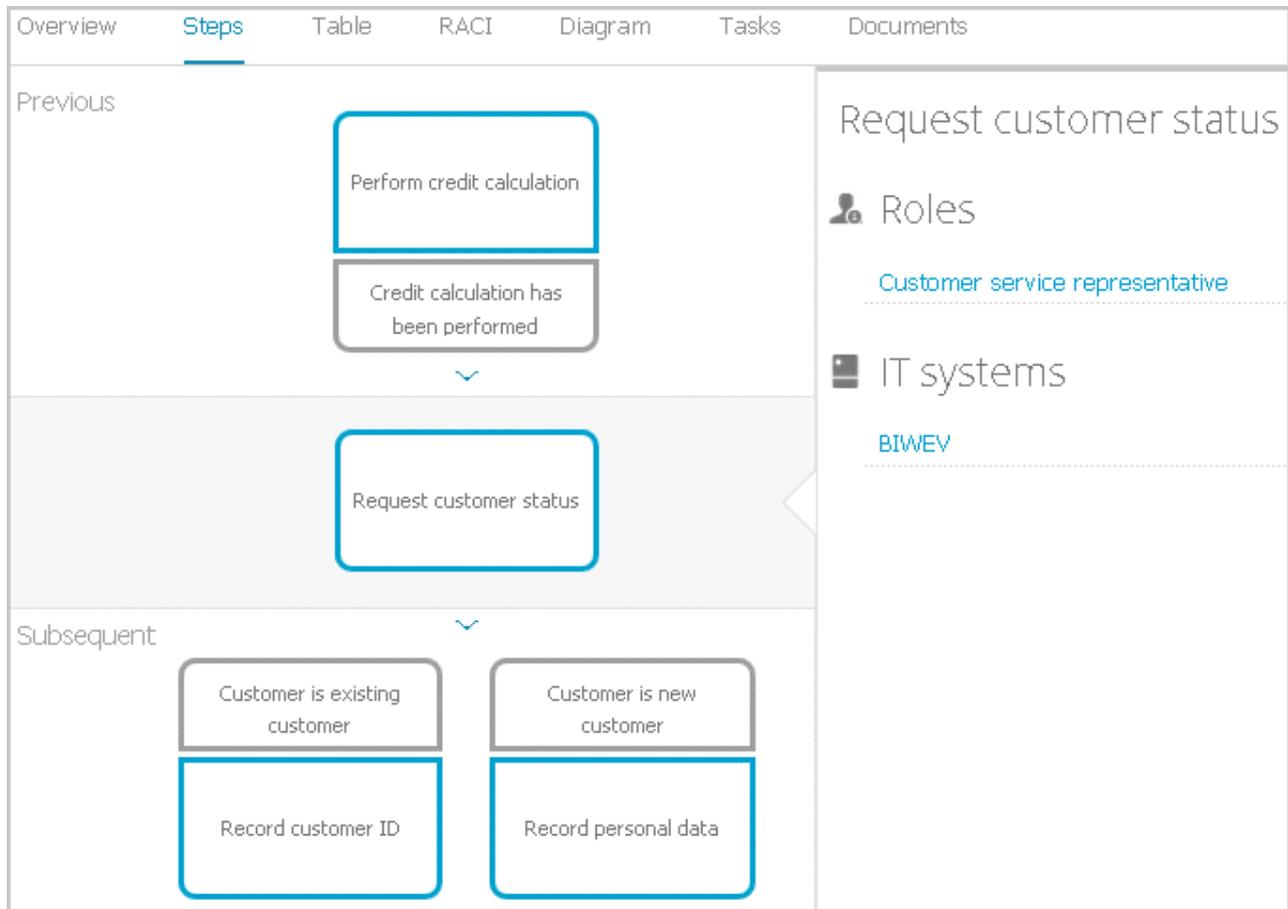
Transparently displays all steps of a process (EPC) (page 64). Regardless of the process size you can view only the previous, current, and subsequent process steps. For the current step the relevant information is provided in the form of links.



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.

- 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.



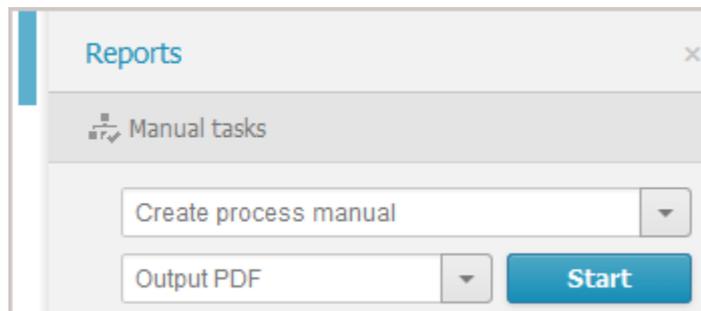
You navigate through a proces step by step.

### 3.25 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.

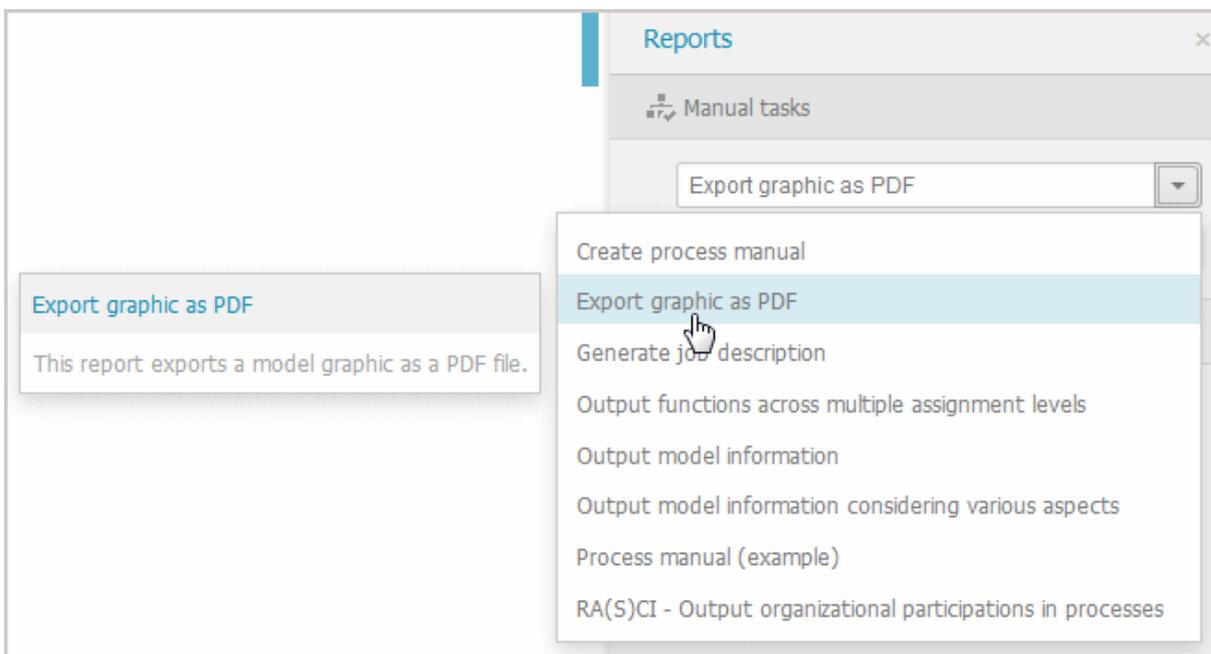
#### Procedure

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 to create a report.
6. Click **Diagram** if not enabled yet.
7. Click **Reports**. The **Reports** dialog opens.

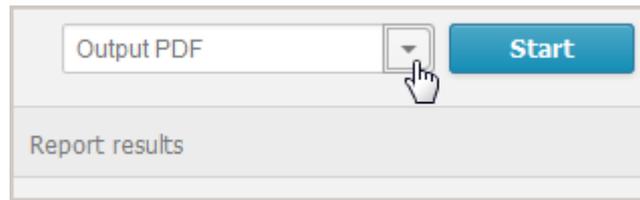


All reports you can start for this diagram are displayed.

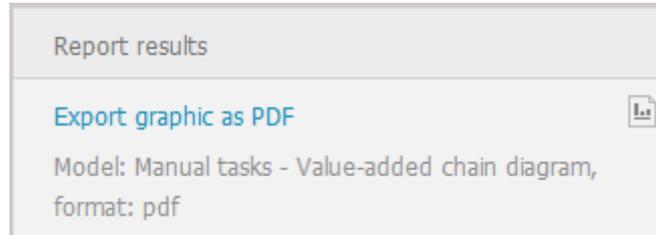
8. Select the relevant report.



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.

## 3.26 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 72).

### Procedure

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

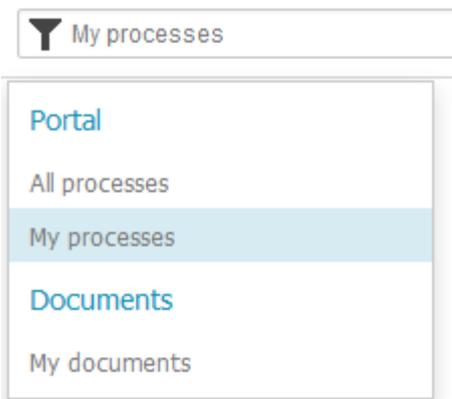
The executable process will start.

### 3.27 Using the Favorite tab in the Portal

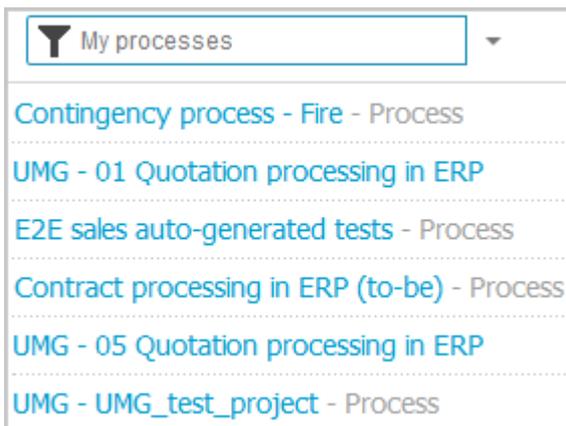
In the Portal, you have direct access to all saved filter settings (Seite 76) to filter the content of the selected database.

#### 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.

## 3.28 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 **i 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.

## 3.29 Valuable information

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

### 3.29.1 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.

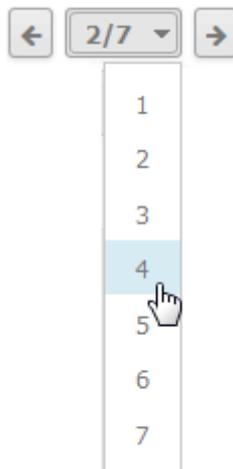
The navigation controls consists of arrows and a drop down list:



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:



### 3.29.2 When can UML content be displayed?

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

- You use the classic view (page 8).
- The database with UML content you are using has been assigned a filter (page 209) that allows UML content. This may be the **Entire method** filter or a filter you have defined in which all UML elements are available.
- The database has been published (page **Error! Bookmark not defined.**) by an administrator. It is therefore available in the portal.
- You have logged in as a user with the **UML Viewer** function privilege.

### 3.29.3 Where is UML content displayed?

UML content is displayed in the same way as other ARIS content. You can use the groups (page 10) to navigate in the database.

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

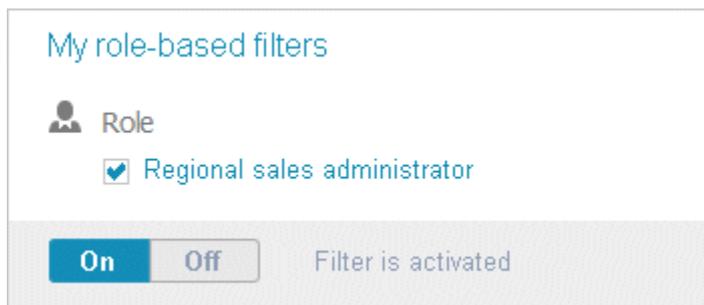
- Thus, UML namespace hierarchies are also displayed together with the group path.
- If you select a UML element, you can display its typical UML-specific properties such as stereotypes and tagged values.
- If you select a diagram, you can of course display it graphically.
- The search also finds UML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

### 3.29.4 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 **Error! Bookmark not defined.**).

You use role filters to further restrict this content. Role filters are available only if roles are assigned (page 62) 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 64), all steps are displayed. The detailed information about the satellites is filtered according to the selected role.

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

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

### 3.29.5 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.

## 3.30 Search

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

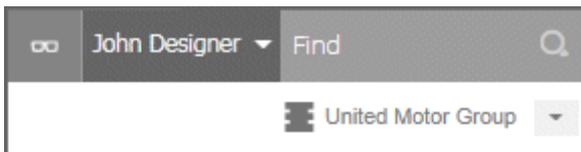
You can use the quick search (page 73) on the start page to access items directly. Or you can use the Search area (page 74) to define the search context beforehand and filter the search results.

### 3.30.1 Start quick search

You can begin the search (page 73) for items directly on the start page of ARIS Connect.

#### Procedure

1. If necessary, select the database (page 41) 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 80) 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.

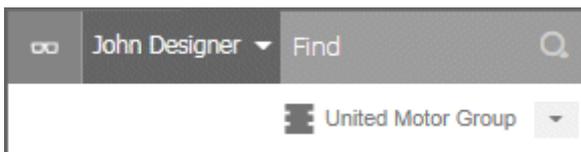
The item will open. For example, if you click the name of an object, it will be displayed in the portal. If you click a comment, it will be output in Collaboration. If you click the name of a model, the model will open in Model Editor.

### 3.30.2 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 41) your search is to be based on.
2. Click in the **Find** box.



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

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

### 3.30.3 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 41) 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 41) your search is to be based on.
2. If you are not in the portal, click 🏠 **Portal**.
3. Click 🔍 **Search**.

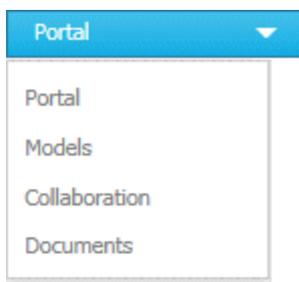
The Search area opens and you can browse ARIS Connect for the relevant terms.

### 3.30.4 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 41) 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 75).

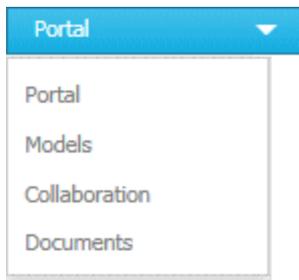
The result of the search will be updated to reflect the search context and filter criteria you specified.

### 3.30.5 Use search context and filters

You can restrict the result in the Search area (page 74) 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.

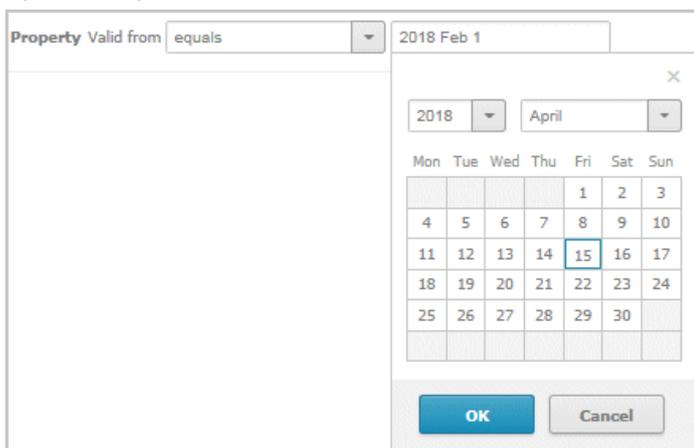
2. Click one or more filter criteria. The selected filter criteria will be listed and the search result updated. If you have selected a filter criterion that you can define more precisely, another area with subordinated filter criteria will be attached to the **Filters** area.
3. Click additional criteria.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



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



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



4. If necessary, specify the property of the search criterion.

5. To clear a selected filter criterion, click **×** **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.

### 3.30.6 Save filter settings as favorite

In the Search area (page 81), 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 75) to define your filter.
2. Click ☆ **Save filters as favorite**. The dialog opens.
3. Enter a name.
4. Click **OK**.

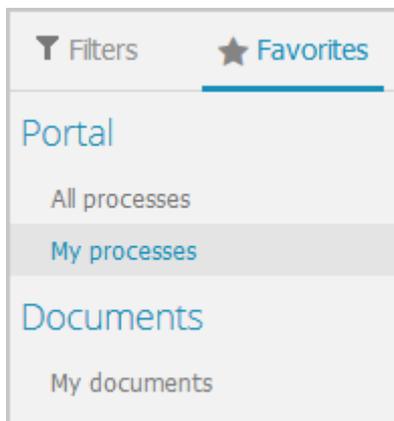
The filter settings are saved in the **Favorites** area. You can filter the content based on these settings (Seite 76) any time later on.

### 3.30.7 Using a favorite in the Search area

In the Search area (page 81), 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.

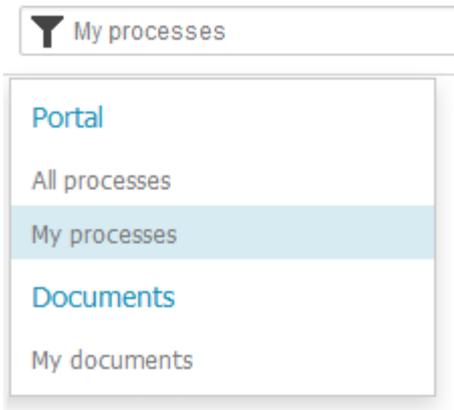
The filter criteria of the selected favorite are immediately applied and the the list of matches updated.

### 3.30.8 Using a favorite in the Favorites area

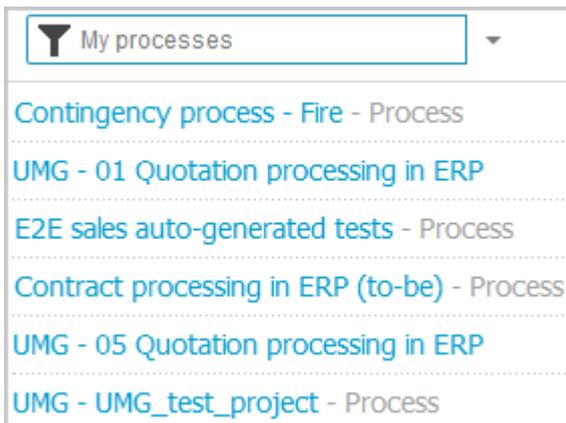
In the Favorites area (page 82), you can open a favorite to filter the content on predefined filter criteria.

#### 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.

### 3.30.9 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.

A screenshot of a filter criterion displayed in a grey rounded rectangle. The text inside the rectangle is "EPC (column display)" followed by a small "x" icon in a square, which is used to remove the filter.

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.

### 3.30.10 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 74).
2. Hold down the **Ctrl** key, and click the name of the relevant item.

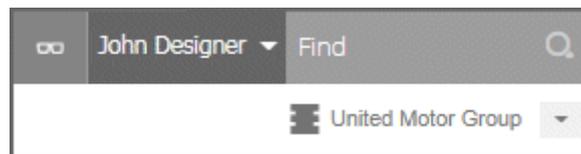
The item will open on a separate tab.

### 3.30.11 Valuable information

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

#### 3.30.11.1 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:

John Designer mod	
Portal	<ul style="list-style-type: none"> <li>Apply for financing Process</li> <li>Receipt of goods (with risks and contr... Process</li> <li>Receipt of goods Process</li> <li>Start model Default</li> <li>Hardware platform for firewall Default</li> </ul>
Models	<ul style="list-style-type: none"> <li>Start model Structuring model</li> <li>Demo_bow_tie_model Bow tie diagram</li> <li>Demo_bow_tie_model_3 Bow tie diagram</li> <li>Demo_bow_tie_model_2 Bow tie diagram</li> <li>Hardware platform for firewall IT architecture matrix</li> </ul>
UML	No results found
Collaboration	No results found
Documents	<ul style="list-style-type: none"> <li>AGE_UC_Configure_tool.doc</li> <li>ARIS Document Storage_SharePoint.p...</li> <li>ARIS Server Installation and Administr...</li> </ul>
80 matches in this category <a href="#">Show all</a>	

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 81).

### 3.30.11.2 How is the Search area structured?

The Search area (page 74) 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.

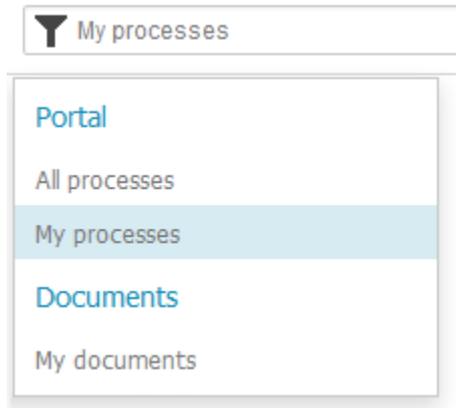
For certain filter criteria, such as the file name, you can enter properties as the search criterion, e.g., a term that should be present in the name.

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.

The screenshot displays the ARIS Connect search interface. At the top, the header shows 'ARIS Connect' and navigation icons. The search bar contains the term 'model' and a dropdown menu set to 'Models'. Below the search bar, there are two tabs: 'Filters' (selected) and 'Favorites'. The 'Filters' panel on the left lists various filter criteria such as 'Show all', 'Access diagram', 'Access diagram (physical)', 'Application collaboration diagram', 'Application system diagram', 'Show more...', 'Clear subordinate filters', 'Approval audit trail', and three 'ARIS document storage Link' items. The main search results area shows a list of items. The first item is 'Receipt of goods (with risks and controls) - EPC', with a path: 'Main group\2. Processes\2.1 Process architecture\2.1.1 Core processes\2.1.1.5 Procurement\2.1.1.5.2 Vehicle management\Receipt of goods\Extended model with risks and controls'. Its description is: 'This model is used to simulate the process of receipts of goods with risks and controls', and it was last changed on Tuesday, March 1, 2016 6:29:54 PM. The second item is 'Receipt of goods - EPC', with a path: 'Main group\2. Processes\2.1 Process architecture\2.1.1 Core processes\2.1.1.5 Procurement\2.1.1.5.2 Vehicle management\Receipt of goods'. Its description is: 'This model is used to simulate the process of receipts of goods without risks and controls', and it was last changed on Tuesday, February 16, 2016 12:50:06 PM. Above the results, there are filter controls: 'Item' with 'EPC' selected, 'Property' with 'Name' selected, and a search box containing 'Contains' and 'Rec'.

### 3.30.11.3 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.



### 3.30.11.4 How can search results be influenced?

If you use quick search (page 73) or the Search area (page 74) to find items, the list of results will be influenced by the selected database (page 41) and the license you are using.

For example, if you are using an ARIS Connect Viewer license, the **Models** area, from which you can open models for editing in the Model Editor, will not be displayed. This area is displayed to users with the **ARIS Connect Designer** license. These users are allowed to open models for editing.

## 3.31 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 89), create new or reuse existing items (page 84), as well as delete items (page 86) in the portal.

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

### 3.31.1 Change values of items

You can change values of items (page 89) 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 88) 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 92) 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 92) if you do not enter a numerical value.

### 3.31.2 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 92). 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 88) 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 96) and added to the list, or the existing role will be reused. If you selected a role to which the risk was already assigned, no new entry is added to the table.

### 3.31.3 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 92). 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 127).

#### 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 88) 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 96) are added to the list, or existing application system types will be reused. Occurrences of new application system types are placed in the diagram window.

### 3.31.4 Delete items from tables

In the portal, you can delete items from tables.

The following description refers to items in a table (page 92). 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 88) is enabled.
6. Navigate to the required diagram and select it.
7. Click the object whose associated item you want to delete. To delete objects of the **Role** type from the **Groups** table, you can select a risk from the sample configuration supplied.
8. In the **Groups** area, click  **Delete** for the role from which you want to remove the risk assignment. A confirmation prompt is shown.
9. Click **OK** to confirm the prompt if you really want to delete the assignment to the role.

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

### 3.31.5 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 92). 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 127).

#### 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 88) is enabled.
6. Navigate to the required diagram and select it. To delete objects of the **Application system type** type from the **Subordinate IT systems** area, you can select an application system type diagram from the sample configuration supplied, for example.
7. Activate the **Overview** area if it is not activated yet.
8. Click the edit box in the **Subordinate IT systems** area. Existing objects are displayed one next to the other with a delete sign (x) added to them.
9. Click the delete sign for the application system types you want to delete from the diagram.
10. Click  **Change**. A confirmation prompt is displayed listing all application system types to be deleted.
11. Click **OK**.

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

### 3.31.6 Valuable information

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

#### 3.31.6.1 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 8), default view (page 24), or a view derived from these views.

#### 3.31.6.2 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:

 Edit

Clicking  **Edit** enables the edit mode.

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

 Edit mode  Exit edit mode

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

The availability of various edit boxes (page 92) is another clear indication that the edit mode is active.

### 3.31.6.3 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

### 3.31.6.4 Which attributes are you able to edit?

ARIS Viewer Contribution enables you to edit attributes (page 92) 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 92) if you do not enter a numerical value.

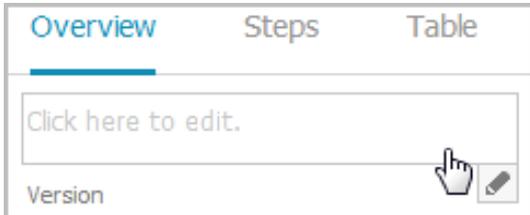
Please note that combined attributes and Binary Large Object (BLOB) attributes are not supported.

### 3.31.6.5 Which editing options are available?

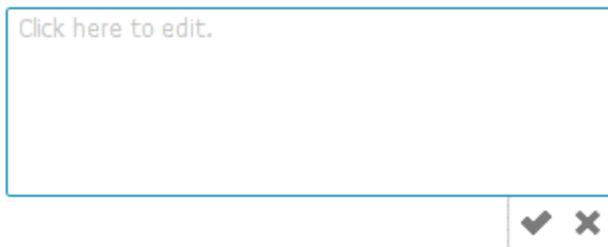
Depending on the attribute (page 91), various editing options are available.

Edit box

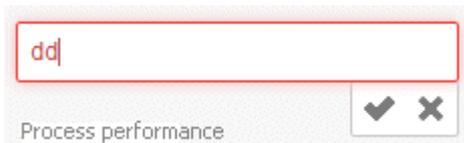
If the edit mode is active (page 88), moving the mouse pointer over an editable property will open the edit box. If no value has been specified yet (page 83), the hint **Click here to edit.** is displayed:



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:

### Select user(s)

Available users

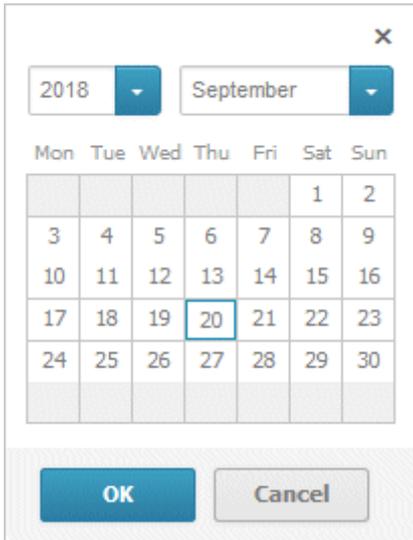
 ×

1-22 of 22

	User name	Name
<input type="checkbox"/>	 cljo	Johnson Clifford
<input type="checkbox"/>	 conjwo	Wojciech John
<input type="checkbox"/>	 erjo	Erlendson John-Michael
<input type="checkbox"/>	 jfg	Grimmette John
<input type="checkbox"/>	 jjohnson	Johnson Joni
<input type="checkbox"/>	 jku	Kucinich John
<input type="checkbox"/>	 jobr	Bradford John
<input type="checkbox"/>	 jobu	Burgon John
<input type="checkbox"/>	 john mansour	John Mansour

## DATE INPUT

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

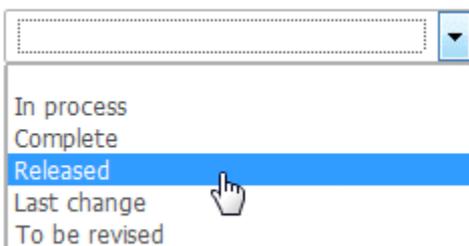


## DROP-DOWN LIST BOX

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:

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

You can add individual objects to the table (page 84) or remove objects from the table (page 86).

### LIST

Existing objects are displayed in a list:

Collaboration system	Loan processing system
Reporting system	Revision data information system

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

**Change:**

Revision data information system x Loan

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

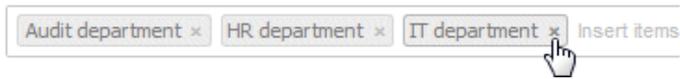
## DELETE OBJECTS

You can delete objects from tables (page 86) and lists (page 87):

Table

Name	Role
Risk manager group Finance	Risk manager_3

## LIST



### 3.31.6.6 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.

## 3.32 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.

### 3.32.1 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 **Error! Bookmark not defined.**).

#### Procedure

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

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

### 3.32.2 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 97) you need to log on to the SAP system again.

### 3.32.3 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 **Error! Bookmark not defined.**).

#### Procedure

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

### 3.32.4 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**.

### 3.32.5 Start ARIS Online Guide

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

#### Prerequisites

- This function has been configured in the portal (page **Error! Bookmark not defined.**).
- You have configured the help call (page 99).

#### Procedure

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

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

### 3.33 RACI matrix

Using the RACI matrix you can represent and analyze responsibilities that exist within a process (page 103). RACI is short for **R**esponsible, **A**ccountable, **S**upportive, **C**onsulted, and **I**nformed. The matrix shows which organizational unit participates in activities of a process and in what manner:

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

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 10) 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**.

#### 3.33.1 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 103).
2. Use objects (page 103) 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 102).

### 3.33.2 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 **Error! Bookmark not defined.**), select the required database by clicking the current database name next to the  database symbol and then clicking the name of the relevant database.
3. Click **Groups**.
4. Show the  **Navigation** bar if it is not visible yet.
5. In the  **Navigation**, open the group in which the required process (page 103) 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 10) 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 236) report to output the RACI matrix in Microsoft Excel format from an open process model (page 138). By default, this report does not return any **Supportive** information. To output this information, your script administrator must set the **g\_bRASCI** variable to **true**.

### 3.33.3 Valuable information

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

#### 3.33.3.1 Which diagrams can be used for a RACI matrix?

A RACI matrix can be based on the following diagrams:

- EPC (API name **MT\_EEPC**)
- EPC (column display) (API name **MT\_EEPC\_COLUMN**)
- EPC (material flow) (API name **MT\_EEPC\_MAT**)
- EPC (row display) (API name **MT\_EEPC\_ROW**)
- EPC (table display) (API name **MT\_EEPC\_TAB**)
- EPC (horizontal table display) (API name **MT\_EEPC\_TAB\_HORIZONTAL**)
- BPMN collaboration diagram (BPMN 2.0) - (API name **MT\_BPMN\_COLLABORATION\_DIAGRAM**)
- BPMN process diagram (BPMN 2.0) (API name **MT\_BPMN\_PROCESS\_DIAGRAM**)
- Enterprise BPMN collaboration diagram (API name **MT\_ENTERPRISE\_BPMN\_COLLABORATION**)
- Enterprise BPMN process diagram (API name **MT\_ENTERPRISE\_BPMN\_PROCESS**)
- Function allocation diagram (API name **MT\_FUNC\_ALLOC\_DGM**). This model must be assigned to a function.
- Value-added chain diagram (API name **MT\_VAL\_ADD\_CHN\_DGM**)

#### 3.33.3.2 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)

### 3.33.3.3 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)

## 3.34 Mini workflows

### 3.34.1 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**.

### 3.34.2 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**.

### 3.34.3 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**.

### 3.34.4 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**.

### 3.34.5 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 124) 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 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.

### 4.1 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 125) in ARIS Architect.

#### Procedure

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

Collaboration opens.

### 4.2 Getting started

These five steps are an optimal start to Collaboration:

1. Create (page 110) a user profile.
2. Search (page 111) for groups and people who provide interesting content.
3. Create filters and check (page 117) for new information.
4. Comment on (page 115), share, flag posts, etc.
5. Invite (page 119) others to Collaboration.

### 4.3 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.

## 4.4 Find users and groups and follow their feeds

Look for colleagues or groups to find interesting contacts and information.

### Procedure

1. Enter the name of the user or group in the global **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.

## 4.5 Follow and comment on content in the portal as a user

Follow interesting content in the portal to be informed about updates, etc., in Collaboration.

### Prerequisite

You have the relevant access privilege (page 125) 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 124) 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.

## 4.6 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 125) 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.

## 4.7 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 125) 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 124) 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 123) 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.

## 4.8 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 125) 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.

## 4.9 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 114) 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.

## 4.10 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.

## 4.11 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**.

## 4.12 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 114) 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 124) 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.

## 4.13 Filter feeds by means of tags

Use tags (page 124) to filter feeds using keywords.

### Prerequisite

- Creating tags and filtering using tags are activated in the ARIS Administration configuration.
- There are tags for the feed.

### Procedure

1. Open the relevant feed overview (👤 **My feed**, 👤 **All company feed**). The tags are displayed above the feeds.
2. Click the tags for which you want to see posts. You can combine multiple tags. Activated tags are indicated in color.

You are shown the posts containing the tags selected.

To cancel the filter, click the selected keywords again.

## 4.14 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 114) 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 114) 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 117). 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

## 4.15 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 113).
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.

## 4.16 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 120) the request, the user can read the posts, comments, etc., by this group, and can himself post content in the group.

Group coordinators can add more users to a group directly (**Add colleagues**). That user immediately becomes a member of the group and receives the posts, comments, etc., by the group (  **My feed**).

## 4.17 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.

## 4.18 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 125) 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.

## 4.19 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.

## 4.20 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.

## 4.21 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 125) 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.

## 4.22 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 124) **#Help**.

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

## 4.23 Valuable information

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

### 4.23.1 What is a feed?

Feeds contain the posts (page 114) in Collaboration, which for example, can be commented (page 115) on. The posts are categorized as follows:

-  **My feed**  
Shows the posts and comments by the users from Collaboration whose feeds you follow.
-  **All company feed**  
Shows all posts and comments by users and public groups from Collaboration.
-  **My portal feeds**  
Displays a linked list of the portal feeds you follow. Portal feeds are only available if Collaboration is used within ARIS Connect.

### 4.23.2 Which target groups can be assigned to posts?

These target groups are selectable for posts (page 114):

-  **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.

### 4.23.3 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.

### 4.23.4 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**.

### 4.23.5 What is a timestamp?

A timestamp (page 115) indicates when a post was last updated in Collaboration, e.g., **2 h**.

### 4.23.6 What is a tag?

Tags are used to categorize posts using keywords, making them easier to find (page 118). The keywords entered as tags are shown below the post. Tags are automatically created for hashtags so that they can be used to filter feeds.

### 4.23.7 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 117). 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

### 4.23.8 What does flagging a post mean?

You can send (page 115) posts you deem inappropriate to the Collaboration administrator for review. The administrator decides (page 121) whether the post will be deleted or not.

### 4.23.9 Which group types exist?

Groups can be created (page 119) 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 120) to the group.

### 4.23.10 What are the privileges of coordinators and Collaboration administrators?

#### COORDINATORS

They are responsible for managing (page 120) 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 120) 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 121). You can view all posts and delete them. Collaboration administrator is a function privilege assigned in ARIS Administration.

### 4.23.11 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).

## 5 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 127) to work in the database groups for which you have the required privileges.

## 6 Model Editor

The Model Editor allows you to edit existing and new models (page 128) in ARIS Connect. Using the **ARIS Connect Designer** license privilege you can create new models (page 128) directly in the portal (page 8), as well as edit (page 138) or create models (page 128) in the repository (page 126).

You can access the entire modeling functionality of Model Editor via buttons and bars (page 200) that you can use to efficiently edit your models.

If you have created or opened a model you can set up the perspective (page 132) and thus, adjust it to your own needs. Modeling (page 138) your organization, processes, data, etc., is just as simple as extended model editing (page 165). In addition to the graphic information, you can add further information to your models using attributes (page 147) that can be placed in the model as a symbol (page 179) or a text (page 175), if necessary.

Of course, you can also add comments to models (page 197) and discuss models with other users.

To be able to use Model Editor, you need to have the **Designer** license.

### 6.1 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.

## 6.2 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>).

### 6.2.1 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 205) 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 205) 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 132) and model the model.

## 6.2.2 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 210) 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 209) 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**.

## 6.2.3 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.

## 6.2.4 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 209) 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**.
  - c. The selected model is imported if an ARIS Express filter or an ARIS Express template is available.
  - d. 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.

## 6.2.5 Import BPMN file

You can import (page 226) 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 131) 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 209) 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.

## 6.3 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.

### 6.3.1 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.

### 6.3.2 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.

### 6.3.3 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 216) 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.

## 6.3.4 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 187) 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.

## 6.3.5 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 216) 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 135), 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.

## 6.3.6 Configure mini toolbar

You can define which object symbols the mini toolbar (page 216) 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 135) the selected object symbols are available.

### 6.3.7 Change grid width

You can show a grid in the model window (page 200). 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 212) 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.

### 6.3.8 Show formatting toolbar

The formatting toolbar is enabled for selected texts, for example, for the text of placed attributes (page 147). 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.

### 6.3.9 Assign model template

You can assign a template (page 250) to a model and thus, change its appearance as well as its attribute placements in the model window (page 200) at once automatically.

#### Procedure

1. Activate the Model (page 212) 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.

### 6.3.10 Reset model template

You can reset the appearance of a model that was assigned templates (page 250) to the ARIS default appearance. Color and size changes and attribute placements assigned by templates are removed.

#### Procedure

1. Activate the Model (page 212) tab bar.
2. Click  **Template**. The list of available templates is shown.
3. Click **Reset**.

The content of the model window (page 200) is adjusted immediately.

## 6.4 Model

Model Editor assists you in editing models, e.g., by providing a grid, a mini toolbar (page 146), graphic objects (page 144), or in-place formatting options (page 147).

### 6.4.1 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.

### 6.4.2 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 139), 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 132).

#### 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.

### 6.4.3 Show grid

You can show a grid in the model window (page 200). When you place or move model items, they are inserted or moved according to the grid width (page 136). This facilitates the orderly placement of model items.

#### Prerequisite

The grid is not shown.

#### Procedure

1. Activate the Model (page 212) 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.

## 6.4.4 Place object symbols

You can place object symbols in the model window (page 200) 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 216) 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.

## 6.4.5 Place occurrence copy

You can place occurrence copies in the model window (page 200) 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.

## 6.4.6 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 209) 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 210) 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.

## 6.4.7 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.

## 6.4.8 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.

## 6.4.9 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.

## 6.4.10 Place graphic objects

You can place graphic objects in the model window (page 200) 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 173) and inside (page 171), and, for example, place the graphic object behind a model area (page 180) 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 173) and inside (page 171), and, for example, place the graphic object behind a model area (page 180) 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 173) and inside (page 171), and, for example, place the graphic object behind a model area (page 180) 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 173) and inside (page 171), and, for example, place the graphic object behind a model area (page 180) 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 173) and inside (page 171), and, for example, place the graphic object behind a model area (page 180) 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 173).

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.

### 6.4.11 Modeling using the mini toolbar

You can model very effectively using the mini toolbar (page 216). By configuring (page 135) it you are quickly offered the object symbols (page 135) required for your model.

#### Procedure

1. Click a placed object symbol (page 140). 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.

## 6.4.12 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 198) 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.

## 6.4.13 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.

## 6.4.14 Create connections

You can link objects using connections in different ways in the model window (page 200).

### 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 216) 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.

### 6.4.15 Place text

You can place text in the model window (page 200) 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 147) the text in just the same way as placed text attributes.

### 6.4.16 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.

## 6.4.17 Delete model items

You can delete model items from the model window (page 200).

### 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**.

## 6.4.18 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.

## 6.4.19 Table-based modeling

Table-based modeling enables rapid and comfortable modeling of EPCs and BPMN diagrams (page 158). 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 153) 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.

### 6.4.19.1 Hide/Show modeling table

You can hide or show the modeling table.

#### Procedure

1. Open (page 138) a model to edit or create (page 128) 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.

### 6.4.19.2 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 138) a model to edit or create (page 128) 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.

### 6.4.19.3 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 138) 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.

### 6.4.19.4 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 153).

#### Procedure

1. Open (page 138) 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.

### 6.4.19.5 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 138) 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.

### 6.4.19.6 Use existing object

You can reuse existing objects in the model.

#### Procedure

1. Open (page 138) 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.

### 6.4.19.7 Rename structurally relevant object

In the modeling table, you can edit structurally relevant objects that have already been modeled.

#### Procedure

1. Open (page 138) 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.

### 6.4.19.8 Edit Description/Definition

You can specify descriptions and definitions for objects.

#### Procedure

1. Open (page 138) a model.
2. If the **Description/Definition** column is not shown, add (page 156) 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.

### 6.4.19.9 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 138) 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 152) 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.

### 6.4.19.10 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 138) 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.

### 6.4.19.11 Model satellites

A satellite is an object that can be inserted in a model or diagram but is not a structurally relevant object (page 252) 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 138) 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 158) when you have created the required satellites.

You have modeled one or more satellites.

Model existing satellites

#### Procedure

1. Open (page 138) 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 158) 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.

### 6.4.19.12 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 138) 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.

### 6.4.19.13 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 138) 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.

### 6.4.19.14 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 138) a model.
2. Select the cell for the relevant attribute.
3. Press **F2**.
4. Edit (page 162) the attribute value.
5. Exit the cell (page 158) when you have edited the attribute value.

You have edited an attribute.

### 6.4.19.15 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 138) 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.

### 6.4.19.16 Remove column

You can remove columns for attributes or objects from the modeling table.

#### Procedure

1. Open (page 138) 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.

## 6.4.19.17 Valuable information

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

### 6.4.19.17.1 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 151).

### 6.4.19.17.2 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	<b>Name</b> column activated	To next row/End editing.
F2	▪ <b>Name</b> cell selected	▪ Activates the <b>Edit name</b> mode.
	▪ <b>Description/Definition</b> cell selected	▪ Opens the <b>Description/Definition</b> dialog. The description/definition can be edited.
	▪ <b>Object</b> cell selected	▪ Opens the objects symbols list if symbols can be inserted

Key/Keyboard shortcut	Context	Action
	<ul style="list-style-type: none"> <li><b>Attribute</b> cell selected</li> </ul>	<ul style="list-style-type: none"> <li>Opens the <b>Edit attribute</b> dialog to insert the attribute value.</li> </ul>
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 <b>BPMN container</b> 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.

### 6.4.19.17.3 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.

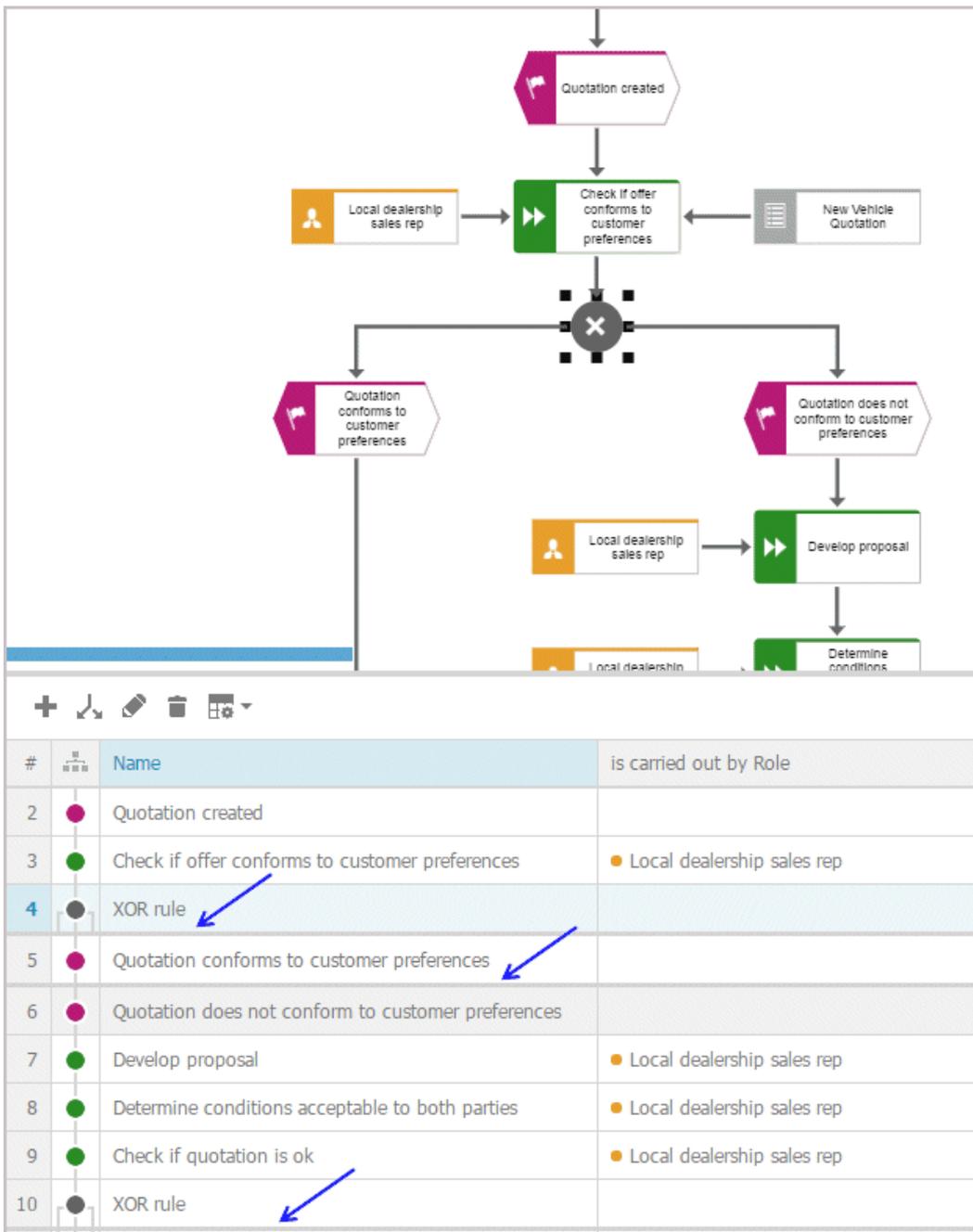
A gray background indicates that no entries can be specified.

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.

## 6.4.19.17.4 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.

### 6.4.19.17.5 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.

### 6.4.19.17.6 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.

The screenshot shows a date and time selection dialog box. At the top, there are dropdown menus for the year (2016) and the month (March). Below these is a calendar grid with days of the week (Mon to Sun) as headers. The date 14 is selected and highlighted with a blue border. Below the calendar, there is a text input field labeled 'Time:' containing the value '12:41:10'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

#### Boolean

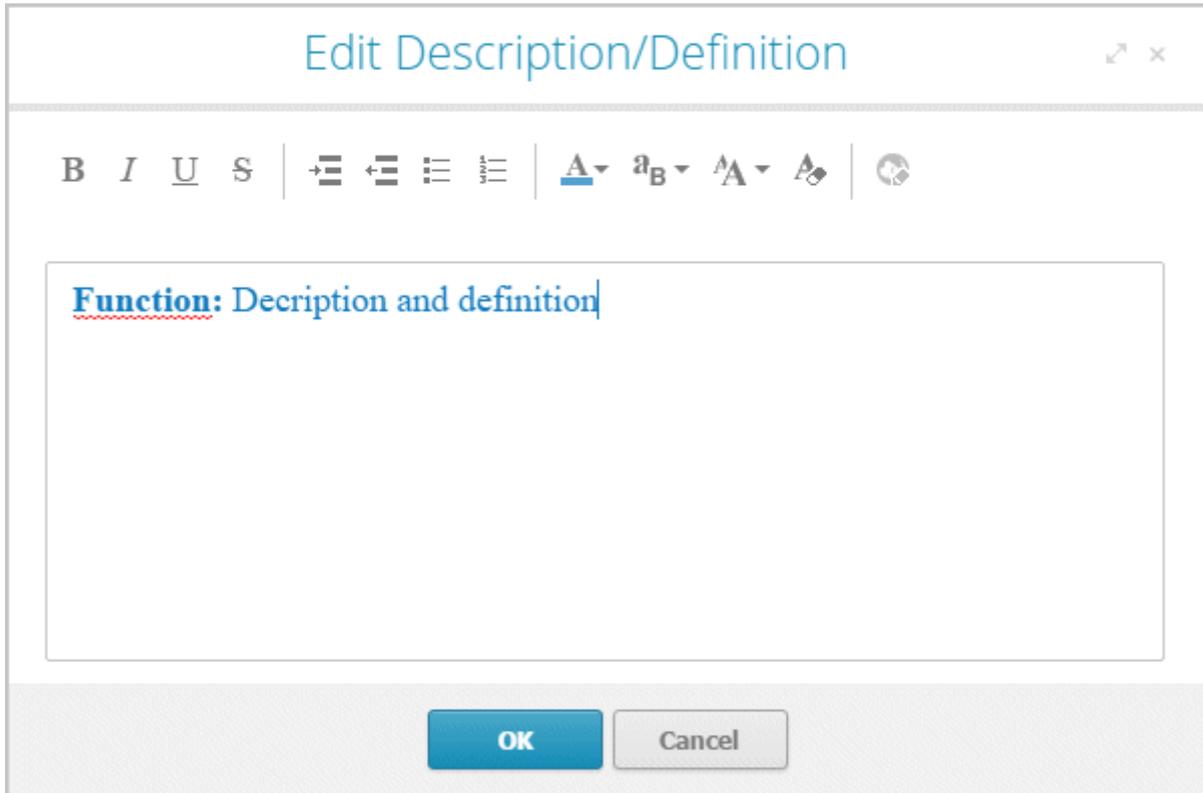
You can change the attribute value by enabling (true: ) or disabling (false: ) the check box. The check box for an attribute value that is not specified is shaded in color ().

#### Text attributes

You can change the attribute value directly in the cell.

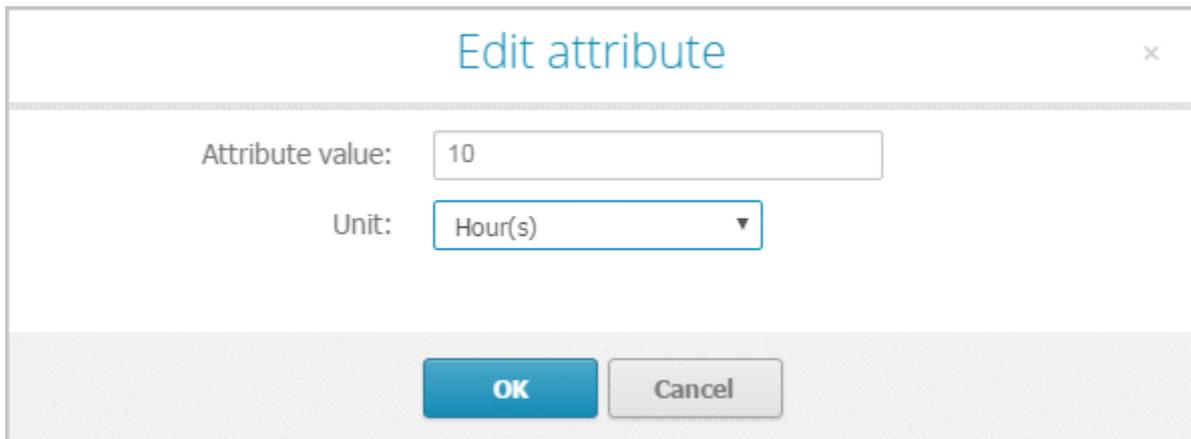
### Formatable text attributes

A dialog opens. You can edit the text and formatting.



### Attribute values with unit

A dialog opens. When saving the attribute value for numerical attributes, a check is made as to whether the value entered is a number. If not, you are notified.

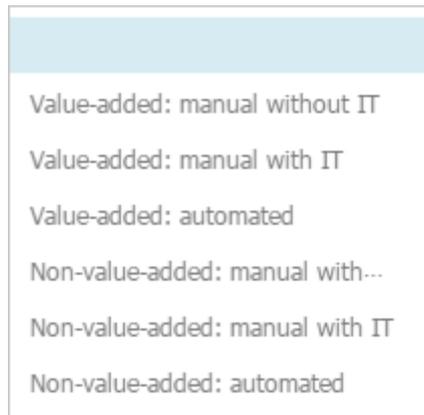


### Numerical attributes

You can change the attribute value directly in the cell. When saving the attribute value, a check is made as to whether the value entered is a number. If not, you are notified.

**List attributes**

You can select from a list of attribute values specified by the method by clicking the relevant value.



## 6.5 Extended editing

Besides the basic editing options, Model Editor provides you with additional functionality, such as copying formatting (page 171), creating groupings (page 181), applying various colors (page 172), inserting user-defined descriptions (page 169), or automatic resizing of objects (page 182).

### 6.5.1 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.

### 6.5.2 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.

### 6.5.3 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.

### 6.5.4 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.

## 6.5.5 Upload documents

You can upload documents to ARIS document storage and assign them to models and objects (page 167) in order to supplement these with detailed descriptions and graphics, for example.

### Prerequisite

The filter in use (page 209) allows the **ARIS document storage Link** attribute.

### Procedure

1. Open (page 138) the relevant model.
2. Activate (page 134) 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 167).

## 6.5.6 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 138) 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 134) 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 175). 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.

## 6.5.7 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 138) 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.

## 6.5.8 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 134).
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 134).
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 134).
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 134).
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 134).
3. Click  **Refresh**.

The display of the **Documentation** attribute is updated so that the changes you have made will be displayed.

## 6.5.9 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 210) 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?

## 6.5.10 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 210) 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.

### 6.5.11 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 210) 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.

### 6.5.12 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 210) 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 172) for the gradient.
7. Click the second color box and select the second color (page 172) 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.

### 6.5.13 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 210) tab bar.
3. Click  **Fill color**. The color palette opens.
4. Click  **No fill color**.

The selected model items are displayed without color.

### 6.5.14 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 210) 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.

### 6.5.15 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 210) 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.

## 6.5.16 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 210) 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.

## 6.5.17 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 210) 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.

## 6.5.18 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 210) 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.

## 6.5.19 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 210) 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.

## 6.5.20 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 210) 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 210) 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.

## 6.5.21 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 175), but also freely.

### PLACE NEW ATTRIBUTE FREELY

Select the object you want to place a new attribute for.

1. Activate the Start (page 210) 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.

## 6.5.22 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 **i 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.

## 6.5.23 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 210) tab bar.
3. Click **▣ Attribute placement**.
4. Enable the **With name** check box.

The attribute value is placed in front of the attribute name.

## 6.5.24 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 179).

### 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 175) the selected attributes.

## 6.5.25 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.

## 6.5.26 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.

## 6.5.27 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.

## 6.5.28 Display placed attributes as a symbol

You can display certain attributes as a symbol (page 218) 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 210) tab bar.
3. Click  **Attribute placement**.
4. Enable the **As a symbol** check box.

The placed attribute is represented as a symbol.

## 6.5.29 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 147) on the **Attributes** tab of the  Properties bar.

### Procedure

1. Select the placed attribute (page 177) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

## 6.5.30 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 210) 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.

### 6.5.31 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 210) 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 209) 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.

### 6.5.32 Place model items one behind the other

You can specify in which order overlapping model items are placed one behind the other in the model window.

In the example below, it is assumed that you have created the three objects **1**, **2**, and **3** in sequence. As the most recently placed objects are created at the highest level, object **3** is at the highest level and object **1** is at the lowest level. You want to reverse this sequence.

#### Procedure

1. Activate the Start (page 210) 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.

### 6.5.33 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 210) tab bar.
3. Click  **Group/Ungroup > Group**. The selected model items are combined in a group (page 247). 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.

### 6.5.34 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 210) 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.

### 6.5.35 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 210) tab bar.
3. Click  **Align** and then the relevant alignment, for example **Align left** or **Distribute vertically**.

The selected model items are aligned accordingly.

### 6.5.36 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 210) 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.

### 6.5.37 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 210) 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.

### 6.5.38 Insert graphic

You can place images and graphics in the model window (page 200) 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 180), for example.

### 6.5.39 Export model as a graphic

You can export the model as a graphic and use it in other programs.

#### Procedure

1. Open (page 138) the relevant model.
2. Ensure that no model item is selected.
3. Activate the Model (page 212) 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.

### 6.5.40 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 138) the relevant model.
2. Select the model item you want to export as a graphic.
3. Activate the Model (page 212) 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.

### 6.5.41 Export BPMN diagram

You can export (page 226) 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.

## 6.5.42 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 212) tab bar.
3. Click  **Layout**. The layout options are provided.
4. Specify your settings (page 243) and click **OK**.

The objects of the model are realigned.

Insert space

Remove space

## 6.5.43 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 212) 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.

## 6.5.44 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 212) 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.

## 6.6 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 176), and specify for specific attributes that they are to be displayed as a symbol (page 179).

### 6.6.1 Customize Attributes tab

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

#### Procedure

1. Click **i Properties**. The Properties bar opens.
2. Click the **Attributes** tab if it is not activated yet.
3. Click **Edit language** if you want to show (page 187) 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.

## 6.6.2 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 198) 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.

## 6.6.3 Show language column

You can show a column for another language next to the original column. This enables you to compare and edit (page 188) 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.

## 6.6.4 Hide language column

You can hide the shown language column (page 187) 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.

## 6.6.5 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 187).
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 198) 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.

## 6.6.6 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**.

## 6.7 BPMN modeling support

If you want to model BPMN (page 244) 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.

### 6.7.1 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 215) 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.

### 6.7.2 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 215) 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.

### 6.7.3 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 215) 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.

## 6.7.4 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 215) 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.

## 6.7.5 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 215) 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 180) and can be opened by double-clicking the assignment icon.

## 6.7.6 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 215) tab bar.
3. Click  **Expand subprocess**.

The process contained is displayed as embedded in the subprocess. (page 180) The process remains assigned to the subprocess (page 180).

## 6.7.7 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 215) 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.

## 6.7.8 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 209) 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 215) 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.

## 6.7.9 Export BPMN diagram

You can export (page 226) 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.

## 6.8 General procedure

Model Editor not only offers specific functionality, but also general access and editing options. You can easily navigate to diagrams assigned (page 180) to objects, open assigned models (page 195), enter comments (page 197), add columns and rows (page 197) to lane models, or output information on models by running reports (page 199).

### 6.8.1 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 **i Properties**. The Properties bar opens.
2. Select the relevant occurrence in the model window.
3. Click the **Occurrences** tab if it is not activated yet. The usage of the selected occurrence is displayed in the areas **In this model** and **In other models**.
4. 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.

### 6.8.2 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 **i Properties**. The Properties bar opens.
2. Select the relevant occurrence in the model window.
3. Click the **Occurrences** tab if it is not activated yet. The usage of the selected occurrence is displayed in the areas **In this model** and **In other models**.
4. In the **In other models** area, click the name of the model in which the occurrence is to be selected.

The selected model opens in a new tab and the occurrence is highlighted. If multiple occurrences of the object exist in this model, the top one is highlighted.

### 6.8.3 Display relationships of selected objects

You can display the relationships of selected objects (page 216).

#### Procedure

1. Click **i Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet.

The relationships of the selected object are listed. If a relationship has an occurrence as a connection, you can select the object (page 194) that is linked to the selected object by the connection. You can also delete connections that do not have any occurrences in models.

### 6.8.4 Select connected object

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

#### Procedure

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

The connected object is selected in the model window.

### 6.8.5 Display and select connection

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

#### Procedure

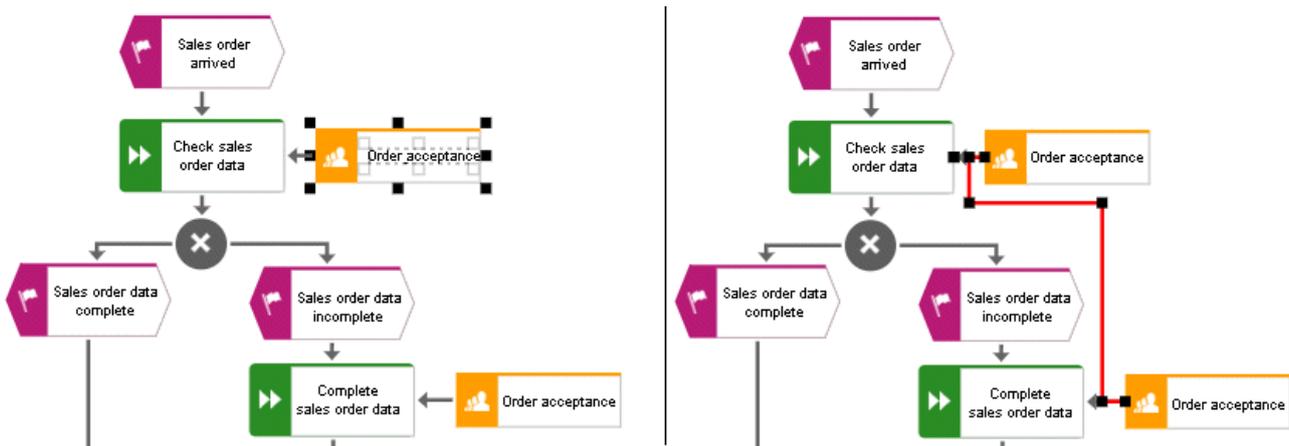
1. Click **i Properties**. The Properties bar opens.
2. Select the occurrence of the relevant object in the model window.
3. Click the **Relationships** tab if it is not activated yet. The relationships of the selected object are listed.
4. Next to the name of the occurrence of a relationship  (connection),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

The connection between source and target object is selected.

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

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.



## 6.8.6 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.

## 6.8.7 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.

## 6.8.8 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 210) 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.

## 6.8.9 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 134) 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.

## 6.8.10 Open linked document

You can easily open an assigned document.

### Procedure

1. Activate (page 134) the **Documents** bar.
2. Click a document.

You can either open or save the linked document.

### 6.8.11 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.

### 6.8.12 Add a column/row to lane models

You can add new columns/rows to lane models (page 249). 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.

### 6.8.13 Delete a column/row from lane models

You can delete columns/rows from lane models (page 249). 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.

### 6.8.14 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 147) 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.

### 6.8.15 Select placed attributes

You can select placed attributes in order to place them at another position or to remove the placement (page 179).

#### 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 175) the selected attributes.

### 6.8.16 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 147) on the **Attributes** tab of the  Properties bar.

#### Procedure

1. Select the placed attribute (page 177) whose placement you want to remove.
2. Press the **Del** key.

The placement of the selected attribute is removed without prompting for confirmation.

## 6.8.17 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.

## 6.8.18 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 226).  
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 200).
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?

## 6.9 Valuable information

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

### 6.9.1 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 139), the text attributes are output in the selected language as long as the text attributes are specified in the target language. If this is not the case, the text attributes are displayed in the alternative language and identified by the language code added to the alternative language.

Logistics - Value-Added Chain Diagram (US ▾)

#### BAR BUTTONS

Using the bar buttons you can show or hide the Search and the Comment, Properties, Reports, and Symbols bars. You can also hide or show the header, depending on whether you need more space for the model window or want to be able to see the information provided in the header.



#### TAB BARS

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

All tab bars contain frequently used buttons (page 210). 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 210).

#### MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 212).

#### FORMAT TAB BAR

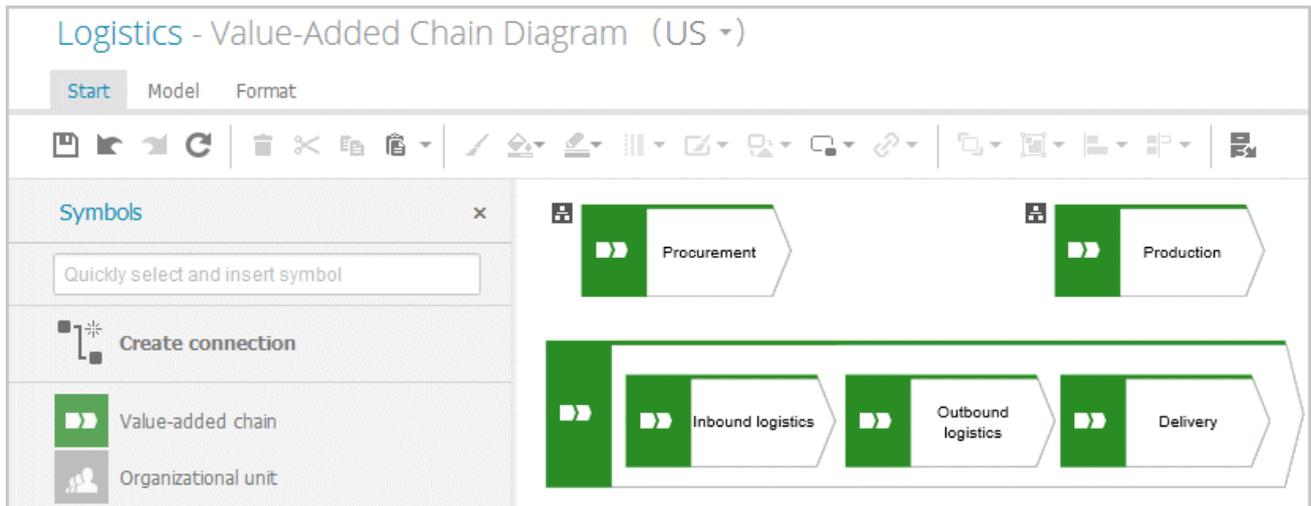
The **Format** tab bar groups the functions related to the presentation of written data in models (page 213).

## 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 215).

## 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.



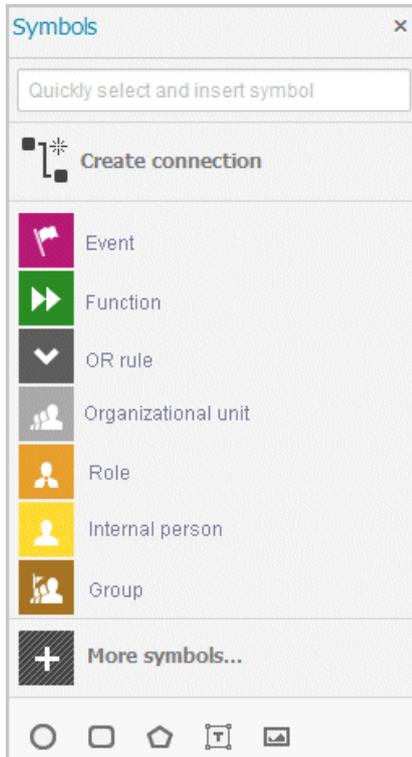
## FIND BAR

Click  **Find** in the bar buttons to show the Find bar that you can use to have objects selected in the model (page 165).



## SYMBOLS BAR

The **Symbols** bar provides object symbols (page 140), graphic objects (page 144), and text (page 149) for insertion into the model window. It also allows you to filter the available object symbols by entering names and create connections between (page 148) objects.



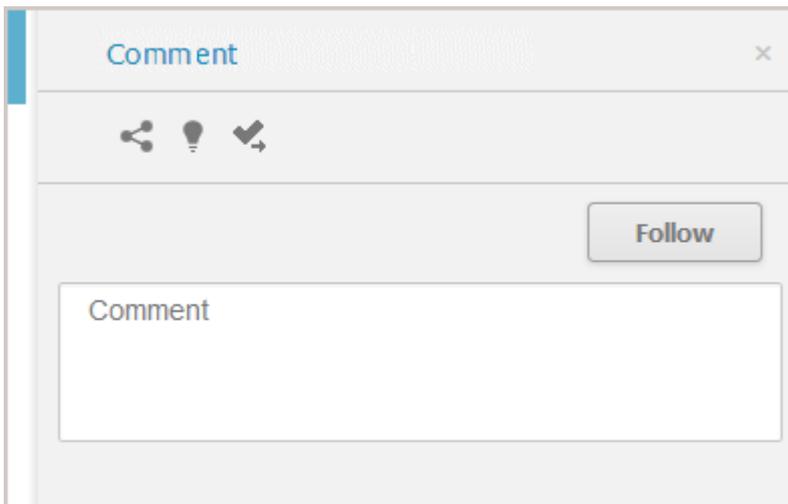
## PROPERTIES BAR

Click **i Properties** in the bar buttons to show the Properties bar where you can edit attributes (page 147), or view occurrences (page 193) and relationships of objects (page 194), for example.

Attributes	
Name	Value
Name	Procedure
Time of generation	2019 Apr 11 13:44:26
Creator	system
Minimum processing time	2 hours
Last change	2019 May 15 14:59:22
Type	EPC
Last user	system
More attributes...	

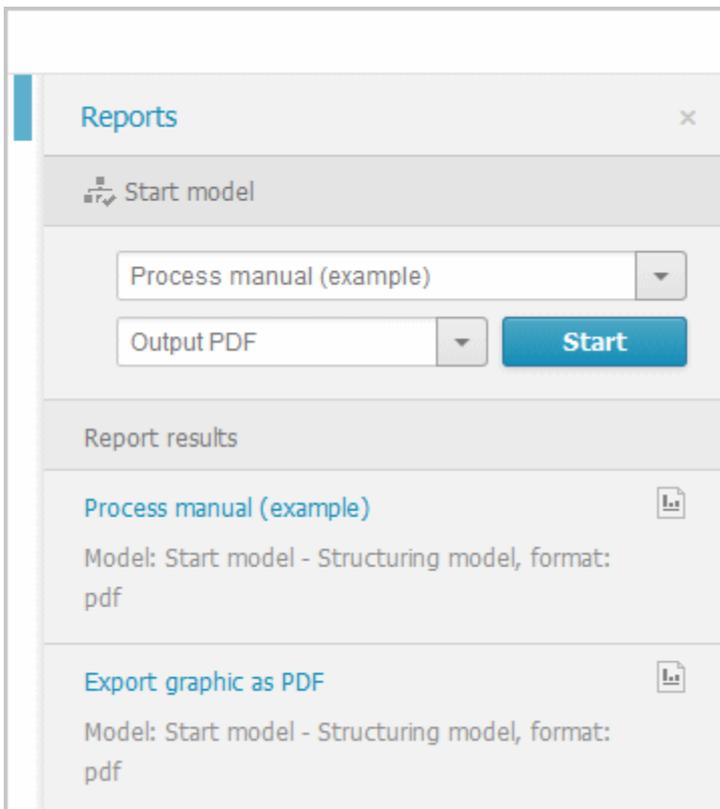
## COMMENT BAR

Click  **Comment** in the bar buttons to show the **Comment** bar that you can use to enter notes, improvement proposals, questions, etc., pertaining to the model (page 197).



## REPORTS BAR

Click  **Reports** in the bar buttons to show the Reports bar and generate reports (page 199).



## 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 149).

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).



## 6.9.2 What model types are available in ARIS Connect?

The following model types are available: Depending on the filter you are using (page 209) 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)

### 6.9.3 Which method filter is used?

When you open and edit models, your work is based on one of the method filters (page 249) 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.

### 6.9.4 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 210). 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 210).

#### MODEL TAB BAR

The **Model** tab bar groups the functions related to the layout and the graphic of models (page 212).

#### FORMAT TAB BAR

The **Format** tab bar groups the functions related to the presentation of written data in models (page 213).

#### 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 215).

## 6.9.5 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.

## 6.9.6 What buttons does the Start tab bar have?

The **Start** tab bar provides the following buttons.



**Format painter:** Transfers the format (page 171) from one item to another.



**Fill color:** Colors the item in the selected color (page 171).



**Line color:** Colors the line of the item in the selected color (page 173).



Equation 1: Edit

**Line style and weight:** Assigns selected items a different style (page 174) (**Dotted**, **Dashed**, or **Solid**) and defines the weight (page 174).



**Appearance:** Assigns other properties to or removes properties from selected items (page 175), such as **Shaded**, **3-D effect**, and in addition, **Active** for objects.



**Change symbol:** Changes the symbol (page 142) 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 180). The type and name of the new model can be selected.



**Arrange:** Positions selected items (page 180) behind or in front of other items.



**Group/Ungroup:** Groups selected items (page 181), so that they can be treated like a single item or ungroups them (page 181).



**Align:** Aligns selected items on the modeling area with regard to each other (page 181).



**Match size of items:** Matches the size of selected model items with each other (page 182).



**Go to occurrence in Explorer:** Opens a new tab showing the repository for the selected object or model and enables the relevant check box.

## 6.9.7 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 184) from left to right.



**Vertical space:** Inserts space in your model (page 184) from top to bottom.



**Export graphic:** Exports the graphic of the model (page 183) to your download area.



**Grid:** Shows and hides the grid in the model window.



**Template:** Provides the available model templates for selection (page 136).

## 6.9.8 What buttons does the Format tab bar have?

The **Format** tab bar provides the following buttons.



**Format painter:** Transfers the format (page 171) from one item to another.



**Font format:** Provides the available font formats for selection.



**Bold:** Applies bold formatting to a text.



**Italic:** Applies italic formatting to a text.



**Underline:** Applies underline formatting to a text.



**Strikethrough:** Applies strikethrough formatting to a text.



**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.

## 6.9.9 What buttons does the BPMN tab bar have?

The **BPMN** tab bar provides the following buttons.



**Change symbol:** Changes the symbol (page 142) of a selected object or the symbols of all selected objects of a type.



**Add lane:** Adds a new lane (page 190) 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 191).



**Collapse subprocess:** Collapses a subprocess object (page 191).



**Expand subprocess:** Expands a subprocess object (page 191).



**Edit:** Opens the process contained in the subprocess (page 191) on a separate tab for editing.

## 6.9.10 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.

## 6.9.11 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.

### 6.9.12 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.

### 6.9.13 What to consider when placing objects in/on objects

You can place objects on other objects (page 166) or in other objects (page 166). 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.

### 6.9.14 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**.

### 6.9.15 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.

### 6.9.16 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 167)
- Directly using the Documents tab (page 168)

## 6.9.17 What happens to placed attributes that have no attribute value?

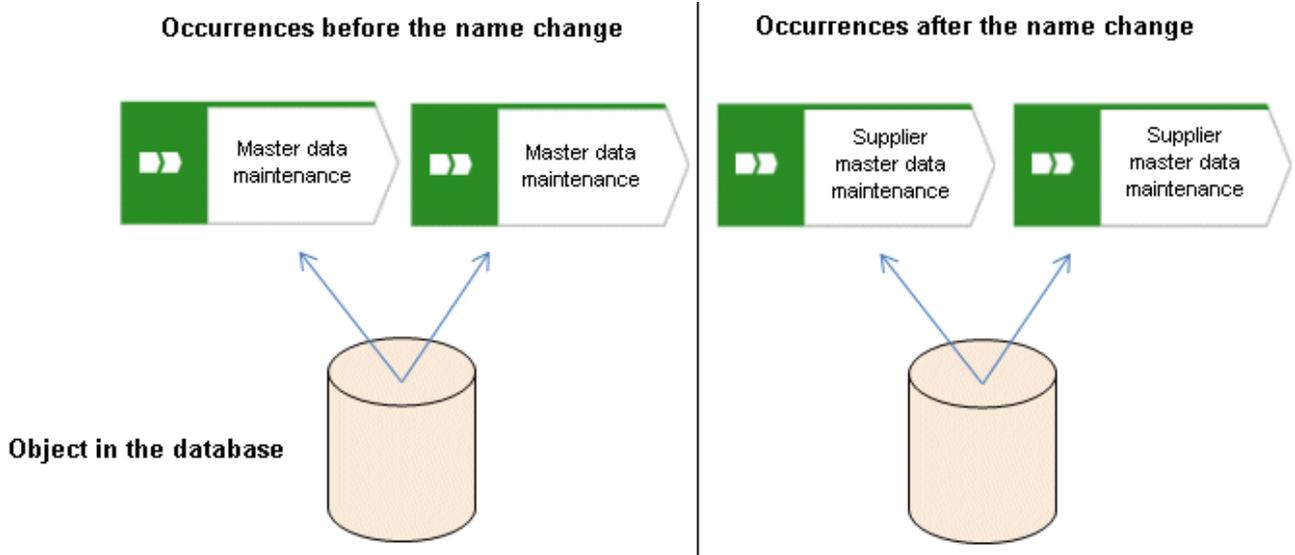
If you place an object in the model window, the name of the object is output as an attribute. The name attribute is usually placed within the object. You can place additional attributes of objects in the model window in order to have the relevant information available directly in the model window. The 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.

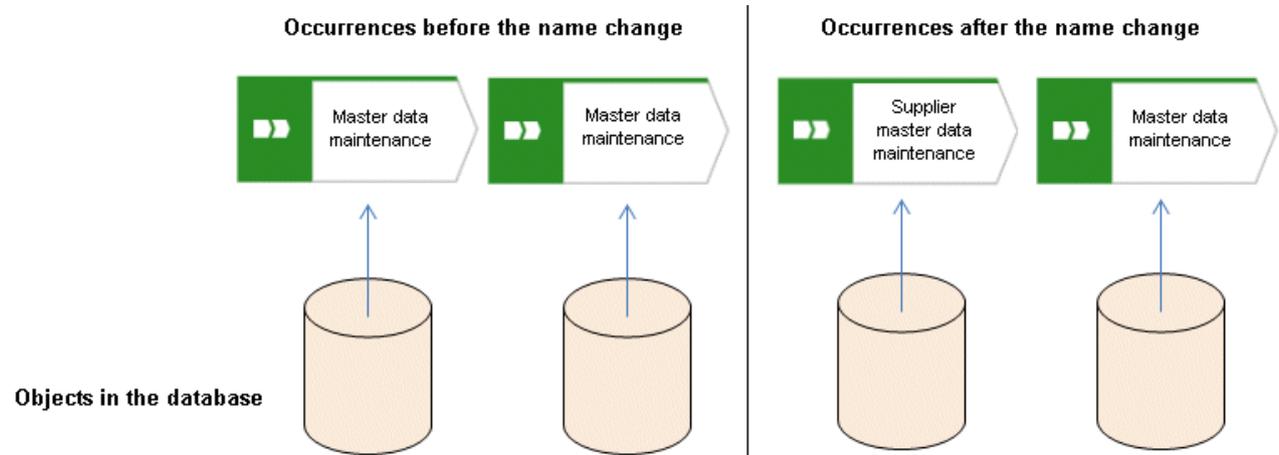
If a placeholder is to be used to make the placement of attributes without a value visible in the model window, you can define that they are to be placed with an attribute name. In our example, **Max. processing time:** would then be output for the relevant functions, and a value entered would appear behind the colon.

### 6.9.18 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
<b>Before the name change</b>			
<b>After the name change</b>			

### 6.9.19 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.

## 6.9.20 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.

## 6.9.21 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?

## 6.9.22 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.

## **6.9.23 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?

## 6.9.24 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.

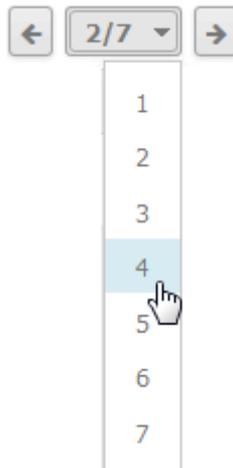
The navigation controls consists of arrows and a drop down list:



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:



## 6.9.25 How to import a BPMN file

The following applies when importing (page 131) 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.

## 6.9.26 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

## 6.9.27 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 231)

Export graphic as PDF (page 228)

Output model information (page 233)

Output model information considering various aspects (page 234)

Output object information (page 235)

Process manual (example) (page 235)

Create process manual (page 227)

RA(S)CI - Output organizational participations in processes (page 236)

Generate job description (page 229)

### 6.9.27.1 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?

## **6.9.27.2 Export graphic as PDF**

### **USE**

This report exports a model graphic as a PDF file.

### **CONTEXT**

Models

### **OUTPUT FORMAT**

PDF

What reports are available?

### 6.9.27.3 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?

## 6.9.27.4 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 group 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
<b>Directed graph with associations</b>	Beginning and end of process, as well as start and end of path.
<b>Hierarchy</b>	Chapter numbers of functions reflect the position of the object in the model hierarchy.
<b>Central object type</b>	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.
<b>Process selection matrix</b>	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?

## 6.9.27.5 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?

## 6.9.27.6 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?

## 6.9.27.7 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

## 6.9.27.8 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?

## 6.9.27.9 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:

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

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

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

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

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

## CONTEXT

- Individual process
- List of processes
- Process hierarchy

## OUTPUT FORMAT

- XLS

What reports are available?

## 7 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 240) 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.

### 7.1 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.

## 7.2 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.

## 7.3 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 199).

## 8 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 238) and permanent locking functions support key aspects of Release Cycle Management.

You can lock:

- objects
- models
- content of groups

### 8.1 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.

## 8.2 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.

## 8.3 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.

## 8.4 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.

## 9 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 254).

## 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.

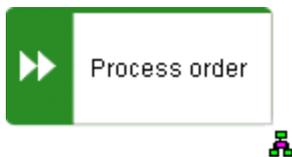
## Assignment icon

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 Process Model and Notation (BPMN)** is a graphical notation used to describe business processes.

## C

### Change list (versioning)

Includes selected content of a database. This may comprise individual models, multiple models without interdependencies, related models, group content, or the entire database contents. They will be versioned together and saved under one change list number. Change lists are sorted in ascending order.

A description of the change list characterizes the versioned contents. The change list description records who versioned which database content, when, and why. Opening a change list displays the database content you selected for versioning. This can be a model, or the entire database content.

### Change list number (versioning)

Number and description of a version of the database content. Change list numbers can be used to select particular versions for viewing. You have only read access for the content.

Change lists are sorted in ascending order. (Versioning state)

### CRON expression

String consisting of six to seven fields that is separated by a space and represents a time.

Normally, a CRON expression is used to define routine jobs that are executed automatically at certain times by the system.

#### Fields

- Seconds, mandatory field, valid value: **0-59**, valid characters: **\*, /, , -**.
- Minutes, mandatory field, valid value: **0-59**, valid characters: **\*, /, , -**.
- Hours, mandatory field, valid value: **0-59**, valid characters: **\*, /, , -**.
- Day in month, mandatory field, valid value: **0-59**, valid characters: **\*, /, , -**.
- Month, mandatory field, valid value: **0-12** or **JAN-DEC**, valid characters: **\*, /, , -**.
- Day of the week, mandatory field, valid value: **0-7** or **SUN-SAT**, valid characters: **\*, /, , -, ?, L, C, #**.
- Year, not a mandatory field, valid value: **1970-2010**, valid characters: **\*, /, , -**.

### Current version (versioning)

Corresponds to the last versioned database content. This version includes the entire versioned content of a database. You have only read access for the content.

In principle, this is the last change list created for a database (versioning state).

## 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 181).

They can be moved, enlarged or reduced, and deleted as if they were one item.

### GUID

**G**lobally **U**nique **I**dentifier (GUID).

The GUID is a string that renders items unique anywhere in the world.

## I

### Impersonation

Impersonation enables a user to perform actions on behalf of a different user account, e.g., back up and restore tenants. This requires the creation (page **Error! Bookmark not defined.**) 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 Authentication and Authorization Service (JAAS).**

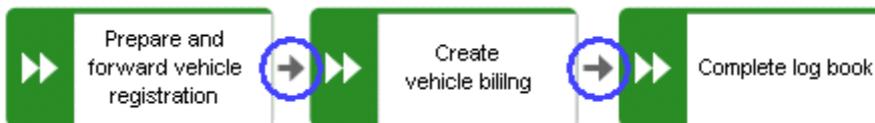
A Java interface that enables you to provide services for authentication and access privileges in Java programs. JAAS supports user-based authentication.

## K

### Connection

Visible relationship between objects, which is created during modeling. It is thus a graphical representation of a relationship.

A connection is usually represented by lines in the model window. If a direction is relevant, the line is added an arrow. One example is the connection of the **is predecessor of** type between functions in models of the **EPC** (event-driven process chain) type.



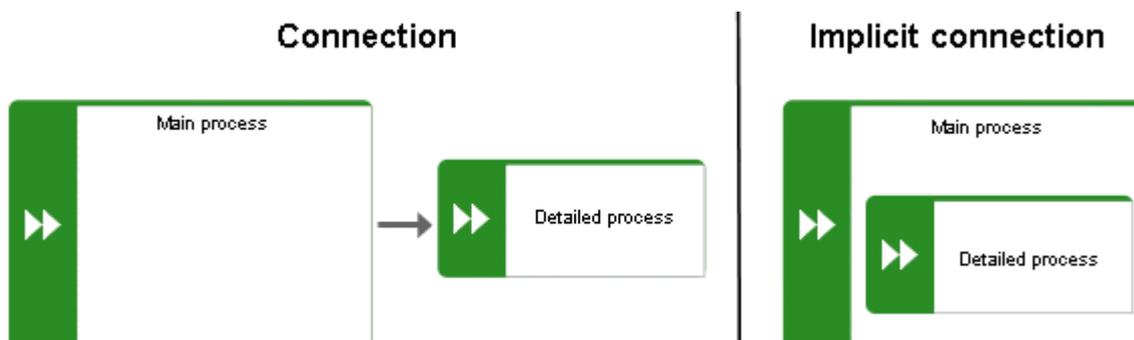
### Connection, implicit

Invisible connection.

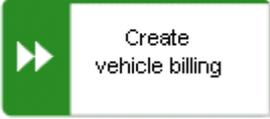
Implicit connections are created if the **Create implicit connections for overlapping objects** option is enabled and objects are placed within objects. In the displayed dialog, you can decide whether to hide any connections and, if so, which connections to hide for these objects. The difference between implicit connections and implicit relationships is that an implicit connection can be represented by a line in the model window. This line is displayed again, for example, if you drag an object from another object down into the free area of the model window.

Example of implicit connections:

Place a function on another function in a model of the **EPC** type.



In a model of the **PCD** type, place a function in the **Function** column and an organizational unit in the **Organizational unit** column. An implicit connection of the 'carries out' type is automatically created from the organizational unit to the function.

Function	Organizational unit
	

This needs to be differentiated from implicit relationships (page 251).

## 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 146) 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 of an object is changed, the change is displayed for all occurrences.

### Occurrence copy

Copy of the occurrence, i.e., only the graphical representation of an object, rather than the entire object as with the definition copy.

All of the occurrence copies of an object represent the underlying object definition.

You can create copies of objects. When copying an object, you can decide whether you wish to create a new object (a definition copy) or a new object symbol for an existing object (an occurrence copy).

It is helpful to create a copy of the object symbol for an existing object - i.e., only a copy of the occurrence of an object - if exactly the same object is used at various positions in the model or in different models.

For example, if, in the model you are creating, Plant 1 supplies goods at various points of the model, it is advisable to use occurrence copies at these points. These refer to the same object, and any changes to this object apply to all occurrence copies.

If you want to rename Plant 1 to **Plant A**, for example, you only need to do this for ONE of the occurrences: All other occurrences are changed to **Plant A** at the same time.

### OLE object

OLE objects are objects from various external applications, which can be used in ARIS. When you start the objects from within ARIS, they are opened in the external application.

For them to open, specific requirements must be met. For example, the security policy of the Web browser must allow opening, and saved objects must be stored in a local drive.

## OTP

**One-Time Pad (OTP).**

This one-time pad is a symmetric encryption method for transferring secret messages. This encryption method is characterized by the fact that it uses a key of the same length as the message itself. The OTP is information-theoretically secure and has proven to be impossible to crack – provided that it is used properly.

## P

### ARIS Process Board

ARIS Process Board is used for editing tasks that are provided by Process Governance during process execution. In addition, ARIS Process Board provides an overview of a user's active tasks.

## R

### Relationship

Connection that can exist between model elements and among models.

Relationships include connections, implicit connections, implicit relationships, assignment, and variant relationships. Therefore, the term **relationship** is a superordinate term for all links that can exist between objects and models.

### Relationship, implicit

Assignment relationship, i.e., a relationship between objects for which no visible connection is drawn.

You create this relationship by assigning a model to an object.

This needs to be differentiated from implicit connections.

### Root element

Model or object that is used as the top element in a hierarchy in the portal. This element is displayed when you open the hierarchy in the portal.

## S

### SAML

**Security Assertion Markup Language (SAML).**

XML framework for exchanging authentication and authorization information. SAML provides functions to describe and transfer security-related information.

### Satellite

A satellite is an object that can be inserted in a model or diagram but is not a structurally relevant object (page 252) 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 Socket Layer (SSL).**

Security software for encrypting data that is exchanged between programs.

## Structurally relevant objects

Basic model objects.

These are objects that indicate the distinctive feature of a model. For a model of the **Organizational chart** type, the objects **Organizational unit**, **Role**, and **Person** are structurally relevant objects, for example. Using these items, you can build the typical hierarchy of an organizational chart.

The **Event** and **Function** objects are typical for the **EPC** model type and are thus structurally relevant to a business process. You can use these to establish the typical control flow.

The **Organizational unit**, **Role**, and **Person** objects can also be inserted into an **EPC**. However, these objects do not constitute the distinctive feature of a business process. As structurally irrelevant objects, they act as satellites, and add more detailed information to the process model. For example, you can insert **organizational units** and link them to functions to illustrate who carries out those functions.

An object that can be inserted in a model or diagram but is not a structurally relevant object is known as a satellite (page 251).

## 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 **Error! Bookmark not defined.**) 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 **Error! Bookmark not defined.**) in ARIS Administration. System users can be created by the system administrator (user **system**) or by another system user.

The system user **system** is created automatically. 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 **Error! Bookmark not defined.**) 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 Layer Security (**TLS**).

TLS is known under the name of its predecessor **Secure Sockets Layer (SSL)** and is an encryption protocol for the secure transfer of data on the Internet.

## U

### UML (Unified Modeling Language)

UML is a graphical modeling language for specifying, constructing, and documenting software, parts of software, and other systems. This "unified" modeling language specifies the notations of the modeling terms and their relationships. It also defines the graphical notation, the static structures, and the dynamic processes.

### URI

String that is used to uniquely identify an abstract or physical resource.

URIs are used to describe resources (such as Web sites, other files, calls for Web services) on the Internet.

URIs can be incorporated as a string (encoded with a character set) into digital documents, particularly those in HTML format, or written by hand. A link from one Web site to another is called a hyperlink.

### URL

**U**niform **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)

## 10 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

## 11 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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